Faculty Profile Report Instructions

M-FACTIR Faculty Profile Report

The Faculty Profile report provides details about a selected faculty member, for use with building NIH Training Grant Tables 2, 3, and 4 (in an xTRACT-friendly format). The report combines institutional sources (from the Training Grant Data Mart) with manually-entered, non-institutional data from the M-FACTIR web application.

How to Access

Go to the M-FACTIR web application and log in with your Level 1 password. Navigate to the Reports tab, and click on the Faculty Report link.

The reports use a reporting tool called Tableau. By default, 'All Departments' is selected, so you may immediately begin with the Faculty dropdown, to look up any faculty member that has a training grant within the university. Or you can use the Department dropdown to filter the list of faculty to only the department you choose. Choosing a faculty member will display their profile details below.

NOTE: the following logic determines which faculty members are available in the Faculty dropdown menu:

- Faculty must have an active Department Appointment
- Faculty must have an active role on a current Training Grant
- Faculty must be identified (within M-FACTIR) as a Participating Faculty on a current training grant

Basic Elements

The Faculty Profile report is divided into 6 sections:

1. Basic Identifiers (Name, Email, Title/Rank, Department, etc.)
2. Degrees (Type, Date Conferred, etc.)
3. Employment (Position, Institution, Department, Dates, etc.)
4. Training Grants (Award ID, Title, Dates, Costs, etc.)
5. Research Funding (Award ID, Title, Dates, Costs, etc.)
6. Mentoring History (Name, Type, Dates, etc.)

Each contains the current (and in some cases, historic) data about the selected faculty member.

How to Use with xTRACT

Within a training grant RTD (a new grant application, a renewal, a revision, or RPPR), xTRACT has a Participating Faculty section. This is where the grant preparer indicates which faculty members are participating on the grant. Adding faculty is as simple as clicking Add Faculty and searching for them; in many cases, xTRACT will already have their profile stored, and some of the profile data will already be available. However, some of it may be out of date, and some may be missing. In other cases, the faculty member may not be in xTRACT yet. The Faculty Profile report can be used to check, revise, or create such Participating Faculty profiles in xTRACT.

The Participating Faculty section is subdivided into four parts, and corresponds to the following Faculty Profile report sections:

<table>
<thead>
<tr>
<th>xTRACT section</th>
<th>M-FACTIR/Tableau report section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Member Data</td>
<td>#1 Basic Identifiers</td>
</tr>
<tr>
<td>Faculty Degree</td>
<td>#2 Degrees</td>
</tr>
<tr>
<td>Research Support</td>
<td>#5 Research Funding</td>
</tr>
<tr>
<td>Mentoring Record</td>
<td>#6 Mentoring History</td>
</tr>
</tbody>
</table>

Sections #3 (Employment) and #4 (Training Grants) on the Faculty Profile report are for reference only, or when creating a completely new faculty profile in xTRACT.

Faculty Upload into xTRACT
xTRACT has a small upload feature, for frequently changing data points such as Research Interest or the number of Predocs/Postdocs in Training. M-FACTIR has a report available that will provide data in the required xTRACT format for one or more selected faculty.

### How to use with NIH Training Grant Tables

The Faculty Profile report contains data relevant to Tables 2, 3, and 4 (per the NIH Institutional Training Grant Application). When manually creating these tables (such as in Microsoft Word), the following mapping can be used to build the tables:

<table>
<thead>
<tr>
<th>NIH Table</th>
<th>M-FACTIR/Tableau report section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2: Participating Faculty Members</td>
<td>#1 Basic Identifiers, #2 Degrees, #4 Training Grants, #6 Mentoring History</td>
</tr>
<tr>
<td>3: Federal Institutional Research Training Grants and Related Support Available to Participating Faculty Members</td>
<td>#4 Training Grants</td>
</tr>
<tr>
<td>4: Research Support of Participating Faculty Members</td>
<td>#5 Research Funding</td>
</tr>
</tbody>
</table>

Section #3 (Employment) on the Faculty Profile report is for reference only.

### Exporting to Excel

While data can be viewed and copied/pasted directly out of the Faculty Report inside Tableau, grant preparers may also want to put the data into their own local Excel documents, for further manipulation and revision. This can be done by downloading the report via the Crosstab format.

Click the 'Download' button in the upper-right corner of the Tableau Report interface, then select 'Crosstab'. The Excel-compatible file will appear in your downloaded documents folder, which can then be opened and edited like any other Excel document, for later use with xTRACT or manual table creation.

NOTE: the data inside the downloaded file will not automatically update, so the Faculty Profile report will need to be re-run if updated information from the data mart is desired.

### Revising Report Data Points

The data inside M-FACTIR (Training Grant Data Mart) is reliant on data sources across the university that may differ from information known by department or academic program administrators. Should you identify incomplete or incorrect data there are a few steps you can take. First, this solution was designed knowing that the data provided may need to be revised or manipulated before being submitted to NIH. For this reason reports can be downloaded and edited in Excel before uploading or entering data into xTRACT. In addition, it is important to update data sources so that future versions of the report will reflect more accurate information, benefitting current and future users of the system.

- **Manually Entered**: This data can be changed in the M-FACTIR application. Navigate to the corresponding training grant or faculty /trainee page and change the information by uploading the correct data point (e.g. participating faculty start/end dates). See the M-FACTIR Documentation for more information on how to do this.
- **Institutional**: This data comes from one of many U-M databases. Contact the source of the data and alert them of the error (e.g., appointed trainees are derived from payroll and student financial aid data). If you are unaware of the likely source of the information please reach out to your training grant support staff or help.med.umich.edu.