



Annual Review Workflow User Guide: Librarian Reviewer

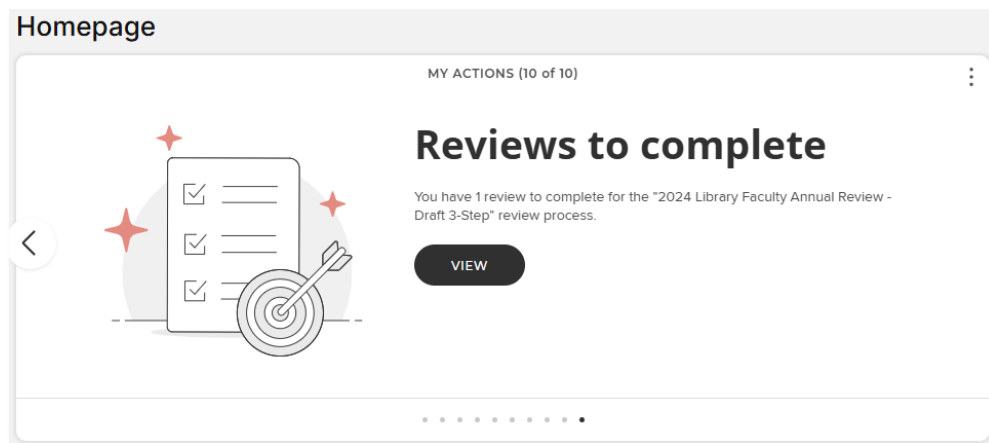
This guide is for reviewers who belong to schools participating in the Annual Review Workflow Pilot for the 2024 calendar year. Annual Review Workflow Pilot School’s faculty will be using the Elements Workflow module to complete their Annual Reviews. The workflow module allows faculty to select and contextualize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

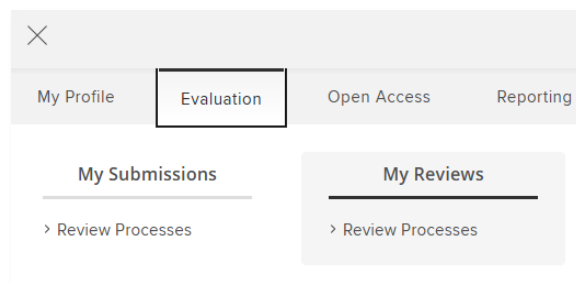
A separate User Guide is available on our website for those in Reviewee roles.


Accessing the Workflow

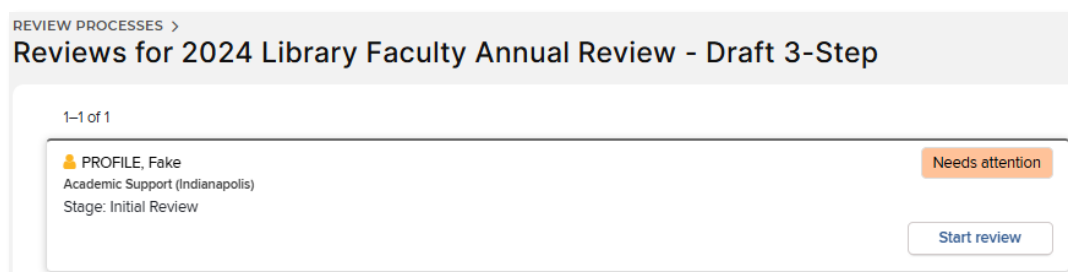
Once a faculty member submits their Annual Review exercise, their exercise will then be available to you in Elements.



