

## CREATING A REVIEW WORKFLOW

### CREATING A REVIEW WORKFLOW OVERVIEW:

This guide provides step-by-step instructions on how to create or initiate a review workflow in FEA. This process is essential for managing reviews such as Promotion and Tenure (P&T) or Annual Reviews.

### ACCESSING THE REVIEW WORKFLOW TAB

#### LOG IN NAVIGATION:

1. **Log in:** The system using your credentials See [Navigation Guide and Login Page](#).  
**NOTE:** Log in as a user with Workflow System Admin access.
2. Navigate to the **Workflow** tab>Click on **Review Workflows**.
3. Select **Create New** to start a new review workflow.

The screenshot shows the Faculty Insight interface. At the top, the 'Workflow' tab is selected in the navigation bar. Below it, the 'Review Workflows' button is highlighted in the left sidebar. In the top right corner, the '+ Create New' button is highlighted. An inset window shows the 'Create Workflow' form with fields for 'Review Workflow Template', 'Workflow Name/Title', 'Select Candidates', and 'Workflow Start Date'.

### SELECTING A REVIEW WORKFLOW TEMPLATE

#### WORKFLOW TEMPLATE:

1. **Use the drop-down menu:** A drop-down menu will appear, for review workflow templates (**Currently, UF has one template available: Promotion and Tenure/Permanent Status Workflow Template to select**).
2. **Proceed:** To Workflow Name/Title (**e.g., Annual Review 2025 or Promotion and Tenure 2024-25**).  
**NOTE:** The workflow name is visible to all candidates, reviewers, and those with reporting access.

The screenshot displays the 'Faculty Insight' interface. The main navigation bar includes 'Home', 'Search', 'My Profile', 'Activities', 'Reporting', 'Admin', 'Customization', 'Workflow', and 'Help'. The 'Workflow' section is active, showing a sidebar with 'Workflow' (Add and customize workflows), 'Review Workflows', 'Review Workflow Templates', and 'My Tasks (0)'. The main content area is titled 'Welcome to Review Workflows' and includes a breadcrumb trail 'Home / Workflows / Review Workflows'. A 'Create Workflow' modal is open, featuring a 'Review Workflow Template' dropdown menu (highlighted with an orange arrow and box), a 'Workflow Name/Title' input field containing 'Training Test', a 'Select Candidates' section with '0 Selected Users', and a 'Workflow Start Date' field with a calendar icon. 'Cancel' and 'Continue' buttons are at the bottom of the modal.

## SELECTING CANDIDATES SECTION

**SELECTING CANDIDATES:**

1. **Click:** Select Users to open the user picker.
2. **Filter:** Candidates by Academic Unit:
  - **Click:** the down arrow to view institution sections.
  - **Use:** the search box to locate specific colleges or departments.
  - **Select:** the appropriate department.
3. **Click:** All Users to include all candidates from the selected unit (**If necessary, deselect specific candidates manually**).
4. **Click:** Done when the selection is finalized.

# Faculty Insight

Home Search My Profile Activities Reporting Admin Customization **Workflow** Help

**+ Create New**

## Workflow

Add and customize workflows

### Review Workflows

Review Workflow Templates

My Tasks (0)

Home / Workflows / Review Workflows

## Welcome to Review Workflows

Administer existing workflows and create new workflows from existing templates

All 20

Filter Review Workflows

Projects per page: 20

### Create Workflow

### Review Workflow Template \*

Promotion & Tenure Workflow

Workflow Name/Title \*  
Training Test

Select Candidates \*  
**Select Users** 0 Selected Users

Workflow Start Date \* mm/dd/yyyy  
Start Date applies to first review step in workflow

Cancel Continue

Reset Filters Add Filter

#### Academic Units

Agronomy, Department of

agronomy

+ Expand All - Collapse All

#### Institution

#### College of Agricultural and Life Sciences

Agronomy, Department of

Unassigned

#### Faculty/Non-Faculty

Faculty/Non-Faculty (None)

