



ELEMENTS@IU

Annual Review Workflow User Guide: Reviewee

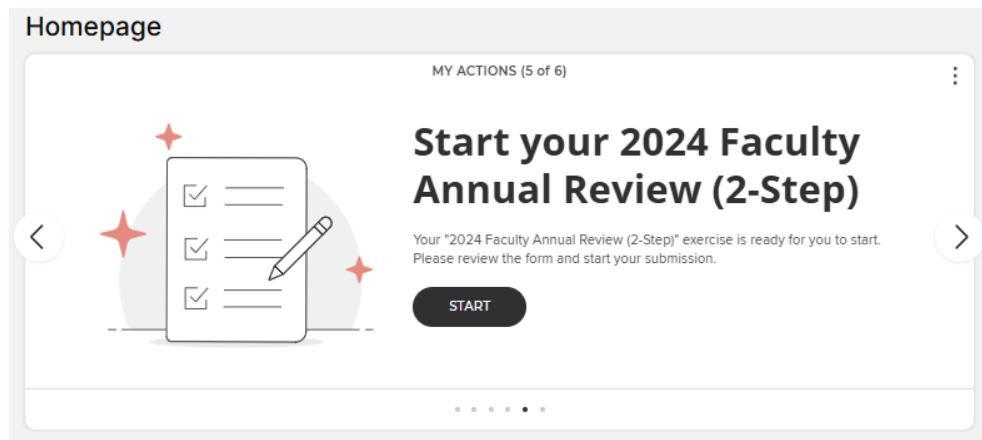
This guide is for faculty members who belong to schools participating in the Annual Review Workflow Pilot for the 2024 calendar year. Annual Review Workflow Pilot School's faculty will be using the Elements Workflow module to complete their Annual Reviews. The workflow module allows faculty to select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

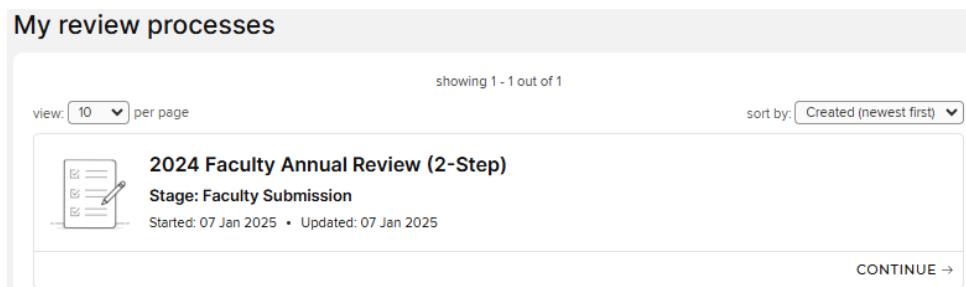
A separate User Guide is available on our website for those in Reviewer roles.


Accessing the Workflow

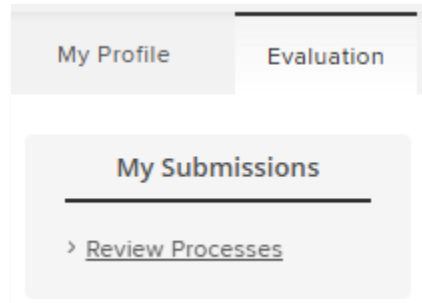
Once activated for your account, the Annual Review Exercise will then be available to you in Elements.



