



## Annual Review Workflow User Guide: Librarian Reviewee

This guide is for faculty members who belong to schools participating in the Annual Review Workflow Pilot for the 2024 calendar year. Annual Review Workflow Pilot School’s faculty will be using the Elements Workflow module to complete their Annual Reviews. The workflow module allows faculty to select and contextualize their activities with attachments within Elements.

Once the faculty member submits their exercise, Elements routes the exercise securely and directly to the reviewers, presenting them with a space for comments and attachments as needed. The exercise is locked to the reviewee after it’s submitted, but the reviewee can continue view their exercise and any submitted reviews.

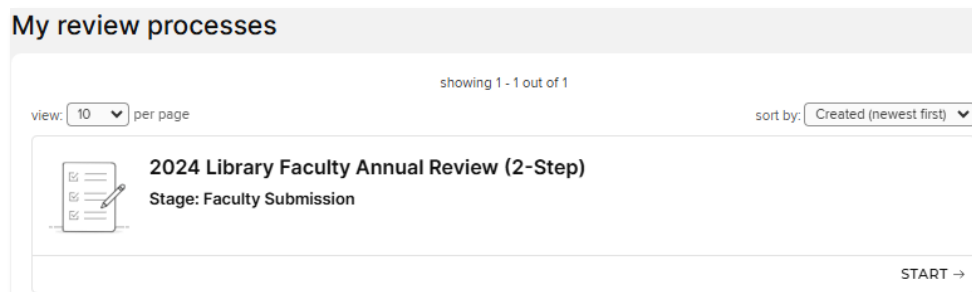
A separate User Guide is available on our website for those in Reviewer roles.


### Accessing the Workflow

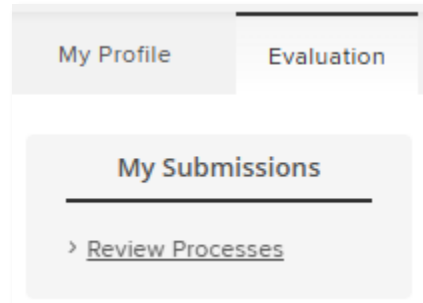
Once activated for your account, the Annual Review Exercise will then be available to you in Elements.



It will appear to you as an action in your action list, where “**Start**” or “**Continue**” will take you directly into the exercise.

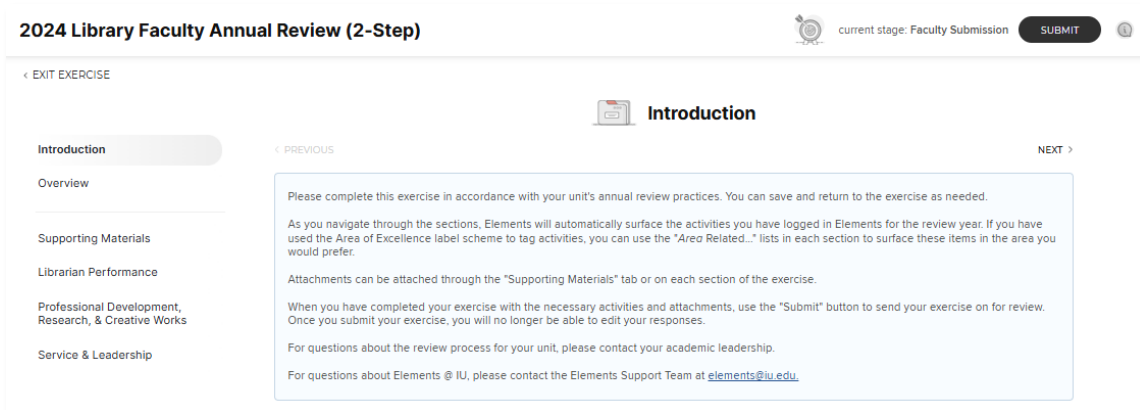


You can also navigate to your reviews using the main menu. Using the drop-down menu , navigate to the “**Evaluation**” tab, selecting “**Review Processes**” from the “**My Submissions**” section. You will then arrive at the “**My Review Processes**” page, showing you the review exercise available to you. Your list should show you a single annual review exercise per year.

