ACTIVITY INSIGHT/ FACULTY SUCCESS

REFERENCE GUIDE

UPDATED: 2022-12-12

Overview

Activity Insight/Faculty Success (AI/FS) is Washington State University's tool for collecting faculty information for annual reviews and other reporting purposes. It is a browser-based tool hosted by the third-party company Watermark and administered by WSU's Office of Institutional Research. AI/FS enables faculty to build reports on teaching, research, and service activities.

Activity Insight/ Faculty Success sources faculty information directly from internal WSU records (including Workday, myWSU, and ORSO), but faculty members can also add or edit items. Edits are by manual entry, file upload, and/or linking to third-party databases such as ORCID.

This tool has activity "screens" that collect similar activities under one heading and "groups." Screens are where adds/edits occur. FS/AI has two basic types of screens to enter data: static and dynamic. Static screens collect data that are fixed and not likely to change, and faculty cannot modify some of the fields on this screen. If changes are needed, faculty are advised to contact their unit admin or visit Workday or myWSU. Faculty can only enter one record on a static screen. By default, there are some static screens in FS/AI: Personal and Contact Information, Permanent Data, Security and Permissions, WSU Academic Appointment, and WSU Positions. Dynamic screens collect activity data encompassing multiple individual activities or data that faculty must capture and report for a specific time. Since FS/AI enables a user to create multiple records, faculty should use this structure to capture data for each activity as a single record.

A typical workflow for a faculty member might look like this:

Login → Browse information → Verify accuracy → Edit existing items → Add new items → Generate a report (e.g., "Annual Report") → Submit to the department chair.

Useful Links

Provost's overview: https://provost.wsu.edu/annual-review/activity-insight/

Direct login: http://ai.provost.wsu.edu/

Reference manual (this document): https://provost.wsu.edu/documents/

FAQs: https://provost.wsu.edu/annual-review/activity-insight-liaisons/activity-insight/activity-insight-faqs/

Support and Training: https://provost.wsu.edu/activity-insight-support/

Training Videos: https://provost.wsu.edu/annual-review/activity-insight/activity-insight-videos/

WSU Reporting Requirements (table):
https://provost.wsu.edu/annual-review/activity-insight/university-reporting-requirements/

Helpdesk: https://jira.esg.wsu.edu/servicedesk/customer/portal/44/user/login?destination=portal%2F44

Getting Started

This guide introduces how to use **Activity Insight/Faculty Success** to log activities relevant to your annual review. In this guide, you will find step-by-step instructions on adding or editing an activity, explaining which activities should be listed in which sections, who to contact when you need assistance, and more.

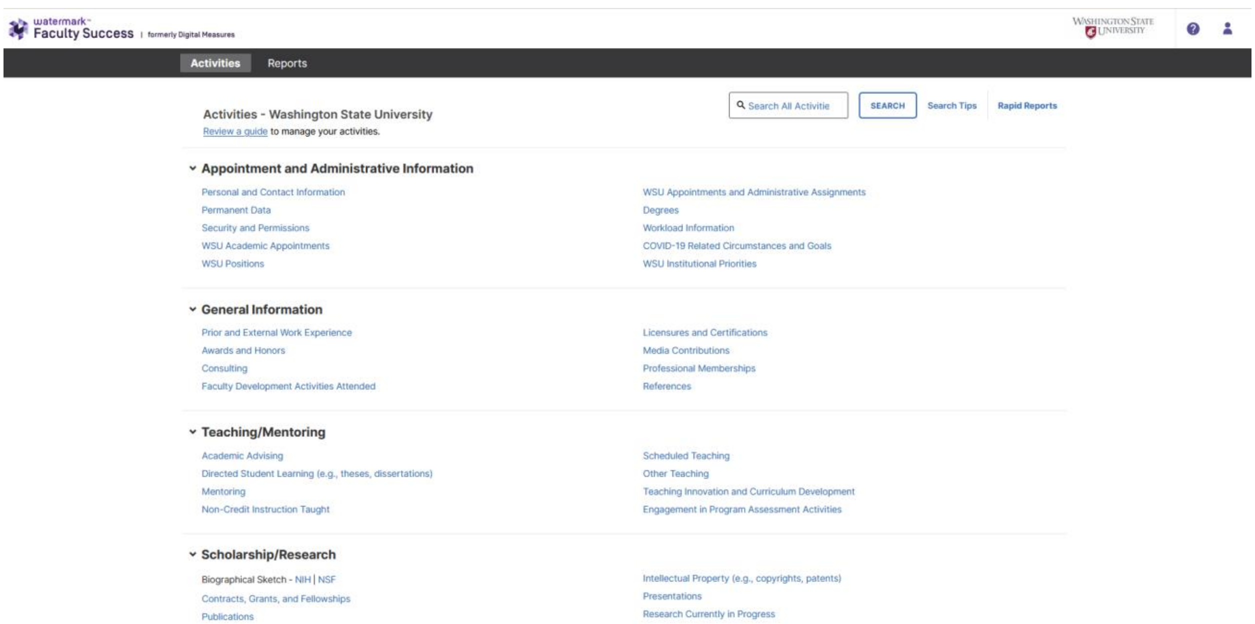
Screen-specific Instructions

This guide includes a page for many screens you will encounter in Activity Insight/Faculty Success. Each screen page provides step-by-step instructions on how to add or edit an item. Note that screen-specific sections can be found above the step-by-step instructions on many pages.

To log in, visit https://provost.wsu.edu/annual-review/activity-insight/, then click "**Activity Insight/Faculty Success login.**" Enter your WSU credentials to log in (username and password). You can also access the portal through the direct link: https://www.digitalmeasures.com/login/wsu/faculty/. If you click on the link and it does not work, please copy and paste it into your browser.

