UofL Folio Quick Start Guide

UofL Folio is an online system that provides a convenient digital space for faculty members to archive their accomplishments related to teaching, research, creative productions, service activities, and community engagement. Some information in UofL Folio is uploaded institutionally from university systems and some is entered by faculty. Reports can then be generated and used as part of the annual performance review process as well as other reviews. Data can also be used for a variety of institutional reporting needs, including those related to accreditation. (UofL Folio is UofL's adaptation of a program known as Interfolio Faculty180. You can find more information on that product at: https://www.interfolio.com/products/faculty180/.)

IMPORTANT NOTES:
- *Preferred browsers are Firefox and Chrome.*
- *Please do not select the browser back button. A "Go Back" button is located at the bottom left corner of most pages. You may also click in the menu to the left of the page.*
- *Always remember to click **SAVE** after you have entered information on a page.*
- *An asterisk next to a field indicates an entry is required*
- *Help is available at* help@interfolio.com *or call Interfolio Scholar Services at: (877) 997-8807.*

LOGIN ISSUE: Some faculty may have existing accounts with other Interfolio products such as "Dossier" or "Review, Promotion and Tenure", causing problems at first login. The solution is to merge your accounts. Instructions to merge accounts are available at: https://product-help.interfolio.com/m/29601/l/878473-how-to-merge-interfolio-accounts . Alternatively, you may email help@interfolio.com or call Interfolio Scholar Services at: (877) 997-8807. In most cases, this is an easy fix.

LOGGING IN TO UofL Folio:

There are two ways you may log into the UofL Folio webpage.

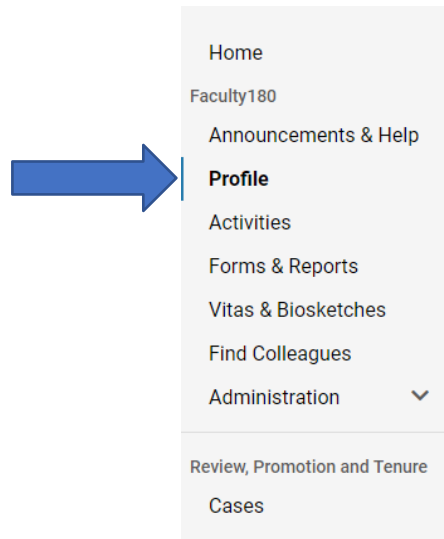On the University's main webpage https://louisville.edu/ at the top right corner click on "My Accounts"
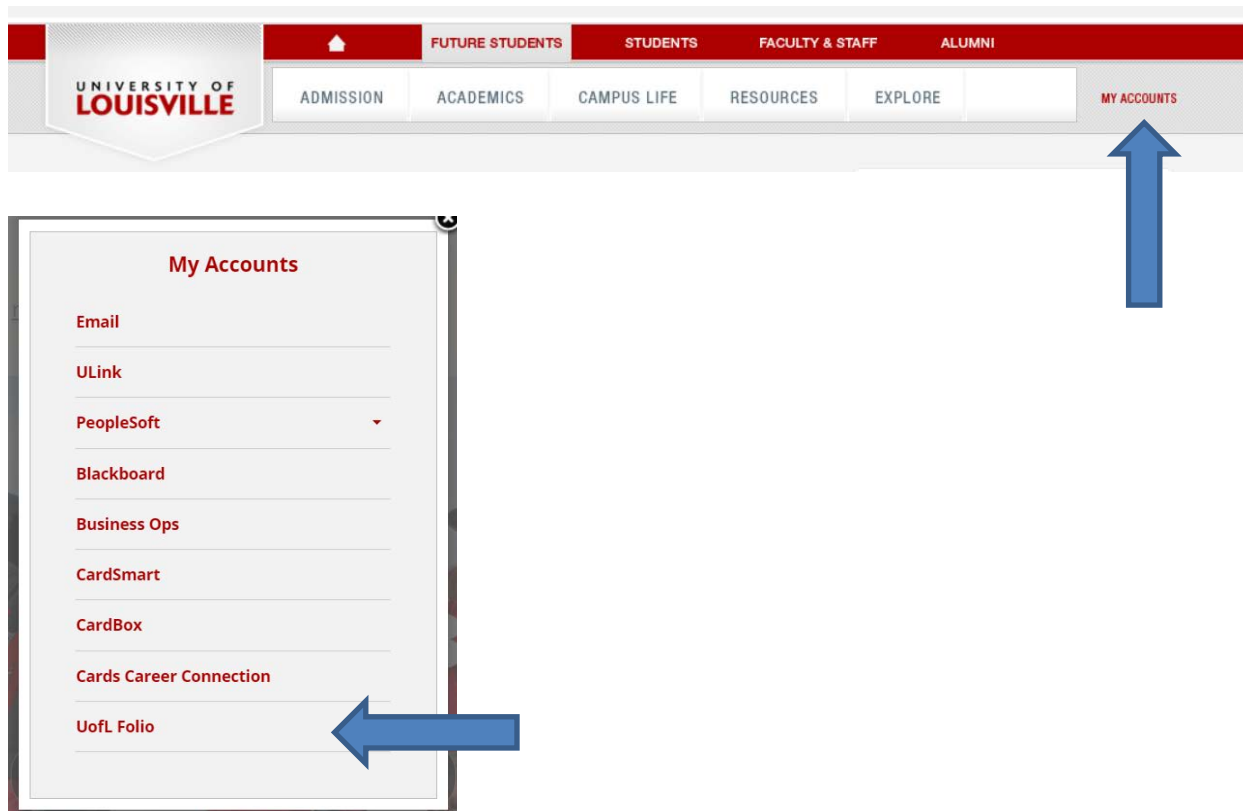
You may also go to the Office of the Executive Vice President and University Provost webpage. (If clicking on the link does not take you to the screen below, copy and paste the link to your browser.)

