JULY 2022

WORKFLOW
ESSENTIAL SKILLS TRAINING

Overview and Training

PURDUE UNIVERSITY | FORT WAYNE

Introduction

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

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

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

Campus Goals and Expectations

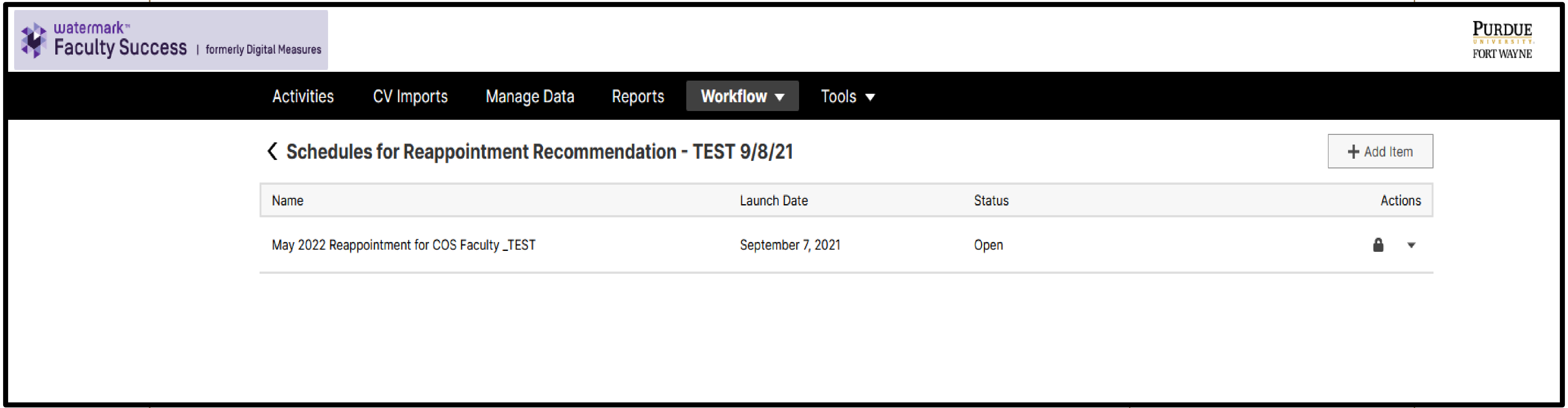
- Faculty are expected to maintain their data in Faculty Success and make the necessary updates via the 'Activities' tab as all reports will be run through this system once launched
  - It is a good idea to review all custom reports in the 'Reports' tab of Faculty Success **BEFORE** the review process begins as to verify all information is displayed correctly

- Faculty up for review are to confirm with their home departments the due dates for their submissions and what document(s) they should expect to have included

- All questions concerning Faculty Success or the Watermark system should go to the systems administrator Lindsey Dutrieux, OIR 1-0797 dutrieul@pfw.edu

Campus Goals and Expectations

- Move current Promotion and Tenure process from OneDrive to Workflow
  - Promotion and Tenure (Fall 2022)



Essential Skills and Best Practices

Accessing Workflow

When the Workflow process launches, tasks are created and await the attention of the faculty subjects who will submit their materials in the system.

