

WORKFLOW REPORTING GUIDE

WORKFLOW REPORTING GUIDE OVERVIEW:

This guide provides step-by-step instructions on how to access and run workflow reporting within the application.

ACCESSING WORKFLOW REPORTS SECTION

ACCESSING WORKFLOW REPORTS:

1. **Log in:** The system using your credentials [\[Link to Navigation Guide and Login Page\]](#).
NOTE: Ensure you have permission to access workflow reports.
2. Navigate to the **Reporting** section in the application.
3. Click on **Workflow Reports**.
4. You will see a default workflow report titled **Workflow Details**.
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.

Faculty Insight

Home Search My Profile Activities **Reporting** Administration Workflow

Reporting

Add and customize forms to your reports

Accreditation Reports

Activity Reports

Workflow Reports

← Home / Reporting Home / Workflow Reports

Workflow Reports

Search

ALL A B C D E F G H I J K L M N

1 Reports Found

Workflow Details

View steps of a Review Workflow by faculty member.

SETTING FILTERS IN WORKFLOW REPORTS SECTION

SETTING FILTERS:

1. **No Data:** The first time you access the report, no data will be displayed until you set your filters.
2. **Click:** on the Filter dropdown to set your preferred filters.
3. **Select:** A Review Workflow status to view by clicking a box.
4. **Use the search function:** If you know the specific review workflow name.

Reporting

Add and customize forms to your records

Accreditation Reports

Activity Reports

Workflow Reports

← Home / Reporting Home / Workflow Reports / Workflow Details

Workflow Details

ⓘ Please click on the filter button below to apply desired filters and generate a report

Filter

Review Workflow

Please select a review workflow

Review Workflow Status

☐ Select All

☐ Unconfigured

☒ In Progress

☒ Completed

☒ Configured

☐ Overdue

Review Workflows

Search

train

Training Test

SELECTING A WORKFLOW STEPS SECTION

SELECTING A WORKFLOW:

1. **All review:** Workflow steps are selected by default.
2. **To exclude:** A step, unselect it from the list.
3. **Select:** A Review workflow step to move forward to grouping.

Reporting

Add and customize forms to
your records

Accreditation Reports

Activity Reports

Workflow Reports

Please click on the filter button below to apply desired filters and generate a report.

Filter

Search...

Review Workflow

Training Test

Review Workflow Steps

All (Upload Packet +8)

Search for Review Workflow Step...

- ☒ Select All
- ☒ Upload Packet
- ☒ Upload Files
- ☒ Department Faculty Review
- ☒ Chair/Director Letter Uploaded
- ☒ Chair/Director Assessment Response
- ☒ College Faculty Review

No Reports

Once you have selected
applied your desired
report will appear

GROUPING THE REPORT SECTION

GROUPING THE REPORT:

- Select:** The report by **Candidate** or **Step** to group the report.
NOTE: Selecting **Candidate** provides an overview of task completion for each candidate. Selecting a step organizes candidates by workflow steps.
- Click:** Apply to generate the report.

Reporting

Add and customize forms to your records

Accreditation Reports

Activity Reports

Workflow Reports

← Home / Reporting Home / Workflow Reports / Workflow Details

Workflow Details

ⓘ Please click on the filter button below to apply desired filters and generate a report.

Filter

Search...

Review Workflow

Training Test

Review Workflow Steps

All (Completed Packet +8)

Group Data By

☒ Candidate
 ☐ Step

Clear Filters

Apply

No F

Once you have applied your c

UNDERSTANDING THE REPORT SECTION

THE REPORT DISPLAYS:

- The report displays:**
 - Candidate names
 - Number of completed vs. total tasks
 - Workflow steps and their statuses
 - Task start and due dates
 - Reviewers and review authors
 - Any recusals
- Scroll down:** to view individual candidate progress.



