

FEA WORKFLOW INSTRUCTION GUIDE (CANDIDATE, COLLEGE, AND DEPARTMENT ADMINISTRATORS)

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UPLOAD PACKET AS A CANDIDATE

CANDIDATE OVERVIEW:

This section is designed to help you upload your packet for tenure and promotion as a candidate. You will complete your candidate dossier and waiver decision in this section.

NOTE: This section is completed by the candidate, also known as the faculty member who is up for Tenure and Promotion. You will only submit for review your candidate dossier (**For testing purposes you will use Curriculum Vitae**) and waiver decision in this section. **Also, please refer to your Associate Dean for any discipline specific questions.**

Log In and Access Task Navigation:

1. **Log in:** Using your credentials as the candidate [[Link to Navigation Guide and Login Page](#)].
2. **Complete:** Please complete the Activity Manager with all materials needed to upload your packet before moving to Step 3 ([Link to Activity Manager process and Instruction Guides](#)).
3. **Navigate:** To the Reporting Tab > Vitas & Biosketches and click Candidate Dossier. **NOTE:** For testing purposes please select Curriculum Vitae.

The screenshot shows the Faculty Insight interface. At the top, a dark blue header contains the text 'Faculty Insight'. Below this is a navigation bar with links for Home, Search, My Profile, Activities, Documents, Reporting, and Work. The 'Reporting' link is highlighted with an orange box and an orange arrow pointing to it from the right. Below the navigation bar, the 'Reporting' section is active, showing a sidebar with a link for 'Vitas & Biosketches' highlighted by an orange box and an orange arrow pointing up from below. The main content area shows a breadcrumb trail: Home / Reporting Home / Vitas & Biosketches. Below this is a search bar and a list of reports. The 'Candidate Dossier' report is highlighted with an orange box and an orange arrow pointing to it from the right. Below it, the 'Curriculum Vitae' report is also highlighted with an orange box and an orange arrow pointing to it from the right. The 'NIH Biographical Sketch (Non-Fellowship)' report is visible below that.

NOTE: There are often two scroll bars: one for the main page and another for the specific section you are navigating in on the Faculty Insight platform.

4. **Select:** The date of last promotion or the beginning of UF employment whichever applies to your review period.
5. **Select:** A Citation Format from drop down menu and click Download Curriculum Vitae (You can make edits or add in additional works in Word to your CV).

6. **Navigate:** To the Home tab and click on Upload Packet (**Not started will appear until task is completed**).

7. **Select:** To upload your Candidate Dossier (**Use Curriculum Vitae for testing purposes**). **NOTE:** Once you hit **Save & Complete** you cannot make changes to the dossier (**No changes to Curriculum Vitae**).
8. **Use drop-down menu:** Select Today's Date for the Waiver Decision.
9. **Choose from drop-down menu:** Select your Waiver Decision.
10. **Click:** Save & Complete when finished (**This is not a final submission of packet**).

Review Step: Upload Packet

Overview

Documents

Candidate Dossier

Forms

Waiver Decision

Documents

Curriculum Vitae

Curriculum Vitae - February 24, 2025 (2)

Forms

Waiver Decision

Today's Date Required

02/25/2025

The Nominee (Does/Does Not) Waive His/Her Right to Review Letters of Evaluation Required

Does

Does Not

Review Step: Upload Files

Candidate Dossier Key Terms (Skip for training purposes):

The candidate dossier is the candidate’s portfolio containing information regarding their qualifications, experience and achievements for the promotion and tenure process. The dossier will include sections such as:

- Courses Taught
- Teaching Evaluations
- Graduate Committee Activities
- Teaching, Advising & Instructional Accomplishments
- Publications
- Letters of Recommendation
- Education Portfolio (if applicable)
- Clinical Portfolio (if applicable)
- Extension Portfolio (if applicable)
- Professional Certifications or Licenses
- Supporting Materials

Waiver Key Terms (These will assist in organizing your work effectively):

Completing a waiver statement typically refers to a faculty member's decision to either waive or retain their right to review external letters of recommendation during the tenure and promotion process.

NOTE: If you have already submitted your review and need to modify the waiver, an **administrator (Assigned to your department)** will need to manually return the waiver to you for changes.

11. **Locate:** Select your name as a candidate.
12. **Select:** Submit Review. **NOTE: A warning message will appear that all submissions are final.** Also, submit a reason in the box provided to move on to complete the final submission process.

The screenshot displays the 'TTT 2/25 - Upload Packet' interface. At the top, it shows the due date as 'Tuesday, February 25, 2025'. Below this, there are tabs for 'All 1', 'Not Started 0', 'Completed 1', and 'Overdue 0'. A search bar labeled 'Filter Candidates..' is present. There are links for 'Download a review sheet' and 'Upload a review sheet'. A table at the bottom shows one candidate selected, 'Elisabeth', with a status of 'Completed'. A modal window titled 'Submit Review' is open, displaying the message: 'Submission is irrevocable. After reviews are submitted, the submitted review will appear in the candidate's portfolio and you will no longer have access to that candidate for review.' Two orange arrows point to the 'Submit Review' button and the modal window.

13. **Navigate:** To the Home Tab to review that your Completed Workflow Task is removed.

NOTE: If removed, it will state **“You’re up to date!”** (This means that your packet is now uploaded and submitted for review for that task).

Home Search My Profile Activities Documents Reporting Workflow Help

Welcome, Elisabeth

Faculty Insight is a comprehensive tool for you to store, organize, and showcase your academic and career achievements.

Complete Workflow Tasks

Please complete these tasks as soon as possible.

You're up to date!
There are currently no tasks assigned to you.

[Go to Workflow](#)

UPLOAD FILES AS AN DEPARTMENT ADMINISTRATOR

DEPARTMENT ADMINISTRATOR OVERVIEW:

These steps are managed at the departmental level and involve file uploads, faculty reviews, and submission confirmations. **NOTE:** If you're a college administrator skip this section and go to the College Faculty section. **Also, please refer to your Associate Dean for any discipline specific questions.** Department Administrators have the ability to assign a proxy.

Here is a chart outlining access and permissions for each role in the tenure and promotion workflow:

Step	Who Has Access?	Permissions
Department Admin Review	Department Administrator	<ul style="list-style-type: none"> Upload and review all materials Ensure packet accuracy Submit packet to move forward

Log in and Access Tasks Navigation:

- Log in:** The system using your credentials [\[Link to Navigation Guide\]](#) or Proxy as a faculty member if you do not have assigned workflow tasks in FEA as a Department Administrator [\[See Proxy Instruction Guide\]](#).

NOTE: If you proxy as a faculty member, you will be impersonating their account and gaining access to their workflow. Also, there are often two scroll bars: one for the main page and another for the specific section you are navigating in on the Faculty Insight platform.

2. **Navigate:** Select a specific task from the homepage or navigate through Workflow > My Tasks.
3. **Click:** On the task to access the uploaded files of the candidate.
4. **Locate:** The candidate's submission and click not started (e.g., Chris).

Faculty Insight

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

Workflow
Add and customize workflows

Review Workflows

Review Workflow Templates

My Tasks (1)

← Home / Workflows / My Tasks

My Tasks
Complete review tasks and monitor progress of review workflows

Search tasks

Task	Task Type	Due Date	Actions
Training Test - Upload Files	Reviewer Tasks	March 1, 2025	⋮
Chris	Agronomy, Department of	Not Started	
Jason	Agronomy, Department of	Completed	

Department Admin Logged in

Review the Candidate Packet:

5. **Expand:** The Upload Packet section
6. **View:** The Candidate Dossier by downloading it.
7. **Upon Download:** The file will appear right of the screen (You can view then close out of document).
8. **Review:** The Waiver Decision.