Summary Screen View of Activities

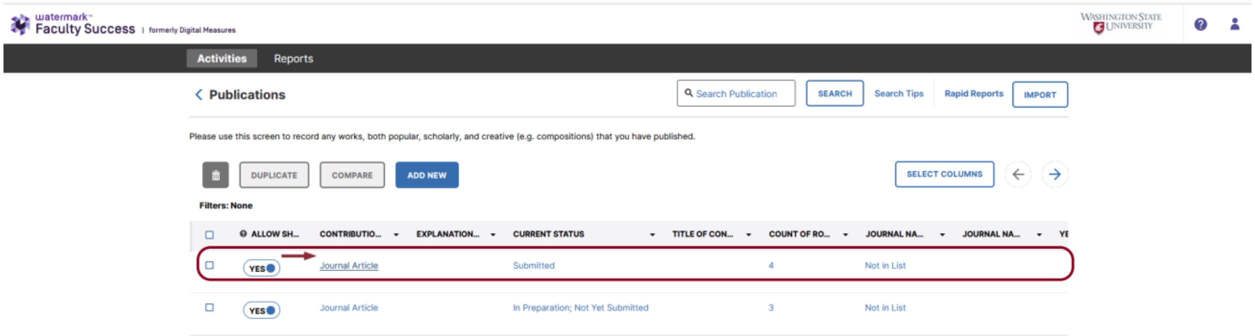
The summary screens provide a list of your activity screens. It can present your saved records in a table format and allows you to sort and search so that you can easily find records. You can view your summary screen when data are entered in Activity Insight/Faculty Success. Each summary screen has been pre-set with which fields you will see in the table. You can customize your summary screen table. However, it is recommended that you have no more than 5-7 fields viewable on your summary screen. The new dynamic features of summary screens were introduced in the Summer of 2021. The redesigned activities summary screens included the table format, select columns, column scrolling, and sorting and filtering.

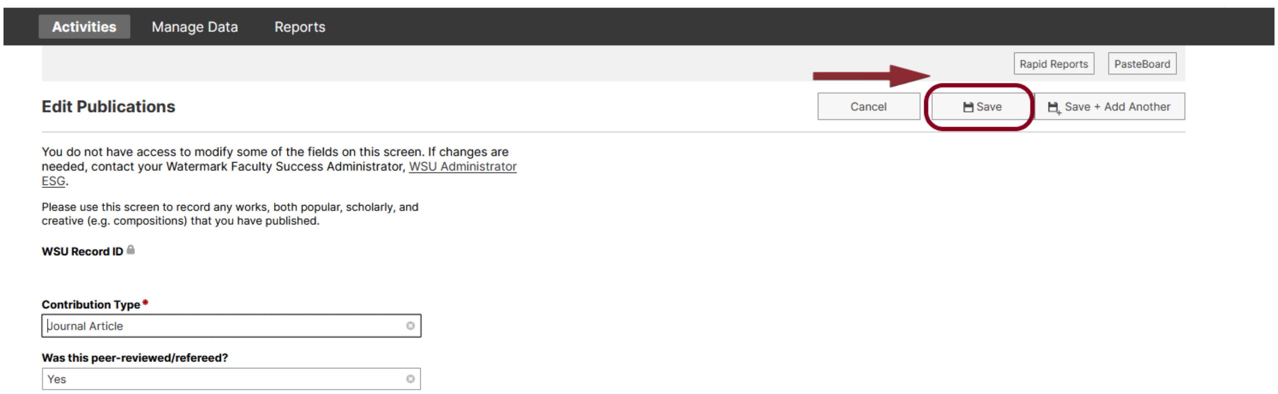


Adding vs. Editing an Activity

- **Adding**: If you do not see an activity already listed, you will want to add a new entry following the instructions found in this guide.
- **Editing**: If an activity already exists, you will want to edit it instead of adding a duplicate entry to update its information. For example, if a publication previously listed in Activity Insight/Faculty Success has since been published, you would want to edit the entry of the submitted publication to include the published date. If you added a new entry for this purpose rather than editing the existing entry, this publication would be listed twice.

- To edit an existing activity, click on the activity, make the edit and after editing the activity, click on save, as seen below.

