**Faculty Insight by Academic Analytics – Faculty FAQ**

## How do I get started in Faculty Insight?

- **Accessing Faculty Insight** Faculty Insight is accessed through UCF's single-sign-on (SSO) portal. Once logged in, you will see your personalized dashboard with any required tasks and any workflows assigned to you.
- **Navigating the Dashboard** The dashboard displays your profile, academic activity summary, pending tasks, and links to your portfolio workflow. Use the top navigation headers to move between sections such as My Profile, Activities, and Workflows.
- **Notifications** You can adjust your notification settings by clicking the caret next to your name in the top-right corner of the Faculty Insight page. Select "Notifications" to open the settings page, where you can choose how you want to be notified, how often, and for which types of updates.

## How do I access my assigned workflow?

- **Understanding Workflows** Workflows are structured faculty processes (i.e., annual evaluation, promotion and tenure, sabbatical, etc.) that guide you through required steps. Each workflow includes instructions, required fields, and submission deadlines.
- **Viewing Assigned Workflows** Assigned workflows appear on your homepage and in the **Workflows** tab. Click the workflow name to begin completing assigned tasks.
- **Monitoring Workflows** You can track the progress of your workflow on your homepage by viewing the **My Progress Tracker.** You will also receive progress notifications via email and within the application.
- **Troubleshooting Workflow Issues** If you cannot access a workflow or encounter errors, contact your department/unit administrator or the Faculty Excellence support team (FacultyExcellence@ucf.edu).

## How do I upload documents?

- **Where to Upload Documents** Documents are uploaded within an assigned workflow in the designated document upload spaces within a particular workflow step. You may be asked to upload items such as CVs, annual evaluation materials, or other supporting documentation depending on your workflow's requirements.
- **Accepted File Types** Faculty Insight accepts common file formats including PDF, Word, and Excel. If a file does not upload, verify that it is an approved file type and

does not exceed the maximum file size allowed. Each document has a 60 MB file size limit.

- **Replacing or Updating a Document** If you have not yet submitted your portfolio and the workflow step remains open, you may replace a document by selecting the **delete** icon next to the existing file and uploading a new version. Once your portfolio has been submitted, changes can only be made if the workflow is returned to you for revisions. See "If You Need to Make Changes After Submission" below for additional information.

### How do I submit my portfolio?

- **What "Submitting Your Portfolio" Means** Submitting your **portfolio** sends your completed materials to the next step in the workflow process for review. Once submitted, additional edits are not permitted unless the portfolio is returned to you by Faculty Excellence.
- **Save Progress** If you need to pause your progress before submission and return later, you can click the "Save Draft" button at the top of the page. This saves your progress so you can navigate away from your portfolio and then continue working on your materials before the submission deadline.
- **How to Submit** When all required sections are complete, you may click the **Submit** button at the top of your workflow step page. The system will not allow submission until all required fields have been completed. Once successfully submitted, the task will clear from your **Workflow Tasks** section and your **My Progress Tracker** will be updated.
- **If You Need to Make Changes *After* Submission** Contact your chair/supervisor or your department/unit administrator. If given approval, Faculty Excellence can return the workflow to you for revisions if needed after the submission deadline.

### What are proxies?

- **What "Proxy" Means** A **proxy** is someone who has been granted permission to enter information or upload documents on your behalf. This is often used when faculty are unavailable, on leave, or need administrative support.
- **Who Can Serve as a Proxy** Authorized proxies are typically department staff, program coordinators, or other authorized personnel designated by your unit. Faculty Excellence retains the ability to assign and remove proxy rights.

- **What Proxies Can Do** Proxies can upload documents, complete sections of your portfolio, assist with data entry, and submit your portfolio.
- **Tracking Proxy Activity** To ensure proxy activity remains visible, Faculty Insight logs all actions completed by a proxy and requires a brief comment explaining why they are submitting materials on behalf of a user. Both the proxy log and the comment are visible to administrative staff and anyone with access to your portfolio.
- **How to Request a Proxy** Contact your department administrator or chair. If your request is approved, Faculty Excellence can provide proxy access through the Faculty Insight administrative settings.

### Activity Data & Accuracy

- **Where Activity Data Comes From** Activity data is sourced from Academic Analytics and institutional systems. Some fields may require faculty verification or manual updates.
- **Correcting Activity Data** Use the **Activities** section to review and update your information. Review your activity data periodically for accuracy. If you identify missing or incorrect information, please contact your department administrator or Faculty Excellence for assistance.

### Support & Assistance

- **Who to Contact for Help** For technical issues, contact the Faculty Excellence team (FacultyExcellence@ucf.edu). For workflow specific questions, please reach out to your chair or department administrator as your first point of contact.