ELEMENTS@IU

**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.
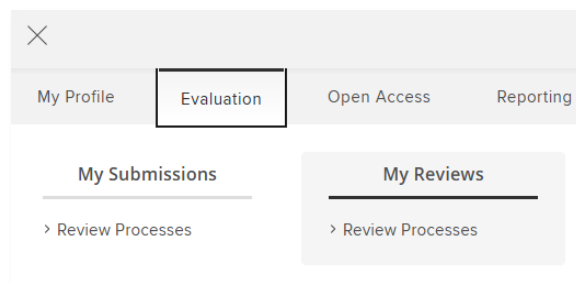
A separate User Guide is available on our website for those in Reviewee roles.
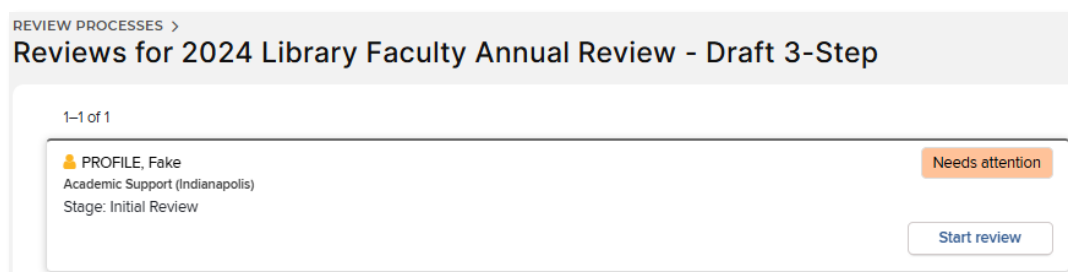
Accessing the Workflow

Once a faculty member submits their Annual Review exercise, their exercise will then be available to you in Elements.
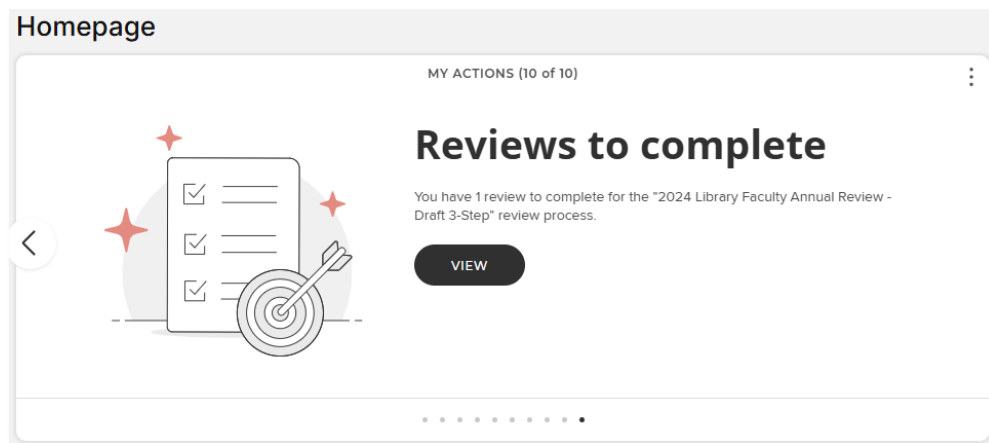
It will appear to you as an action in your action list, where "**View**" will take you directly into the exercise.