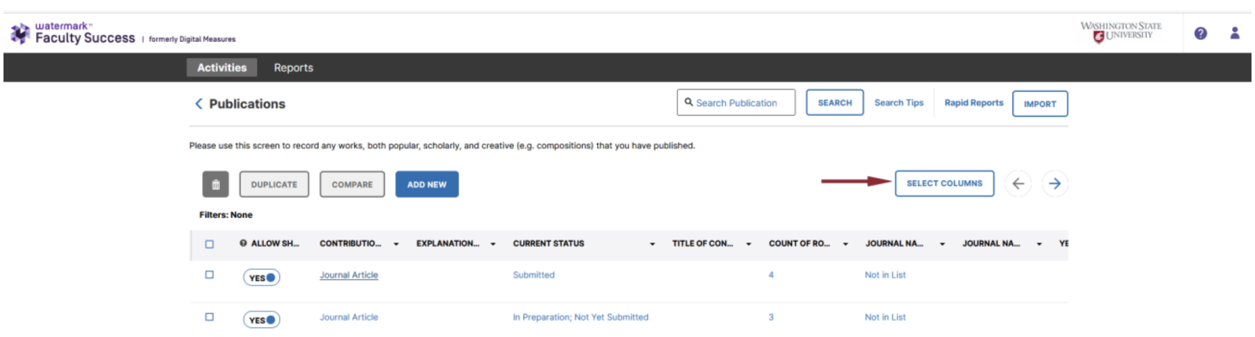




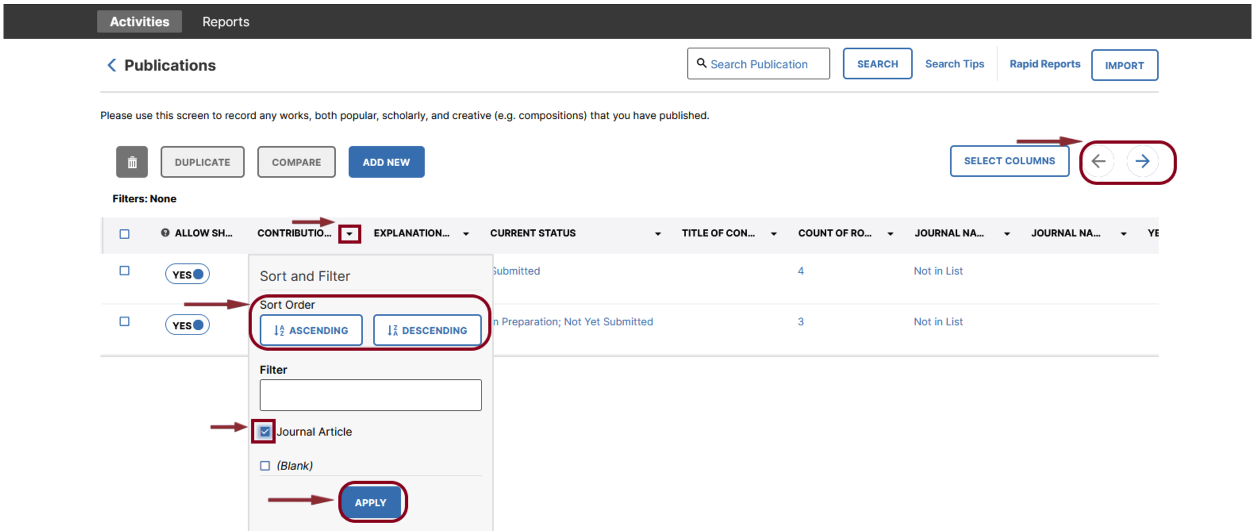
Sorting, Filtering, and Selecting Columns on a Summary Screen

For each screen you click on, you will see a summary screen of the activities you entered or that were loaded into Activity Insight/Faculty Success from a WSU data system. The summary screen enables you to select columns to display, scroll over to view all the activities you have chosen, and sort and filter activities according to your preference. Below is an example of a summary screen of entered activities for the Publication Screen."

Click "**Select Columns**" in the top right corner to select the activities you want to display. Then click on "**Update**" to modify the columns you want to display.



Click the "**Left and Right Arrows"** button next to the selected columns to scroll over your activities. To sort your activities according to your preference, click the "dropdown" button close to the activity, then choose either the "**Ascending" or "Descending**" options. Also, you can filter your activity by clicking the box close to the activity you want to view under "**Filter**," then click on "**Apply**" to effect the changes.



Required Fields to Save Activity

Entering a year is **REQUIRED** to save a record. Screens where this is an exception are:

- “Citations” (only visible to some Colleges)
- “Permanent Data”

How to Enter Dates

- Including a **START** and **END DATE** indicates the event happened over the specified time frame.
- Including only a **START DATE** indicates the event began on the date listed and is ongoing.
- Including only an **END DATE** indicates the event happened **ONLY** on the date listed.

  Record the following in the end date if the event took place over:
  - **ONE DAY:** enter the day, month, and year.
  - **ONE MONTH:** enter only the month and year.
  - **ONE YEAR:** enter only that year.

Closing Completed Activities

If you have completed an activity currently listed as ongoing, make sure to edit the activity to close the date range. If an end date is not entered, the activity will continue to appear in reports as a current event. To close the date range for the activity, edit the activity to include the date the activity ended in the end date. Note that the event should already have a start date if indicated as an ongoing event (see How to Enter Dates above).

Where to Record an Activity

If you are not sure what to classify as an activity, most pages have examples of what does and does not qualify as that type of activity. For a more comprehensive list, see the **Activity Index by Screen** table found toward the end of this guide.

University Reporting Requirements

The following is a list of minimum activities required by the Provost's office. For clarification on completing a section, please refer to detailed information for each section found later in this guide. Contact your chair and dean for a comprehensive list of your department and college requirements.

Personal and Contact Information

Please verify that your **Work Location, Office information,** and **Campus** are correct. If they are not correct, please ask your unit or departmental administrator (whomever handles personnel actions and works with Workday) to correct them in Workday. **Work Location** is from Site Location in Workday.

Security and Permissions

The departments and colleges listed will be based on the past six years of your position and academic appointment information once Workday contains all of this information. Currently, for enabled accounts, it is based on the information available in Workday. Please verify that your **college and department affiliation(s)** is correct based on your paid salaried positions and academic appointments. **Unpaid positions should not be listed.** If you need to change this information, please get in touch with the person who handles human resource actions for your unit or department. Note that if you have more than one paid position or academic appointment, all should appear here. The college information on this screen grants accesses to specific screens (for instance, **Clinical Service** screens) for which you may have had reporting requirements in prior years.

Degrees

NWCCU Accreditation and many program-specific accrediting bodies require WSU to report the **highest degree, year, and degree-granting institution** for all faculty. In addition, metrics on the percentage of faculty with terminal degrees are used in rankings surveys and Common Data Set reporting.

Workload Information

The information on this screen, particularly the allocation of instructional effort, has been used in a report mandated by the State of Washington. The data collected here is combined with instructional funds to estimate the costs of instruction by college and level (lower-level undergraduate, upper-level undergraduate, graduate/professional student). Note that the entries for the **"Total Workload"** section should add up to **100%,** and the entries for **"Instructional Workload"** should either add up to **100% or be left blank** if you do not have any Instructional Workload as indicated in the "Total Workload" section.

Awards and Honors

WSU Strategic Plan metrics include the **number of prestigious/highly prestigious awards to faculty** and **National Academy Members**. The awards are in the dropdown menu boxes on the **Awards and Honors** screen. If you have been awarded a prestigious or highly prestigious award, please select it on this screen.

Publications

The WSU Strategic Plan includes a metric for the "**number of publications co-authored by graduate students/undergraduates/post-docs**." If you publish a paper with a student or post-doc, please select that role next to the student's name in the author list. The individual must be a student or post-doc at the time the work was done, regardless of when the paper was published.

Personal and Contact Information (PCI)

Fields Locked for Editing in PCI

Your name and contact information is populated from **myWSU** and **Workday**. Please visit myWSU or consult with your unit or department administrator (whomever handles personnel actions) to request changes to the data in locked fields. You can change your office phone number in Workday if incorrect. You can initiate a change to your Working Title in Workday (Business Title). Please use the following links to access further information on changes to personal information:
https://wd5.myworkday.com/wsu/d/search.htmld?q=change%20name
https://wd5.myworkday.com/wsu/d/search.htmld?q=change%20my%20business%20title

See the next section for information on how to update your name.