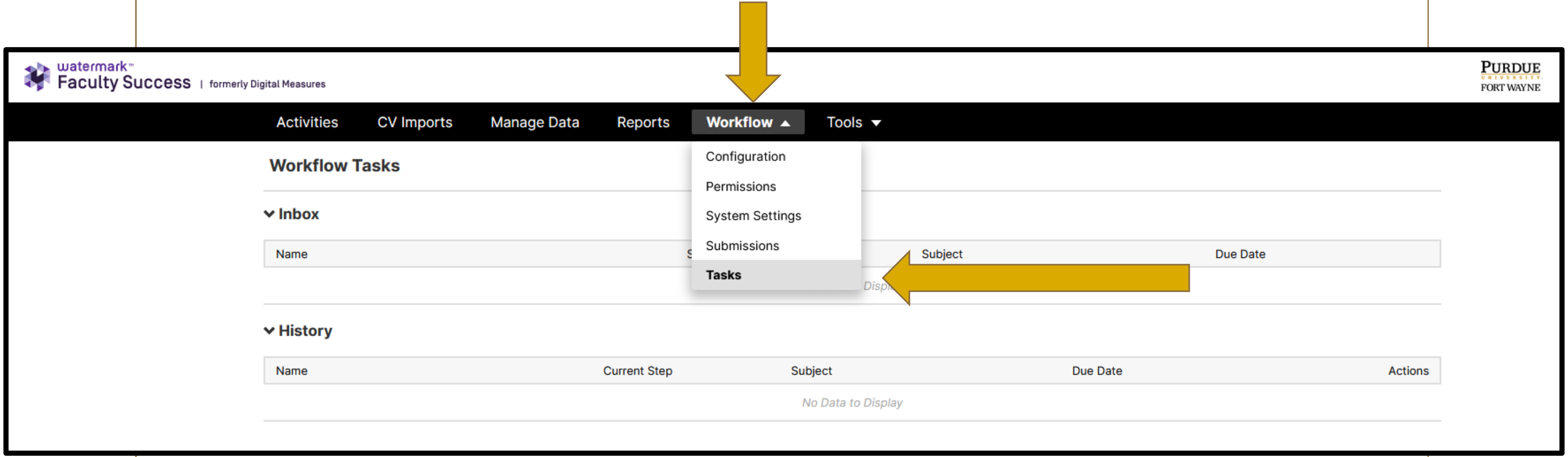
Faculty and reviewers can access tasks two ways:

1. **Through the email that was generated when the process launched**
   - This will come to your PFW.edu email from Watermark (much like using *DocuSign*)
2. **By logging into Faculty Success directly**
   - When a process launches, the appropriate users will be given access to the Workflow Tasks utility, where they can review the Inbox for any available tasks

(next page provides an example)

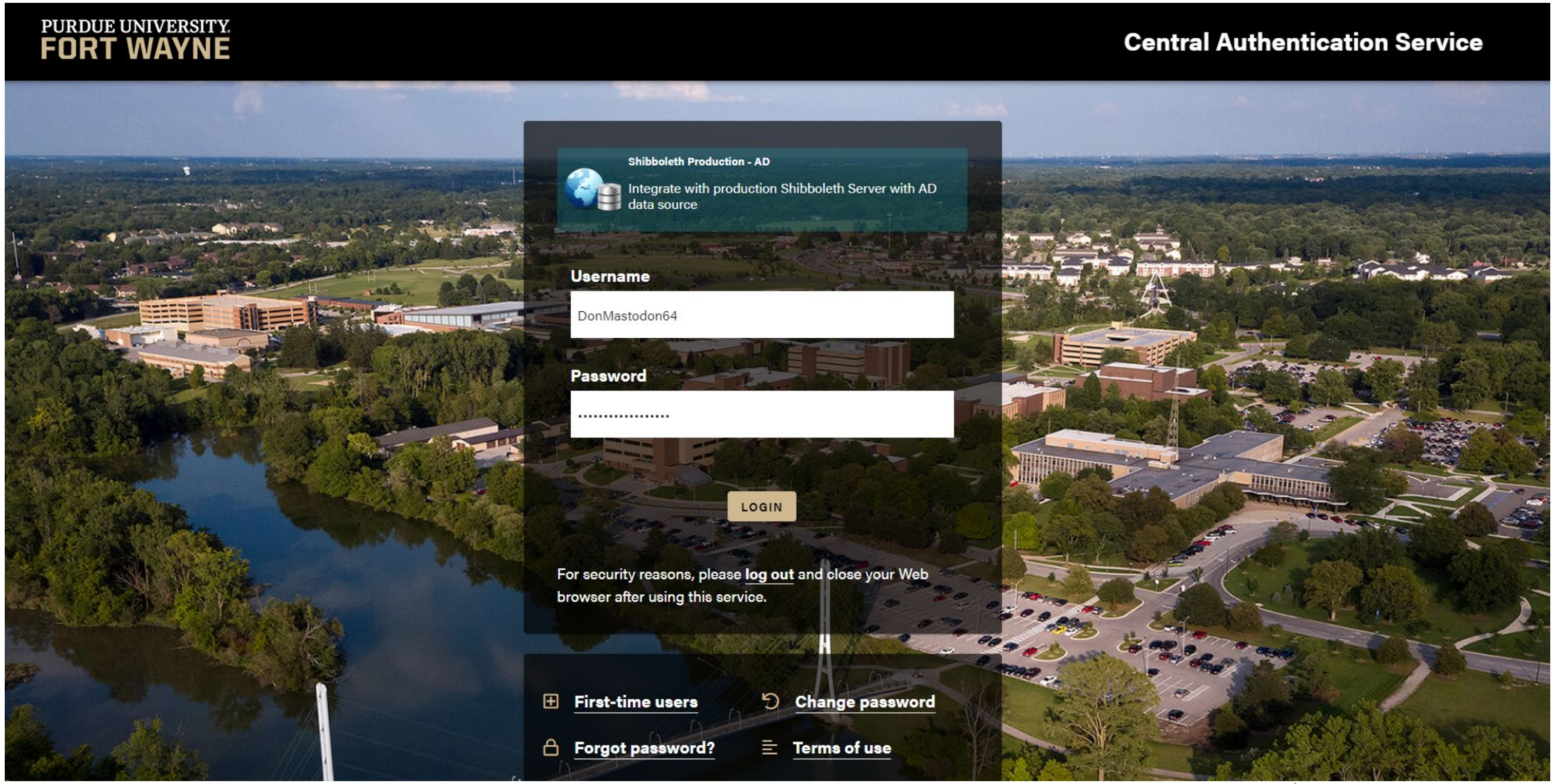
[redacted]

