CREATING A REVIEW WORKFLOW
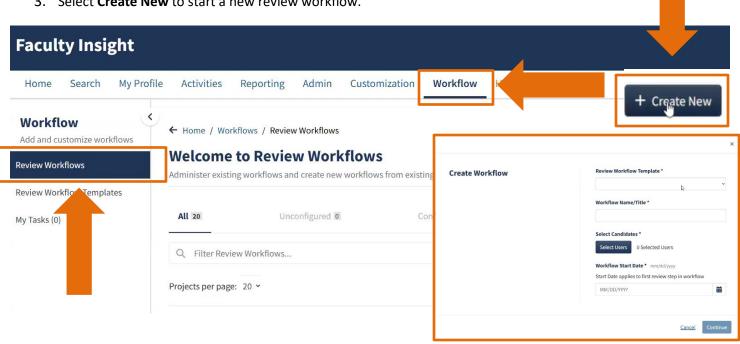
CREATING A REVIEW WORKFLOW OVERVIEW:

This guide provides step-by-step instructions on how to create or initiate a review workflow in FEA. This process is essential for managing reviews such as Promotion and Tenure (P&T) or Annual Reviews.

ACCESSING THE REVIEW WORKFLOW TAB

LOG IN NAVIGATION:

1. **Log in:** The system using your credentials [Link to Navigation Guide and Login Page].
   NOTE: Log in as a user with Workflow System Admin access.
2. Navigate to the **Workflow** tab>Click on **Review Workflows**.
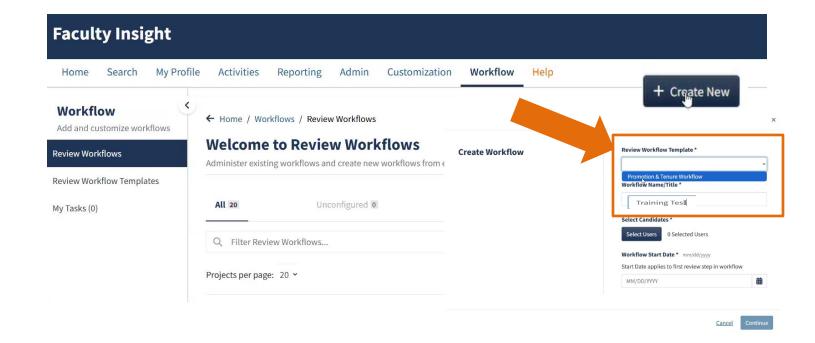3. Select **Create New** to start a new review workflow.

SELECTING A REVIEW WORKFLOW TEMPLATE

WORKFLOW TEMPLATE:

1. **Use the drop-down menu**: A drop-down menu will appear, for review workflow templates **(Currently, UF has one template available: Promotion and Tenure/Permanent Status Workflow Template to select)**.
2. **Proceed:** To Workflow Name/Title **(e.g., Annual Review 2025 or Promotion and Tenure 2024-25).**
   NOTE: The workflow name is visible to all candidates, reviewers, and those with reporting access.
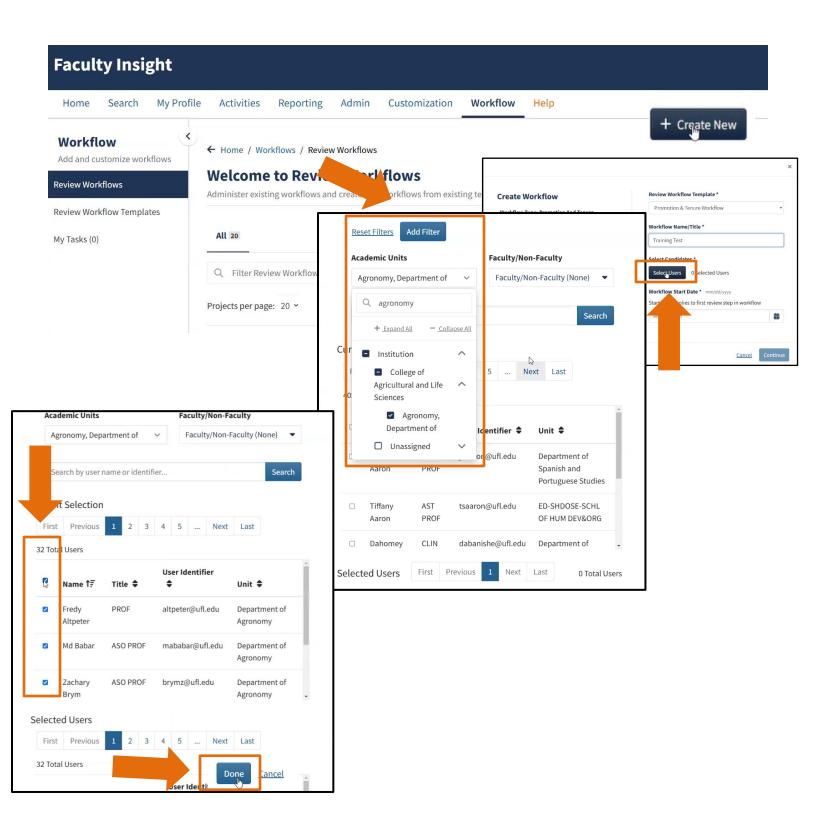
SELECTING CANDIDATES SECTION