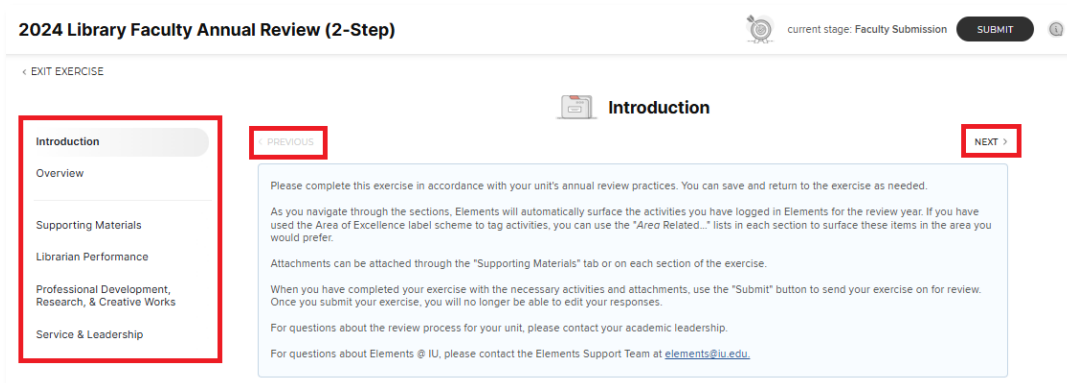


## Navigating the Workflow

When you first enter the exercise, you will land on an introduction page with basic instructions. The top row identifies the exercise you are working on as well as what stage the exercise is on. To enter and edit information into your exercise, it must be at the “**Faculty Submission**” stage. Once you “**Submit**” the exercise using the submit button in the top right, it will no longer be editable.



You can navigate the exercise using the “**Previous**” or “**Next**” buttons at the top of each page or by clicking the section headers listed on the left.



You can save, leave, and return to the exercise by using the toolbar available on the left side of the screen or by using the “Exit Exercise” button on the top left of the exercise page.

2024 Library Faculty Annual Review (2-Step)



current stage: Faculty Submission

SUBMIT



< EXIT EXERCISE

## Overview

The “**Overview**” section shows you a high-level overview of your entire exercise. You can review how many items and attachments have been saved in each section. By clicking on any section or sub-section of the exercise from the Overview page, you can navigate directly to that component of the exercise.

The screenshot shows the 'Overview' page for the '2024 Library Faculty Annual Review (2-Step)'. The page is titled 'Overview' and has navigation links for 'PREVIOUS' and 'NEXT'. The main content is organized into sections, each with a folder icon and a title. Each section includes a sub-section with an icon, a title, and a count of items or attachments. The 'Teaching Activities' sub-section shows 3 items, while all other sub-sections show 0 items or attachments. The sections are: Test System (Indiana University), Supporting Materials (Overall attachments: 0), Librarian Performance (Attachments: 0, Librarian Performance: 0 items, Teaching Activities: 3 items, Librarianship Related Scholarly & Creative Works: 0 items, Librarianship Related Grants & Contracts: 0 items, Librarianship Related Service & Leadership: 0 items), and Professional Development, Research, & Creative Works (Attachments).

Section	Sub-section	Count
Test System	Indiana University	-
Supporting Materials	Overall attachments	0
Librarian Performance	Attachments	0
	Librarian Performance	0 items
	Teaching Activities	3 items
	Librarianship Related Scholarly & Creative Works	0 items
	Librarianship Related Grants & Contracts	0 items
	Librarianship Related Service & Leadership	0 items
Professional Development, Research, & Creative Works	Attachments	-

We recommend using the Overview section to track your progress and to confirm that you have entered and uploaded all your activities and attachments before submitting your review.

## Supporting Materials

< PREVIOUS

Supporting Materials

NEXT >

Attachments

Please use this space to upload supporting materials, such as a CV or personal narrative, for your Faculty Annual Review.  
For questions about the expected attachments for your unit, please contact your academic leadership.