Review Faculty Chris Agronomy, Department of

Save & Exit Save & C

Candidate Dossier - February 26, 2025_timestamp=174059901796.docx
406 KB • Done

Review Step: **Upload Packet**

Overview

- Reviewer
- Documents**
- Candidate Dossier
- Forms
- Waiver Decision
- Impersonation Annotation

Reviewer

Submitted on February 26, 2025
Reviewer 1 - Chris

Documents

Candidate Dossier

Candidate Dossier - February 26, 2025.docx

Curriculum Vitae

Forms

Waiver Decision

Today's Date 02/26/2025

The Nominee (Does/Does Not) Waive His/Her Right to Review Letters of Evaluation Does

Candidate Dossier - February 26, 2025_timestamp=174059901796 - Protected View - Saved to this PC

PROMOTION, TENURE, & PERMANENT STATUS

Name: Chris Wilton
UFID: 51383239
Department: Agronomy
Rank: ASST PROF

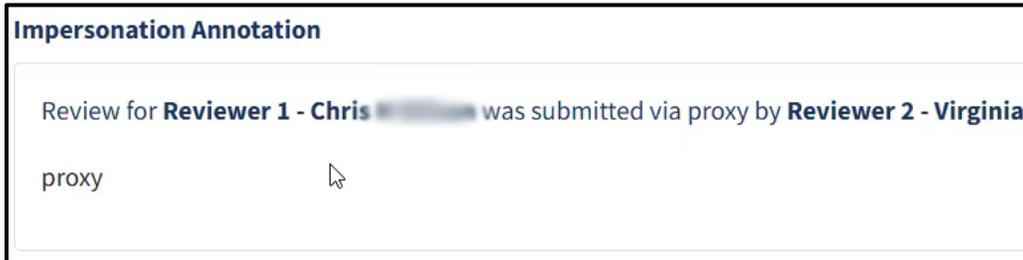
BRIEF DESCRIPTION OF JOB DUTIES

AREAS OF SPECIALIZATION

EFFORT REPORTED SINCE LAST PROMOTION

Term/Year	Teaching	Research	Service	Extension	Clinical	Sabbatical	Leave	Other	Total
Spring									

- Review Impersonation Annotation:** Review the Proxy Decision if applicable (e.g., Virginia was impersonating as candidate Chris in FEA and submitted packet/review for the candidate).



Upload Required Files:

- Expand:** The Upload Files section or scroll down.
- Drag and drop:** Files or use Choose Files to upload:
- Ensure:** The correct file format is used (**You can make adjustments to the files you have attached**).

← [Home](#) / [Workflows](#) / [My Tasks](#) / [Training Test - Upload Files](#) / [Chris](#)

Review Faculty Chris

Agronomy, Department of

Save & Exit

Save & Complete



Review Step: Upload Packet

Review Step: Upload Files

Overview

Documents

- Tenure & Promotion Criteria
- Annual Evaluation
- External Reviewers Letters & Sample Letters

Documents

Tenure & Promotion Criteria

Drag and drop or Choose files to upload

pdf, doc, docx, xls, xlsx, csv, or txt

Documents

Tenure & Promotion Criteria

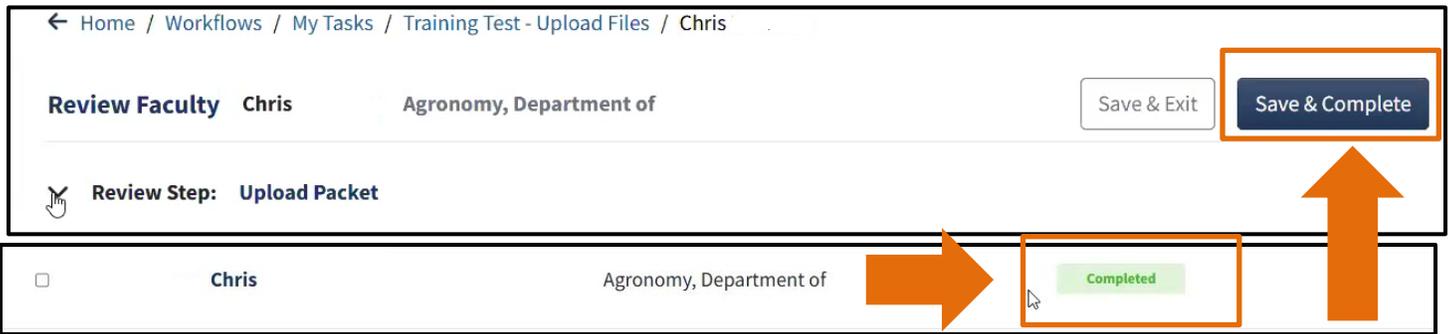
Tenure and Promotion Criteria.docx
Remove

Annual Evaluation

Annual Evaluation.docx
Remove

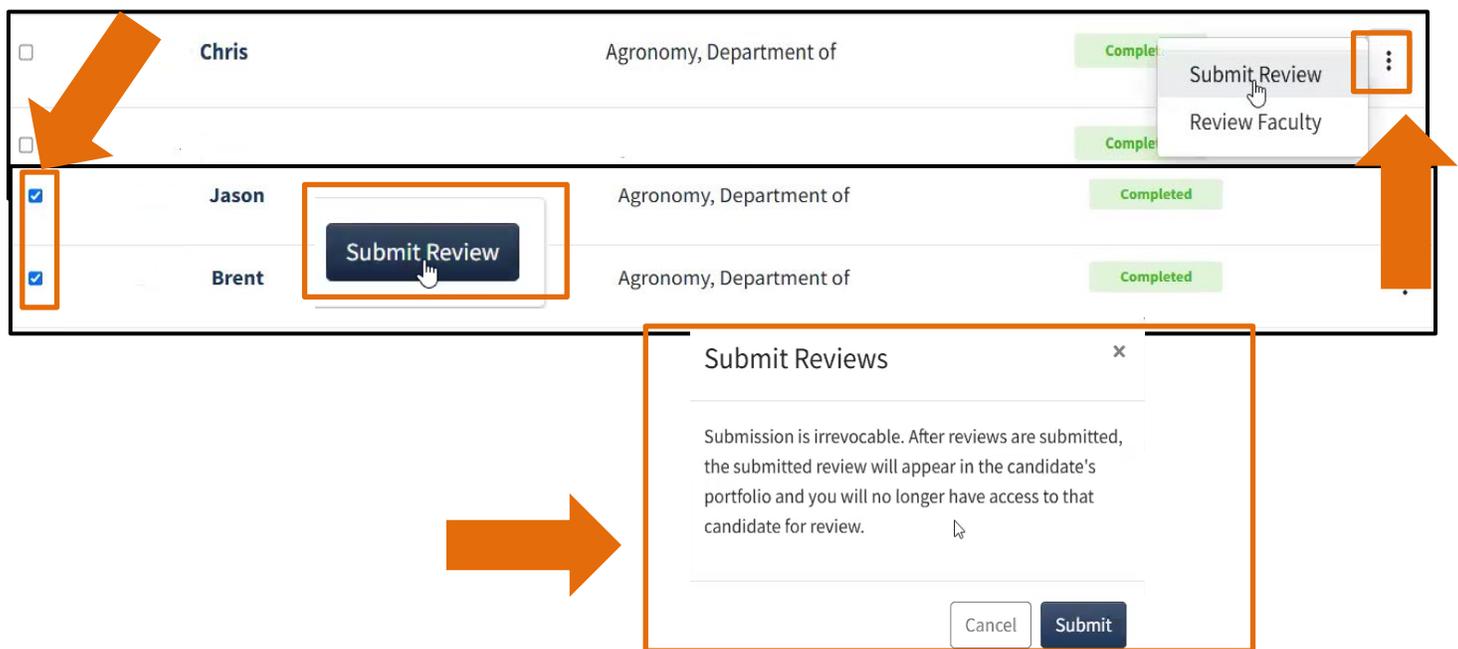
Save Progress:

13. **Click:** Save and Complete when all modifications are finalized (**Click Save and Exit to retain changes only**).
Note: You can still make edits to the uploaded documents after clicking the Save and Exit/Save and Complete buttons.
14. **After clicking:** Save and Complete button it will change the status of the candidate to completed (e.g., Chris is updated to completed in status for packet review).



Submit Review:

15. **Click:** Submit Review to submit an individual review.
16. **Select:** Multiple reviews and use Submit Review to submit in bulk.
17. **After bulk selection of reviews:** Hit the Submit Review button.
18. **After hitting Submit Review:** The submission when prompted (**submission is irrevocable**).