- Via ‘Workflow’ tab in Faculty Success
- Use drop down to ‘Tasks’ to view what is assigned to you



Logging into Digital Measures is easy!

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



Workflow Forms

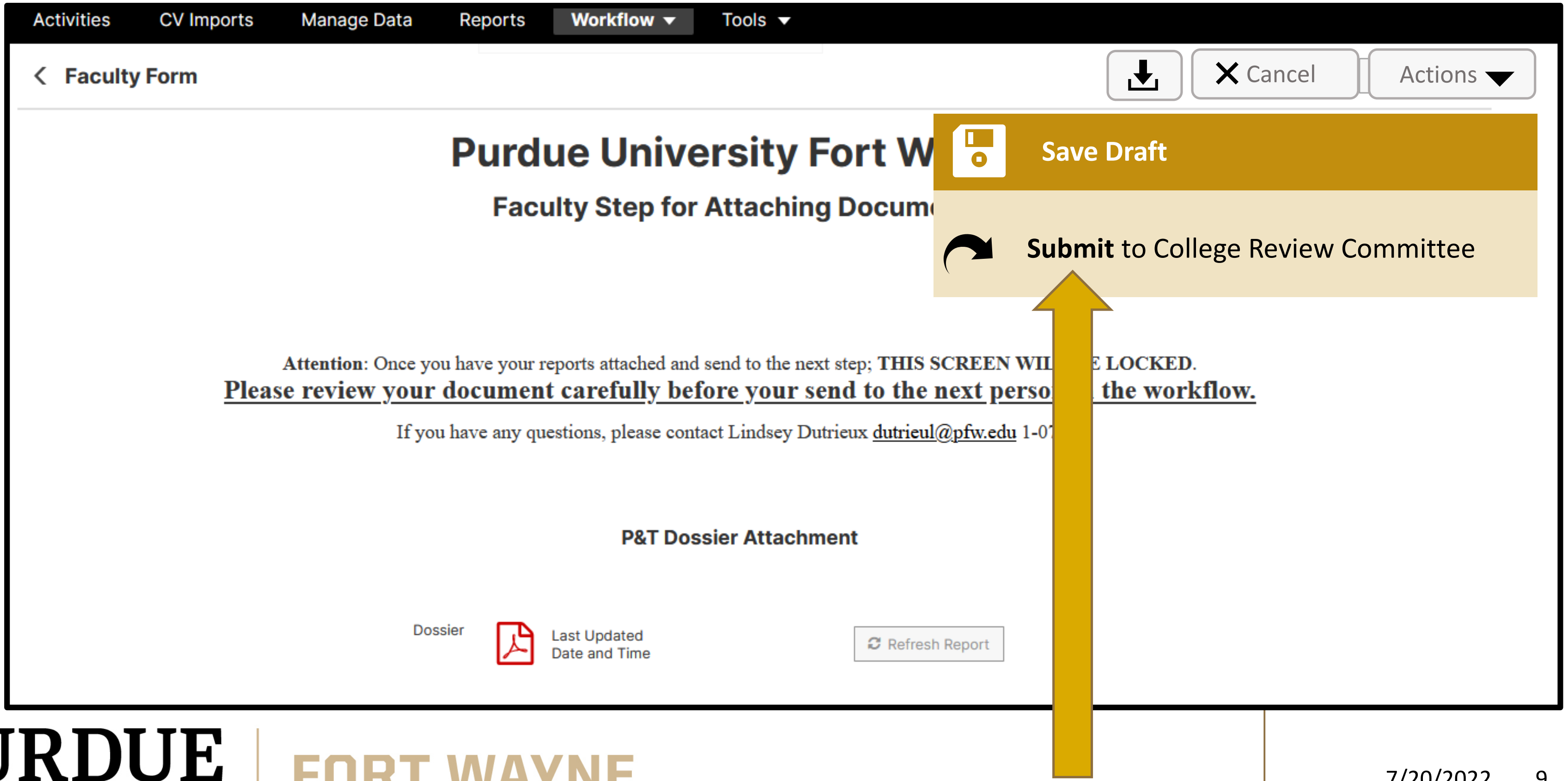
The submission forms available to our faculty are customized for each specific process and step by the Workflow Administrator. Certain fields may be set as required. This is a configuration choice made when the form was created. Based on the type of fields selected, users may also have rich text formatting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