SELECTING CANDIDATES:

1. **Click:** Select Users to open the user picker.
2. **Filter**: Candidates by Academic Unit:
   - **Click:** the down arrow to view institution sections.
   - **Use:** the search box to locate specific colleges or departments.
   - **Select:** the appropriate department.
3. **Click:** All Users to include all candidates from the selected unit **(If necessary, deselect specific candidates manually).**
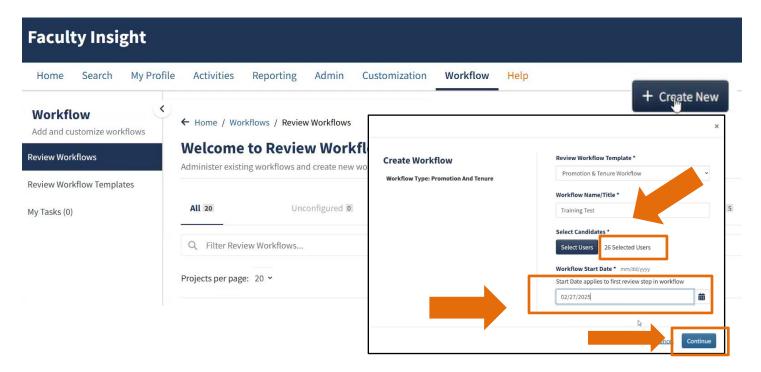4. **Click:** Done when the selection is finalized.

START **D**ATE:

1. **Selected Users**: Make sure users are already selected to choose a future start date **(See Steps 1-4 in Selecting Candidates Section).**
2. **Choose:** A future start date (e.g., the next day).
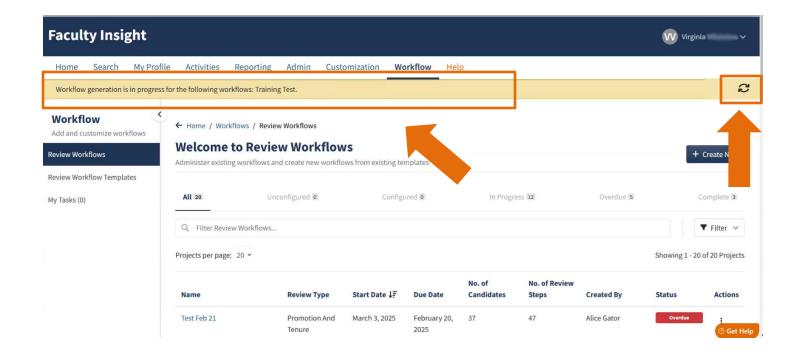3. **Click:** Continue to proceed.

WORKFLOW **G**ENERATION:

4. **After clicking continue:** A yellow bar will appear at the top, indicating the system is generating the workflow.
5. **Click:** The Refresh icon to check when the workflow is ready **(The yellow bar will disappear once the process is complete).**
6. **NOTE:** This process runs in the background and updates every 5 minutes. Also, it doesn't matter what tab you're on inside of the application that yellow bar will appear as the workflow is being generated on the back end.
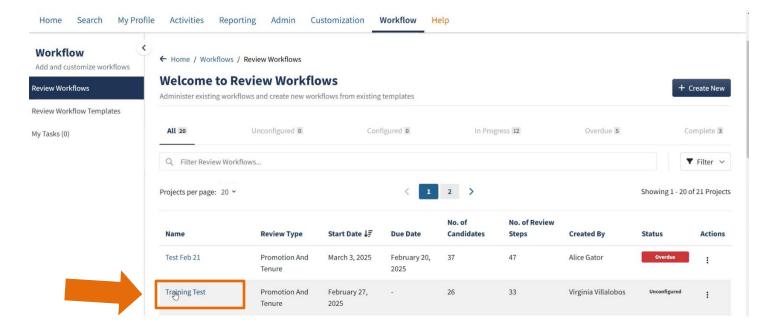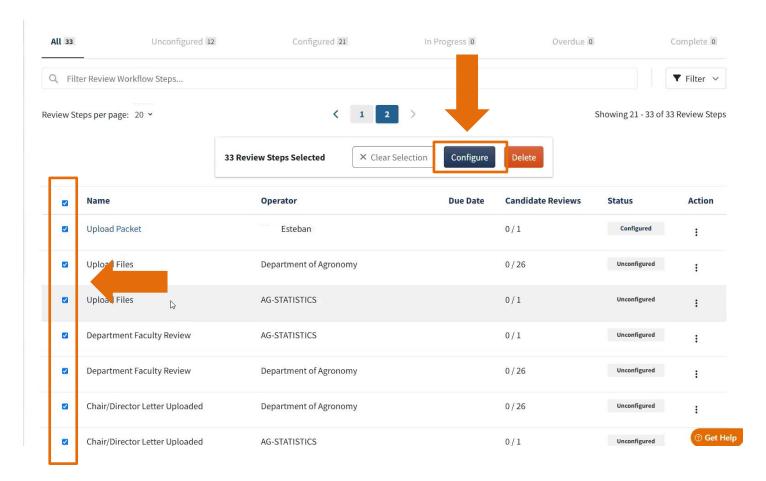
CONFIGURING WORKFLOW STEPS SECTION

CONFIGURING WORKFLOW:

1. **Locate:** The newly created workflow in the Review Workflows list and click on the workflow name to enter configuration mode **(e.g., Training Test in the Review Workflow List).**
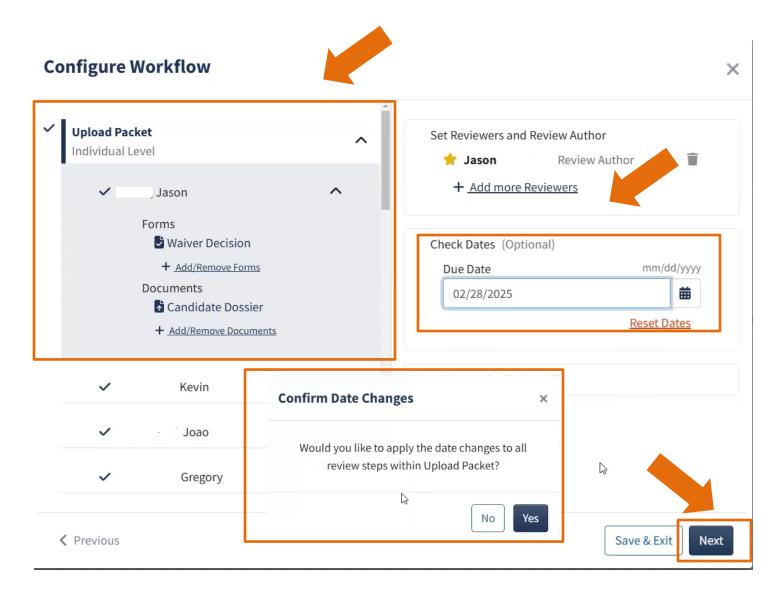   **NOTE:** The yellow bar should no longer appear on the application.

2. **Select:** All Steps to view the complete workflow structure.
3. **Click:** Configure to begin step-by-step setup.

ASSIGNING REVIEW AUTHORS AND DUE DATES:

4. For each workflow step:
   - **After clicking configure:** Scroll and click to assign a review author **(Typically the faculty member for initial steps).**
   - **Set:** A due date **(Optional).**
   - **Hit Next:** To apply due date changes to all relevant steps when prompted.
   - **Confirmation:** A confirmation date change will appear then you will hit "Yes" if you like due date changes to apply to all.