DEPARTMENT FACULTY REVIEW SECTION

DEPARTMENT FACULTY REVIEW:

Faculty can view packet, vote is done and recorded by admin. **NOTE: Also, please refer to your Associate Dean for any discipline specific questions.**

Here is a chart outlining access and permissions for each role in the tenure and promotion workflow:

Step	Who Has Access?	Permissions
Department Faculty Review	Department Administrator Department Faculty	<ul style="list-style-type: none"> Faculty: View the packet Faculty: Participate in Voting Admin: Record the vote in the system

Log In and Access Tasks Navigation:

- Log in:** Using your credentials [\[Link to Navigation Guide and Login Page\]](#).
- Navigate:** To the Home or Workflow Tab to see assigned tasks on homepage.
- Select:** A candidate not started (e.g., Chris).

NOTE: Also, there are often two scroll bars: one for the main page and another for the specific section you are navigating in on the Faculty Insight platform.

Faculty Insight PA Patricia

Home Activities Documents Reporting Workflow Help

Welcome, Patricia
Faculty Insight is a comprehensive tool for you to store, organize, and showcase your academic and career achievements.

Complete Workflow Tasks
Please complete these tasks as soon as possible.

Department Faculty Review - Chris Training Test	Not Started
Department Faculty Review - Stephen Training Test	Not Started
Department Faculty Review - Barry Training Test	Not Started
Department Faculty Review - Brent Training Test	Not Started

Complete your Profile
Keep your academic profile up-to-date by reviewing the below activities.

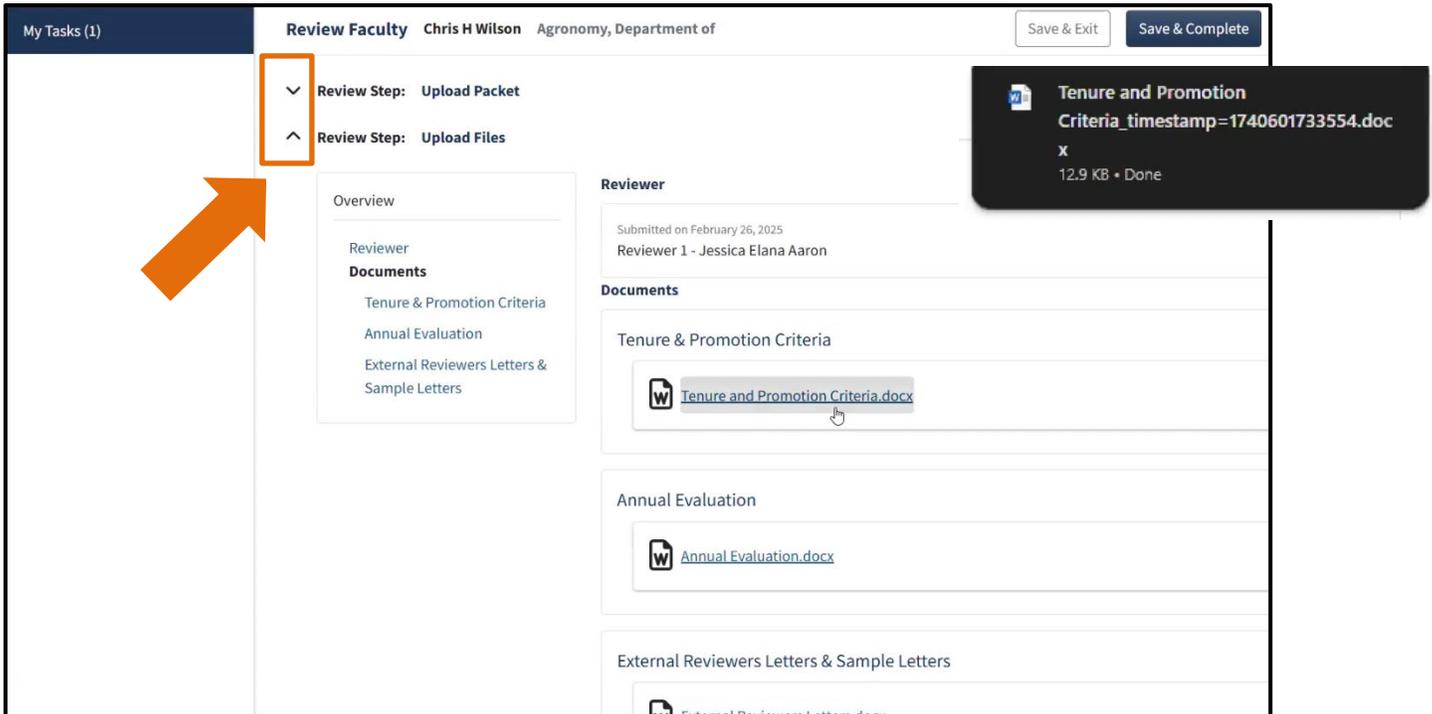
- Update your photo
I'll do it later
- Update your Research Interests
I'll do it later
- Update your Research Summary
I'll do it later
- Update your Research Keywords

Profile Completion
0%

Review Previous Submissions:

- Expand Upload Packet to review uploaded Candidate Dossier and Waiver Decision (**Documents are downloadable**).

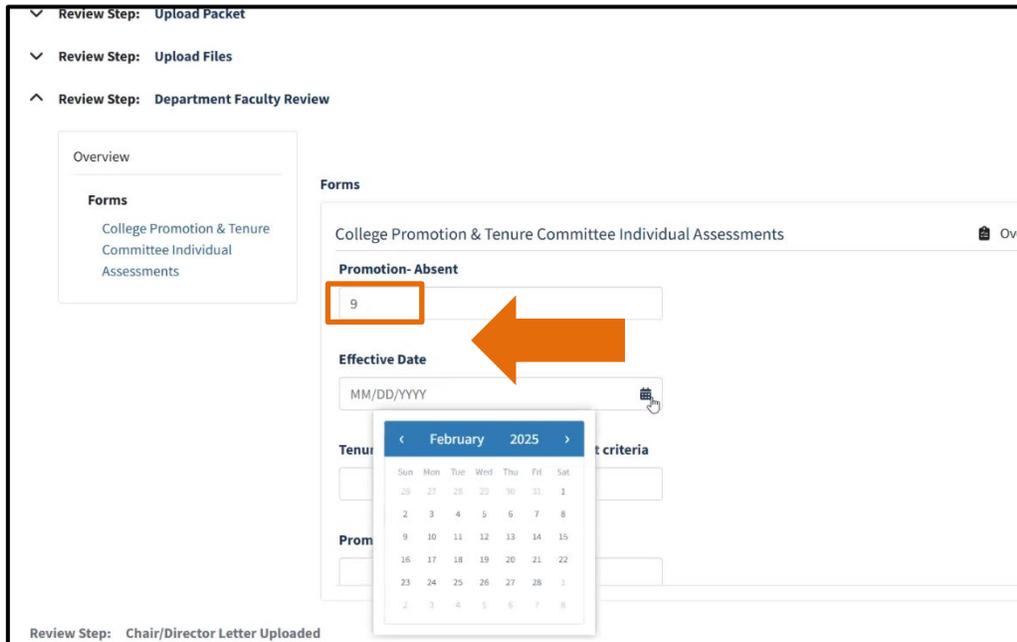
5. Expand Upload Files to review Tenure & Promotion documents (**Documents are downloadable**).



Complete the Review Form:

6. Enter the required information (This form only takes numbers in the entry fields).

NOTE: Please type in zeros if there is no eligible faculty to vote in the voting categories.



7. Save progress using Save and Exit (**Only retains saved information**) or Save and Complete (**To move to completed status**).

Batch Processing (Optional):

Review Faculty Chris H Wilson Agronomy, Department of

Save & Exit Save & Complete + Expand All

Review Step: Upload Packet

Overview

Reviewer

Documents

Forms

Submitted on February 26, 2025
Reviewer 1

Candidate Dossier

Candidate Dossier - February 26, 2025.docx

Waiver Decision

Today's Date	02/26/2025
The Nominee (Does/Does Not) Waive His/Her Right to Review Letters of Evaluation	Does

8. **Click:** The Download Review Sheet to access an Excel template.

NOTE: Download a Review Sheet to see candidates in bulk that do not have a completed review.

9. **Fill out:** Required information in each tab of the template in excel sheet that is missing (**Numbers required in this field**) then Save excel sheet to your desktop.