No attachments have been added for this review process. Add...

< PREVIOUS

NEXT >

The “**Supporting Materials**” section allows you to upload any general attachments to your exercise. By clicking the “+” button on the right-side of the section you can add an attachment, specifying a type and adding a description if you so choose.

Add an attachment

Type

Annual Narrative

Choose a file \*

Annual Narrative.pdf

Description

This is my 2024 Annual Narrative.

CANCEL SAVE

When specifying a type, the options are Annual Narrative, CV, Position Description, and Supplementary Information. Refer to your academic leadership’s guidance regarding the attachment expectations for your unit.

Elements supports a variety of attachment types, however the system allows for seamless PDF viewing for reviewers.

## Librarian Performance, Professional Development, Research, & Creative Works, and Service & Leadership

The activities you have logged into Elements for the relevant calendar year will automatically be pulled into your Annual Review Exercise. Librarianship items and Teaching Activities will be listed in the “**Librarian Performance**” section, Professional Development items, Scholarly & Creative Works, and Grants & Contracts in the “**Professional Development, Research, & Creative Works**” section, and Service & Leadership activities in “**Service & Leadership**.”

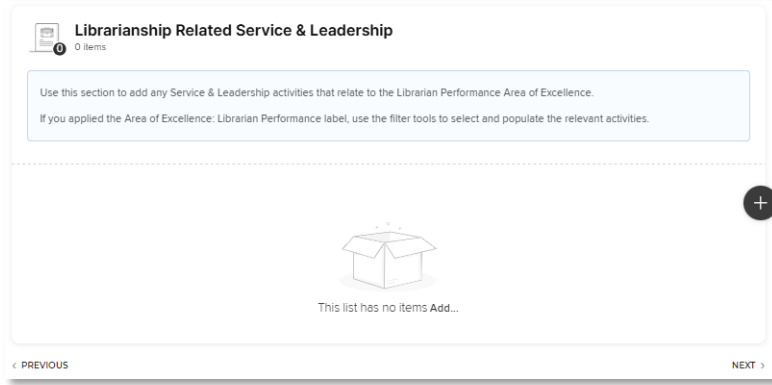
The screenshot displays the 'Librarian Performance' section in the Elements interface. At the top, there are navigation links for '< PREVIOUS' and 'NEXT >'. Below this is an 'Attachments' section with a blue header and a light blue box containing the text: 'Please use this space to upload supporting materials related to Librarian Performance.' Below the box, it indicates '1 attachment'. A single attachment is shown: 'List of Acquired Books in 2024.pdf', uploaded on 07 Jan 2025 15:14, with a size of 615 kB. The attachment details include a 'Type' of 'Additional Supplementary Information' and a 'Description' that reads: 'Attached here is a complete list of the books acquired in 2024 through the book acquisition project...'. To the right of the attachment card is a blue circular '+' button. Below the attachments section is a list of 'Librarian Performance' items, showing '2 items' and '2 items' in the interface. The list is set to '10 per page' and '1-2 out of 2' items are visible. The first item is 'Book Acquisition', categorized under 'LIBRARIANSHIP'. Its details include: Title: Book Acquisition, Sub-Type: Acquisitions, Start Date: 02 Mar 2024, End Date: 10 Oct 2024, and Additional Information/Explanation: books books books. There are links for 'URL' and 'Additional URL', and 'Reporting Dates: 02 Mar 2024 - 10 Oct 2024'. A blue 'REMOVE' button is located to the right of the item's description. At the bottom of the item card, there are tabs for 'SUMMARY' and 'LABELS (0)'. A blue circular '+' button is also present to the right of the list header.

Each section begins with a place for attachments, followed by the automatically surfaced list of Elements Activities. In Librarian Performance, you can designate a type for attachments you choose to upload; type options include Course Evaluations, Supplementary Information, and Syllabus. For the other sections, you can upload attachments and provide a description, but no types are available.

