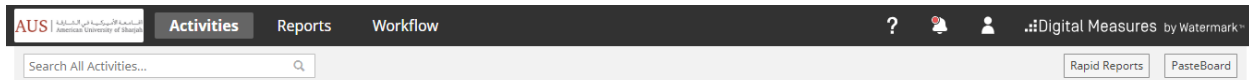


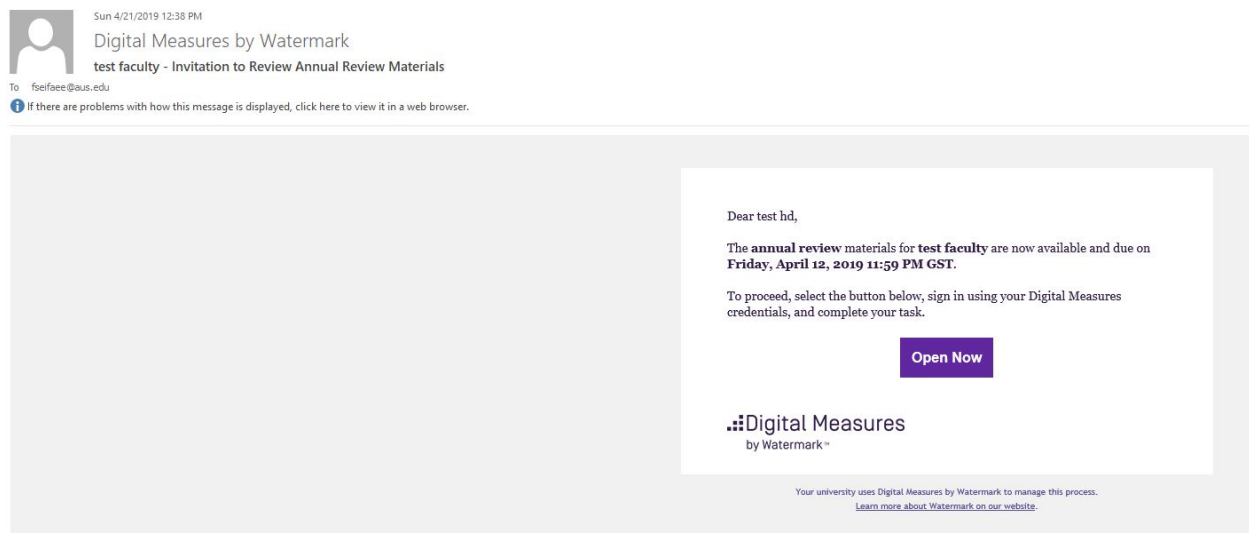
## WORKFLOW GUIDE FOR ACTIVITY INSIGHT

Workflow is used to facilitate the annual review process for faculty in Activity Insight. This guide focuses on the features available in the “Workflow” part of Activity Insight. The Workflow button will appear for the first time when you have been assigned to a workflow. If it does not appear, you have not yet been assigned to any workflows.



### EMAIL NOTIFICATIONS:

When workflow is launched, email notifications are sent to individual faculty inviting them to login and submit their materials. The email notifications generated from a workflow come from “Activity Insight by Watermark”. PLEASE ALERT YOUR FACULTY SO THEY DO NOT DELETE THE MESSAGES. If faculty delete the message, they can still login to Activity Insight and navigate to the Workflow screen. From the email invitation, when following the Open Now button, it will open to the Workflow page inside Activity Insight.



### OPENING A WORKFLOW:

From the email invitation, when following the Open Now button, it will open to the Workflow page inside Activity Insight. To begin working on the workflow, click on the name of the workflow that appears in the Inbox area. In this example, the name is “SBA Annual Review AY 2018-2019 test”. Real workflows will have a meaningful name like “SBA Annual Review”.

## Workflow Tasks

### ▼ Inbox

Name	Step	Subject	Due Date
SBA Annual Review AY 2018 - 2019 test	Faculty Submission	Self	April 24, 2019 @ 11:59 PM

### ▼ History

Name	Current Step	Subject	Last Modified	Actions
No Data to Display				

Once inside Faculty Submission Step page, click and review the PDF titled Faculty Annual Report (see screenshot below). This is a custom report generated from Activity Insight and populated with data from various fields under the Activities section. If updates or edits are needed in your Annual Report, navigate to Activities section and correct or revise the data under the appropriate topic (i.e., Publications, Presentations, etc.). Once updates are completed and saved in your Activities screens, return to the Workflow Task where you **MUST REFRESH** your Faculty Annual Report PDF in order for it to display the new information.