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

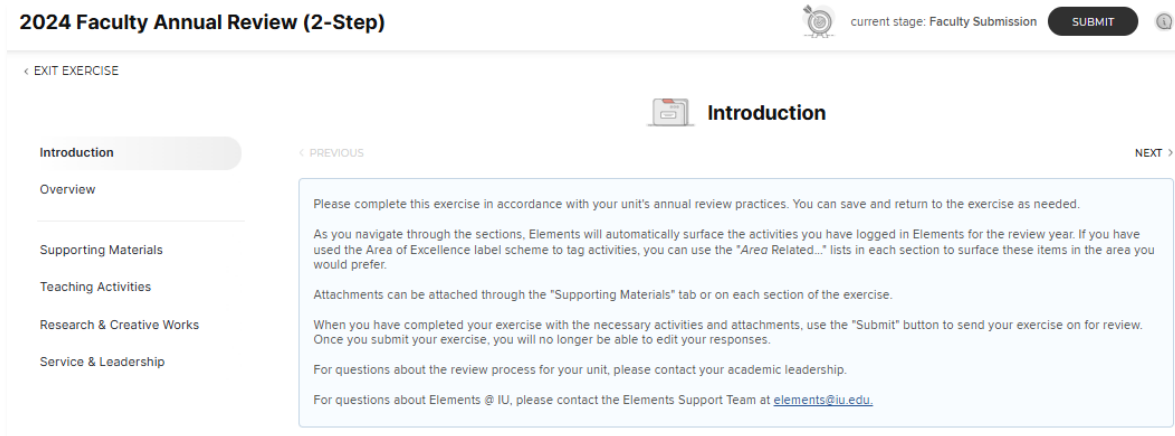


You can also navigate to your reviews using the main menu. Using the drop-down menu , navigate to the “**Evaluation**” tab, selecting “**Review Processes**” from the “**My Submissions**” section. You will then arrive at the “**My Review Processes**” page, showing you the review exercise available to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

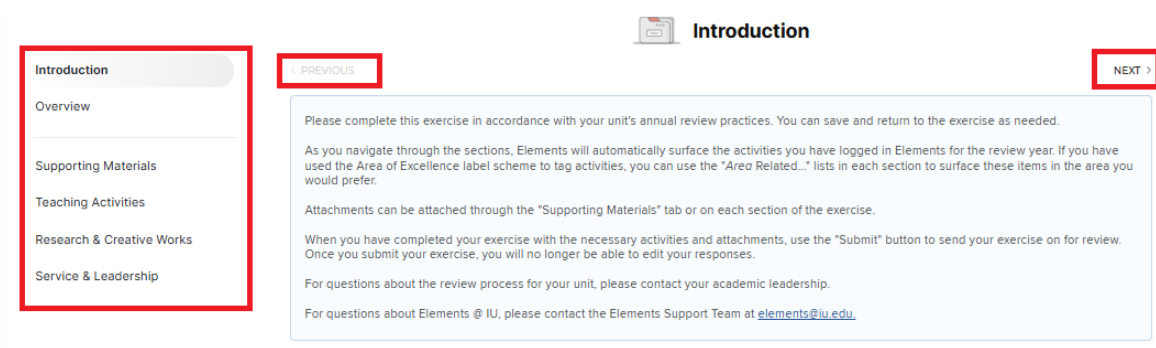


Navigating the Workflow

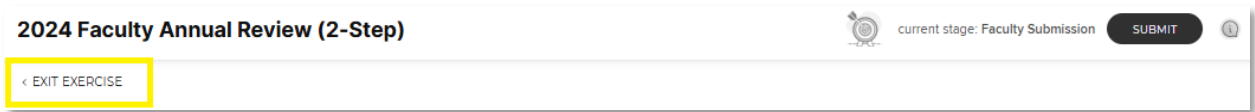
When you first enter the exercise, you will land on an introduction page with basic instructions. The top row identifies the exercise you are working on as well as what stage the exercise is on. To enter and edit information into your exercise, it must be at the “**Faculty Submission**” stage. Once you “**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.