10. **Click Upload a review sheet:** Upload the completed excel sheet to populate review fields automatically (**This will update each candidates' review portfolio on this page from the excel sheet template you filled out**).

[Download a review sheet](#)
[Upload a review sheet](#)

Training Test - Department Faculty Review / Download a review sheet

Name
 College Promotion & Tenure Committee Individual Assessments

Download

Candidates per page: 20

Showing 1 - 5 of 5 Candidates

<input type="checkbox"/>	Faculty Name	Academic Unit	Status	Action
<input type="checkbox"/>	Chris	Agronomy, Department of	Completed	⋮
<input type="checkbox"/>	Stephen	Agronomy, Department of	Not Started	⋮
<input type="checkbox"/>	Barry	Agronomy, Department of	Not Started	⋮
<input type="checkbox"/>	Brent	Agronomy, Department of	Not Started	⋮

AutoSave Off

Training Test - Department Faculty Review - College Promotion & Tenure Committee Individual Assessm...

File Home Insert Page Layout Formulas Data Review View Automate Help

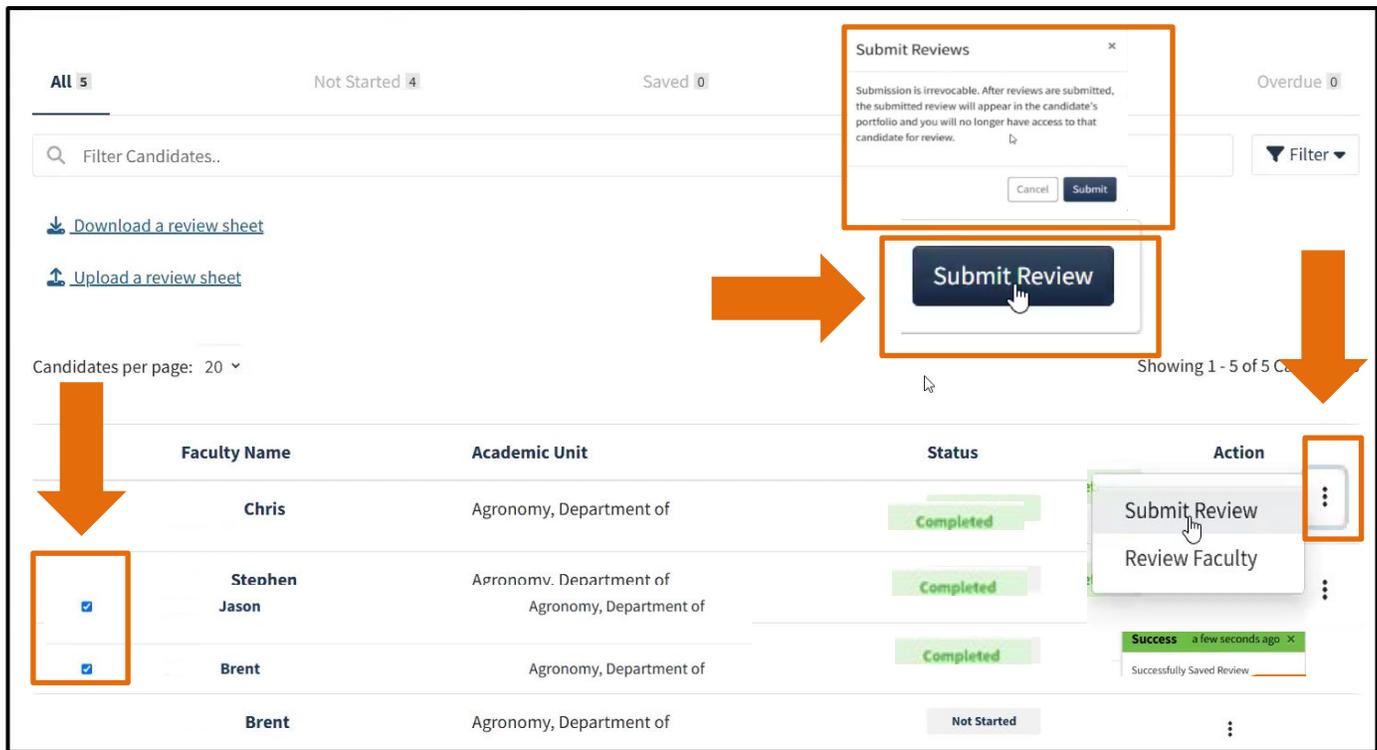
POSSIBLE DATA LOSS Some data might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these fea...

To exit full screen, press Esc

Faculty Name	Faculty Id	Academic Unit	Promotion- Absent-2273	Effective Date-2274	Tenure/Permanent Status- Does not meet criteria-2275	Promotion- Abstain-2279	Promotion- Does not meet criteria-2289	Tenure/Permanent Status- Absent-2290
Stephen	760	Agronomy, Department of	9	2/26/2024	9			
Barry	763	Agronomy, Department of	9		9			
Brent	764	Agronomy, Department of	9		9			
Jason	770	Agronomy, Department of	9		9			

Submit Review

- Click:** Submit Review to submit an individual review.
- Select:** Multiple reviews and use Submit Review to submit in bulk (**The multi-selector is only an option if candidate review is in completed status**). Completed status is clicking Save & Complete.
- After bulk selection of reviews:** Hit the Submit Review button.
- After hitting Submit Review:** The submission when prompted (**submission is irrevocable**).



CHAIR/DIRECTOR LETTER UPLOAD SECTION

CHAIR/DIRECTOR LETTER REVIEW:

The chair uploads the letter in FEA as part of the chair/director letter review process.

NOTE: Please refer to your Associate Dean for any discipline specific questions.

Here is a simple chart outlining access and permissions for each role in the tenure and promotion workflow:

Step	Who Has Access?	Permissions
Chair/Director	Chair/Director	<ul style="list-style-type: none"> Upload review letter Review Submitted materials

Log In and Access Task Navigation

- Log in:** Using your credentials [\[Link to Navigation Guide and Login Page\]](#).
- Navigate:** To the Home or Workflow Tab to see assigned tasks on homepage.
- Select:** A candidate not started (e.g., Chris).

NOTE: Also, there are often two scroll bars: one for the main page and another for the specific section you are navigating in on the Faculty Insight platform.

Faculty Insight ZA Zoleikha

Home Search Activities Documents Reporting Workflow Help

Welcome, Zoleikha
Faculty Insight is a comprehensive tool for you to store, organize, and showcase your academic and career achievements.

Complete Workflow Tasks
Please complete these tasks as soon as possible.

Chair/Director Letter Uploaded - Chris	Not Started
--	-------------

Complete your Profile
Keep your academic profile up-to-date by reviewing the below items.

- Update your photo
I'll do it later
- Update your Research Interests
I'll do it later
- Update your Research Summary
I'll do it later
- Update your Research Keywords

Profile Completion
0%

Upload Required Document

4. **Expand:** previous steps to review all submitted materials.
5. **Click:** Choose Files or drag and drop the required Chair/Director letter (**You can also remove this document**).
6. **Click:** Save progress using Save and Exit (**Only retains saved information**) or Save and Complete (**To move to completed status**).

My Tasks (1) Review Faculty Chris Agronomy, Department of Save & Exit Save & Complete

- Review Step: Upload Packet
- Review Step: Upload Files
- Review Step: Department Faculty Review
- Review Step: Chair/Director Letter Uploaded

Overview

Documents

Chair/Director Letter

Documents

Chair/Director Letter

Drag and drop or Choose files to upload

pdf, doc, docx, xls, xlsx, csv, or txt

- Review Step: Chair/Director Assessment Response
- Review Step: College Faculty Review
- Review Step: Dean/Director Letter

Save and Submit:

7. **After clicking:** Save and Complete.
8. **Select:** The candidates name (**e.g., Chris**).
9. **Click:** To submit the review.
10. **After hitting Submit Review:** The submission when prompted (**submission is irrevocable**)
11. **Finished:** A Success confirmation will appear.