https://louisville.edu/provost/faculty-personnel/uoflfolio
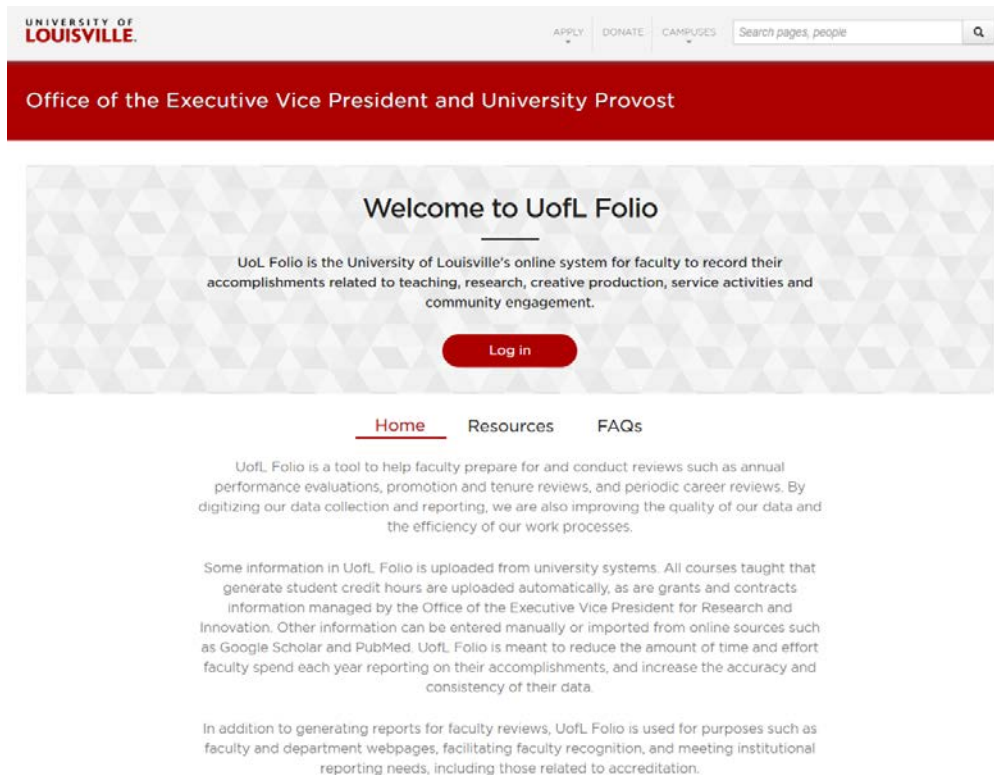
Once you have reached the login page you will enter your UofL Username and Password

Once logged in, on the left-hand side of the **HOME** screen you will find the main **MENU.**

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Welcome back, Kimberly Goughler

Your Action Items

There are no items assigned to you at this time. Use the navigation menu to the left to navigate to other areas of your account.

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Click on **PROFILE** to begin. Once opened, you will be able to edit fields in each section. Some fields in the Personal Information and Current Position sections are pre-loaded by the University and are not editable. *Questions about information you are not able to edit should be directed to your departmental or academic unit human resources personnel.* At your option, you may add additional information about you in the **PROFILE** sections.