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



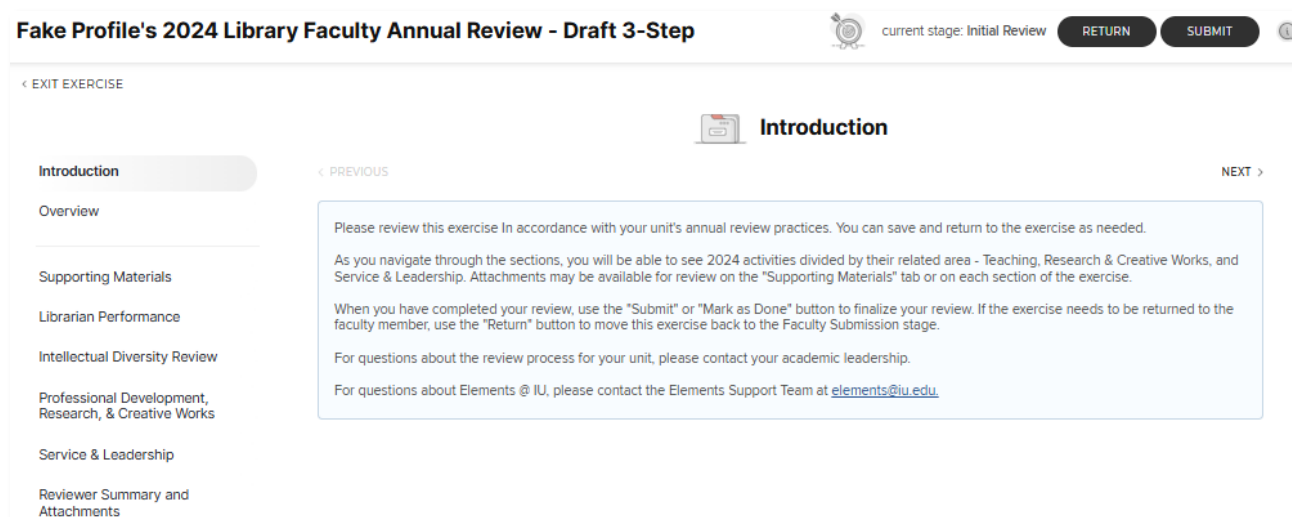
You can also navigate to your reviews using the main menu. Using the drop-down menu , navigate to the “**Evaluation**” tab, selecting “**Review Processes**” from the “**My Reviews**” section. You will then arrive at the “**Review Processes**” page, showing you the reviews that are available to you. Select “**Start Review**” to begin the review process. You can save and return to your reviews through this menu at any point. Filtering tools are available on this screen so you can search for specific individuals or return to reviews which have been marked as done.



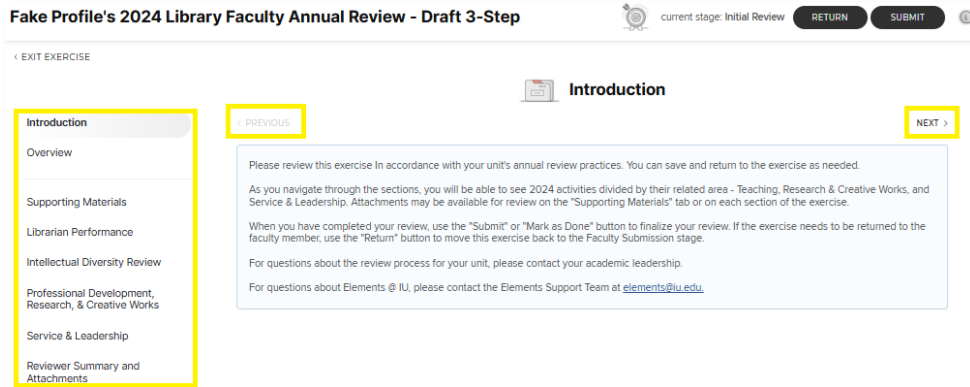
Navigating the Workflow

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 stage you are assigned a reviewer on. You can use the “**Return**” button to send the exercise back down to the faculty member. Once you “**Submit**” the exercise using the submit button in the top right, it will no longer be editable as it will have routed up to the next level of review.

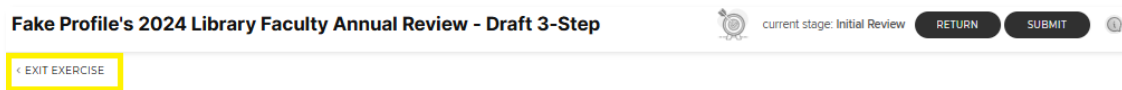
If you are the final reviewer in the process, you will have a “**Mark as Done**” button rather than a “**Submit**” button. This will mark it as done but you can return and re-open the review process if needed.



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.