Jason [redacted]
No. of submitted tasks / No. of all tasks: 5 / 9

Workflow Step	Status	Start Date	Due Date	Reviewers	Review Authors	Recusals
Upload Packet	Submitted	2/26/2025	2/26/2025	Jason [redacted]	Jason [redacted]	
Upload Files	Submitted	2/26/2025	2/26/2025	Jessica [redacted]	Jessica [redacted]	
Department Faculty Review	Submitted	2/26/2025	2/26/2025	Patricia [redacted]	Patricia [redacted]	
Chair/Director Letter Uploaded	Submitted	2/26/2025	2/26/2025	Zoleikha [redacted]	Zoleikha [redacted]	
Chair/Director Assessment Response	Submitted	2/26/2025	2/26/2025	Sean [redacted]	Sean [redacted]	
College Faculty Review	Not Started			Alyson [redacted]	Jonathan [redacted]	
Dean/Director Letter	Pending			Christopher [redacted]	Christopher [redacted]	
Dean/Director Assessment Response	Pending			Neha [redacted]	Neha [redacted]	
Final Assessment	Pending			Jaime Ahlberg	Jaime [redacted]	



Stephen I [redacted]
No. of submitted tasks / No. of all tasks: 7 / 9

Workflow Step	Status	Start Date	Due Date	Reviewers	Review Authors	Recusals
Upload Packet	Submitted	2/26/2025	2/26/2025	Stephen F [redacted]	Stephen I [redacted]	

CHANGING REPORT GROUPING SECTION

CHANGING REPORT GROUPING:

1. **Select:** Step and click **Apply** to change the grouping.

Reporting

Add and customize forms to your records

Accreditation Reports

Activity Reports

Workflow Reports

← Home / Reporting Home / Workflow Reports / Workflow Details / Training Test

Workflow Details

Showing results for Training Test

2 Filter

Search...

Training Test

Review Workflow Steps

All (Upload Packet +8)

Group Data By

☐ Candidate
 ☒ Step

Clear Filters

Apply

L M N

Date

Due Date

/2025

2/26/2025

2. **After clicking apply:** The report will now be structured per workflow step (e.g., **Upload Packet and Upload Files**). Each step lists all candidates and their completion status.

Workflow Details

Showing results for Training Test

Export CSV

2 Filter

Search...

ALL

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Expand All

Collapse All

Upload Packet

No. of submitted tasks / No. of all tasks: 6 / 21

Faculty Name	Faculty ID	Academic Unit	Status	Start Date	End Date	Reviewers	Review Authors	Recusals
Jason F	11655723	Agronomy, Department of	Submitted	2/26/2025	2/26/2025	Jason F	Jason F	
Kevin K	81837153	Agronomy,	Not			Kevin K	Kevin K	

ADDING VIEWING OPTIONS SECTION

ADDING VIEWING OPTIONS:

1. **Expand or collapse:** all sections for easier navigation.
2. **Click Export:** To CSV to download the report for further analysis in Excel.

← Home / Reporting Home / Workflow Reports / Workflow Details / Training Test

Workflow Details

Showing results for Training Test

2 Filter

Search...

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

^ Expand All
v Collapse All

Upload Packet
No. of submitted tasks / No. of all tasks: 6 / 21

Faculty Name	Faculty ID	Academic Unit	Status	Start Date	Due Date	Reviewers	Review Authors	Recusals
Jason Ferrell	11655723	Agronomy, Department of	Submitted	2/26/2025	2/26/2025	Jason Ferrell	Jason Ferrell	

CREATING A CUSTOM WORKFLOW REPORT SECTION

CREATE A CUSTOM WORKFLOW:

1. **Click Create New:** To generate a custom report.
2. **Enter:** A meaningful Report Name.
3. **Use the dropdown menu:** To select A Workflow Template (e.g., UF Promotion & Tenure Workflows).
4. **Choose:** The Review Workflow you want to report on (e.g., Training Test).

Faculty Insight WV

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

Reporting
Add and customize forms to your records

Accreditation Reports
Activity Reports
Workflow Reports

← Home / Reporting Home / Workflow Reports

Workflow Reports

Search

ALL A B C

1 Reports Found

Workflow Details
View steps of a Review Workflow

← Home / Reporting Home / Workflow Reports / New Report

Create Workflow Report

Name of Workflow Report *
Test Report

Workflow Template *
Promotion & Tenure Workflow

Review Workflow *
Please select a review workflow

Review Workflow Status

- ☒ Select All
- ☒ In Progress
- ☒ Overdue
- ☒ Completed

Review Workflows

Search train

Training Test

+ Create New

5. **Select:** Specific Workflow Forms and Fields to include.