The process may also have been configured to automatically include a **Self-service report** from Faculty Success. This report is generated when the process launches. **Faculty have the ability to preview the report**. If a faculty member notices any issues in the report or realize that additional activities are needed, they can:

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

Submitting a Step

Once a faculty member's submission is complete and ready for reviewers, they can simply click the **Submit** option on the Actions menu to move the materials to the next step in the process. At this point, the submission materials are locked (including any reports that have been attached).



Recalling a Step (Chairs, Deans, Admins only)

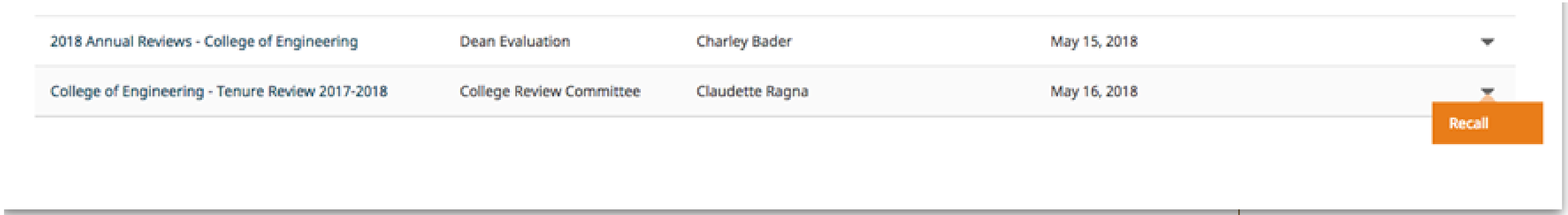
If you have already submitted to the next step, you can recall the submission to:

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

In the 'Tasks' menu for Workflow

1. Click the arrow under Actions
2. Choose Recall

Note: Once the next step has begun (exp. Faculty Member starts reviewing) the recall option is no longer available

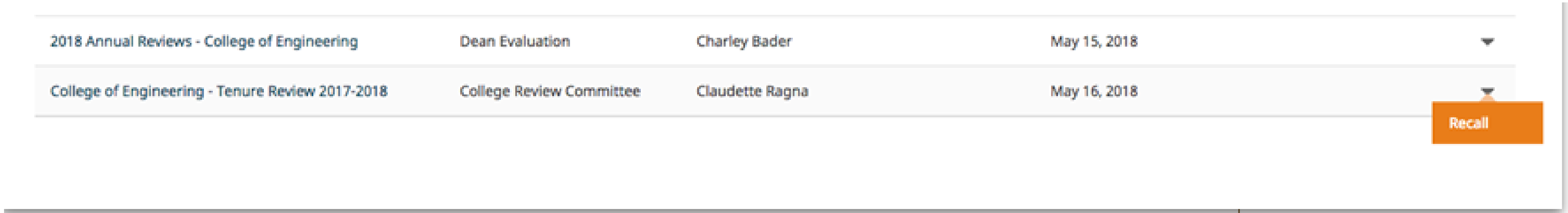


Sending Back a Step (Chairs, Deans, Admins only)

If you need the faculty member to make adjustments to their submission you can use the 'Actions' button on the top left to 'Send Back to Faculty Member' with a not on changes needed.