Home Search My Profile Activities Documents Reporting **Workflow** Help

Workflow
Add and customize workflows

My Tasks (1)

← Home / Workflows / My Tasks / Training Test - Chair/Director Letter Uploaded

Training Test - Chair/Director Letter Uploaded Save & Exit **Save & Complete**

Due Date: No due date

All 1 Not Started 0 Saved 0 Completed 1 Overdue 0

Filter Candidates.. Filter

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

1 Candidates Selected Clear Selection Submit Review

<input checked="" type="checkbox"/>	Faculty Name	Academic Unit	Status	Action
<input checked="" type="checkbox"/>	Chris	Agronomy, Department of	Completed	⋮

Submit Reviews [X]

Submission is irrevocable. After reviews are submitted, the submitted review will appear in the candidate's portfolio and you will no longer have access to that candidate for review.

Cancel Submit

Success a few seconds ago [X]
Successfully Saved Review

CHAIR/DIRECTOR RESPONSE AND ASSESSMENT SECTION

CHAIR/DIRECTOR RESPONSE AND ASSESSMENT:

In this section this is the candidate’s response to the chair’s letter during the 10-day period. Also, in this section an assessment is done to see if the chair indicates whether they support or do not support the candidate.

NOTE: Notifications are sent exclusively to the faculty (candidate). Administrators with proxy access can review these notifications on behalf of the faculty within the application. **Also, please refer to your Associate Dean for any discipline specific questions.**

Chair/Director Assessment steps in the tenure and promotion workflow:

Step	Who Has Access?	Permissions
Chair/Director Response	Candidate	<ul style="list-style-type: none"> Submit a response to the Chair’s letter 10-day response period
Chair/Director Assessment	Chair/Director	<ul style="list-style-type: none"> Indicate support or non-support for the candidate

Log In and Access Task Navigation

- Log in:** The system using your credentials [[Link to Navigation Guide and Login Page](#)].
- Navigate:** To the Home or Workflow Tab to see assigned tasks on homepage.
- Select:** A candidate not started (e.g., Chris).

NOTE: There are often two scroll bars: one for the main page and another for the specific section you are navigating.

Upload Response Document

4. **Expand:** previous steps to review all submitted materials.
5. **Click:** Choose the files or drop and drag for the response to the faculty assessment. **(You can also remove this document).**
6. **Click:** Save progress using Save and Exit **(Only retains saved information)** or Save and Complete **(To move to completed status).**

← Home / Workflows / My Tasks / Training Test - Chair/Director Assessment Response / Chris

Review Faculty Chris Agronomy, Department of

Save & Exit Save & Complete + Expand All - Collapse All

- Review Step: Upload Packet
- Review Step: Upload Files
- Review Step: Department Faculty Review
- Review Step: Chair/Director Letter Uploaded
- Review Step: Chair/Director Assessment Response

Overview

Documents

- Response to Faculty Response

Response to Faculty Response

Drag and drop or Choose files to upload

pdf, doc, docx, xls, xlsx, csv, or txt

Review Step: College Faculty Review

Review Step: Dean/Director Letter

Save and Submit:

7. **After clicking:** Save and Complete.
8. **Select:** The candidates name **(e.g., Chris)**.
9. **Click:** To submit the review.
10. **After hitting Submit Review:** The submission when prompted **(submission is irrevocable).**

Home Search My Profile Activities Documents Reporting Workflow Help

Workflow
Add and customize workflows

My Tasks (1)

Save & Exit Save & Complete

Home / Workflows / My Tasks / Training Test - Chair/Director Assessment Response

Training Test - Chair/Director Assessment Response

Due Date: No due date

All 1 Not Started 0 Saved 0 Completed 1 Overdue 0

Filter Candidates.. Filter

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

1 Candidates Selected Clear Selection Submit Review

<input checked="" type="checkbox"/>	Faculty Name	Academic Unit	Status	Action
<input checked="" type="checkbox"/>	Wilson, Chris	Agronomy, Department of	Completed	

Success a few seconds ago Successfully Saved Review

Submit Reviews

Submission is irrevocable. After reviews are submitted, the submitted review will appear in the candidate's portfolio and you will no longer have access to that candidate for review.

Cancel Submit

COLLEGE FACULTY REVIEW SECTION

COLLEGE FACULTY REVIEW:

In this section this the College Faculty Review committee reviews packet and vote is done. College Faculty Review Committee also reviews packet for accuracy and certifies packet. As a member of the College Faculty Review Committee, you must be assigned as a reviewer or reviewer author to perform certain tasks in this process.

NOTE: This section is also for college administrators. College administrators have the ability to assign a proxy ([See Proxy Guide](#)). Also, here are often two scroll bars: one for the main page and another for the specific section you are navigating.

Step	Who Has Access?	Permissions
College Faculty Review	<p>College Faculty Committee (Reviewer)</p> <p>College Faculty Committee (Review Author Role)</p>	<ul style="list-style-type: none"> • Faculty (Reviewer): Review the candidate's packet and participate in voting. • Faculty (Reviewer): Can not submit a review. Only review, make notes and comment in College Review Faculty Form. • Faculty (Review Author Role): Review the candidate's packet. • Faculty (Review Author Role): Can submit a review for final packet.

College Faculty Committee (Reviewer):

1. **Log in:** The system using your credentials [\[Link to Navigation Guide and Login Page\]](#).
2. **Navigate:** Select a specific task from the homepage or navigate through Workflow > My Tasks.

Reviewer Key Terms (These will assist in organizing your work effectively):

A committee member but not a review author. A committee member does not make final decisions with the packet but needs access to the materials for their review. **NOTE:** You can have more than one reviewer assigned.

3. **Expand:** Candidates portfolio to review uploaded documents (**Documents are downloadable**)
Review: Reviewer has access to enter responses in the College Faculty Review Form and make notes in this form (**Reviewer can also review their comments in this form**). **NOTE:** Please type in zeros if there is no eligible faculty to vote in the voting categories.
4. **Click:** Save progress using Save and Exit (**Only retains saved information**) or Save and Complete (**To move to completed status**).

The screenshot shows a workflow interface for a 'College Faculty Review'. The breadcrumb trail is: Home / Workflows / My Tasks / Training Test - College Faculty Review / Chris H Wilson. The user is identified as 'Chris' from the 'Agronomy, Department of'. At the top right, there are buttons for 'Save & Exit' and 'Save & Complete', with an orange arrow pointing to the latter. A list of review steps is shown on the left, with an orange arrow pointing to the 'College Faculty Review' step. Below this, a 'Forms' section is visible, containing a form titled 'College Promotion & Tenure Committee Individual Assessments' with fields for 'Promotion- Abstain' (value 8) and 'Promotion- Absent' (value 9). A 'Completed' status is shown at the bottom right with an orange arrow pointing to it.

Save and Submit:

5. **After clicking:** Save and Complete the candidate is moved to completed status (e.g., **Chris is now moved to completed status**).
NOTE: As a reviewer you **cannot submit** the review (no submission option available).
6. **Review:** Review that the candidate is in completed status

The bottom portion of the interface shows the candidate's name 'Chris' and department 'Agronomy, Department of'. A green 'Completed' status is highlighted with an orange box and an orange arrow pointing to it from the right.

COLLEGE FACULTY COMMITTEE (REVIEW AUTHOR ROLE):

If you're assigned as a Review Author Role please use the following navigation in this section. **NOTE:**

Also, please refer to your Associate Dean for any discipline specific questions.

1. **Log in:** Using your credentials [[Link to Navigation Guide and Login Page](#)].
2. **Navigate:** Select a specific task from the homepage or navigate through Workflow > My Tasks.
3. **Select:** A candidate not started (e.g., Chris).

The screenshot shows the Faculty Insight dashboard for a user named Jonathan. The top navigation bar includes 'Home', 'Search', 'Activities', 'Documents', 'Reporting', 'Workflow', and 'Help'. An orange arrow points to the 'Home' link. Below the navigation bar, the user is greeted with 'Welcome, Jonathan' and a brief description of the tool. On the left, a 'Complete Workflow Tasks' section lists three tasks: 'College Faculty Review - Brent Training Test', 'College Faculty Review - Jason Training Test', and 'College Faculty Review - Chris Training Test'. The 'Chris' task is highlighted with an orange box and an arrow. On the right, a 'Complete your Profile' section lists three tasks: 'Update your photo', 'Update your Research Interests', and 'Update your Research Summary'. A 'Profile Completion' gauge shows 0%. A box labeled 'The Reviewer Author (Logged In)' with an arrow points to the user's name in the top right corner.