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 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.
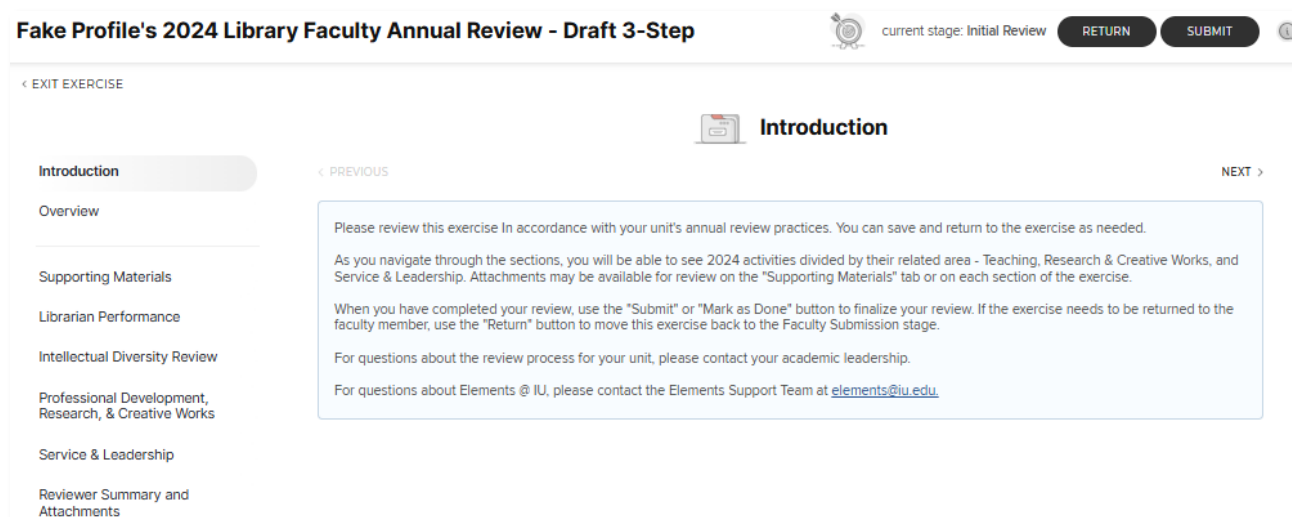
You can navigate the exercise using the "**Previous**" or "**Next**" buttons at the top of each page or by clicking the section headers listed on the left.
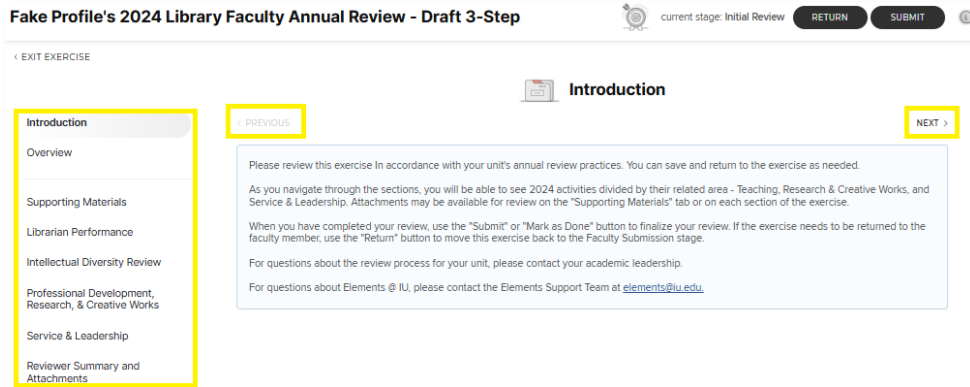
You can save, leave, and return to the exercise by using the toolbar available on the left side of the screen or by using the "**Exit Exercise**" button on the top left of the exercise page.
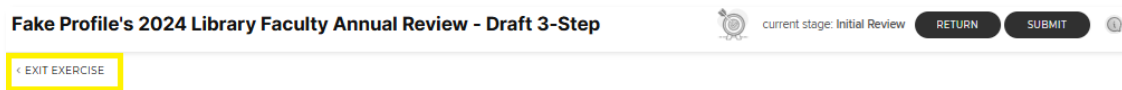
Overview

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.
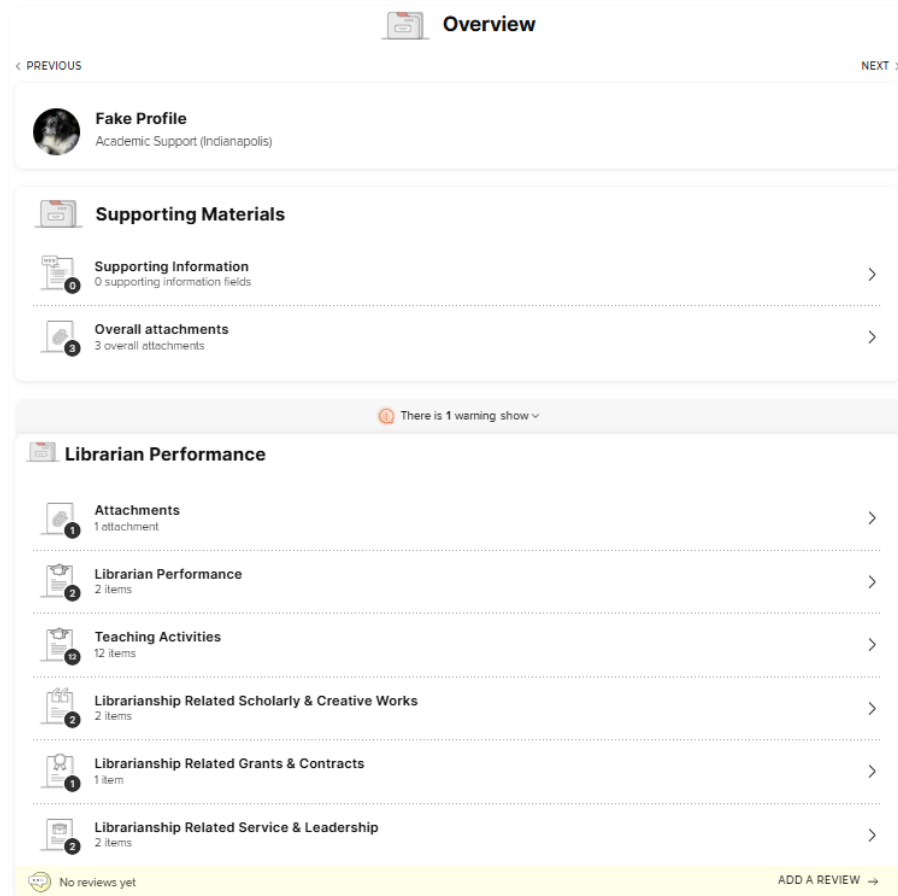
Supporting Materials

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.

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.

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.

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

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.

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.

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

Multiple Level Reviewer Example

Last Updated: 1/8/25