If you want to exclude an activity from your review, use the remove button to the right of the activity's description.

## Activities Beyond Area

If you used the Area of Excellence Label Scheme to tag activities with an area differing from where it is automatically listed, you can pull those items into the section you prefer using the “Area Related...” sub-sections. Each activity can only be included on one list.

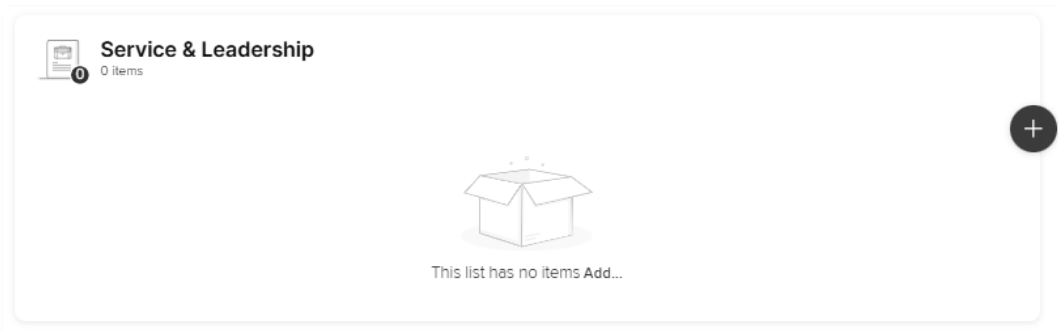


For example, if you had completed a librarian performance-related service activity and wanted it considered as a part of your Librarian Performance during your review, you could navigate to the “**Librarianship Related Service & Leadership**” list and select the “+.” This will show you a list of your eligible Service & Leadership activities.

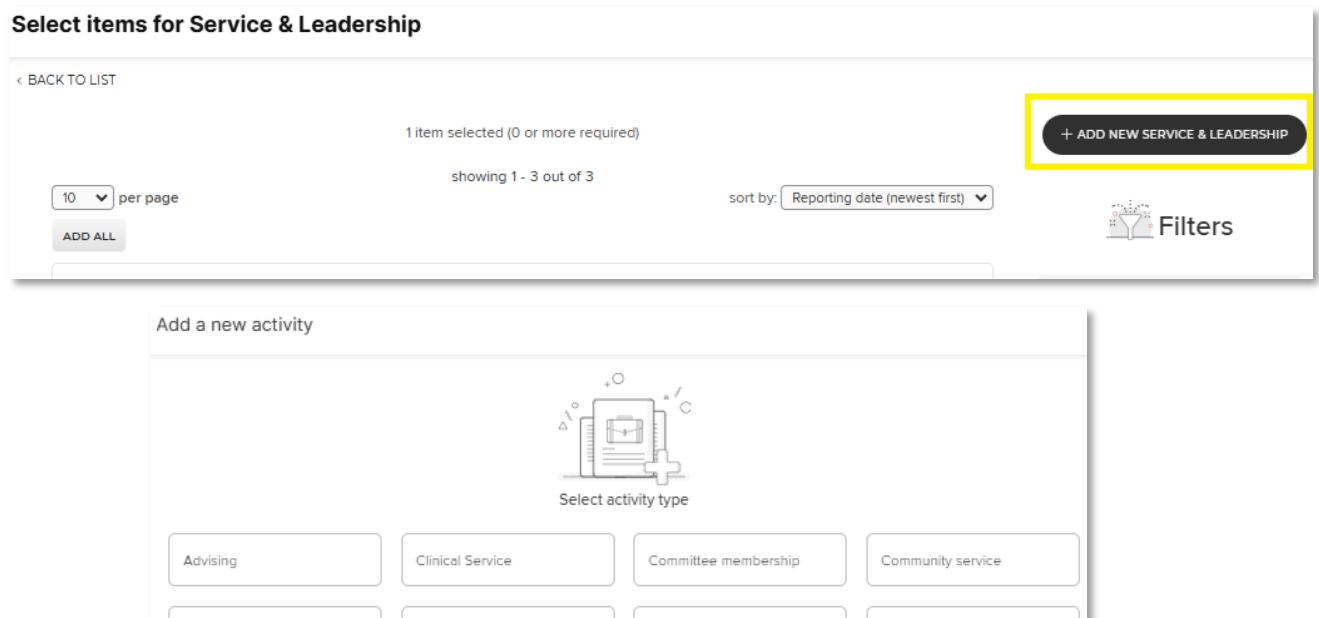
Using the filter tools on the right-side of the screen, search for the appropriate label – in this case “librarian performance.” This will reduce the list of activities to only those items to which you have applied the Librarian Performance label. Use the “**Add**” button to the right of the item description to move the activity from its initial spot on the Service & Leadership section to the Librarian Performance section. As items can only be included once per review, a pop-up will ask you to confirm that you would like to move the item.

