

[Annual Faculty Reports: How to Create and Submit Your AFR](#)

Step 1: Login/Logoff

To log in, go to the UMass Boston homepage at [Annual Faculty Report \(AFR\) - UMass Boston \(umb.edu\)](#).

Click

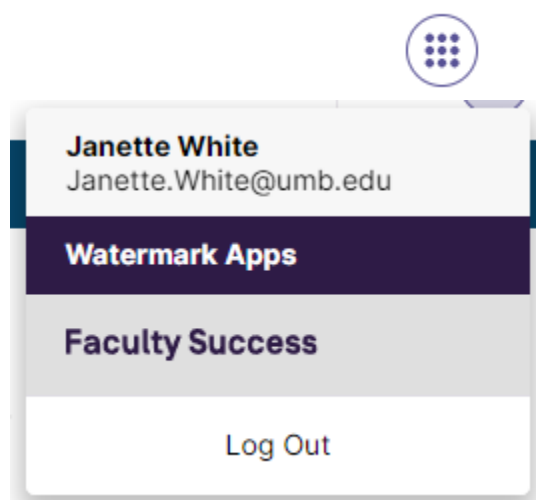
A dark blue rounded rectangular button with the text "AFR Log-in" in white.

On the next screen, enter the following info:

- User Name = *firstname.lastname* of your UMass Boston campus email address
- Password = your UMass Boston campus email password

If you don't remember your campus email password, please visit <https://www.umb.edu/it/password> to reset your password. You can also contact the IT Service Desk at 617.287.5220 or ITServiceDesk@umb.edu.

When you want to end your session, click on the icon at the top right of your screen and shown below, then select Log Out from the dropdown menu.



AFR Support:

If you experience any issues with AFR, please email AFRSupport@umb.edu for assistance.

Step 2: Enter Data

After you log in, you will see the **Activities** screen (which you can also return to at any time by clicking on the Activities button at the top of your screen in the navigation bar and selecting "Manage Activities"). Data can be entered in five main categories:

- General Information
- Teaching
- Scholarship/Research
- Service
- Review

Each category has links to particular activity screens. Click on these links to review specific data entry fields.

Notes:



- All system fields are optional. However, data should be entered into screens and fields containing information you want presented as part of your review.
- The system does not automatically save data that has been entered. You must click on the SAVE button when you have finished adding details to each entry.
- **IMPORTANT** – *Items entered must meet the current review period's "DATE" criteria to appear in your report:*
 - Start Date is equal to or later than September 1, 2023 **and**
 - End Date is equal to or before August 31, 2024 **or** End Date is left blank for items still in progress.
- The system will time you out after 90 minutes of inactivity. You will receive a warning before this occurs.
- To back out of a category or section, click on the arrow to the left of the category name near the top of the page.

Entering items for current review period:

To update the General Information section:

- Personal and Contact Information and Permanent Data screens: edit necessary fields and select SAVE.
- Yearly Data screen: to help reduce data entry, your 2023-2024 record is copied over from 2022-2023 and the Academic Year field defaults to 2023-2024. *Please review this information carefully, edit if necessary, and select SAVE.*
- To add College or Department affiliations, go to the Yearly Data summary screen under General Information and click on "Select the number of university affiliation rows to add." Confirm the Academic Year field = 2023-2024, enter additional College/Department information and SAVE. *This will create a separate College/Department affiliation in Section 1 of your report, and will allow that college/department to access your AFR during the Review Period.*
- Affiliations can be deleted or the list order changed by clicking on the appropriate icons to the right of each entry (trash icon to delete, up and down arrows to re-order the list).

To update all other sections (e.g. Intellectual Contributions, Research Currently in Progress, Presentations, etc.):

- For *NEW* activity, select the  button located at the top right of each summary screen.
- For *ONGOING* activity, you can click on 2022 or prior year records to update dates and statuses, and select SAVE.
- *To limit data entry*, you can  2022 or prior year records that are similar to new activities, update those records with new information, and select SAVE. To do so, click on the checkbox next to the item that you want to duplicate, and then click Duplicate.