Review Author Role Key Terms:

A review author makes the final decision with the packet.

NOTE: You can have more than one Review Author assigned (See the How to Create a Review Workflow Instruction Guide for Multiple Review Authors). Also, there are often two scroll bars: one for the main page and another for the specific section you are navigating.

4. **Expand:** Candidates portfolio to review uploaded documents (**Documents are downloadable**).
5. **Review:** Reviewer has access to enter responses in the College Faculty Review Form and make notes in this form (**The Review Author can also review their comments in this form**).
6. **Click:** Save progress using Save and Exit (**Only retains saved information**) or Save and Complete (**To move to completed status**).

Workflow
Add and customize workflows

Home / Workflows / My Tasks / Training Test - College Faculty Review / Chris H Wilson

Review Faculty **Chris** Agronomy, Department of

Save & Exit Save & Complete Expand All Collapse All

- Review Step: Upload Packet
- Review Step: Upload Files
- Review Step: Department Faculty Review
- Review Step: Chair/Director Letter Uploaded
- Review Step: Chair/Director Assessment Response
- Review Step: College Faculty Review

Overview

Forms

College Promotion & Tenure Committee Individual Assessments

College Promotion & Tenure Committee Individual Assessments Overview

02/26/2025

Promotion- Abstain

8

Promotion- Absent

9

Tenure/Permanent Status- Does not meet criteria

I

Review Step: Dean/Director Letter

Save and Submit:

7. **After clicking:** Save and Complete.
8. **Select:** The candidates name (e.g., **Chris**).
9. **Click:** To submit the review.
10. **After hitting Submit Review:** The submission when prompted (**Submission is irrevocable**)
11. **Finished:** A Success confirmation will appear.

Candidates per page: 20 ▾

Showing 1 - 3 candidates

1 Candidates Selected

Faculty Name	Academic Unit	Status	Action
Brent	Agronomy, Department of	Not Started	<div style="border: 1px solid orange; padding: 5px;"> <p>Submit Reviews</p> <p>Submission is irrevocable. After reviews are submitted, the submitted review will appear in the candidate's portfolio and you will no longer have access to that candidate for review.</p> <p><input type="button" value="Cancel"/> <input type="button" value="Submit"/></p> </div>
Jason	Agronomy, Department of	Not Started	
Chris	Agronomy, Department of	Completed	

DEAN AND DIRECTOR LETTER SECTION

DEAN AND DIRECTOR LETTER

In this section, the dean plays a crucial role in evaluating the candidate’s qualifications and providing a formal recommendation. **NOTE: Please refer to your Associate Dean for any discipline specific questions.**

Step	Who Has Access?	Permissions
Dean/Director Review	Dean/Director	<ul style="list-style-type: none"> Upload review letter

Log In and Access Task Navigation

- Log in:** Using your credentials [\[Link to Navigation Guide and Login Page\]](#).
- Navigate:** Select a specific task from the homepage or navigate through Workflow > My Tasks
- Select:** A candidate not started (e.g., Chris).

NOTE: There are often two scroll bars: one for the main page and another for the specific section you are navigating.

Faculty Insight CA Christopher

Home Search My Profile Activities Documents Reporting Workflow Help

Welcome, Christopher
Faculty Insight is a comprehensive tool for you to store, organize, and showcase your academic and career achievements.

Complete Workflow Tasks
Please complete these tasks as soon as possible.

Dean/Director Letter - Chris	Not Started
Training Test	

Complete your Profile
Keep your academic profile up-to-date by reviewing the below activities.

- Update your photo
I'll do it later
- Update your Research Interests
I'll do it later
- Update your Research Summary

4. **Expand:** Candidates portfolio to review uploaded documents (**Documents are downloadable**)
5. **Click:** Choose the files or drop and drag for the response to the faculty assessment. (**You can also remove this document**).
6. **Click:** Save progress using Save and Exit (**Only retains saved information**) or Save and Complete (**To move to completed status**).

Review Faculty Chris Agronomy, Department of

Save & Exit Save & Complete + Expand All - Collapse All

- Review Step: Upload Packet
- Review Step: Upload Files
- Review Step: Department Faculty Review
- Review Step: Chair/Director Letter Uploaded
- Review Step: Chair/Director Assessment Response
- Review Step: College Faculty Review
- Review Step: Dean/Director Letter

Overview

Documents

Dean/Director Letter

Documents

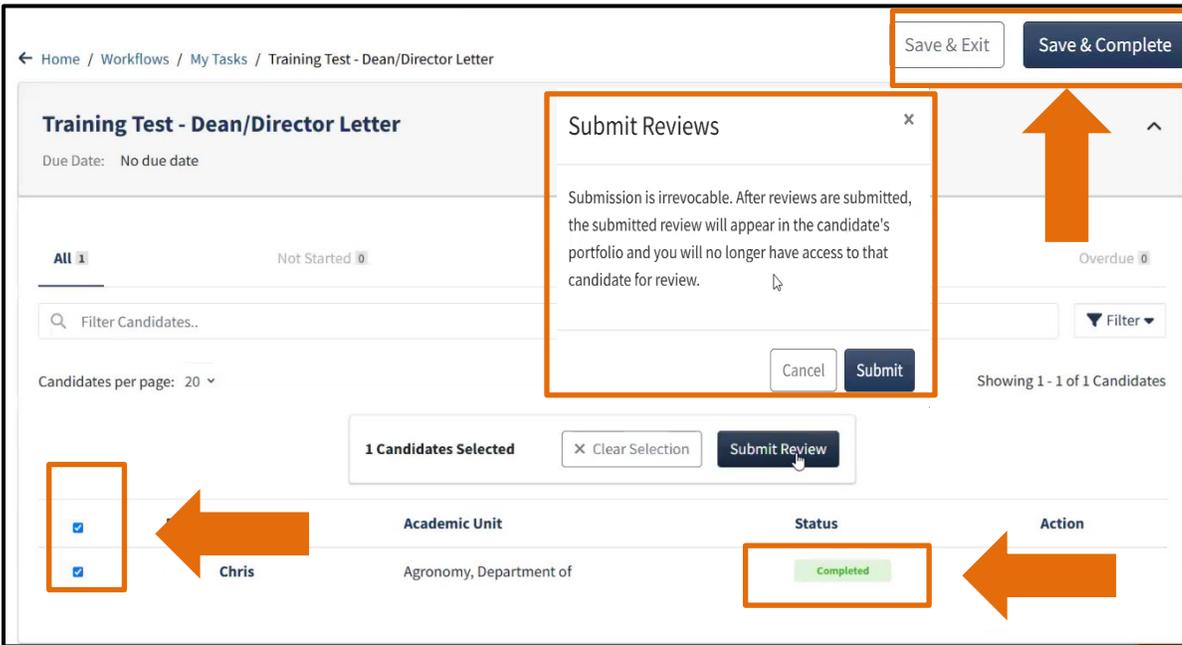
Dean/Director Letter

Drag and drop or Choose files to upload

pdf, doc, docx, xls,xlsx, csv, or txt

Save and Submit:

7. **After clicking:** Save and Complete.
8. **Select:** The candidates name (**e.g., Chris**).
9. **Click:** To submit the review.
10. **After hitting Submit Review:** The submission when prompted (**submission is irrevocable**).
11. **Finished:** A Success confirmation will appear.



DEAN AND DIRECTOR ASSESSMENT RESPONSE SECTION

DEAN AND DIRECTOR ASSESSMENT RESPONSE

In this section after the Dean/Director submits their review letter, the candidate is given a **10-day period** to review the letter and submit a formal response if they choose. This section focuses on responding to the faculty review process.

NOTE: Notifications are sent exclusively to the faculty (candidate). Administrators with proxy access can review these notifications on behalf of the faculty within the application. **Also, please refer to your Associate Dean for any discipline specific questions.**

Step	Who Has Access?	Permissions
Dean/Director Response	Candidate	<ul style="list-style-type: none"> Submit a response to the Dean's letter 10-day response period
Dean/Director Assessment	Dean/Director	<ul style="list-style-type: none"> Indicate support or non-support for the candidate

Log in and Access Task Navigation

- Log in:** Using your credentials [[Link to Navigation Guide and Login Page](#)].
- Navigate:** Select a specific task from the homepage or navigate through Workflow > My Tasks
- Select:** A candidate not started (e.g., Chris).