### Adding New Activities

You can add new activities into Elements via the Annual Review Exercises. These activities will reside on your full Elements profile just as activities entered from the Home page do.



Clicking the “+” button on any list will take you to a list of any entries for that activity category during the reporting period. In the upper right corner, there is an “+ Add New Activity” button.



Clicking “+ Add New...” will pop-up a menu of activities for that category. Once you select the activity type you need, you will arrive directly to the manual entry page for that activity type. Saving the activity adds it to the initial list and Elements will return you to the “Select items for...” screen.

## Finalizing Your Review

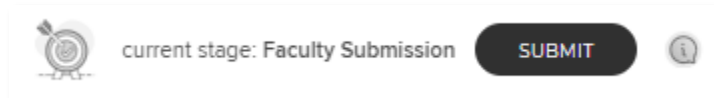
Once you have attached all your attachments and ensured all your activities have been entered into Elements and added to your Annual Review exercise, you are ready to review and submit your exercise for review. If you forget to enter or attach something, you will need to work with your academic leadership to return your exercise to your level.

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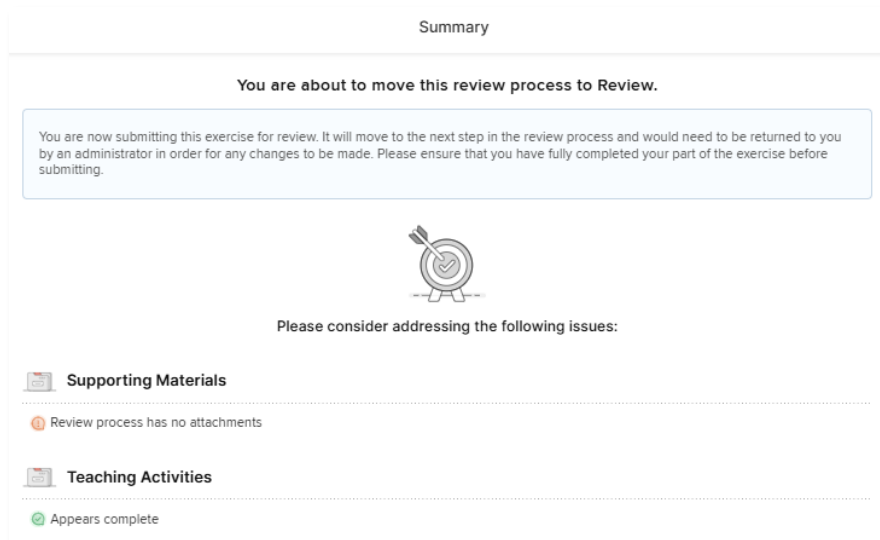
***Once you submit your Annual Review, it will be locked for editing.***

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The Overview section will allow you to review your entire exercise on one screen; showing you the locations and counts of attachments and activities.



Selecting the “**Submit**” button in the upper right corner will trigger a summary pop-up, reminding you that your exercise locks after submission.



By hitting “**Confirm**” at the bottom of the summary pop-up, your exercise then moves to the Review stage and can no longer be edited. Your reviewer(s) can now see and begin reviewing your submission.

