

JANUARY 2022

FACULTY SUCCESS WORKFLOW FACULTY & STAFF ESSENTIAL SKILLS TRAINING

Overview and Training

PURDUE
UNIVERSITY

FORT WAYNE

2/15/2022 1

Introduction

Workflow is used with Faculty Success to fully digitize our processes for annual reviews, reappointments, and promotion & tenure cases. We can now easily configure workflows with flexible steps and set up deadlines and notifications to ensure that faculty cases are always secure, on time, and error-free.

Workflow empowers faculty to track progress and provide guidance to our stakeholders to ensure completion of critical campus processes from one central location.

- Eliminates manual tasks
- Provides consistency and convenience
- Easily track progress and provide guidance
- Completion of critical campus processes—from one location
- Intuitive, easy-to-use solutions that support processes

Campus Goals and Expectations

- ~~Have all faculty data in Faculty Success by August 2021~~ **COMPLETED**
- Begin using the Workflow system through Faculty Success beginning Fall 2021
- Move all processes currently accessed through DocuSign to Workflow
 - Reappointments (Spring 2022)
 - 3rd Year review (Fall 2021)
- Move current Promotion and Tenure process from OneDrive to Workflow
 - Promotion and Tenure (Spring 2022)

The screenshot displays the Faculty Success interface. At the top left is the 'watermark™ Faculty Success | formerly Digital Measures' logo. At the top right is the 'PURDUE UNIVERSITY FORT WAYNE' logo. A navigation bar contains 'Activities', 'CV Imports', 'Manage Data', 'Reports', 'Workflow' (selected), and 'Tools'. Below the navigation bar, the page title is '< Schedules for Reappointment Recommendation - TEST 9/8/21'. To the right of the title is a '+ Add Item' button. Below the title is a table with the following data:

Name	Launch Date	Status	Actions
May 2022 Reappointment for COS Faculty _TEST	September 7, 2021	Open	

Campus Goals and Expectations

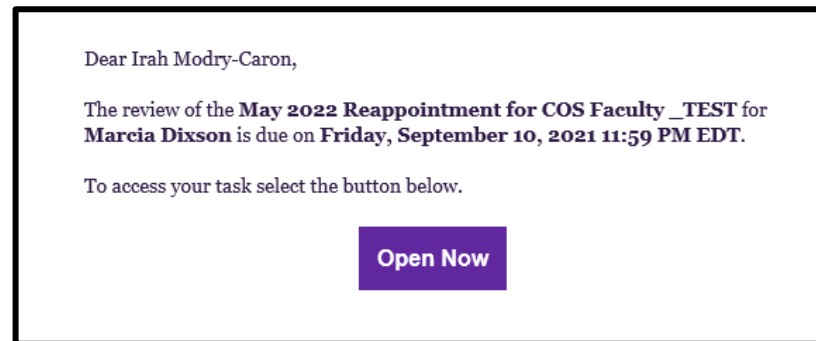
- Faculty are expected to maintain their data in Faculty Success and make the necessary updates via the 'Activities' tab as all reports will be run through this system once launched
 - It is a good idea to review all custom reports in the 'Reports' tab of Faculty Success **BEFORE** the review process begins as to verify all information is displayed correctly
- Faculty up for review are to confirm with their home departments the due dates for their submissions and what document(s) they should expect to have included
- All reappointment process questions should be addressed to Julie Meyer, OAA 1-6613 yoderj@pfw.edu and questions concerning Faculty Success or the Watermark system should go to Lindsey Dutrieux, OIR 1-0797 dutrieul@pfw.edu

Essential Skills and Best Practices

Accessing Workflow

When the Workflow process launches, tasks are created and await the attention of the faculty subjects who will submit their materials in the system. Faculty can access these tasks two ways:

1. Through the email that was generated when the process launched

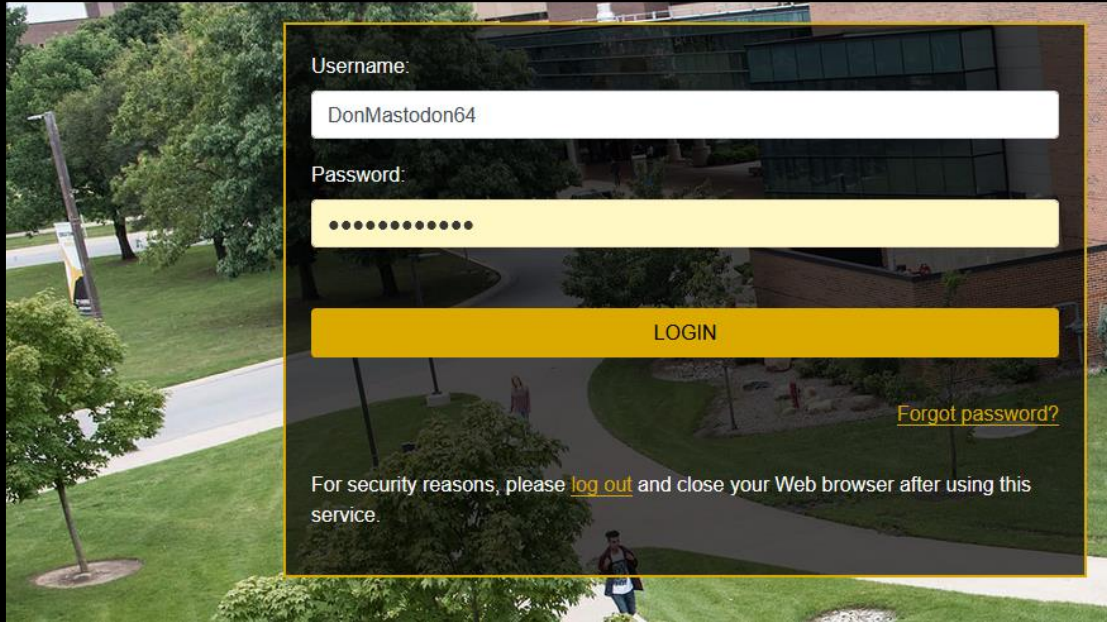


2. **By logging into Faculty Success directly.** When a process launches, the appropriate users will be given access to the Workflow Tasks utility, where they can review the Inbox for any available tasks.

Logging into Faculty Success is easy!

Use the same credentials as your GoPFW (CAS) Login. Please contact **ITs ext. 1-6030** if you have trouble remembering your username/ password.

CENTRAL AUTHENTICATION SERVICE (CAS)



Username:
DonMastodon64

Password:
.....

LOGIN

[Forgot password?](#)

For security reasons, please [log out](#) and close your Web browser after using this service.

Workflow Forms

The submission forms available to our faculty are customized for each specific process and step by the Workflow Administrator. Certain fields may be set as required. This is a configuration choice made when the form was created. Based on the type of fields selected, users may also have rich text formatting options that allow them to organize and emphasize their information as needed.

The process may also have been configured to automatically include a **custom report** from Faculty Success, populated with data from the Manage Activities utility. This report is generated when the process launches. **Faculty have the ability to preview the report.** If they notice any issues in the report or realize that additional activities need to be entered into the database, they can:

1. Save a draft of their progress on the Workflow Task by accessing the Actions menu in the top right and selecting Save Draft.
2. Navigate to Manage Activities.
3. Correct or revise the appropriate data.
4. Return to the Workflow task and refresh the report, so the updates are reflected in the report

Submitting a Step

Once a faculty members submission is complete and ready for review, they can simply click the **Submit** option on the Actions menu to move the materials to the next step in the process. At this point, the submission materials are locked (including any reports that have been attached), even if changes are made through the Manage Activities module.

The screenshot displays the Faculty Success interface. At the top, there is a navigation bar with 'Activities', 'CV Imports', 'Reports', and 'Workflow'. The main content area shows a submission step titled 'Department Chair Step - Due September 10, 2021 @ 11:59 PM'. Below this, a dropdown menu is open for 'Faculty Member Step - Marcia Dixon', showing options: 'Save Draft', 'Submit to Faculty Member', and 'Send Back to Previous Step'. The main content area displays the title 'College of Science Reappointment Recommendation May 2022' and a section of instructions: 'Instructions: The following reports are generated from your data in Digital Measures. If you need to update your information before submitting this report please do so now. To save your progress, click Save Draft. Once your information is updated be sure to click the "Refresh Report" button so that your changes are saved correctly. If you have questions on the reappointment process please contact Julie Meyer 1-6113. If you have questions on the Digital Measures system please contact Lindsey Dutrieux 1-0797'. Below the instructions, there are three rows of information: 'Current CV' with a PDF icon and 'Last Updated September 8, 2021 at 2:02 PM'; 'Reappointment Dossier' with a PDF icon and 'Last Updated September 8, 2021 at 2:02 PM'; and 'Previous Years Reappointment - Please Upload' with a document icon and 'Dixon Dossier 3.docx (142.16 KB)'. The top right corner of the interface shows the Purdue Fort Wayne logo and a help icon.

Recalling a Step

If you advance a submission to the next step, you can recall the submission from that step to:

- Correct factual or typographical errors
- Add a critical piece of information that was missed
- Further review a submission that was prematurely advanced

1. Click the arrow under Actions.
2. Click Recall.

Note: Once the next step has begun, the recall option is no longer available

2018 Annual Reviews - College of Engineering	Dean Evaluation	Charley Bader	May 15, 2018	▼
College of Engineering - Tenure Review 2017-2018	College Review Committee	Claudette Ragna	May 16, 2018	▼

Recall

Accessing History

After a subject has advanced the process to the next step, they will see the task move from the Inbox to the History section in Workflow. There, they can see where in the process the submission stands as it advances through each future step, and, depending on the form visibility settings, review the content of the submission and the fields completed by reviewers. The historical record will remain available to the subject for future reference.

To access history:

1. Log into Faculty Success
2. Click Workflow
3. Locate the History section

Workflow Tasks

▼ **Inbox**

Name	Step	Subject	Due Date
<i>No Data to Display</i>			

▼ **History**

Name	Current Step	Subject	Due Date	Actions
May 2022 Reappointment for COS Faculty _TEST	Faculty Member	Marcia Dixson	September 13, 2021 @ 11:59 PM	▼

Help Tools

Click **'?'** icon in the top right corner of your account to contact Technical Support or your campus administrator.



Q&A

THANK YOU