## ENTERING DATA FOR WORKFLOW:

Enter data into each box presented on the workflow form (see screenshot below). You can attach supplemental documents on this page if required. The text boxes are smart text boxes so you can use tables, bulleted and numbered lists, bold, italics, underline, hyperlinks, etc.

< Faculty Submission Step - Due April 24, 2019 @ 11:59 PM

   Save  Route ▼

SBA Annual Review Report



Last Updated  
April 23, 2019 at 8:54 AM

Refresh Report

• EXECUTIVE SUMMARY Please provide a summary of the contributions this academic year that you consider being exceptionally noteworthy

B I U ↶ ↷ ☰ ☷ ☰ ☷ 🔗 📄 ↻ 🗑️ </>

UNIVERSITY/SCHOOL POLICIES

B I U ↶ ↷ ☰ ☷ ☰ ☷ 🔗 📄 ↻ 🗑️ </>

OTHER SERVICES THAT SHOULD BE PART OF YOUR EVALUATION

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Supplemental Files

Drop files here or click to upload


## SAVING AND SUBMITTING A WORKFLOW:

Individuals may save and leave this page and come back to it later. Saving does not advance the workflow. When done, be sure to **SUBMIT** it to the next step by clicking on **Route** button and choosing the appropriate option in the top right of the screen:

< Faculty Submission Step - Due April 24, 2019 @ 11:59 PM

SBA Annual Review Report  Last Updated April 23, 2019 at 8:54 AM  Refresh Report 

\* EXECUTIVE SUMMARY Please provide a summary of the contributions this academic year that you consider being exceptionally noteworthy

**B I U** 

After submitting, the screen will revert to the Workflow page where the workflow just submitted will appear in the History area with the status indicated. Individuals can exit and re-enter the Workflow page to check on the status of their workflow. Depending on how the workflow is built, individuals may have the option to Recall or Download the form materials by choosing those Actions (on the right side of the row). **NOTE:** Faculty should communicate with their Department Head in advance if they need to recall their workflow for any changes. In case workflow is recalled by faculty, Department Head cannot complete the review until faculty resubmits the document back to Department Head. When a workflow has processed all the way through to the end, the Current Step will indicate “completed.”

### Workflow Tasks

#### ▼ Inbox

Name	Step	Subject	Due Date
No Data to Display			

#### ▼ History

Name	Current Step	Subject	Last Modified	Actions
SBA Annual Review AY 2018 - 2019 test	Head of Department	Self	April 23, 2019	 



## THE NEXT STEP OF A WORKFLOW - (DEPARTMENT HEAD):

Meanwhile, the workflow submitted to the next step (i.e., Department Head) will appear in that person’s Workflow Inbox and s/he will receive an email notification that the workflow is ready for review.

### Workflow Tasks

#### ▼ Inbox

Name	Step	Subject	Due Date
SBA Annual Review AY 2018 - 2019 test	Head of Department	test faculty	April 25, 2019 @ 11:59 PM


#### ▼ History

Name	Current Step	Subject	Last Modified	Actions
No Data to Display				

Like the faculty member, the Department Head should open the workflow and complete the form as instructed. They will see the materials uploaded or entered on the form from the previous step(s). They will not be able to edit materials submitted in an earlier step, or extract those materials outside the reader in Activity Insight; however, if they spot a mistake or missing materials, they will be able to choose "Send Back" from the Route drop-down. Like the faculty member, the assignee to this step may save the form and return later. When done, they should SUBMIT the form to the next step.

< Head of Department Step - Due April 25, 2019 @ 11:59 PM Save Route

Faculty Submission Step - test faculty Submitted April 23, 2019 by test faculty

SBA Annual Review Report  Last Updated April 23, 2019 at 8:54 AM

EXECUTIVE SUMMARY Please provide a summary of the contributions this academic year that you consider being exceptionally noteworthy

**RESEARCH:**  
During the window for this annual report's evaluation (12 May 2018 to 11 May 2019), I have published two research papers, listed below.