To Copy and Paste data from another document into your AFR:


You can copy text from your CV or other "text" type documents and paste it into the data fields.

- Copy text as you normally would in another document and paste it into the desired field.

Scheduled Teaching

For your convenience, 2023-2024 academic year course information from the Registrar's Office is pre-populated into the Scheduled Teaching screen before the beginning of the new fall semester. *Please review this information carefully and EDIT/SAVE or DELETE items where necessary.*

- To *DELETE* records on a summary screen, select checkbox next to the item(s) you would like to remove and select the trash icon that appears at top right of screen.

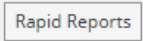
< Scheduled Teaching		+ Add New Item	Duplicate	
Item				<input type="checkbox"/>
Spring 2015 Independent Study GERON GR 796, Section 3				<input type="checkbox"/>
Spring 2015 Race & Culture GERON GR 724, Section 1				<input checked="" type="checkbox"/>
Fall 2013 Independent Study GERON GR 796, Section 7				<input type="checkbox"/>
Spring 2013 Capstone Seminar GERON GR 691, Section 01				<input type="checkbox"/>
Spring 2013 Dissertation Resrch GERON GR 899, Section 01				<input type="checkbox"/>

Step 3: Create and Submit AFR

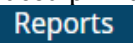
When you have completed your AFR, go to the Review Comments and Archive screen and select the Academic Year 2023-2024. Located at the top of review screen is a Faculty section with the field “My AFR is ready for review and I have generated a copy of my report for my own records.” **Select "Yes" to confirm completion and click on SAVE in the upper right corner of the screen.**

You can generate your AFR as many times as you like in the process of preparing it. You should periodically generate your AFR during data entry to ensure that your data appears in the sections of the AFR you would like them to be presented in (e.g. Teaching, Research, Service, etc.).

Steps for generating an AFR from the database using Rapid Reports:

1. Click  at the top right of your screen when you are on Activities screen.
2. Select **Annual Faculty Report** from the drop-down menu.
3. Confirm date range is set to the current review period of September 1, 2023 – August 31, 2024.
4. Click **Run Report** at bottom of the pop-up screen to generate your AFR.
5. Select either “Open with Microsoft Windows” or “Save File” in download message to view report.

Notes:

- If you need to make changes to a screen or field value, go back to **Activities**, make the necessary edits, click SAVE, and rerun report to confirm information now appears in the preferred sections.
- You can use the **AFR Cross-Reference Guide** on the [AFR webpage](#) to determine which screens and field values fall into each area of your generated report.
- Rapid Reports default to APA citation style and are used primarily to review placement of information in your AFR. *If you require MLA citation style, select  on the top left side of the screen and follow the directions provided.*

It is recommended that all faculty check with their department chairs to confirm if there are additional steps for submitting their AFR, as the process can vary by department.

IMPORTANT –If you run an empty or partially created report from the AFR system and save it to your desktop to edit or make changes **outside** of the electronic AFR system, those **changes WILL NOT track back or be reflected in the electronic AFR screens or fields.**

- If you choose to use an AFR that has been modified outside the electronic AFR system for your review, you must send that AFR as an attachment via email to your department chair to start the review process.

You should also include a note in your email that the attached AFR was created outside the AFR system so your reviewers can clarify how they will manage their comments.

Step 4: Review Process

The **Review Comments and Archive** screen, located at the bottom of the Activities screen, allows your Department Personnel Committee chair, department chair, and dean to enter their review comments into the appropriate fields.

You can also use this review screen to enter your own comments in response:

1. On the Activities screen, click on **Review Comments and Archive**.
2. Click on the 2023-2024 record.
3. In the **Faculty Comments** field, enter your review response comments.
4. Enter your name and date in the Faculty Name and Sign-off Date fields.
5. Click SAVE at the top right of the screen.

All comments and sign-offs entered into the Review Comments and Archive screen will appear in your generated report in the appropriate sections. Once your review is complete, you may want to generate and save an updated report that includes all comments.