

Guide to Entering Annual Activities into Activity Insight/Faculty Success (AI/FS) & Submitting to the Annual Review Process through Workflow

This document is a guide for faculty on how to enter annual productivity information into Activity Insight/Faculty Success and submit your data, through the Workflow process, for [Tenured & Tenure Track](#) and [Non-Tenure Track \(section 8.09, p. 17\)](#) annual review. There are three steps to completing your portion of the annual review:

1. Entering/updating your activities in Activity Insight/Faculty Success (pp.1-5)
2. Verifying the accuracy and quality of the data that will be submitted (p. 6)
3. Submitting the data through the Workflow utility. (p. 7)

Entering/Updating your Annual Data:

To add, update, or correct data that will be included on your "[MSU - Faculty Annual Review \(Faculty Submitted Data\)](#)" report, click the **Activities** link (in the top, blue navigation bar).

If in doubt about where a particular activity belongs, please contact your department head/chair first as they may have expectations regarding where such activities should be located.

General Information

Give special attention to the following screens:

- **Personal & Contact Information**
 - Correct and/or update information (some of these fields also populate your department's Web Directory and your Faculty Web Profile)
 - Review the Teaching Interest(s) and Research Interest(s) fields as these pull into the new Faculty Web Profile template.
- **Biography & Expertise**
 - This screen may be used in the near future to populate a "subject matter expert" database.
- Appointment Data - **Yearly Data, Annual Narrative & Goals**
 - Enter your Annual Evaluation Narrative. This is a brief narrative highlighting your accomplishments for the 2021 calendar year.
 - You can type or copy and paste text into the text box. Some Departments require that you enter your narrative in the text box rather than use the document upload functionality (as the report will just show the link to the uploaded document, not the content). Please check with your Department Head/Chair or School/Campus Director before uploading a file.
 - Enter Teaching, Scholarship, Service, and Administrative (if applicable) goals for 2022 calendar year.
 - Be specific in regard to teaching/research/service/extension. Goals

should be action items that build upon past activities and accomplishments. It is also “ok” that you plan to maintain the quality program you already have in place. For example, elements of a teaching or extension program that is already highly effective. You can type or copy and paste data into the text box. Some Departments require that you enter your narrative in the text box rather than use the document upload functionality (as it the report will just show the link to the uploaded document, not the content). Please check with your Department Head/Chair or School/Campus Director before uploading a file.

- The goals will pull into the “MSU - Faculty Annual Review (Faculty Submitted Data)” report.
- **Annual Workload Distribution**
 - Make sure there are records for the immediate past, and current academic year with the correct Confirmed Workload. If anything is missing or incorrect, please ask your Department Head to create and/or correct the appropriate records.
(Does **NOT** apply to NTT faculty.)
- **Administrative Assignments** (if appropriate - most will not have anything to report here).
- **Faculty Professional Enhancement Activities**
 - Include any training(s) that have contributed to your professional development.
 - If you participated in Center for Faculty Excellence programming, those records should have been created for you. Please review them to make sure they are complete and that you do not accidentally create duplicate records.
- Any other categories in the “General information” section
 - Check and update/correct as needed.

Teaching

Review and/or create all 2021 records. Correct and/or update as needed. Give special attention to the following screens:

- **Scheduled Teaching**
 - Insure that all information is correct and includes all classes taught.
 - Independent study, and internship course records are not loaded into the *Scheduled Teaching* screen. You should create those records in the *Directed Student Learning...* screen.
 - For each class, input the mean for the Overall Instructor Rating from the appropriate CampusLabs/IDEA course evaluation data.
 - Upload the PDF [Course Evaluation forms from CampusLabs](#) into the “Additional Course Document (*i.e.* copies of student course evaluations, etc.)” file upload field at the bottom of the record. (Select **Course Reports** → choose appropriate course → click **Print Reports** button in upper right → in the Print window, select **Destination = “Save to PDF”**)
 - Dr. Mike Babcock created a very nice [video walking through the course evaluation upload process](#). (3:11 run time)