Search

5 ... Next Last

#### Identifier Unit

or@ufl.edu Department of Spanish and Portuguese Studies

<input type="checkbox"/>	Aaron	PROF	tsaaron@ufl.edu	ED-SHDOSE-SCHL OF HUM DEV&ORG
<input type="checkbox"/>	Tiffany Aaron	AST PROF	tsaaron@ufl.edu	ED-SHDOSE-SCHL OF HUM DEV&ORG
<input type="checkbox"/>	Dahomey	CLIN	dabanishe@ufl.edu	Department of

Selected Users First Previous 1 Next Last 0 Total Users

#### Academic Units

Agronomy, Department of

#### Faculty/Non-Faculty

Faculty/Non-Faculty (None)

Search by user name or identifier... Search

#### Unit Selection

First Previous 1 2 3 4 5 ... Next Last

32 Total Users

<input checked="" type="checkbox"/>	Name ↑	Title ↓	User Identifier ↓	Unit ↓
<input checked="" type="checkbox"/>	Fredy Altpeter	PROF	altpeter@ufl.edu	Department of Agronomy
<input checked="" type="checkbox"/>	Md Babar	ASO PROF	mababar@ufl.edu	Department of Agronomy
<input checked="" type="checkbox"/>	Zachary Brym	ASO PROF	brymz@ufl.edu	Department of Agronomy

#### Selected Users

First Previous 1 2 3 4 5 ... Next Last

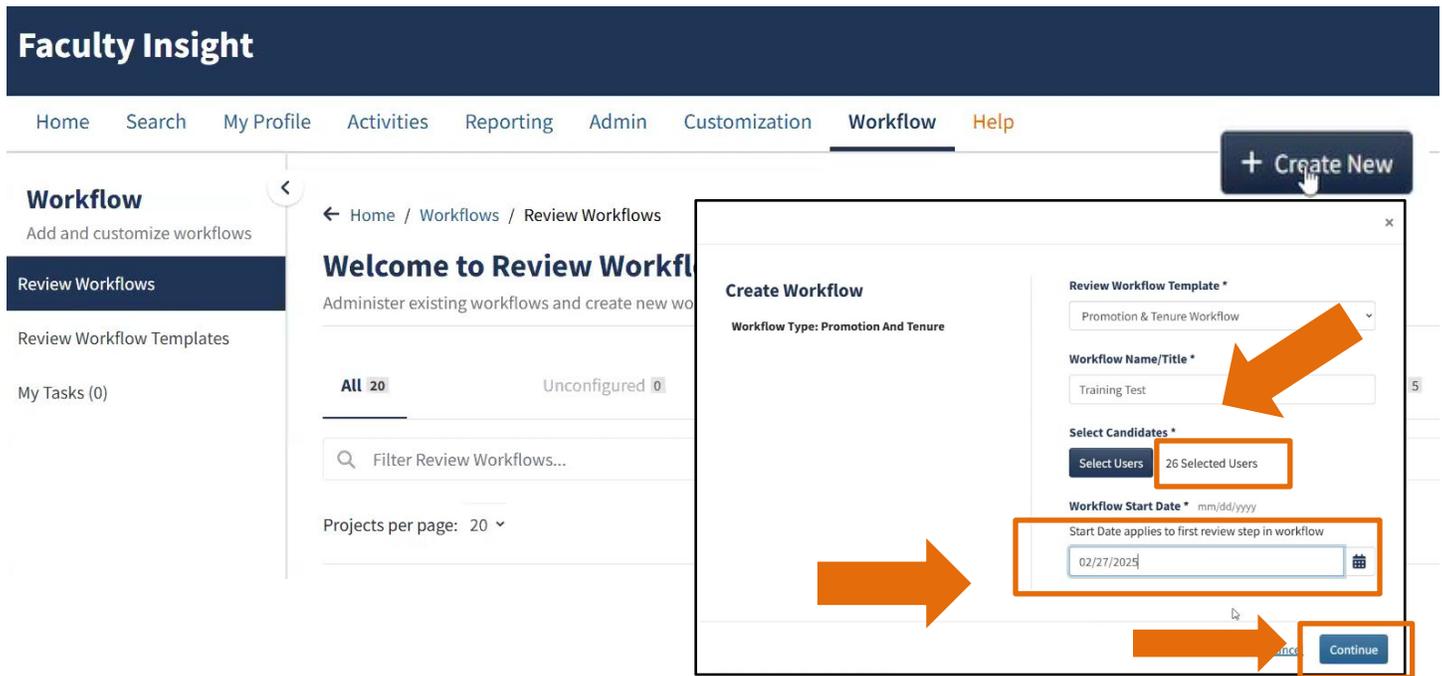
32 Total Users

Done Cancel

**WORKFLOW GENERATION SECTION**

**START DATE:**

1. **Selected Users:** Make sure users are already selected to choose a future start date (**See Steps 1-4 in Selecting Candidates Section**).
2. **Choose:** A future start date (e.g., the next day).
3. **Click:** Continue to proceed.