Test Report

Workflow Template *
Promotion & Tenure Workflow

Review Workflow *
Training Test

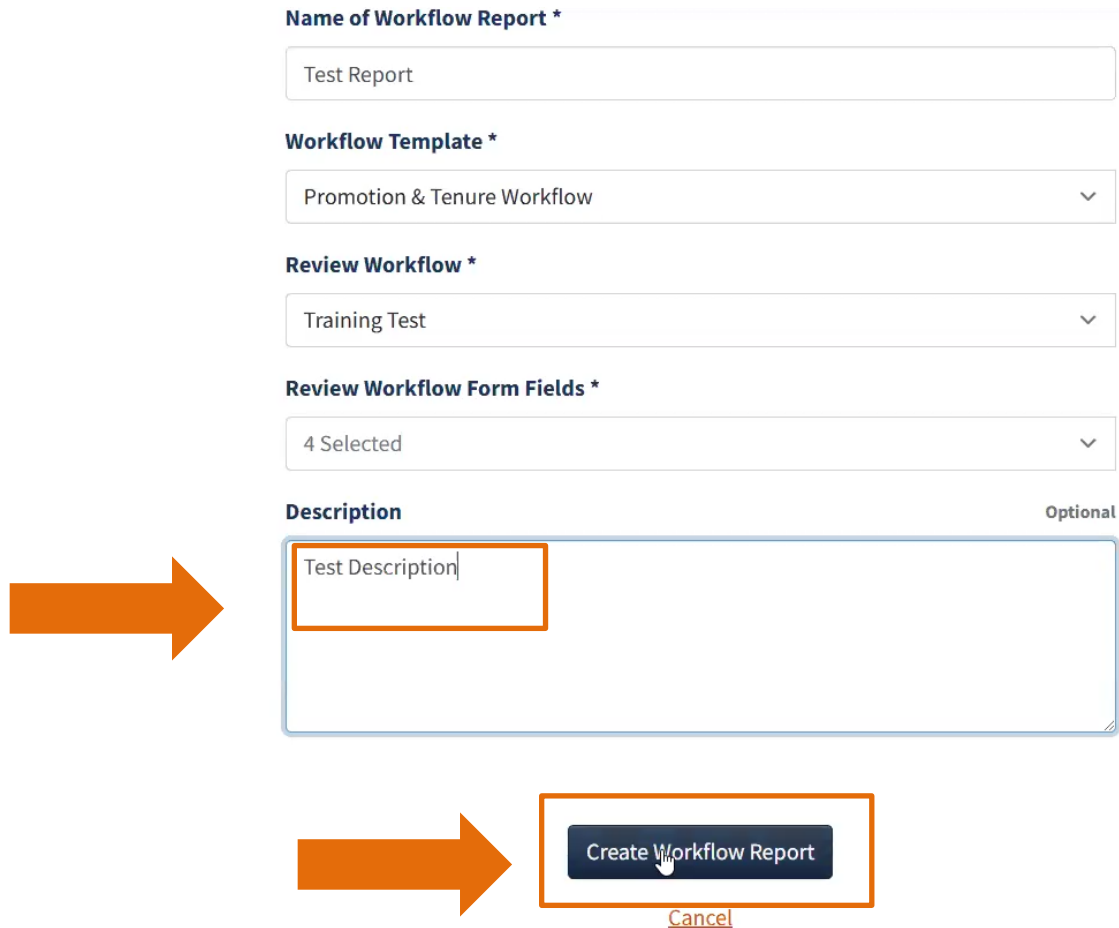
Review Workflow Form Fields *
4 Selected

Search for Workflow Form Fields...

+ Expand All - Collapse All

- ☐ Promotion- Abstain
- ☐ Promotion- Absent
- ☒ Tenure/Permanent Status- Does not meet criteria
- ☒ Step - Final Assessment
 - ☒ Form Name: Packet Ready for APB Review
 - ☒ Today's Date

6. **Add:** A **Description** to help identify the report later (Optional).
7. **Click:** **Run Report** to generate the custom report.