NOTE: There are often two scroll bars: one for the main page and another for the specific section you are navigating.

Faculty Insight NA Neha

Home Search **←** Activities Documents Reporting Workflow Help

Welcome, Neha
Faculty Insight is a comprehensive tool for you to store, organize, and showcase your academic and career achievements.

Dean/Director (Logged In) **↑**

Complete Workflow Tasks
Please complete these tasks as soon as possible.

Dean/Director Assessment Response - Training Test	Stephen	Not Started
Dean/Director Assessment Response - Training Test	Chris	Not Started

Complete your Profile
Keep your academic profile up-to-date by reviewing the below activities.

- Update your photo
I'll do it later
- Update your Research Interests
I'll do it later
- Update your Research Summary
I'll do it later

Profile Completion **0%**

- Expand:** Candidates portfolio to review uploaded documents (**Documents are downloadable**)
- Click:** Choose the files or drop and drag for the response to the faculty assessment. (**You can also remove this document**).
- Click:** Save progress using Save and Exit (**Only retains saved information**) or Save and Complete (**To move to completed status**).

Review Faculty Chris Agronomy, Department of

Save & Exit **Save & Complete** Expand All Collapse All

- Review Step: Upload Packet
- Review Step: Upload Files **←**
- Review Step: Department Faculty Review
- Review Step: Chair/Director Letter Uploaded
- Review Step: Chair/Director Assessment Response
- Review Step: College Faculty Review
- Review Step: Dean/Director Letter
- Review Step: Dean/Director Assessment Response

Documents

- Overview
- Documents**
- Response to Faculty Response
- Response

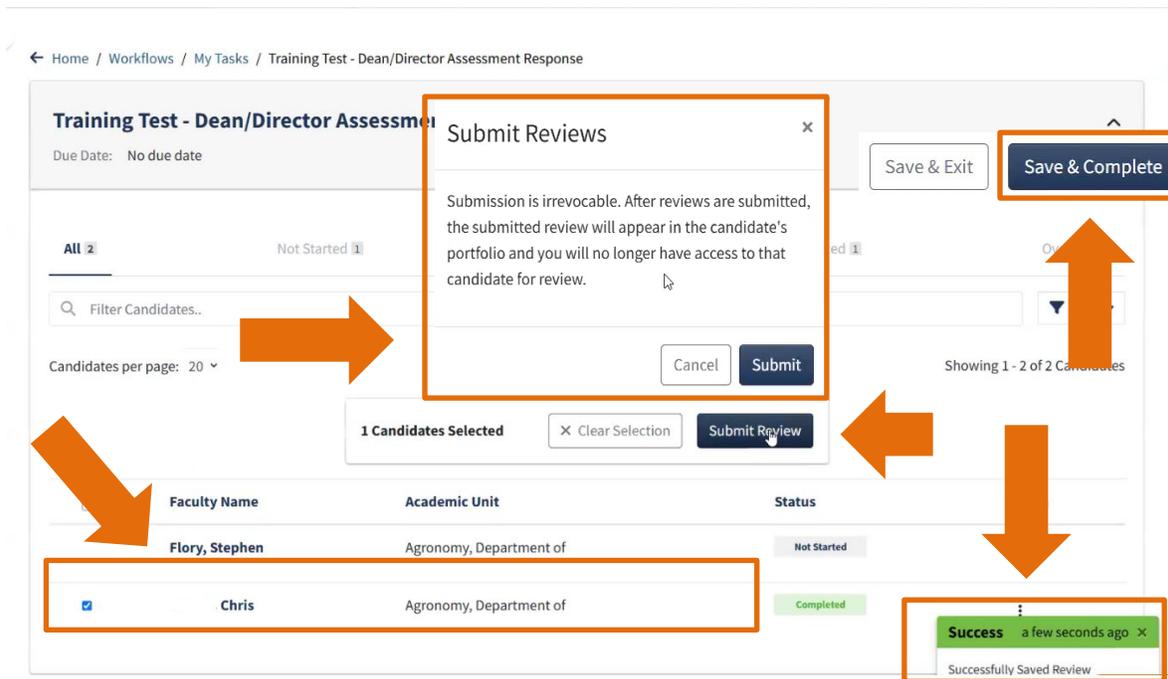
Response to Faculty Response

Drag and drop or **Choose files to upload**

pdf, doc, docx, xls,xlsx, csv, or txt

Save and Submit:

7. **After clicking:** Save and Complete.
8. **Select:** The candidates name (e.g., Chris).
9. **Click:** To submit the review.
10. **After hitting Submit Review:** The submission when prompted (submission is irrevocable).
11. **Finished:** A Success confirmation will appear.



FINAL ASSESSMENT SECTION

FINAL ASSESSMENT SECTION:

This section incorporates the final review section of the tenure and promotion process. The final assessment involves the highest level of institutional review (**e.g. University-Level Review**) before a final decision is made.

NOTE: In this section, the packet is prepared for the Academic Personnel Board, or APB, Review. It also covers how administrators can use FEA to review workflows, allowing administrators to track the steps of faculty members that need to be completed. **Also, please refer to your Associate Dean for any discipline specific questions.**

Step	Who Has Access?	Permissions
Final Review	APB (Academic Personnel Board)	<ul style="list-style-type: none"> Access and review the packet
Review Complete	University Administrators	<ul style="list-style-type: none"> Mark case as closed

NOTE: There are often two scroll bars: one for the main page and another for the specific section you are navigating.

Log in and Access Task Navigation

1. **Log in:** Using your credentials [[Link to Navigation Guide and Login Page](#)].
2. **Navigate:** Select a specific task from the homepage or navigate through Workflow > My Tasks
3. **Select:** A candidate not started (e.g., Chris).

Faculty Insight JA Jaime

Home | Profile | Activities | Documents | Reporting | Workflow | Help

Welcome, Jaime
Faculty Insight is a comprehensive tool for you to store, organize, and showcase your academic and career achievements.

Complete Workflow Tasks
Please complete these tasks as soon as possible.

Final Assessment - Chris (Not Started)

Complete your Profile
Keep your academic profile up-to-date by reviewing your activities.

- Update your photo (I'll do it later)
- Update your Research Interests (I'll do it later)
- Update your Research Summary (I'll do it later)

Profile Completion: 0%

4. **Expand:** Candidates portfolio to review uploaded documents (**Documents are downloadable**)
5. **Click:** Select the final assessment date.
6. **Click:** Save progress using Save and Exit (**Only retains saved information**) or Save and Complete (**To move to completed status**).

Review Faculty Chris H Wilson Agronomy, Department of

Save & Exit | Save & Complete | + Expand All | - Collapse All

- Review Step: Upload Packet
- Review Step: Upload Files
- Review Step: Department Faculty Review
- Review Step: Chair/Director Letter Uploaded
- Review Step: Chair/Director Assessment Response
- Review Step: Department Faculty Review
- Review Step: Dean/Director Letter
- Review Step: Dean/Director Assessment Response
- Review Step: Final Assessment