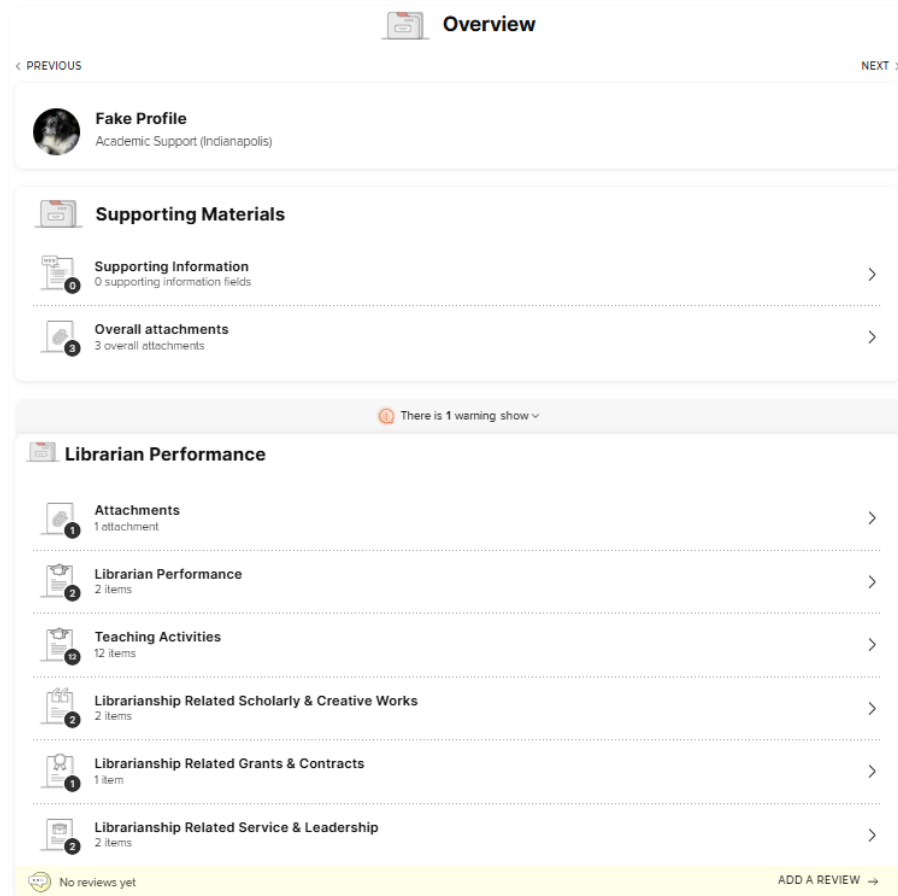


You can save, leave, and return to the exercise by using the toolbar available on the left side of the screen or by using the “Exit Exercise” button on the top left of the exercise page.



Overview

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



Supporting Materials

The “**Supporting Materials**” section is where faculty can upload any general attachments to their exercise, specifying a type and leaving a description if they so choose.


The screenshot shows the 'Supporting Materials' interface. At the top, there's a title 'Supporting Materials' with a folder icon. Below the title are navigation links for 'PREVIOUS' and 'NEXT'. The main section is titled 'Attachments' and contains a blue instruction box: 'Please use this space to upload supporting materials, such as a CV or personal narrative, for your 2024 Faculty Annual Review. For questions about the expected attachments for your unit, please contact your academic leadership.' Below this, there are three attachment cards, each with a numbered label (1, 2, 3) on the left. Card 1: 'Position Description.pdf', 'Uploaded on 10 Jan 2025 15:12 | 636 kB', 'Type', and an eye icon. Card 2: 'F. Profile 2024 CV.pdf', 'Uploaded on 10 Jan 2025 15:12 | 629 kB', 'Type', and an eye icon. Card 3: '2024 Annual Narrative.pdf', 'Uploaded on 10 Jan 2025 15:13 | 634 kB', 'Type', 'Description' (Attached here is my 2024 Annual Narrative.), and an eye icon. At the bottom, there are 'PREVIOUS' and 'NEXT' navigation links.

PDFs function nicely within Elements exercises, as clicking the eye-shaped icon allows for in-browser PDF viewing.

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

The activities a faculty member logged into Elements for the relevant calendar year will be divided between the sections. 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.**”

At the top of each section, they will have had the opportunity to upload any relevant attachments. Below this is a space for review comments, and a list of all the items they have chosen to pull in for their review.


 **Librarian Performance**

< PREVIOUS NEXT >

Attachments

Please use this space to upload supporting materials related to Librarian Performance.

1 attachment

1  **Log of 2024 Acquisitions for Topical Library.csv** ↓

Uploaded on 10 Jan 2025 15:14 | 3 kB

Reviews

Evaluation Scale: Stage: Initial Review

SAVE


Librarian Performance

2 items 2 items

10 per page 1-2 out of 2

[VIEW ITEM DETAILS →](#)

Book Acquisition



LIBRARIANSHIP

Title: Book Acquisition

Sub-Type: Acquisitions

Start Date: 02 Mar 2024

End Date: 10 Oct 2024

Additional Information/Explanation: books books books

Activities have been limited so that they can only appear one place in the exercise and must have a reporting date within the review period. Faculty can opt to include activities originally entered into other sections by including them in the “**Area Related...**” lists.