Fields Available for Editing in PCI

You are encouraged to edit your information in unlocked fields on this screen.

Work Location Definition

Work Location information is populated from Workday.

Campus Definition

For the purpose of Activity Insight/Faculty Succes, the campus refers to campuses: Pullman, Tri-Cities, Spokane, Vancouver, Everett, and Global Campus. This information is populated from Workday.

When to Update Your Name in myWSU or Workday

If you use a name other than your legally given **personal name**, you may want to fill out the preferred name in your profile on myWSU or in the personal data section in Workday. The personal (or legal) name will be used for all reports unless you specify a **Preferred name**. Once a preferred name is listed, the reports will use the preferred name in place of your personal (or legal) name.

How to Update Your Preferred Name

You can change your preferred name in Workday or myWSU. To change it in Workday, you can enter **Change My Preferred Name** into the **Search** field at the top of the page and select **Change My Legal Name – Task**. More detailed instructions are found in the Workday Knowledge base in Confluence in the Workday Reference guide in the **Modify Personal Information** section.

To update your preferred name in myWSU, sign in to myWSU. Navigate to the **Homepage** using the dropdown in the middle of the top of the page and select **Profile**. With **Personal Details** selected, click the **Personal** tab; you should select **Preferred** from the **Name Type** dropdown menu. Fill in your preferred first and last names, then “Save.” Note that the layout of your myWSU page may be customized for your use; thus, the steps you need to take may differ slightly from these general directions.

How to Update Your Personal Name

Updating your personal name record can be initiated in Workday or by contacting Payroll Services. Please use the following link to find information from Payroll Service’s website on how to update your personal name: https://payroll.wsu.edu/name-change/

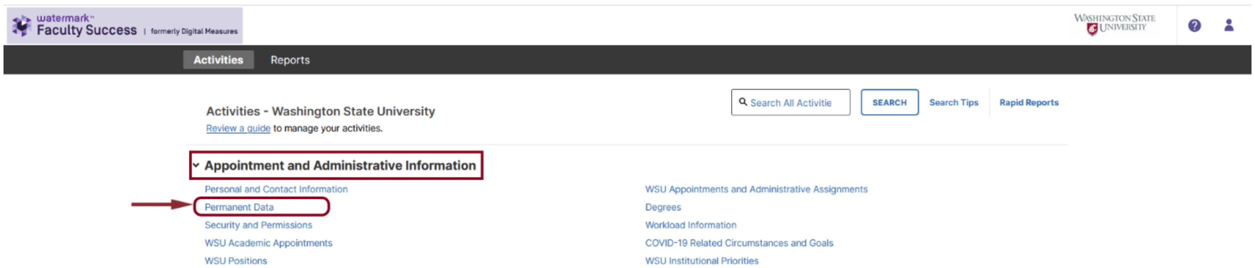
To change it in Workday, you can enter **Change My Legal Name** into the Search field at the top of the page and select **Change My Legal Name – Task**. More detailed instructions are found in the Workday Knowledge base in Confluence in the Workday Reference guide in the **Modify Personal Information** section.

Appointment and Administrative Information Screens

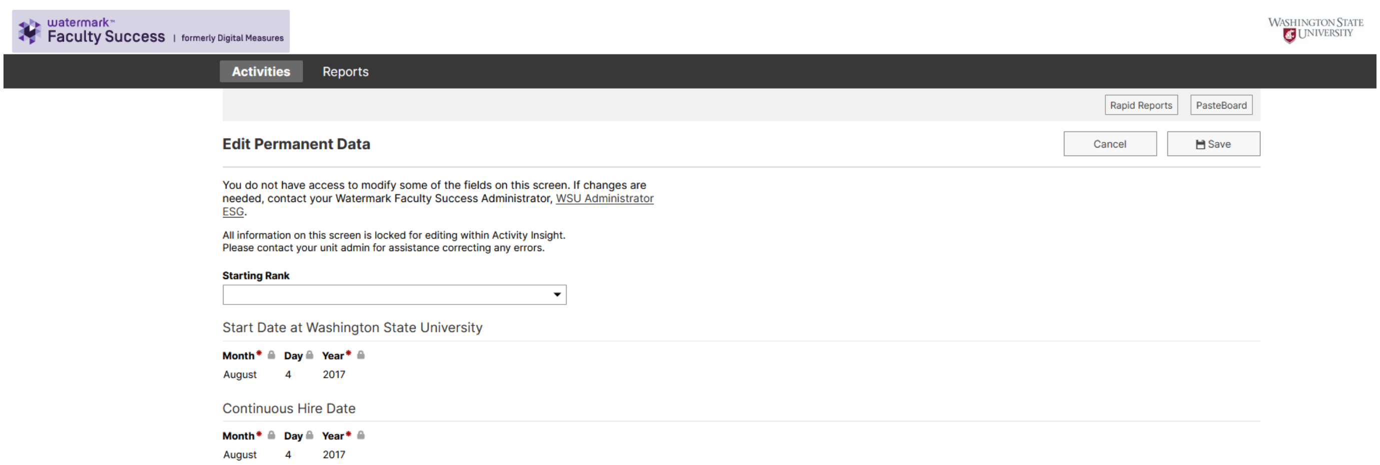
Permanent Data

Overview

All locked information on this screen comes from Workday. The **Start Date at Washington State University and Continuous Hire Date** fields refer to general employment at WSU and are not department or rank-specific. Continuous Hire Date would differ from your Start Date at Washington State University if you had a gap in employment. Please consult with your unit or department administrator (whomever handles personnel actions) to correct any errors in fields such as tenure status or dates related to your employment.



In the **rank advancement section**, you should list each rank you attained at WSU and the date you started working at the rank. Do **not** include ranks that you earned at previous institutions.