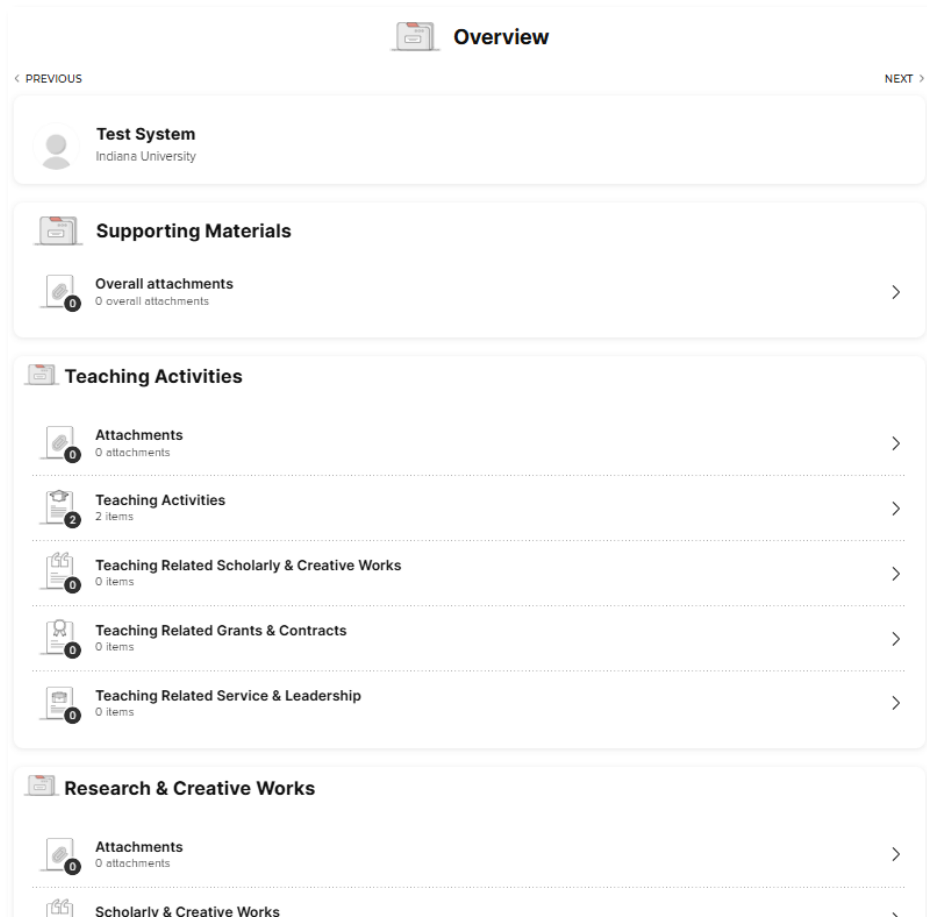


You can save, leave, and return to the exercise by using the toolbar available on the left side of the screen or by using the “Exit Exercise” button on the top left of the exercise page.



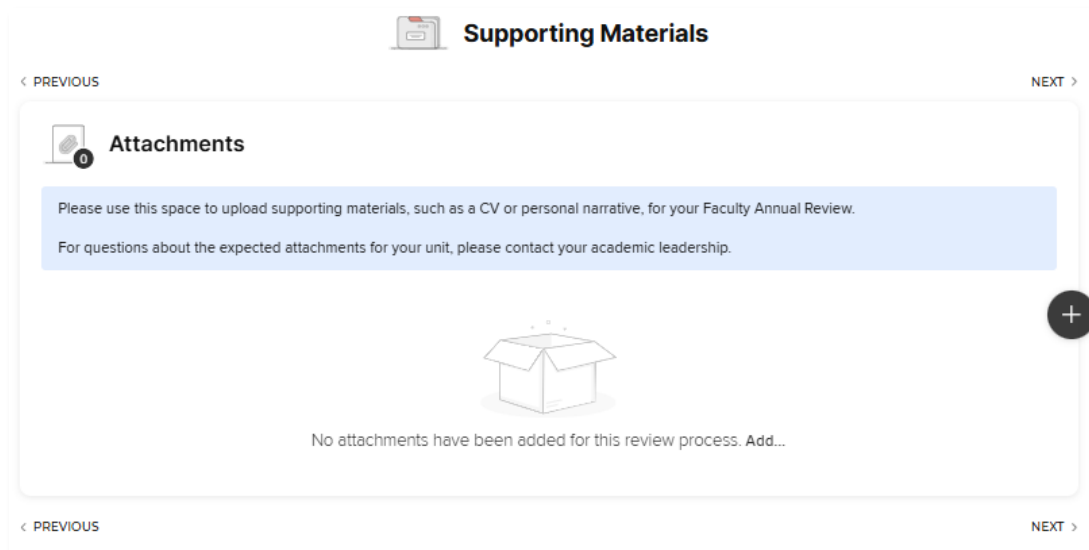
Overview

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.



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



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.

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.

Teaching Activities, 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. Each activity will initially be listed in its original section: Teaching Activities in “**Teaching Activities**,” Service & Leadership activities in “**Service & Leadership**,” and Scholarly & Creative works and Grants & Contracts activities in “**Research & Creative Works**”).

The screenshot displays the 'Teaching Activities' interface. At the top, there are navigation arrows for 'PREVIOUS' and 'NEXT'. Below this is an 'Attachments' section with a blue instruction bar: 'Please use this space to upload supporting materials related to Teaching Activities.' It shows '1 attachment' and a card for 'GEOL-F Syllabus 4242.pdf' uploaded on 07 Jan 2025 12:01 (615 kB). The card includes fields for 'Type' (Syllabus) and 'Description' (This is my syllabus from my Spring 2024 section of GEOL-F 116.).