Librarianship Related Service & Leadership

2 items 2 items

10 per page 1-2 out of 2

[VIEW ITEM DETAILS →](#)

IUPUI Weeks of Welcome Planning Committee



COMMITTEE MEMBERSHIP

Committee name: IUPUI Weeks of Welcome Planning Committee

Committee Role: Committee member

Start date: 01 Jan 2018


Ex-officio: False

Reporting Dates: 01 Jan 2018 -

To view more information on any item, you can click the “View Item Details” button in the top right corner of the item.

[VIEW ITEM DETAILS →](#)

BANNED BOOKS AND THE LITERACY CRISIS




COURSE TAUGHT
Course title: BANNED BOOKS AND THE LITERACY CRISIS
Course Subject & Class Number: AMST-A 360
Number of Credit Hours: 3.00
Start date: 13 Jan 2024

From there, select “View *Item* Details” and will open a new tab with the full detailed view for the activity. If an item has multiple sources, you can view the different metadata provided from each layer.

[< BACK TO LIST](#)

Item details


[VIEW COURSE TAUGHT DETAILS](#)



COURSE TAUGHT

BANNED BOOKS AND THE LITERACY CRISIS

Teaching activity details




COURSE TAUGHT


BANNED BOOKS AND THE LITERACY CRISIS

Data sources

Manual	BANNED BOOKS AND THE LITERACY CRISIS
ID:	A6E5C493-FEE1-4DBF-B2BD-968E799DABD4
Course title:	BANNED BOOKS AND THE LITERACY CRISIS
Course Subject & Class Number:	AMST-A 360
Number of Credit Hours:	3
Start date:	13 Jan 2024
End date:	10 May 2024



REPORTING DATES
13 Jan 2024 - 10 May 2024




RELATIONSHIPS
Users 1

Intellectual Diversity Review

If you are the final review in the review process and your academic unit has opted in, you will have access to an Intellectual Diversity Review section. Only complete this section if you are the appropriate person to be leaving this review. Refer to your relevant campus and school policies for more information on Indiana Code 21-39-5.

IU Bloomington is not using this section in the pilot and it will not appear on any IUB exercises.

 **Intellectual Diversity Review**


[< PREVIOUS](#) [NEXT >](#)

Final Reviewers Only:

Use the dropdown tool below to indicate one of the following options regarding intellectual diversity:

- Criteria Met** - To the best of my knowledge, I affirm that this faculty member has met the criteria identified in Indiana Code 21-39.5.
- Criteria Not Met** - To the best of my knowledge, I affirm that this faculty member has not met the criteria identified in Indiana Code 21-39.5.
- Did Not Teach** - To the best of my knowledge, this faculty member did not teach during this year of review.

No additional commentary is necessary. [see less](#)

 **Reviews**

Intellectual Diversity: ? Stage: **Review**

[SAVE](#)

[< PREVIOUS](#) [NEXT >](#)

Finalizing Your Review

The final screen available to you as a reviewer in the Elements Workflow is “**Reviewer Summary and Attachments**” section. Here you can leave final comments, scores, and attachments, in accordance with your academic units’ annual review process.

Once you have attached any attachments and left any comments or scores, you are ready to review and submit your review. If you forget to enter or attach something, you will need to work with your academic leadership to return the exercise to your level.

If multiple reviewers review the same stage, do not submit the review until all reviewers have completed their tasks.

The Overview section will allow you to review your entire exercise on one screen; showing you the locations and counts of attachments and activities. If you are part of a committee where multiple people should be reviewing or leaving comments, do not submit the exercise until all members have completed their portion.


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





Summary

You are about to move this review process to Secondary Review.

You are now submitting this exercise for review. It will move to the next step in the review process and would need to be returned to you by an administrator in order for any changes to be made. Please ensure that you have fully completed your part of the exercise before submitting.




 **Supporting Materials**

 Review process has no outstanding reviews

By hitting “**Confirm**” at the bottom of the summary pop-up, your exercise then moves to the next review stage and can no longer be edited. The next reviewers can now see and begin reviewing the submission.

If you are the final reviewer, you will have a the ability to return the exercise to an earlier level via the “**Return**” or “**Review #**” buttons. You can also “**Mark as Done**” but as the final reviewer you can “**Unmark as Done**” if needed to continue editing or adding to your review.

Single Level Reviewer Example



current stage: Review

RETURN


|

status: In progress

MARK AS DONE



Multiple Level Reviewer Example


current stage: Secondary Review


RETURN


REVIEW 1

|

status: In progress

MARK AS DONE




current stage: Secondary Review


RETURN


REVIEW 1

|

status: Marked as done

UNMARK AS DONE



 You have marked your review of this review process as done

Last Updated: 1/8/25