Security and Permissions

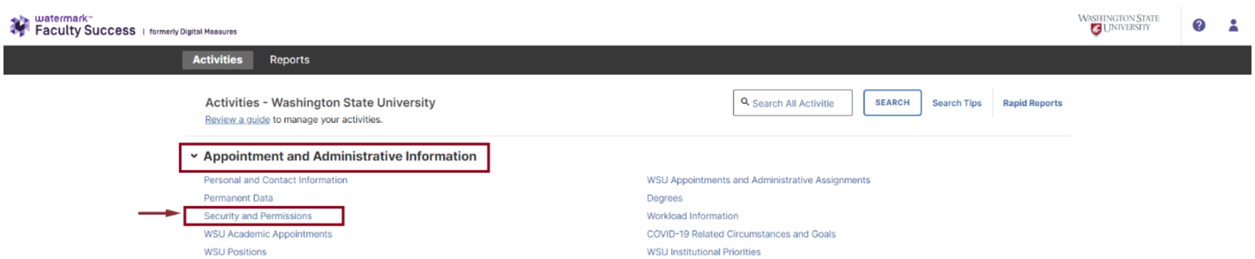
Overview

This screen is solely used to give access to screens and reports. Over time, it will show all salaried faculty positions/academic appointments for the past six (6) years. This information is populated from Workday university data and mapped to the Activity Insight/Faculty Success list of WSU colleges and departments. Supervisory Organizations and Academic Units pointing to campuses or units outside of academic areas are mapped to “Campus-Level and Other Appointments.” You should see joint positions/academic appointments listed here.

An individual’s screen permissions are assigned based on positions/academic appointments listed on this screen. The order of the colleges and departments listed has no meaning and is based on the order in the data set that populates the screen. There is no need for the order to be changed because the order does not matter in the assignment of access to screens and reports.

Reporting location and campus field information is from **Workday Site** and **Worker Campus** and are used in Activity Insight/Faculty Success to give administrators access to reports.

Errors in your reporting location, campus, and paid position/academic appointment information **cannot be corrected through Activity Insight/Faculty Success**. It should be reported to your unit administrator (whomever handles human resource or personnel actions) to be corrected in the administrative system so that you are sure to have access to all screens you need in Activity Insight/Faculty Success.



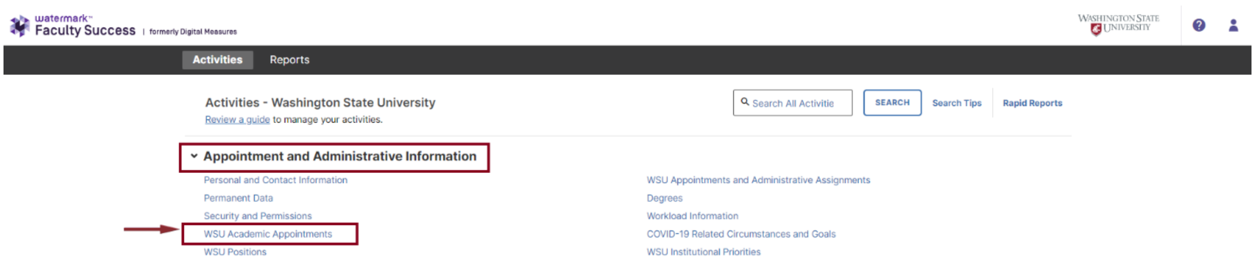
WSU Academic Appointments

Overview

Information on this screen is from Workday academic appointments and cannot be edited in Activity Insight/Faculty Success. All academic appointments listed in Workday appear in the list of appointments. Note that appointments that are not current may have an end date in the future. When you open an appointment, there is a field Current Academic Appointment at the bottom of the screen that indicates whether the appointment is current.

Errors in academic appointments cannot be corrected in Activity Insight/Faculty Success. All errors should be reported to your unit HR administrator to initiate a correction in Workday.

Information about academic appointments is found on the WSU **Academic Appointments** screen.

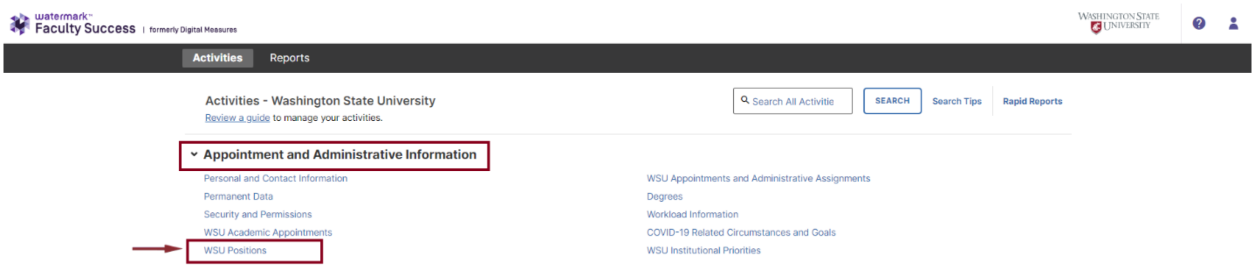


WSU Positions

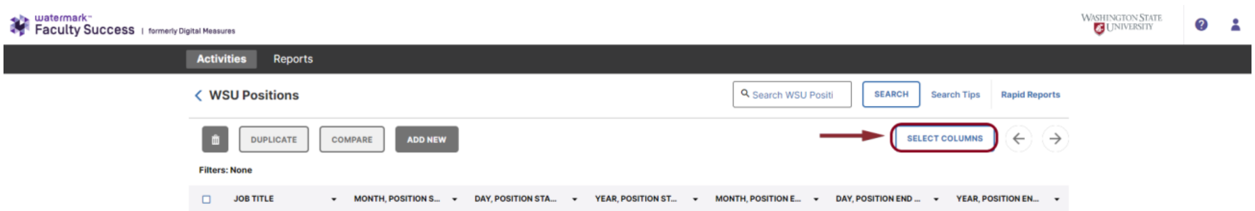
Overview

Information on this screen is from **Workday** positions. Positions listed in Workday appear in the list of WSU positions. There are two fields on the screen not populated from Workday where faculty can enter information regarding the position: **Description of Position** and **FTE**. If there are errors in the other fields on this screen, they cannot be corrected in Activity Insight/Faculty Success. **All errors should be reported to your unit HR administrator to initiate a correction in Workday**.