**WORKFLOW GENERATION:**

4. **After clicking continue:** A yellow bar will appear at the top, indicating the system is generating the workflow.
5. **Click:** The Refresh icon to check when the workflow is ready (**The yellow bar will disappear once the process is complete**).
6. **NOTE:** This process runs in the background and updates every 5 minutes. Also, it doesn't matter what tab you're on inside of the application that yellow bar will appear as the workflow is being generated on the back end.

**Faculty Insight** W Virginia

Home Search My Profile Activities Reporting Admin Customization **Workflow** Help

Workflow generation is in progress for the following workflows: Training Test.

**Workflow**  
Add and customize workflows

**Review Workflows**

Review Workflow Templates

My Tasks (0)

← Home / Workflows / Review Workflows

**Welcome to Review Workflows**  
Administer existing workflows and create new workflows from existing templates

+ Create New

All 20 Unconfigured 0 Configured 0 In Progress 12 Overdue 5 Complete 3

Filter Review Workflows... Filter

Projects per page: 20 Showing 1 - 20 of 20 Projects

Name	Review Type	Start Date	Due Date	No. of Candidates	No. of Review Steps	Created By	Status	Actions
Test Feb 21	Promotion And Tenure	March 3, 2025	February 20, 2025	37	47	Alice Gator	Overdue	⋮
Training Test	Promotion And Tenure	February 27, 2025	-	26	33	Virginia Villalobos	Unconfigured	⋮

Get Help

## CONFIGURING WORKFLOW STEPS SECTION

### CONFIGURING WORKFLOW:

- Locate:** The newly created workflow in the Review Workflows list and click on the workflow name to enter configuration mode (e.g., Training Test in the Review Workflow List).

**NOTE:** The yellow bar should no longer appear on the application.

Home Search My Profile Activities Reporting Admin Customization **Workflow** Help

**Workflow**  
Add and customize workflows

**Review Workflows**

Review Workflow Templates

My Tasks (0)

← Home / Workflows / Review Workflows

**Welcome to Review Workflows**  
Administer existing workflows and create new workflows from existing templates

+ Create New

All 20 Unconfigured 0 Configured 0 In Progress 12 Overdue 5 Complete 3

Filter Review Workflows... Filter

Projects per page: 20 Showing 1 - 20 of 21 Projects

Name	Review Type	Start Date	Due Date	No. of Candidates	No. of Review Steps	Created By	Status	Actions
Test Feb 21	Promotion And Tenure	March 3, 2025	February 20, 2025	37	47	Alice Gator	Overdue	⋮
Training Test	Promotion And Tenure	February 27, 2025	-	26	33	Virginia Villalobos	Unconfigured	⋮

2. **Select:** All Steps to view the complete workflow structure.  
**NOTE:** If a department user is viewing Review Workflows, they will only see Review Workflows that include faculty within their department. If a college level user logs in to see their Review Workflows, they'll only see review workflows that include faculty within their college.
3. **Click:** Configure to begin step-by-step setup.