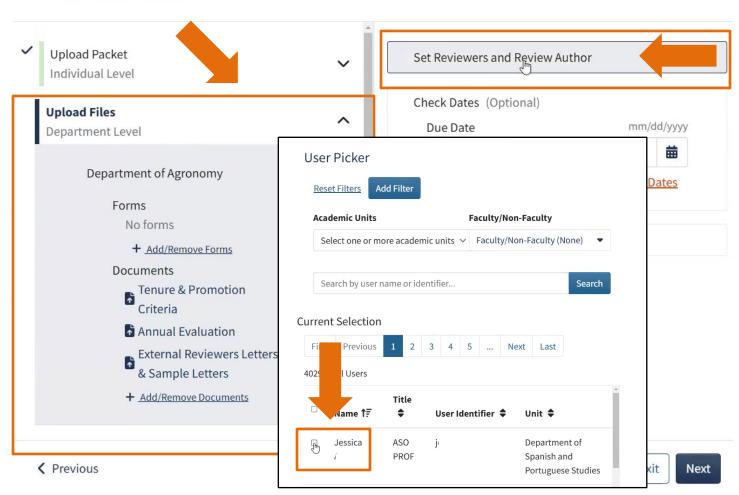**For department-level steps:**

5. Each workflow step:
   - **Collapse or Scroll:** To Upload Files **(Department Level).**
     NOTE: Adding Reviewers and Review Authors can be used for each step in the workflow process.
   - **Click:** Set Reviewers and Review Author.
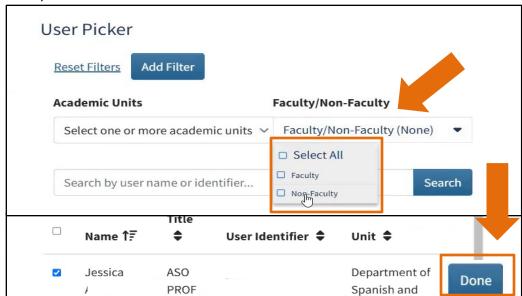   - **Select:** At least one review author **(e.g., Jessica).**

- **Use dropdown menu:** To filter **(e.g., academic unit, faculty/non-faculty)** to find the correct individuals or search by username then click done.
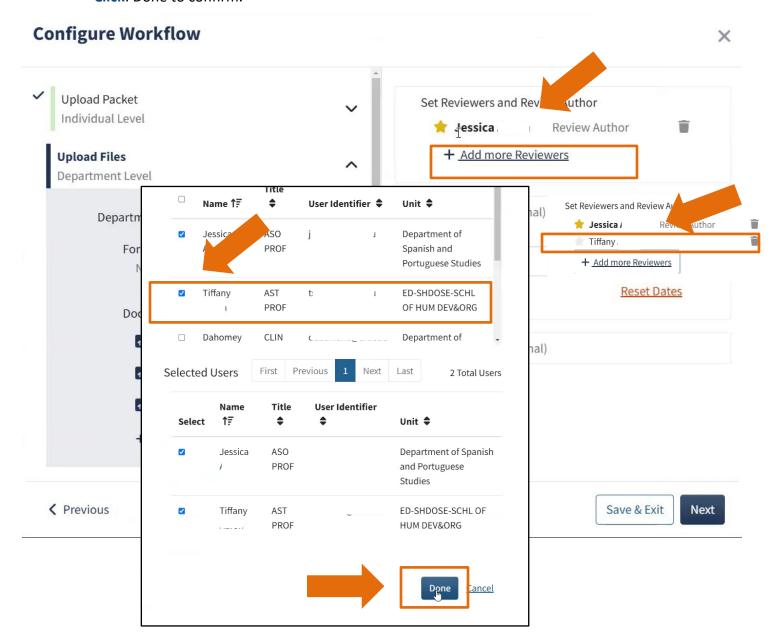
- **After pressing done:** The Review Author is automatically set **(e.g., Jessica)**. This only occurs if only one reviewer is selected in the User Picker (If more than one review is selected, see step 6 on Multiple Reviewers and Review Authors).
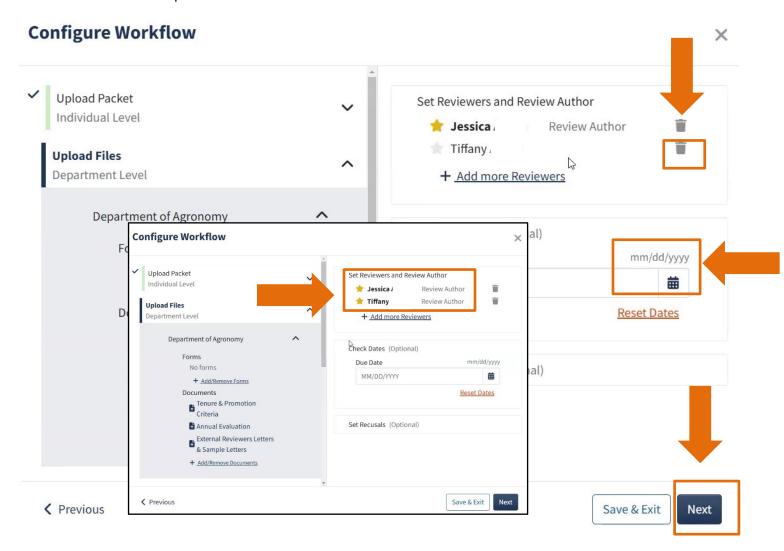 **NOTE:** The Review Author is the person who will submit the review.
- **Click:** Add more Reviewers if needed then scroll to select the Reviewer name **(e.g., Tiffany).**
- **Confirm:** The Reviewer name under Set Reviewers and Review Author.
- **Click**: Done to confirm.