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Each time you enter new information into the system you must **SAVE** the page before moving on. The **SAVE** button is located in the bottom left corner of each page. In this section you may **SAVE**, **SAVE** and **ADD ANOTHER** personal statement, **SAVE AND GO BACK**, to your previous screen or choose to CANCEL your action.

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Once you have entered and saved information in the **PROFILE** area, you are ready to move onto **ACTIVITIES.** On the left side of the **HOME** page, click **ACTIVITIES.** Use the sections in this area to enter your academic and professional activities, such as publications and other creative activity, service work, and awards received.

Important Notes:

- *Annual work plans, courses taught for credit, student teaching evaluations, and grants and contract data managed by the Office of the Executive Vice President for Research and Innovation will be bulk loaded centrally (although not all of this information has been currently uploaded.) Other information will need to be entered by you.*
- *Instructions are embedded at the top of each activity section to guide you through data entry.*
- *The "**Start Semester**" and "**End Semester**" fields record when an activity began and ended. Choose "**Ongoing**" if the activity has not ended yet.*
- ***SCHOOOL OF MEDICINE FACULTY ONLY:*** *Consider Spring Semester to begin on January 1 and end on June 30. Consider Fall Semester to begin on July 1 and end on December 31. Disregard Summer and Winter Semesters.*

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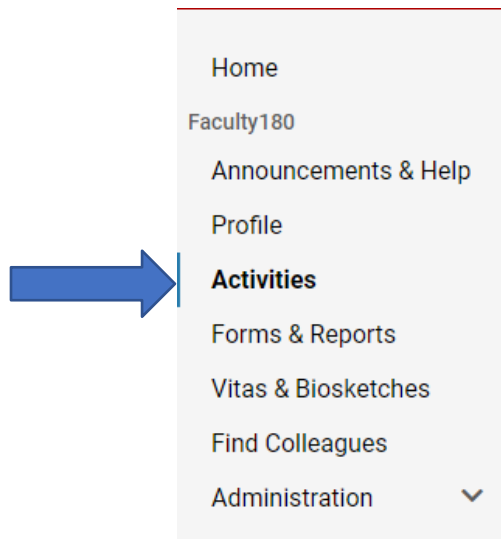
Interfolio ›

Activities

Quicklinks ⌄

ⓘ Use these sections to enter your academic and professional activities.

Important notes:

- Enter an activity in one activity section only. Usually, the best activity section to choose is the one corresponding to where the activity would appear in your curriculum vitae.
- Fields names within each section that are followed by an asterisk (*) are required to save the information entered.
- Select "Start Semester" fields according to when the activity began.
- For the "End Semester" fields, select when the activity ended or "Ongoing" if the activity has not ended.
- **School of Medicine Faculty Only:** Consider Spring Semester to begin in January and run through June. Consider Fall Semester to begin in July and run through December. Disregard Summer and Winter Semester.
- After you have entered information for the activity, click "Save" to save and continue editing, "Save and Add Another" to add another activity in the section, or "Save and Go Back" to move to another activity section.

Jump to Section ⌄   ⊙ Show All | ⊙ Hide All

▶ Annual Work Plan: Summative   ❓ Help

▶ Teaching: Courses   ❓ Help

▶ Teaching: Non-Credit Instruction   ❓ Help

▶ Mentoring and Structured Student/Clinical Trainee Learning   ❓ Help

▶ Publications, Creative Works, Presentations, Patents/Intellectual Property ❓ Help