<input checked="" type="checkbox"/>	Name	Operator	Due Date	Candidate Reviews	Status	Action
<input checked="" type="checkbox"/>	Upload Packet	Esteban		0 / 1	Configured	⋮
<input checked="" type="checkbox"/>	Upload Files	Department of Agronomy		0 / 26	Unconfigured	⋮
<input checked="" type="checkbox"/>	Upload Files	AG-STATISTICS		0 / 1	Unconfigured	⋮
<input checked="" type="checkbox"/>	Department Faculty Review	AG-STATISTICS		0 / 1	Unconfigured	⋮
<input checked="" type="checkbox"/>	Department Faculty Review	Department of Agronomy		0 / 26	Unconfigured	⋮
<input checked="" type="checkbox"/>	Chair/Director Letter Uploaded	Department of Agronomy		0 / 26	Unconfigured	⋮
<input checked="" type="checkbox"/>	Chair/Director Letter Uploaded	AG-STATISTICS		0 / 1	Unconfigured	⋮ <a href="#">Get Help</a>

### ASSIGNING REVIEW AUTHORS AND DUE DATES:

4. For each workflow step:
  - **After clicking configure:** Scroll and click to assign a review author (**Typically the faculty member for initial steps**).
  - **Set:** A due date (**Optional**).
  - **Hit Next:** To apply due date changes to all relevant steps when prompted.
  - **Confirmation:** A confirmation date change will appear then you will hit “Yes” if you like due date changes to apply to all.

**Configure Workflow**

✓ **Upload Packet**  
Individual Level

✓ Jason

Forms

- ✓ Waiver Decision
- + [Add/Remove Forms](#)

Documents

- ✓ Candidate Dossier
- + [Add/Remove Documents](#)

Set Reviewers and Review Author

★ Jason Review Author

+ [Add more Reviewers](#)

Check Dates (Optional)

Due Date mm/dd/yyyy

02/28/2025

[Reset Dates](#)

Confirm Date Changes

Would you like to apply the date changes to all review steps within Upload Packet?

No Yes

Save & Exit Next

**For department-level steps:**

- Each workflow step:
  - Collapse or Scroll:** To Upload Files (**Department Level**).  
**NOTE:** Adding Reviewers and Review Authors can be used for each step in the workflow process.
  - Click:** Set Reviewers and Review Author.
  - Select:** At least one review author (e.g., Jessica).

## Configure Workflow

Upload Packet  
Individual Level

Set Reviewers and Review Author

Check Dates (Optional)  
Due Date mm/dd/yyyy

Upload Files  
Department Level

Department of Agronomy

Forms  
No forms  
+ Add/Remove Forms

Documents  
Tenure & Promotion Criteria  
Annual Evaluation  
External Reviewers Letters & Sample Letters  
+ Add/Remove Documents

User Picker

Reset Filters Add Filter

Academic Units Faculty/Non-Faculty

Select one or more academic units Faculty/Non-Faculty (None)

Search by user name or identifier... Search

Current Selection

1 2 3 4 5 ... Next Last

Name	Title	User Identifier	Unit
Jessica	ASO PROF	ji	Department of Spanish and Portuguese Studies

Previous

- **Use dropdown menu:** To filter (e.g., academic unit, faculty/non-faculty) to find the correct individuals or search by username then click done.

User Picker

Reset Filters Add Filter

Academic Units Faculty/Non-Faculty

Select one or more academic units Faculty/Non-Faculty (None)

Search by user name or identifier... Search

Name	Title	User Identifier	Unit
Jessica	ASO PROF	ji	Department of Spanish and Portuguese Studies

Done

- **After pressing done:** The Review Author is automatically set (e.g., Jessica). This only occurs if only one reviewer is selected in the User Picker (If more than one review is selected, see step 6 on Multiple Reviewers and Review Authors).

**NOTE:** The Review Author is the person who will submit the review.

- **Click:** Add more Reviewers if needed then scroll to select the Reviewer name (e.g., Tiffany).
- **Confirm:** The Reviewer name under Set Reviewers and Review Author.
- **Click:** Done to confirm.

## Configure Workflow

The screenshot shows the 'Configure Workflow' interface. On the left, there are sections for 'Upload Packet Individual Level' and 'Upload Files Department Level'. The main area is titled 'Set Reviewers and Review Author'. It features a table of users with columns for Name, Title, User Identifier, and Unit. Below the table is a 'Selected Users' section with pagination controls (First, Previous, 1, Next, Last) and a '2 Total Users' indicator. At the bottom right, there are 'Save & Exit' and 'Next' buttons. An orange arrow points to the 'Done' button in the bottom right corner of the main area.