Name of Workflow Report *

Test Report

Workflow Template *

Promotion & Tenure Workflow

Review Workflow *

Training Test

Review Workflow Form Fields *

4 Selected

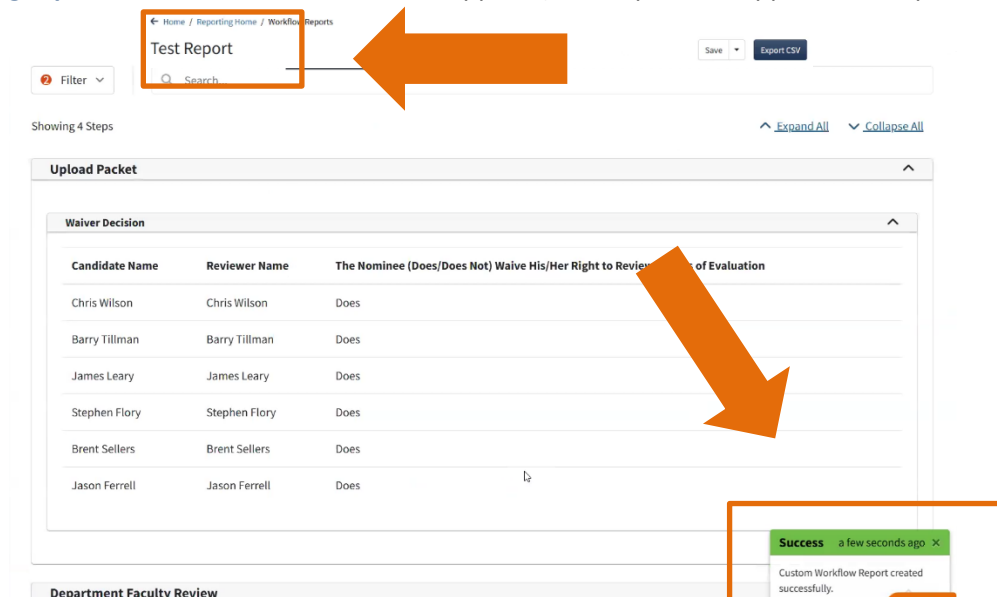
Description Optional

Test Description

Create Workflow Report

[Cancel](#)

8. **After creating report:** A success confirmation will appear (Your report will appear with report information you requested).



Home / Reporting Home / Workflow Reports

Test Report

Filter

Showing 4 Steps

Expand All Collapse All

Upload Packet

Waiver Decision

Candidate Name	Reviewer Name	The Nominee (Does/Does Not) Waive His/Her Right to Review of Evaluation
Chris Wilson	Chris Wilson	Does
Barry Tillman	Barry Tillman	Does
James Leary	James Leary	Does
Stephen Flory	Stephen Flory	Does
Brent Sellers	Brent Sellers	Does
Jason Ferrell	Jason Ferrell	Does

Success a few seconds ago

Custom Workflow Report created successfully.

Department Faculty Review

MODIFYING CUSTOM REPORTS SECTION

MODIFYING CUSTOM REPORTS

1. **Filter:** To add or remove fields as needed.
2. **Click Apply:** to update the report **(The new field will be added to the report).**
3. **Save:** changes using either:
 - Save to update the existing report.
 - Save As to create a new report with the modified settings.
4. **Click:** Export to CSV to download the report **(You are finished creating a report).**

The screenshot displays the 'Test Report' interface. At the top, there is a navigation bar with links: Home, Search, My Profile, Activities, Reporting (active), Admin, Customization, Workflow, and Help. Below the navigation bar, the left sidebar shows 'Reporting' with sub-links: 'Add and customize forms to your records', 'Accreditation Reports', 'Activity Reports', and 'Workflow Reports' (selected). The main content area shows the 'Test Report' title and a breadcrumb: 'Home / Reporting Home / Workflow Reports'. Below the title, there is a 'Filter' dropdown menu. To the right of the filter, there is a 'Review Workflow' section with a 'Training Test' dropdown. Below that, there is a 'Review Workflow Form Fields' section with a '5 Selected' dropdown. A search bar for 'Search for Workflow Form Fields...' is also present. The 'Apply' button is highlighted with an orange box and an arrow. The 'Save' and 'Export CSV' buttons are also highlighted with an orange box and an arrow. The 'Save As' button is also highlighted with an orange box and an arrow.

FOR ADDITIONAL ASSISTANCE

Policies & General Questions

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Technical Issues

Academic Analytics

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