1. Click the arrow under Actions
2. Choose Send Back to Faculty Member

Note: Once the next step has begun (exp. Faculty Member starts reviewing) the recall option is no longer available



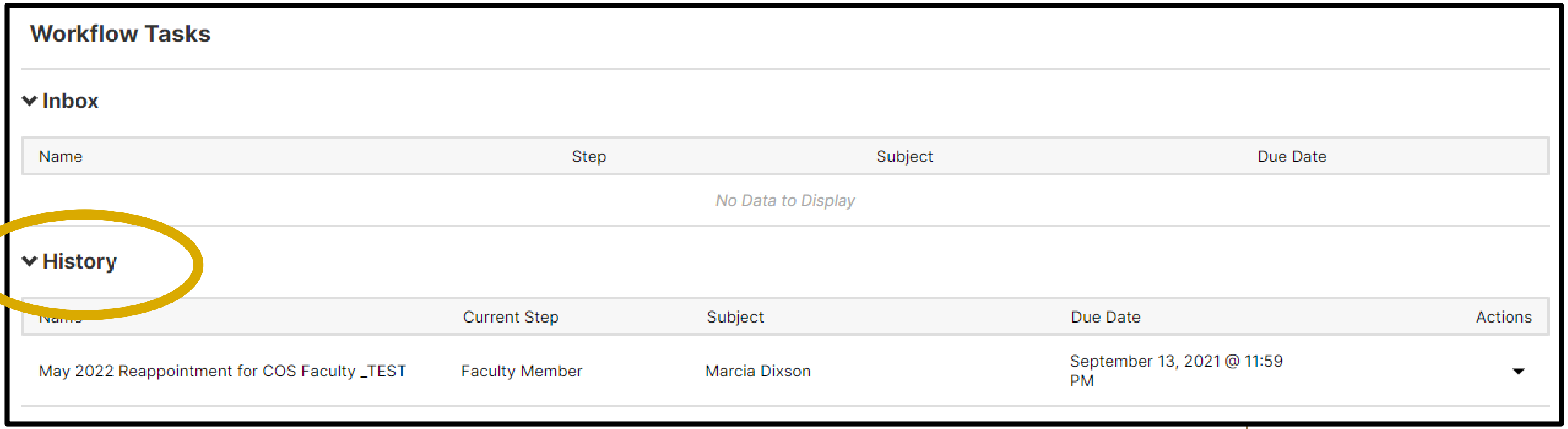
Accessing History

After a subject has advanced the process to the next step, they will see the task move from the Inbox to the History section in Workflow. There, they can see where in the process the submission stands as it advances through each future step and review the content of the submission and the fields completed by reviewers.

The historical record will remain available to the subject for future reference.

To access history:

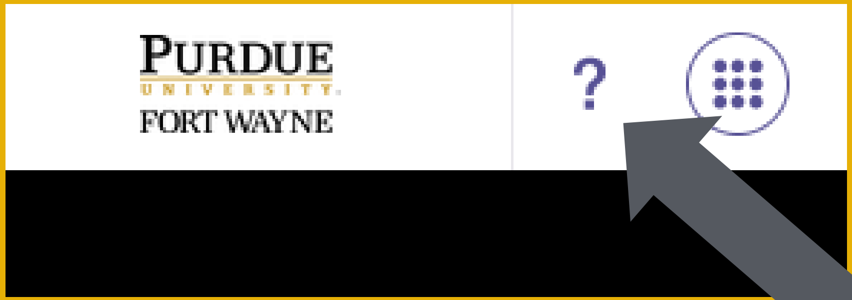
1. Log into Faculty Success
2. Click the Workflow tab
3. Locate the 'History' section from the drop-down options



Help Tools

[redacted]

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



Q&A

Additional Resource Links:

https://support.watermarkinsights.com/hc/en-us/articles/4409231918491-What-is-Workflow-

https://support.watermarkinsights.com/hc/en-us/articles/4409239981851-How-to-Review-and-Contribute-to-a-Submission

https://support.watermarkinsights.com/hc/en-us/articles/4409240034843-Workflow-Onboarding-Curriculum

THANK YOU