Information from the legacy administrative system, which is similar to the WSU Positions, is found on the WSU **Appointments and Administrative Assignments** screen.



Please notice that you can organize the information you see according to your preferences. Click **"Select Columns"** in the top right corner to select the information you wish to see.



Once your selection is complete, click on **'Update,'** and you will see the changes on the screen. You can also filter how the information will be displayed. To do so, click the arrow next to each column. With this, you will have the option to sort and filter.

Current Administrative Assignments (and Legacy/Read-only WSU Appointments)

Source

Primary information is from our legacy HR system (AIS), and secondary information is entered by faculty. You can enter your current Administrative Assignments if they do not appear elsewhere. However, you CAN NOT edit “Legacy WSU Appointments” because this screen contains READ-ONLY historical positions from the legacy AIS system and CANNOT be EDITED. For CURRENT information, please refer to the "WSU Positions" screen for current positions and the "WSU Academic Appointments" screen for current academic appointments.

Purpose

This screen is meant to contain all paid legacy-system WSU appointments held. You can add supplementary appointments and administrative entries for any positions not recorded in AIS.

Appropriate Items to Report

Graduate program director, program or research center director, academic director, and school associate director.

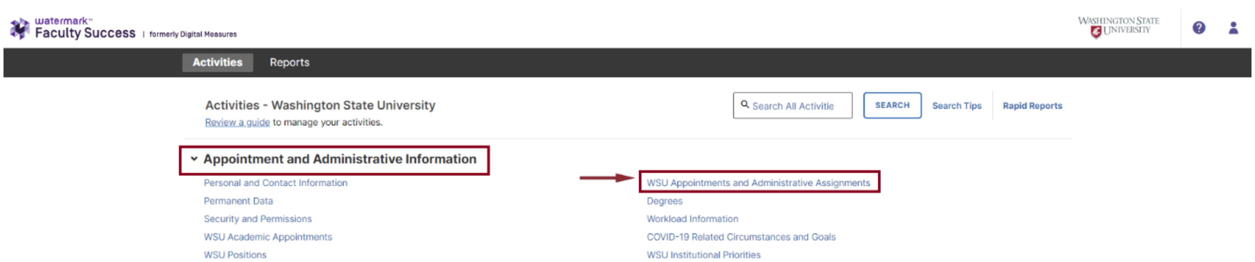
Inappropriate Items to Report

Non-WSU positions (record in Prior and External Work History) and unpaid service positions (record in appropriate Service category). More examples can be found in the **Activity Index by Screen** table toward the end of this guide.

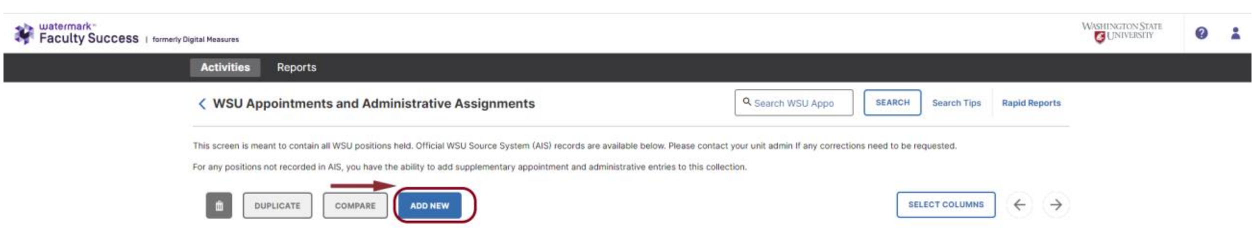
How to Add Items

Ensure the position does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

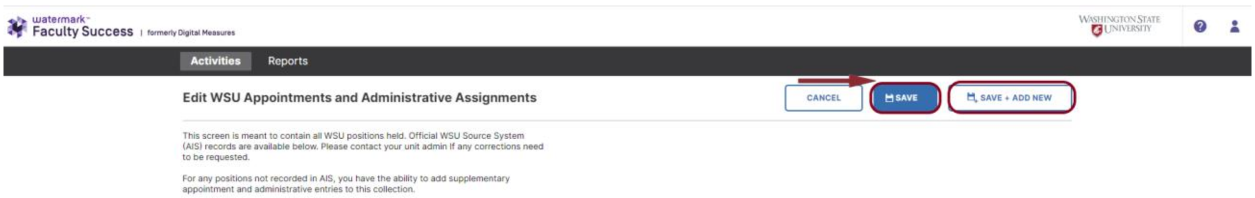
1. To add supplementary positions held at WSU not already listed here, select **“WSU Appointments and Administrative Assignments”** under Appointment and Administrative Information.



2. Once you’ve selected this screen, you should see all your positions pre-populated for you here, as they are recorded in AIS, along with their appointment titles, appointing departments, and appointment begins and ends dates.
3. Click “**Add New”** to add supplementary data not included in AIS (e.g., administrative assignments, endowed positions, etc.). Complete all fields for the activity which are required or relevant to your annual review



4. Entering a **Year** is required to save the information (For more information on date entering, refer to *Getting Started* section “How to add dates”).
5. Create a separate entry for each position held. For example, if you were a department chair and held an endowed position at the same time, **each position should have its own entry.**
6. Select **“Save + Add Another”** if you have more information to add, **or** select **“Save”** when you are done entering information for this screen.



7. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon to delete
8. When you are finished entering data on this screen, select either the **back arrow button i**n the top left or **“Activities”** to return to the main screen.

Degrees

Source
Faculty.

Purpose
Please use this screen to record your academic degrees held, most importantly, your **highest degree earned**. Please indicate the highest degree by selecting "**Yes"** next to the question, **"Is This the Highest Degree You Have Earned?"** Information on your highest degree earned is needed for NWCCU Accreditation. In particular, the area, degree-granting institution, and level of your highest degree are required to provide a general count of how many faculty members have earned a Bachelor's degree versus a Master's degree versus a Doctoral degree, etc., as their highest level of education.