▶ Grants and Contracts   ❓ Help

▶ Service: Institutional Committees   ❓ Help

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The **JUMP TO SECTION** on this page will help you to quickly find or "jump" to any area that you may want to quickly review or update, such as mentoring, patents, or honors and awards without having to scroll through the page.
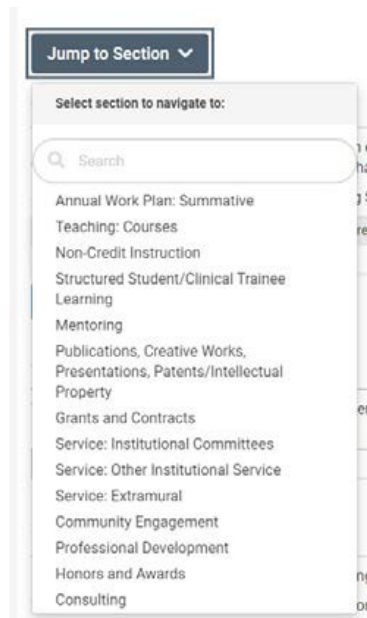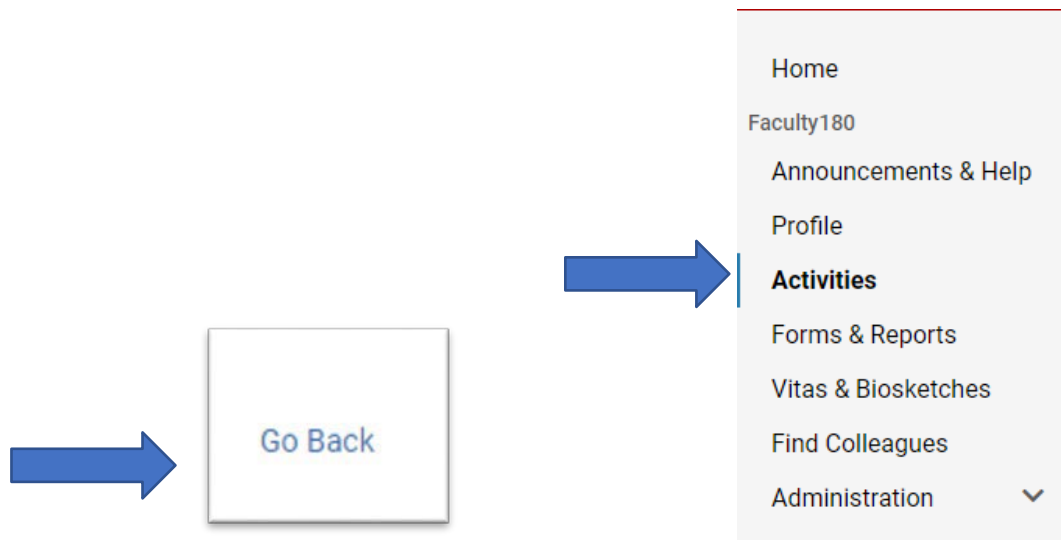

To the right of your screen you will notice that **HELP** is always available. If you have questions about a particular section you are in, simply click on the "**HELP**" or **"?"** found in that section and a text box will appear with information and in some cases contact information to help you. In addition, instructions are provided at the top of each activity section.
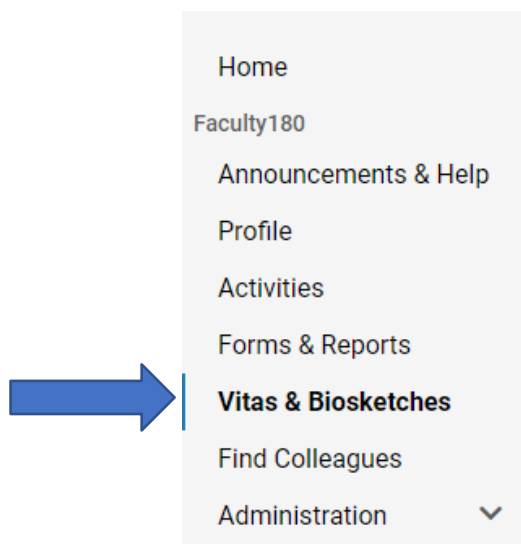
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A **"GO BACK"** button can be found at the bottom left of most screens. If you land on a page and wish to go back simply click on the **"GO BACK"** button located at the bottom left of many pages or you may click in the **MENU** found in the left column to go to the section you wish to proceed to.

Important note: Do not select the browser back button.

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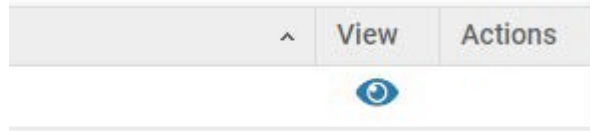
    Administration ⌄

Go Back

Once you have entered information into the **ACTIVITIES** sections, you may prepare a report to be exported to a Word or PDF document. Click on **VITAS and BIOSKETCHES**, to do so.

Important note: The "University Standard CV" is loaded into the system for your convenience. Units may add additional templates for specific reviews such as annual performance reviews.

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To begin click on the **VIEW** button located to the right of the screen.

The **VITAS and BIOSKETCHES** reporting area will appear. Here you will find options to create personal or institutional CVs, chose date ranges for your reporting needs and export to a word or pdf file.

Congratulations! You have succeeded in entering your activities.

To learn how to customize your vita go to: https://product-help.interfolio.com/m/68320/l/726117-vitas-biosketches#edit-a-vita-biosketch

SUPPORT

- Help is available at help@interfolio.com
- Interfolio Scholar Services at: (877) 997-8807

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