Multiple Reviewers and Review Authors (Optional):

6.   Each workflow step:
 - **Click**: The star icon to state which reviewer is the review author (The star icon will highlight yellow).
   NOTE: You must have at least one Review Author selected to move forward.
 - **Use:** the trash icon to remove incorrect selections if needed **(To remove the Review Author or Reviewer selection).**
 - **Select Date:** This is optional.
 - **Click:** Nex**t** to proceed.

Setting Recusals:

7. Each workflow step:

- **Click:** Set Recusals **(On the left side faculty members are listed and the Reviewer is listed at the top).**
- **Click:** The recusal box next to the faculty member **(This is optional)** if certain reviewers should be prevented from reviewing specific candidates.
- **Click:** Save if you checked any recusals.
- **Click:** Next to apply all changes to all review steps within Upload Files and confirm changes if needed.

FINALIZING THE WORKFLOW:

8. Each workflow step:

   Continue setting Reviewers and Review Authors for **(See Step 5 for Adding Reviewers and Review authors/See Step 7 to Set Recusals in the Configuring Workflow Steps Section):**
   - Department faculty review
   - Chair/director letter upload
   - Chair/director assessment response
   - College faculty review
   - Dean/director letter upload
   - Dean/director assessment response
   - Final assessment (Institutional level)
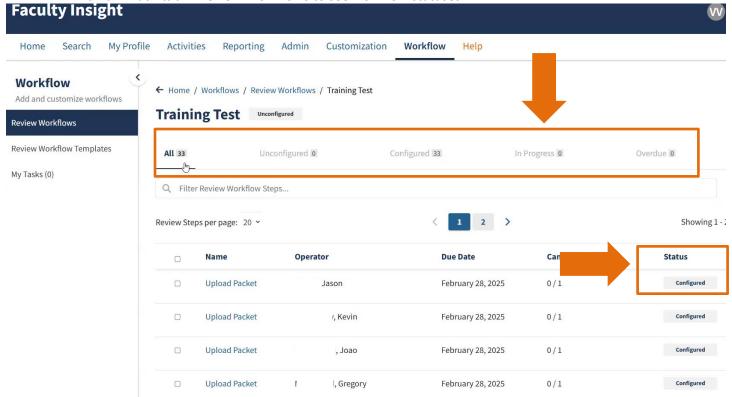   **NOTE:** Ensure every step has a designated review author.

   Confirm that all steps are marked with a check and Save & Exit.

COMPLETION:

9. Each workflow step:
   - **After clicking Save & Exit:** All steps are configured, and the review workflow is ready.
   - **Review:** Each tab in Review Workflows to see workflow statuses.

- **If changes are needed**: Click a review step on the page **(e.g., Department Faculty Review).**
- **Expand:** A property to edit **(e.g., Due Date)** then hit apply changes**.**
- **Confirm:** Click "Yes" or "No" to confirm and a Success confirmation will appear.