Below the attachments is a 'Teaching Activities' list section showing '3 items'. It includes a '10 per page' dropdown, 'REMOVE ALL', and 'ORDER BY' buttons. The first item is 'FIRST YEAR SEMINAR - HOOSIERS ROCK!' with a 'VIEW ITEM DETAILS' link. The item card shows a graduation cap icon and the following details:

- COURSE TAUGHT
- Course title: FIRST YEAR SEMINAR - HOOSIERS ROCK!
- Course Subject & Class Number: GEOL-F 116
- Number of Credit Hours: 4.00
- Start date: 12 Jan 2024
- End date: 01 May 2024
- Academic session: Spring
- Enrollment Total: 20
- Instruction Mode: In-person
- Campus: Northwest

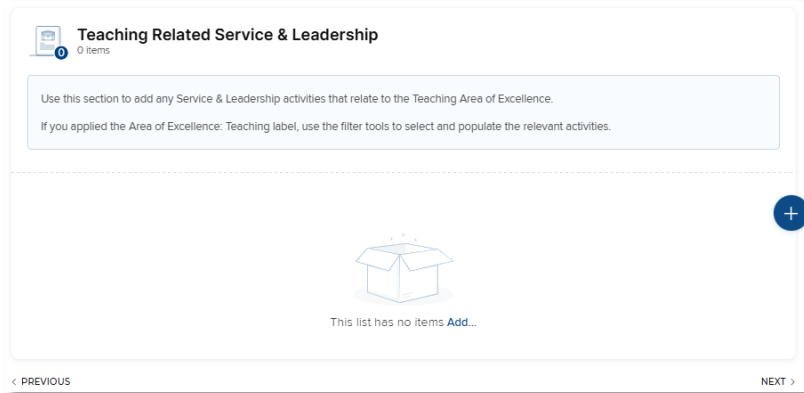
A 'REMOVE' button is located at the bottom right of the item card.

Each section begins with a place for attachments, followed by the automatically surfaced list of Elements Activities. In Teaching Activities, 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.

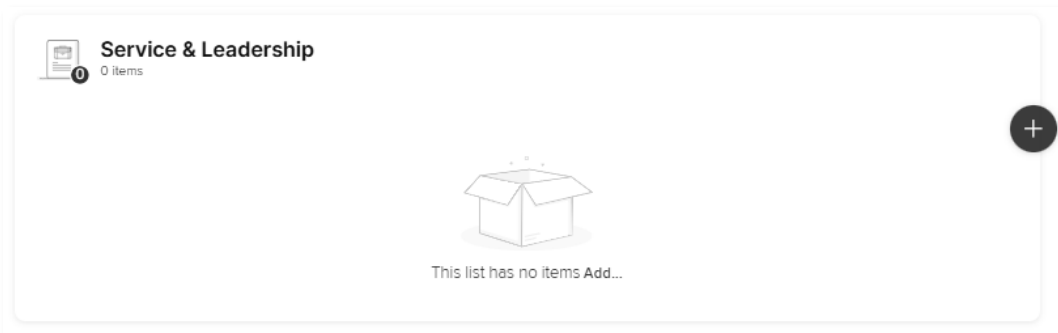


For example, if you had completed a teaching-related service activity and wanted it considered as a part of your Teaching Activities during your review, you could navigate to the “**Teaching Related Service & Leadership**” list and select the “+.” This will show you a list of your eligible Service &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