- Keep in mind that the “Which of the following High-Impact Educational Practices (HIPs) were integrated into this course?” field is used (counted) for MSU Strategic Planning metrics and other university level reporting purposes.
- Consider filling in information in the categories of “describe any pedagogical innovations” “describe any new teaching material”, and “Describe any activities in your course...” Especially if any of these were a goal for this reporting year.
- We also encourage you to upload a copy of your syllabus with each course record.
- **Other Instruction**
 - Faculty with extension appointments – use this screen for extension education activities.
 - Faculty without extension appointments use this screen for activities not covered under other links in the teaching section (Guest lecturer, *etc.*).
- **Directed Student Learning...**
 - List all graduate students that you may be supervising, including as Co-Advisor, and TAs, RAs, *etc.*
 - Check that graduate students who have completed their degrees have ending dates in their records.
 - List all undergraduate research, independent study, and internships that you provide direct leadership and mentoring for the student(s) involved. Do not include internships in which your involvement is limited to academic advisor and/or administrative approval.
- **Graduate Committees, Dissertations, and Theses**
 - Records of student committees populate from Banner once the grad student has submitted a Program of Study & Committee form.
 - Insure that record is complete but remember that students who have not completed/submitted a program of study will not be listed in this screen (you can identify "your" graduate students who have yet to submit a Program of Study & Committee Form in the *Directed Student Learning...* screen).
 - If the student has completed their graduate degree or you are no longer on the student’s committee there should be a date in the “Date faculty released from committee” field. If there is not, please contact Laura Collins (lcollins@montana.edu) in The Graduate School to make sure the Banner committee record is updated.
 - If you know a student has departed and does not intend to return to complete their graduate degree, please contact Laura Collins (lcollins@montana.edu) in The Graduate School to make sure the committee record is closed.
 - It is possible that you could have duplicate records (at the same level - masters or doctorate) for a, or several students. This often happens if a student or program changes program codes (EDUC to EDCI, or MATH to STAT, *etc.*). If there are duplicate records that should be removed, please contact Ian Godwin (igodwin@montana.edu) in the Office of Planning & Analysis)
- **Academic Advising-Undergraduate**
 - Insure that “number of students advised” is correct.

- This number is a count of the individual students that you are identified as the Primary Advisor for in Banner. That association in Banner is a responsibility of your academic department. Please have them make the appropriate student/faculty advisor associations in Banner before contacting Ian Godwin (igodwin@montana.edu) to get the number changed.
 - Consider including “Number of letters of reference”, “Approx number of hours”, and a “Description of advising”.
- **Library Instruction**
 - Only Library Faculty should see this link.
 - Enter activities as appropriate.
- **Research Consultations**
 - Only Library Faculty should see this link.
 - Enter activities as appropriate.
- **Other Librarianship Activities**
 - Only Library Faculty should see this link.
 - Enter activities as appropriate.

Research, Creativity & Technology Transfer

Create and/or review all 2021 records. Correct and/or update as needed. Give special attention to the following screens:

- **Publications/Intellectual Contributions**
 - Insure that this list accurately reflects all your publications/intellectual contributions.
 - Be sure to add all MSU co-authors as the publication will then show up on their page. Keep in mind that your MSU co-authors may already have created a record of the publication for you. Review the existing list to avoid creating duplicate records.
 - Please also make sure that if one of the co-authors was a student you identify their level and whether they are an MSU student as these are metrics used in the Strategic Plan.
 - Please ensure that the “Current Status” field is updated and correct. In many reports, only records explicitly identified as “Published” in the “Current Status” field are pulled/counted.
 - Select a response in the “Was this peer- reviewed/refereed?” drop down. Some reports (the "Research Productivity Report" developed for the VPREDGE, for example) only pull items that are peer- reviewed.
 - Please make sure that all records have year in at least one of the date fields at the bottom of these record.
- **Artistic & Creative Activities**
 - Please provide as comprehensive information as possible for these records.
 - These are shared records (with your co-exhibitors/performers/creators) so please check your summary screen list to make sure you are not duplicating a record that one of your co-contributors created on your behalf.
- **Grants and Sponsored Research, Contracts, Fellowships**

- Read and follow the directions given in this section. These records “self-populate” from Banner, but anything that does not go through OSP will not be included (see next bullet).
- **Research in Progress & Other Funded Activities (not submitted on an Electronic Proposal Clearance Form - ePCF)**
 - This is for any unfunded or funded research/grants that do not get submitted via the OSP electronic Proposal Clearance Form process (grants funded directly from the MSU Foundation, many internal grants from the Provost’s Office, COA equipment grants, etc.)
- **Presentations**
 - Review and update as needed, make sure to include MSU co-authors. This will then show up on their page.
- **Intellectual Property (e.g., copyrights, patents)**
 - This screen has been opened for users to enter their own data.
 - If you have copyrights, patents, or PVPs, enter them on this screen.