Name	Title	User Identifier	Unit
Jessica /	ASO PROF	j	Department of Spanish and Portuguese Studies
Tiffany	AST PROF	t	ED-SHDOSE-SCHL OF HUM DEV&ORG
Dahomey	CLIN		Department of

Selected Users: First Previous 1 Next Last 2 Total Users

Select	Name	Title	User Identifier	Unit
<input checked="" type="checkbox"/>	Jessica /	ASO PROF		Department of Spanish and Portuguese Studies
<input checked="" type="checkbox"/>	Tiffany	AST PROF		ED-SHDOSE-SCHL OF HUM DEV&ORG

Set Reviewers and Review Author

- ★ Jessica / Review Author
- + Add more Reviewers

Reset Dates

Save & Exit Next

Done Cancel

**Multiple Reviewers and Review Authors (Optional):**

6. Each workflow step:
  - **Click:** The star icon to state which reviewer is the review author (The star icon will highlight yellow).  
**NOTE:** You must have at least one Review Author selected to move forward.
  - **Use:** the trash icon to remove incorrect selections if needed (**To remove the Review Author or Reviewer selection**).
  - **Select Date:** This is optional.
  - **Click:** Next to proceed.

**Configure Workflow**

The screenshot displays the 'Configure Workflow' interface. On the left, a sidebar lists workflow steps: 'Upload Packet' (Individual Level) and 'Upload Files' (Department Level). The 'Upload Files' step is expanded to show the 'Department of Agronomy' section, which includes 'Forms' (No forms) and 'Documents' (Tenure & Promotion Criteria, Annual Evaluation, External Reviewers Letters & Sample Letters). A modal window titled 'Configure Workflow' is open, showing the 'Set Reviewers and Review Author' section with two reviewers: 'Jessica' (selected as Review Author with a yellow star) and 'Tiffany'. Below this is a 'Check Dates (Optional)' section with a 'Due Date' field set to 'MM/DD/YYYY' and a 'Reset Dates' link. At the bottom of the modal are 'Save & Exit' and 'Next' buttons. Annotations include orange arrows pointing to the trash icon for removing a reviewer, the date field, and the 'Next' button.

**Setting Recusals:**

- Each workflow step:
  - Click:** Set Recusals (**On the left side faculty members are listed and the Reviewer is listed at the top**).
  - Click:** The recusal box next to the faculty member (**This is optional**) if certain reviewers should be prevented from reviewing specific candidates.
  - Click:** Save if you checked any recusals.
  - Click:** Next to apply all changes to all review steps within Upload Files and confirm changes if needed.

**Configure Workflow**

The screenshot displays the 'Configure Workflow' interface for the 'Upload Files' step at the Department of Agronomy. The 'Recusals' modal is open, showing a list of reviewers and a 'Save' button. A 'Confirm Date Changes' dialog is also visible, asking if the user wants to apply date changes to all review steps within Upload Files.

**Recusals**

Reviewers	Recusal
Jessica Aaron	<input type="checkbox"/>
Hardeep Singh	<input type="checkbox"/>
Sudeep Singh Sidhu	<input type="checkbox"/>
Emma G Matcham	<input checked="" type="checkbox"/>
Vijaya Gopal Kakani	<input type="checkbox"/>

**Recusals Summary**

Jessica Aaron recused from Emma G Matcham [Add comment](#)

**Save**

**Set Reviewers and Review Author**

★ Jessica Aaron Review Author

+ [Add more Reviewers](#)

**Check Dates (Optional)**

Due Date

[Reset Dates](#)

**Set Recusals (Optional)**

**Confirm Date Changes**

Would you like to apply the date changes to all review steps within Upload Files?

**FINALIZING THE WORKFLOW:**

8. Each workflow step:

Continue setting Reviewers and Review Authors for **(See Step 5 for Adding Reviewers and Review authors/See Step 7 to Set Recusals in the Configuring Workflow Steps Section):**

- Department faculty review
- Chair/director letter upload
- Chair/director assessment response
- College faculty review
- Dean/director letter upload
- Dean/director assessment response
- Final assessment (Institutional level)

**NOTE:** Ensure every step has a designated review author.

Confirm that all steps are marked with a check and Save & Exit.

**COMPLETION:**

- 9. Each workflow step:
  - **After clicking Save & Exit:** All steps are configured, and the review workflow is ready.
  - **Review:** Each tab in Review Workflows to see workflow statuses.