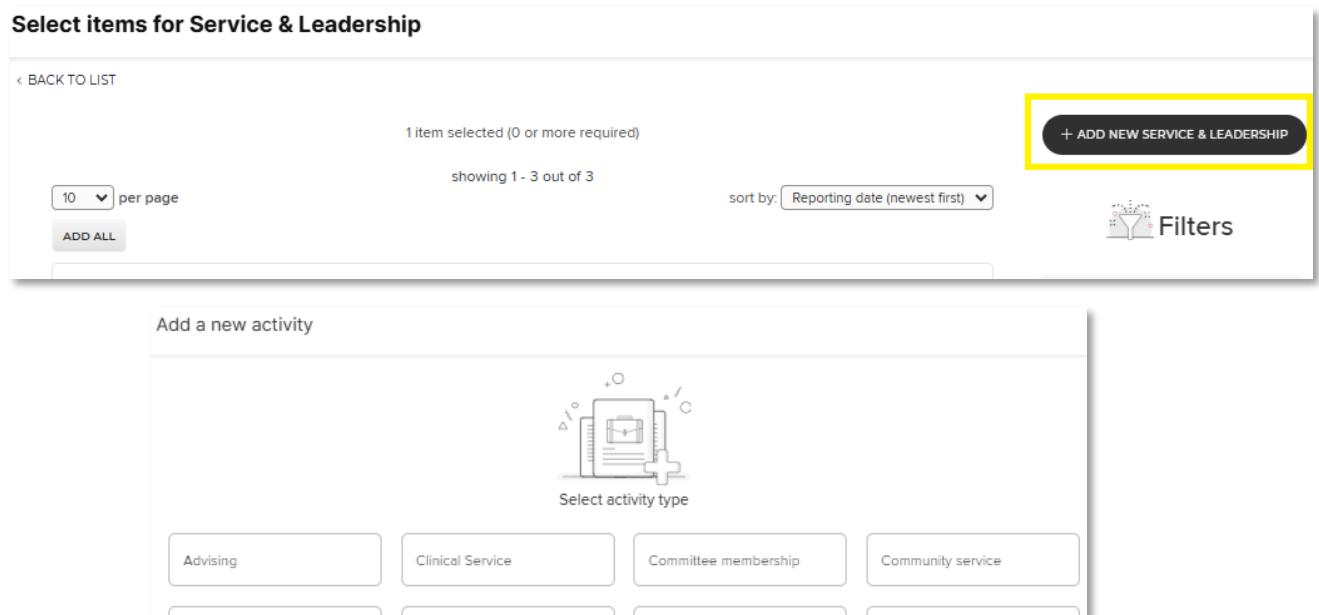
Using the filter tools on the right-side of the screen, search for the appropriate label – in this case “teaching.” This will reduce the list of activities to only those items to which you have applied the Teaching label. Use the “**Add**” button to the right of the item description to move the activity from its initial spot on the Service & Leadership section to the Teaching Activities 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.



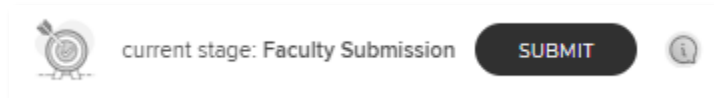
Clicking “+ Add New...” will pop-up a menu of activities for that category. Once you select the activity type you need, you will arrive directly to the manual entry page for that activity type. Saving the activity adds it to the initial list and Elements will return you to the “Select items for...” screen.

Finalizing Your Review

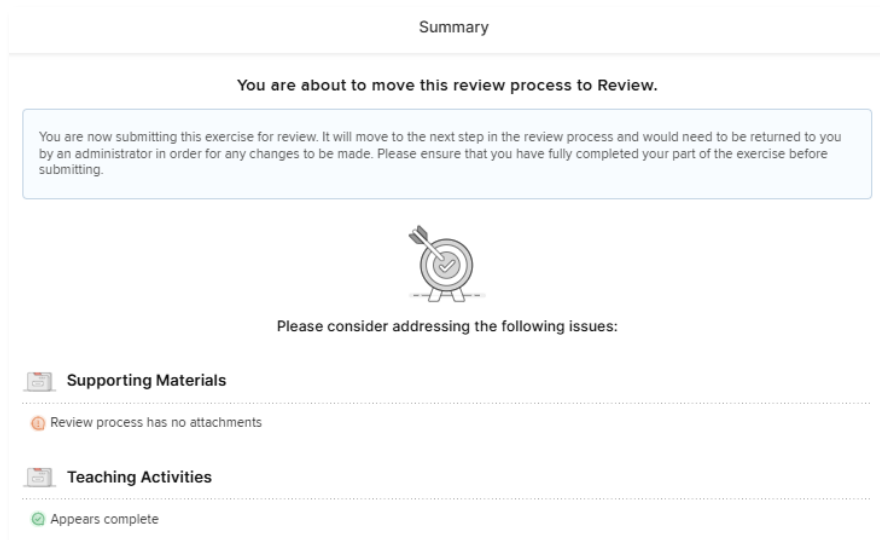
Once you have attached all your attachments and ensured all your activities have been entered into Elements and added to your Annual Review exercise, you are ready to review and submit your exercise for review. If you forget to enter or attach something, you will need to work with your academic leadership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

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

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.