Engagement, Outreach, and Service

Create and/or review all 2021 records. Correct and/or update as needed. Give special attention to the following screens:

- **Engagement Results**
 - This screen captures the outcomes of your engagement (a form of scholarship that bridges teaching, research and service, and brings the university’s intellectual resources to bear on societal needs) activities.
 - Data from this screen is used to support inclusion in annual extension reporting to the Federal government, the Carnegie Classification for Community Engagement, and Strategic Plan progress.
- **University**
 - This is where you can input university, college, and department service. Make sure you enter a starting date. The ending date can remain blank if you are still engaged in a committee. If your service on the committee is over, please make sure you provide an end date.
- **Professional**
 - Make sure you enter a starting date. The ending date can remain blank if you are still engaged in a committee. If your service on the committee is over, please make sure you provide an end date.
- **Public**
 - Use this for service activities not covered in the above categories. Consider inputting community service (outside of the university and professional service).
- **Impact**
 - Only faculty associated with the College of Business will see this link and should create the appropriate records to support AACSB accreditation reporting.
- **Extension Time and Effort**
 - Only faculty with an extension appointment will see this link.
- **Engagement Plan**
 - Only faculty with an extension appointment will see this link.

Data Quality Verification for the Annual Review:

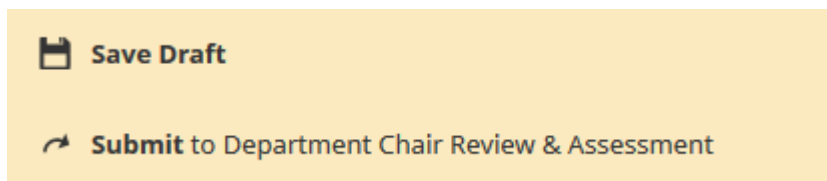
1. Click the **Reports** link (top, blue navigation bar)
 - a. Select the “Data Quality Issues” report. (note: the “Data Quality Issues” report is primarily focused on identifying potential duplicate and incorrectly, or un-dated records)
 - b. The Start Date defaults to the “beginning of time” (*i.e.*, Jan 01, 1925). Do not change that.
 - c. Make sure the End Date is the current date.
 - d. Click the “Run Report” button in the upper right of the browser screen.
 - e. Open and save the report output to your computer.
 - f. Review the report to see if there are any data quality issues to address (missing educational records, duplicate intellectual contribution entries, service/committee records that do not, but should have end dates, *etc.*).
2. Go back to **Activities** (top, blue navigation bar) to correct any data quality issues. (Additional information on how to accomplish this is above, starting at the General Information heading).
3. Next go back to the **Reports** link (top, blue navigation bar), click.
 - a. Select the “MSU - Faculty Annual Review (Faculty Submitted Data)” report
 - b. Make sure the Date Range is correct for the calendar year of review (after Jan 1 it will default to the **next** calendar year).
 - c. Click the “Run Report” button in the upper right of the browser screen.
 - d. Make sure the data in the report is complete and accurate.
 - e. If there are errors in the report, or items you need to add, correct them on the **Activities** tab.
4. Faculty with extension appointments
 - a. In addition to the above “MSU - Faculty Annual Review (Faculty Submitted Data)” and “Data Quality Issues”, please generate a 2021 “Extension - Engagement Plan” report.
5. Once your “MSU - Faculty Annual Review (Faculty Submitted Data)” report has your complete and accurate 2021 activities you will be ready to submit once the **Workflow** process opens.

Submitting to the AI/FS Workflow Process

1. Click the **Workflow** link (top, blue navigation bar).
2. The process step arrows identify which step you are engaged in. Be aware that the third step in the process, “Faculty Acknowledgement” will require you to review, acknowledge, and date the department head/chair’s Annual Review.



3. Click on the **MSU - Faculty Annual Review (Faculty Submitted Data)** PDF icon (📄) to open it and verify that the information is correct and up to date.
 - a. If you updated the information on your **Activities** page and it is not reflected in the report in **Workflow**, you may have to refresh the report (in **Workflow**) by clicking the “Refresh Report” button (🔄 Refresh Report) the right of the PDF icon.
4. If correct, click the Actions button (⌵ Actions) in the upper right corner of the browser window.



- a. Select “**Save Draft**” if you want to work on supporting documentation or the optional comments at a later time, before submitting.
 - b. Select “**Submit** to Department Chair Review & Assessment” if you want to submit your materials for review.
5. Regarding the “Faculty Acknowledgement” step (#3):
 - a. Please know that the Workflow process does not allow the Department Head/Chair or Dean to make any changes to the Annual Review submitted by the Department Head/Chair in step #2, after you have electronically signed to acknowledge seeing it, unless each step of the process is reversed, and it comes back through you first.
 6. A generic video, “Submitting to a Workflow Process”, produced by Watermark is available at <https://vimeo.com/223847085/c007da25ec>. It has a total runtime of 10:57.