- Smith, J., Song, J., and Jones, D. "Closing the Loop: An Empirical Investigation of Causality in IT Business Value." Journal of Strategic Information Systems. In press. [ABDC A\*; Impact Factor: 2.595; accepted December 21, 2016]
- Street, C., Gallupe, B., and Smith J. "Strategic Alignment in SMEs: Strengthening Theoretical Foundations." Communications of the Association for Information Systems. In press. [ABDC A; Impact Factor: 0.535; accepted February 2, 2017] The Journal of Strategic Information Systems, where the first paper

**TEACHING:**


- Spring 2018 – MIS 201-01 – Fundamentals of MIS – Teaching Evaluation: 4.00, course GPA 2.9, 60 students
- Spring 2018 – MIS 39403-01– OOP for Bus. Apps – Teaching Evaluation: 4.00, course GPA 3.11, 13 students

**SERVICE:**  
I had several internal service roles during this academic year, including roles at the University level, School level, and Departmental level. Each of these roles are listed below.

- Member, SBA Dean Search Committee (School level)
- Chair, Assessment Committee (School level)


UNIVERSITY/SCHOOL POLICIES Policies are attached below.

OTHER SERVICES THAT SHOULD BE PART OF YOUR EVALUATION None.

Supplemental Files  EXECUTIVE SUMMARY.docx (12.10 KB)

Teaching Rating  Excellent  Exceeds expectation  Meets expectation  Unsatisfactory

Teaching Evaluation 

**B I U** 

Great teaching quality.


Scholarly Activities Rating  Excellent  Exceeds expectation  Meets expectation  Unsatisfactory

## SENDING A WORKFLOW BACK A STEP:

There is an option under ROUTE to send the form back a step:

< Head of Department Step - Due April 25, 2019 @ 11:59 PM Save Route

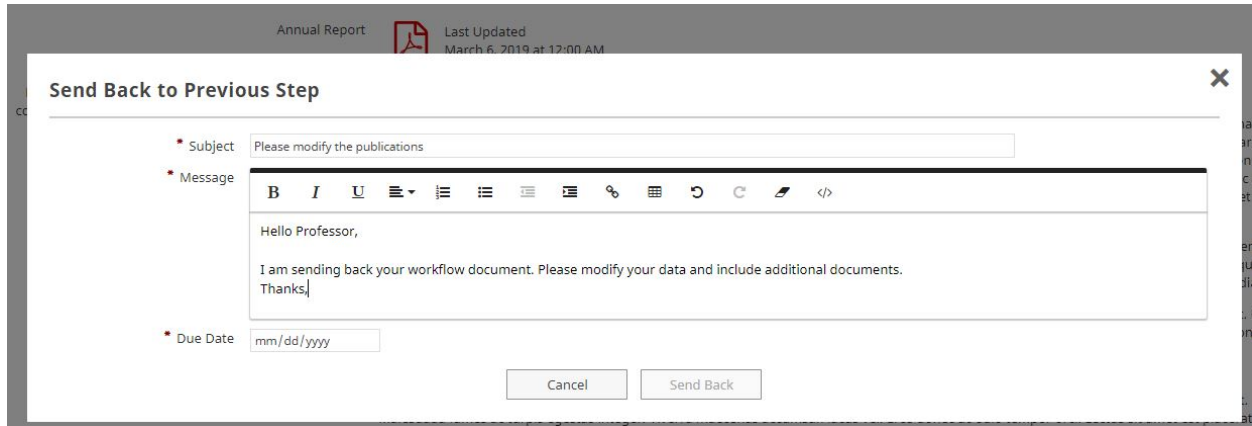
Faculty Submission Step - test faculty Submitted April 23, 2019 by test faculty

SBA Annual Review Report  Last Updated April 23, 2019 at 8:54 AM

Submit to Faculty Response

**Send Back to Faculty Submission**

When “sending back”, there is an option to message the person with instructions. The send back feature may be helpful in faculty reviews to correct a problem with their materials.



The “send back” email is delivered immediately and the individual is able to make the necessary changes; s/he will need to SUBMIT once again.

## DOWNLOAD RESULTS:

For those who are able to download workflow materials from the History area, there will be a drop-down Action button and a choice to “download.” This will download some metadata in addition to the files you would expect to be there. In this example of a download, you can see folders called css and fonts. The folders named “Files\_” will contain the documents uploaded in that step of a workflow. This may be a helpful feature to extract documents for record-keeping in personnel files.