Appropriate Items to Report
Formally-granted academic degrees, such as Ph.D., MD, MA, MS, BA, BS.

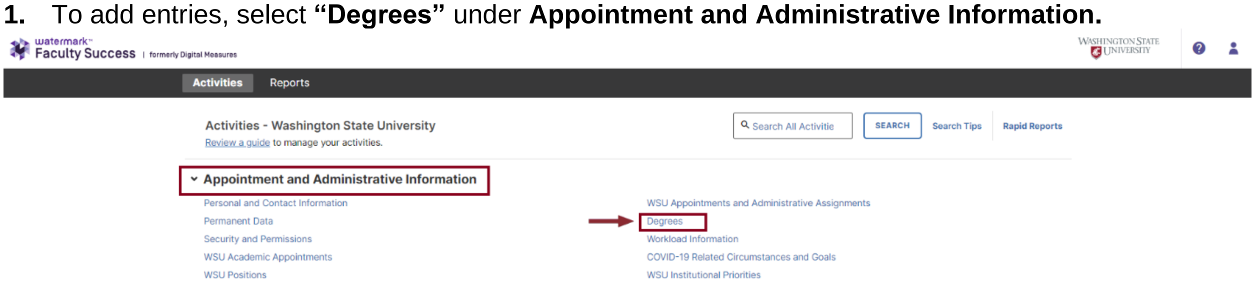
Inappropriate Items to Report
Professional licenses or certifications (should go on "***Licensures and Certifications***") and postdoctoral work (should go on "***Prior and External Work Experience***"). More examples can be found in the **Activity Index by Screen** table toward the end of this guide.

One Entry per Degree
Each degree should be listed separately. If you have more than one degree from the same institution, you will have multiple entries for that institution.

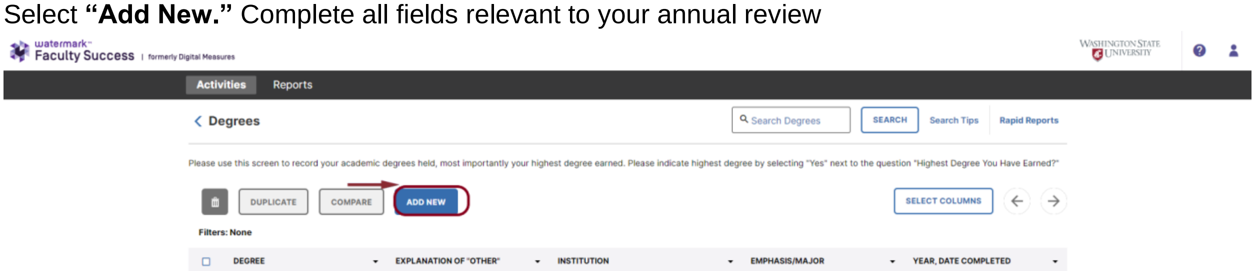
Required Fields
Country, Year Completed.

How to Add Items
Ensure the degree entry does **not** already exist. If it does exist, **edit** it. If it does not exist, **add** a new item as follows:

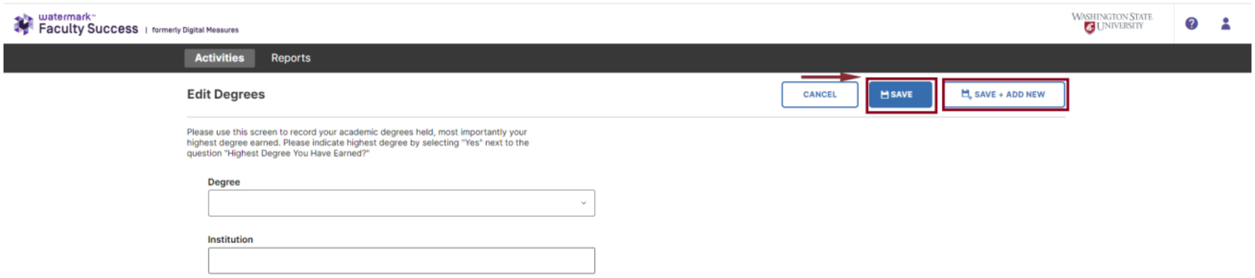
1. To add entries, select **"Degrees"** under **Appointment and Administrative Information.**



2. Select **"Add New."** Complete all fields relevant to your annual review



3. Entering the **Month** and **Year** when the degree was completed is required to save the information.
4. Select **"Save and Add Another"** if you have more information to add, or select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (for more information on editing existing activity, please refer to *Getting Started* section “Adding Vs. Editing”).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **“Activities**” to return to the main screen.

Workload Information

Source

Faculty.

Purpose

Please use this screen to estimate the amount of time you spend in each category listed.

Totaling Sections

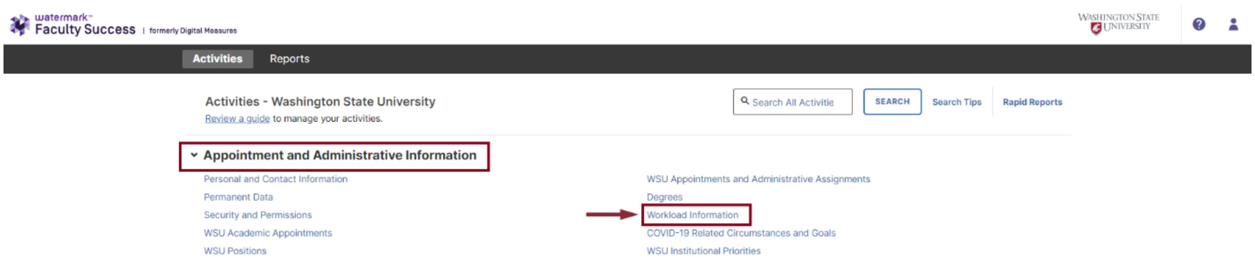
Note that **"Instructional Workload"** and **"Total Workload"** are separate sections. The total of all entries in the "Total Workload" section should add up to 100% for all faculty. In the "Instructional Workload" section, either the total of all entries should add up to 100%, **or** all entries should be left blank to indicate you have no Instructional Workload. The "Instructional Workload" section should only be left blank if you have also left the "Instructional" field blank for the "Total Workload" section, indicating 0% in both places.