HOW TO EDIT REVIEWERS FEATURE

Editing Reviewers:

10. Each workflow step:

- **Expand:** Property to edit Reviewers
- **Click:** The "X" to remove the name of Review Author or Reviewers **(e.g., Dahomey)**
- **Add:** A reason in the description box (Why you are removing this person) then hit "Yes."
- **Click:** Apply changes

- **Click:** Add more Reviewers
- **Select:** Another person to be a reviewer then hit done.
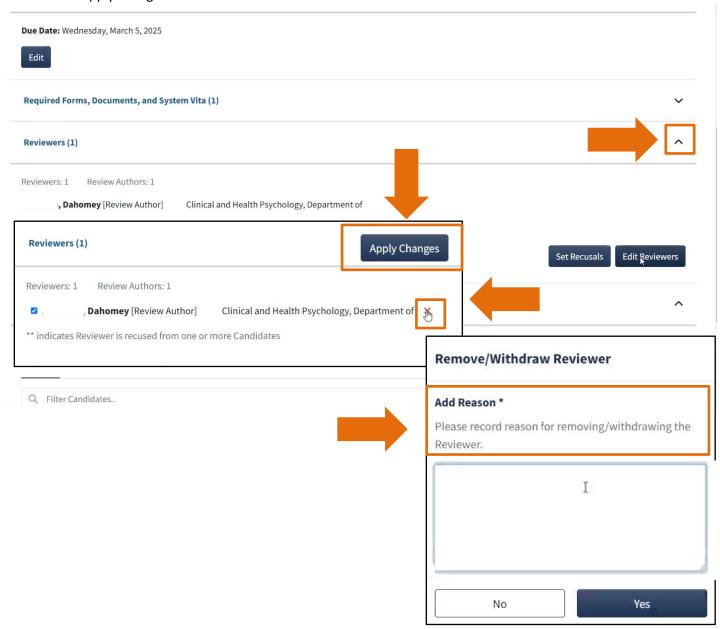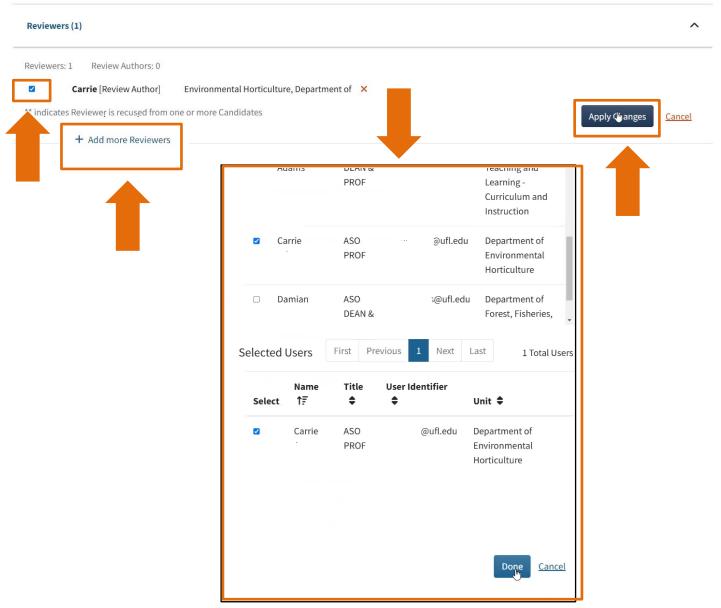- **Click:** The checkbox to make new reviewer a Review Author.
- **Hit:** Apply changes to finish.
- **Click:** Review Workflow to review your workflow list you edited **(See Step 2 in Accessing the Review Workflow Tab).**

Reviewers (1)   ∧

Reviewers: 1   Review Authors: 0

☑   **Carrie** [Review Author]   Environmental Horticulture, Department of ✕

** indicates Reviewer is recused from one or more Candidates   **Apply Changes** Cancel

  + Add more Reviewers

	Adams	DEAN & PROF		Teaching and Learning - Curriculum and Instruction
☑	Carrie	ASO PROF	@ufl.edu	Department of Environmental Horticulture
☐	Damian	ASO DEAN &	;@ufl.edu	Department of Forest, Fisheries,

Selected Users   First Previous **1** Next Last   1 Total Users

Select ↑₌	Name	Title ⬍	User Identifier ⬍	Unit ⬍
☑	Carrie	ASO PROF	@ufl.edu	Department of Environmental Horticulture

                                                                    Done Cancel

Technical Issues

Academic Analytics

facultyinsightproductquality@academicanalytics.com