**Faculty Insight**

Home Search My Profile Activities Reporting Admin Customization **Workflow** Help

**Workflow**  
Add and customize workflows

**Review Workflows**

Review Workflow Templates

My Tasks (0)

← Home / Workflows / Review Workflows / Training Test

**Training Test** Unconfigured

All 33 Unconfigured 0 Configured 33 In Progress 0 Overdue 0

Filter Review Workflow Steps...

Review Steps per page: 20

Showing 1 - 1

<input type="checkbox"/>	Name	Operator	Due Date	Can	Status
<input type="checkbox"/>	Upload Packet	Jason	February 28, 2025	0 / 1	Configured
<input type="checkbox"/>	Upload Packet	r, Kevin	February 28, 2025	0 / 1	Configured
<input type="checkbox"/>	Upload Packet	, Joao	February 28, 2025	0 / 1	Configured
<input type="checkbox"/>	Upload Packet	l, Gregory	February 28, 2025	0 / 1	Configured

- **If changes are needed:** Click a review step on the page (e.g., **Department Faculty Review**).
- **Expand:** A property to edit (e.g., **Due Date**) then hit apply changes.
- **Confirm:** Click “Yes” or “No” to confirm and a Success confirmation will appear.

Filter Review Workflow Steps... Filter

Review Steps per page: 20

Showing 21 - 33 of 33 Review Steps

<input type="checkbox"/>	Name	Operator
<input type="checkbox"/>	Upload Packet	Rios, Esteba
<input type="checkbox"/>	Upload Packet	Department
<input type="checkbox"/>	Upload File	AG-STATISTI
<input type="checkbox"/>	Department Faculty Review	AG-STATISTI

**Department Faculty Review** Confirmed

**Confirm Date Change**

Changing dates will affect the status of this review step. Are you sure you want to apply these changes?

No Yes

Apply Changes

**Success** a few seconds ago

Specified dates applied to review step

## HOW TO EDIT REVIEWERS FEATURE

Editing Reviewers:

- Each workflow step:
  - Expand:** Property to edit Reviewers
  - Click:** The “X” to remove the name of Review Author or Reviewers (e.g., Dahomey)
  - Add:** A reason in the description box (Why you are removing this person) then hit “Yes.”
  - Click:** Apply changes

The screenshot shows a software interface for managing reviewers. At the top, it displays the 'Due Date: Wednesday, March 5, 2025' and an 'Edit' button. Below this is a section for 'Required Forms, Documents, and System Vita (1)'. The main section is titled 'Reviewers (1)' and shows a list of reviewers. One reviewer, 'Dahomey [Review Author]', is highlighted. An orange arrow points to the 'Apply Changes' button in the 'Reviewers (1)' section. Another orange arrow points to the 'X' icon next to the reviewer's name. A third orange arrow points to the 'Add Reason' field in the 'Remove/Withdraw Reviewer' dialog box. The dialog box also contains a text area for recording the reason and 'No' and 'Yes' buttons.

- **Click:** Add more Reviewers
- **Select:** Another person to be a reviewer then hit done.
- **Click:** The checkbox to make new reviewer a Review Author.
- **Hit:** Apply changes to finish.
- **Click:** Review Workflow to review your workflow list you edited (**See Step 2 in Accessing the Review Workflow Tab**).

Reviewers (1) ^

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Reviewers: 1    Review Authors: 0

**Carrie** [Review Author]    Environmental Horticulture, Department of ✕

\*\* indicates Reviewer is recused from one or more Candidates

+ Add more Reviewers

Apply Changes

Cancel
  
  

Select	Name	Title	User Identifier	Unit
<input checked="" type="checkbox"/>	Carrie	ASO PROF	@ufl.edu	Department of Environmental Horticulture
<input type="checkbox"/>	Damian	ASO DEAN &	i@ufl.edu	Department of Forest, Fisheries,

Selected Users    First    Previous    **1**    Next    Last    1 Total Users

Done    Cancel

### Technical Issues

Academic Analytics

[facultyinsightproductquality@academicanalytics.com](mailto:facultyinsightproductquality@academicanalytics.com)