Forms: Packet Ready for APB Review

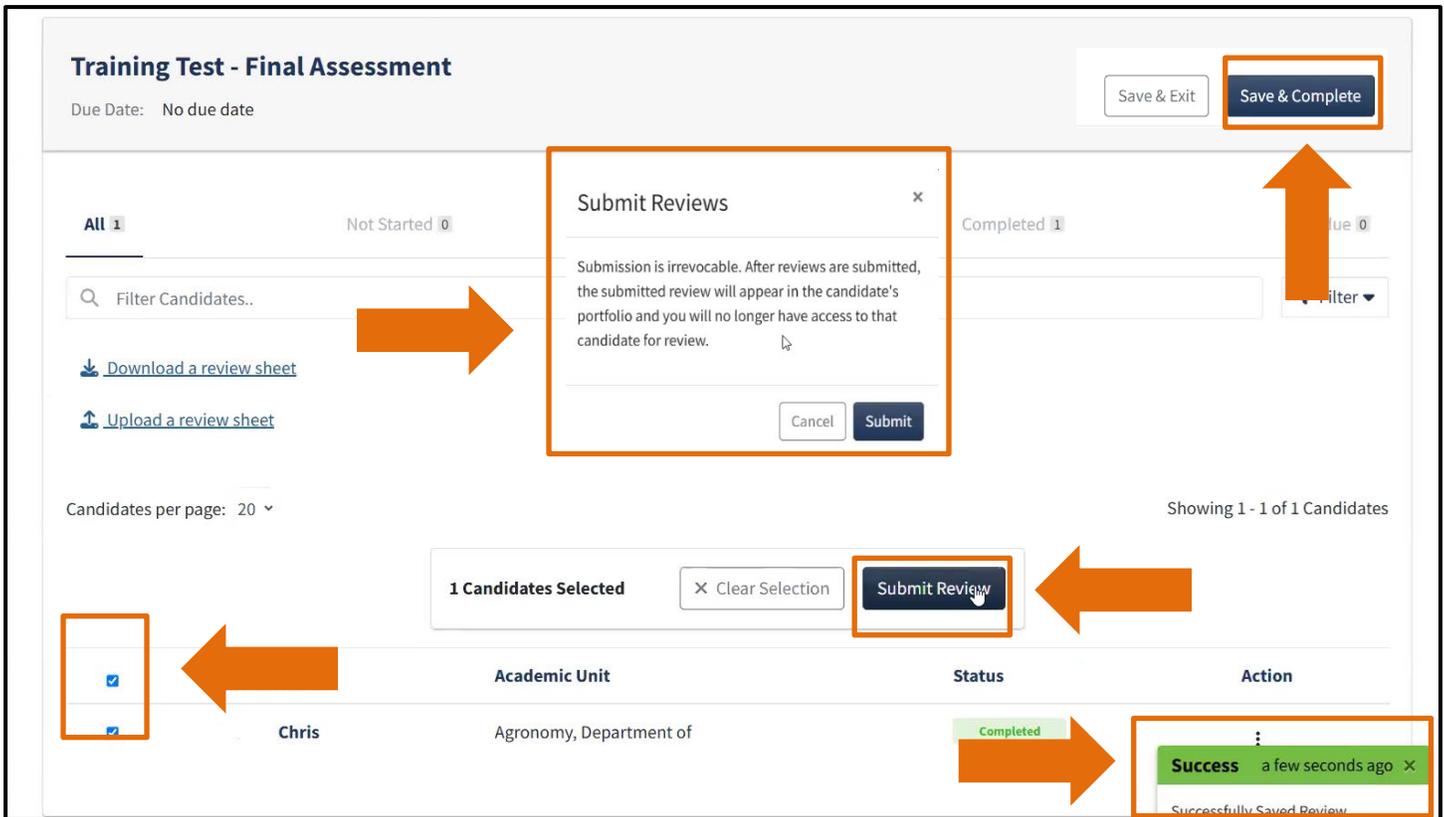
Today's Date: MM/DD/YYYY

February 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

Save and Submit:

7. **After clicking:** Save and Complete.
8. **Select:** The candidates name (e.g., Chris).
9. **Click:** To submit the review.
10. **After hitting Submit Review:** The submission when prompted (submission is irrevocable).
11. **Finished:** A Success confirmation will appear.



Administrator View: Workflow Overview

12. **Toggle Right:** To proxy [See Proxy Instruction Guide].
 13. **Select from drop-down menu:** Select faculty name that you are proxying (e.g., Jamie).
- NOTE:** The administrator view allows you to see how the workflow is progressing.



14. **Navigate:** To Workflow > Review Workflows.
15. **Access:** The training test item for a detailed workflow view.

Faculty Insight W Virginia

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 + Create New

Administer existing workflows and create new workflows from existing templates

All 21 Unconfigured 0 Configured 0 In Progress 13 Overdue 5 Complete 3

Filter Review Workflows... Filter

Projects per page: 20 < 1 2 > 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	Overdue	
Training Test	Promotion And	February 27,	March 5, 2025	26	33	Virginia	In Progress	

16. **After accessing:** The training test will allow you to identify completed and pending steps of the faculty members packet.
17. **Use:** The filter to narrow results by unit levels and workflow steps.
18. **After filtering:** You can view which step level the candidate in on by viewing candidate reviews (**e.g., 1 candidate out of 1 in the packet process**).
19. **Click:** To view workflow step or unit level to view additional details on a candidate review (**e.g., Additional details on Candidate Reviews for 2/26**).

← Home / Workflows / Review Workflows / Training Test

Training Test In Progress

All 33 Unconfigured 0 Configured 19 In Progress 8 Overdue 0 Complete 6

Filter Review Workflow Steps...

Review Steps per page: 20

<input type="checkbox"/>	Name	Operator	Due Date	Candidate Reviews	Status
<input type="checkbox"/>	Upload Packet	Ferrell, Jason	February 28, 2025	1 / 1	In Progress
<input type="checkbox"/>	Upload Packet	Kenworthy, Kevin	February 28, 2025	0 / 1	Configured
<input type="checkbox"/>	Upload Packet	Vendramini, Joao	February 28, 2025	0 / 1	Configured
<input type="checkbox"/>	Upload Packet	Macdonald, Gregory	February 28, 2025	0 / 1	Configured
<input type="checkbox"/>	Upload Packet	Sollenberger, Lynn	February 28, 2025	0 / 1	Configured

Final Assessment Institution 2/26 In Progress

Filter

- Unit Levels (All) +
- Workflow Steps (All) +
- Select All
- Complete College Faculty Review
- Dean/Director Assessment Response
- Configured Dean/Director Letter
- Department Faculty Review
- Configured Final Assessment
- Upload Files
- Configured ⋮
- Configured ⋮

20. **Click:** Candidate sections to view additional information on user submissions and statuses.

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

← Home / Workflows / Review Workflows / Training Test / Final Assessment

Final Assessment In Progress

Review Step Properties

Dates

Required Forms, Documents, and System Vita (1)

Reviewers (1)

Candidates (26)

21. **View:** Candidates status (Submitted or pending).

Candidates per page: 20 ▾ Showing 1 - 20 of 26 Candidates

<input type="checkbox"/>	Faculty Name	Academic Unit	Start Date of Review ↓	End Date of Review ↓	No. of Reviewer Authors	Status	Action
<input type="checkbox"/>	Wilson, Chris	Agronomy, Department of	Feb 26, 2025	Feb 26, 2025	1	Submitted	⋮
<input type="checkbox"/>	Tillman, Barry	Agronomy, Department of	Feb 26, 2025	Feb 26, 2025	1	Submitted	⋮
<input type="checkbox"/>	Ferrell, Jason	Agronomy, Department of	-	-	1	Pending	⋮
<input type="checkbox"/>	Kenworthy, Kevin	Agronomy, Department of	-	-	1	Pending	⋮
<input type="checkbox"/>	Vendramini, Joao	Agronomy, Department of	-	-	1	Pending	⋮

Note: An orange arrow points from the 'No. of Reviewer Authors' column to the 'Status' column, and an orange box highlights the 'Status' column.

22. **Navigate:** To Workflow >Review Workflow to complete. (You are now finished with workflow).

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 In Progress

All 33 Unconfigured 0 Configured 19 In Progress 8 Overdue 0 Complete 6

Filter Review Workflow Steps... Filter ▾

Review Steps per page: 20 ▾ Showing 1 - 20 of 33 Review Steps

<input type="checkbox"/>	Name	Operator	Due Date	Candidate Reviews	Status	Action
<input type="checkbox"/>	Upload Packet	Ferrell, Jason	February 28, 2025	1 / 1	Complete	⋮
<input type="checkbox"/>	Upload Packet	Kenworthy, Kevin	February 28, 2025	0 / 1	Configured	⋮
<input type="checkbox"/>	Upload Packet	Vendramini, Joao	February 28, 2025	0 / 1	Configured	⋮
<input type="checkbox"/>	Upload Packet	Macdonald, Gregory	February 28, 2025	0 / 1	Configured	⋮
<input type="checkbox"/>	Upload Packet	Sollenberger, Lynn	February 28, 2025	0 / 1	Configured	⋮

FOR ADDITIONAL ASSISTANCE

Policies & General Questions

Office of the Provost | Academic and Faculty Affairs

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Technical Issues

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