If you are **part-time**, please indicate how 100% of your WSU time is used so that your entries for each applicable section add up to 100%.

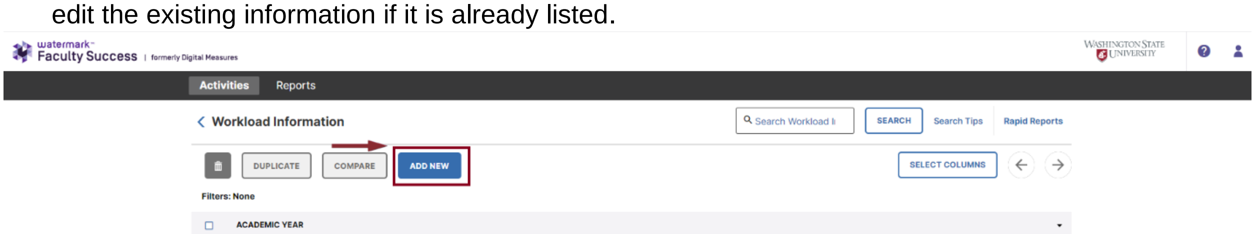
How to Add Items

Ensure an entry for the **Academic Year** you wish to update does **not** already exist, as there should be only **ONE** entry per academic year. If it does exist, click the entry to **edit** it. If it does not exist, **add** a new item as follows:

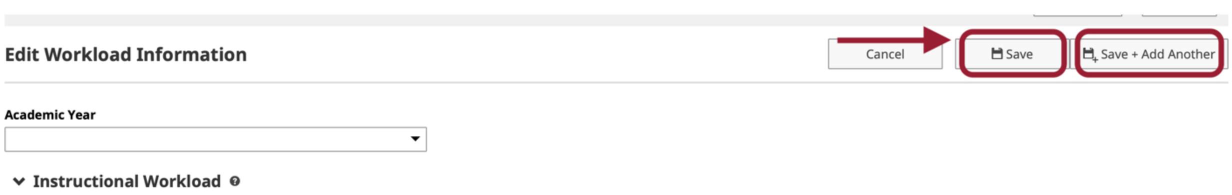
1. To add your Workload Information, select **"Workload Information"** under **Appointment and Administrative Information.**



2. Select **"Add New"** if the Academic Year you need to update is not already listed. Click the entry to edit the existing information if it is already listed.



3. Selecting an **Academic Year** from the dropdown is required to save the information. Note that there should only be **ONE** entry per Academic Year.
4. Complete all fields, ensuring that the entries for **"Total Workload" add up to 100%**. If you indicate having any instructional workload in "Total Workload," ensure the "Instructional Workload" entries **also add up to 100%**. Note that you may leave a field blank to indicate 0%.
5. Select **"Save + Add Another"** if you need to add information for a different academic year that is currently not listed, **or** select **"Save"** when you are done entering information for the selected academic year.



6. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (for more information on editing existing activity, please refer to *Getting Started* section “Adding Vs. Editing”).
7. When you are finished entering data on this screen, select either the back arrow button in the top left or **“Activities”** to return to the main screen.

COVID-19 Related Circumstances and Goals

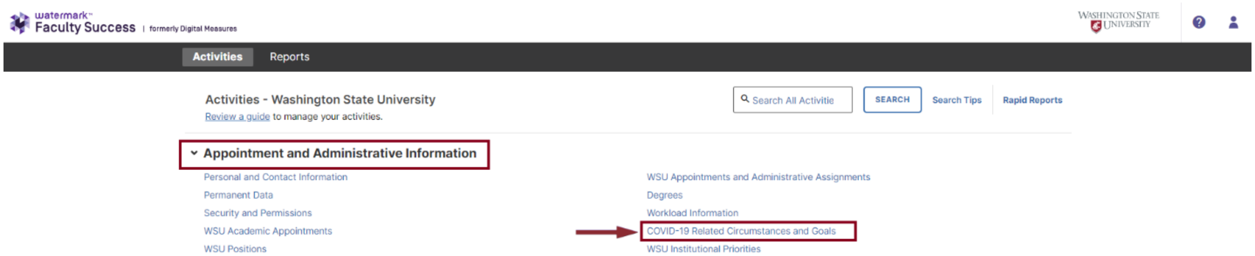
Source
Faculty.

Purpose
Use this screen to track the goals you set every calendar year. **CVs can be uploaded in this section at the very bottom.** You can also record the positive and negative impacts of COVID-19 on your work.

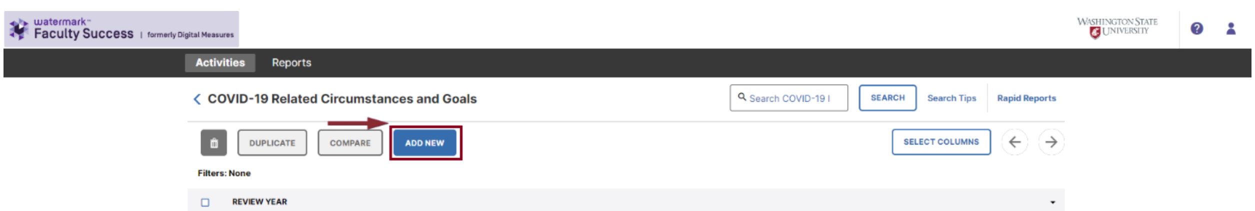
One Entry per Year
Each **"Review Year"** should have only **ONE** entry. To enter multiple goals for a single calendar year, once the entry for that year is open, enter your 1st goal under **"Goals for Upcoming Year,"** then click **"+ Add Row"** to create a new box to add your 2nd goal. Repeat this process to add all of your goals.

How to Add Items
If the year you wish to add goals to already exists, then **edit** it. If it does **not** exist, then **add** a new item:

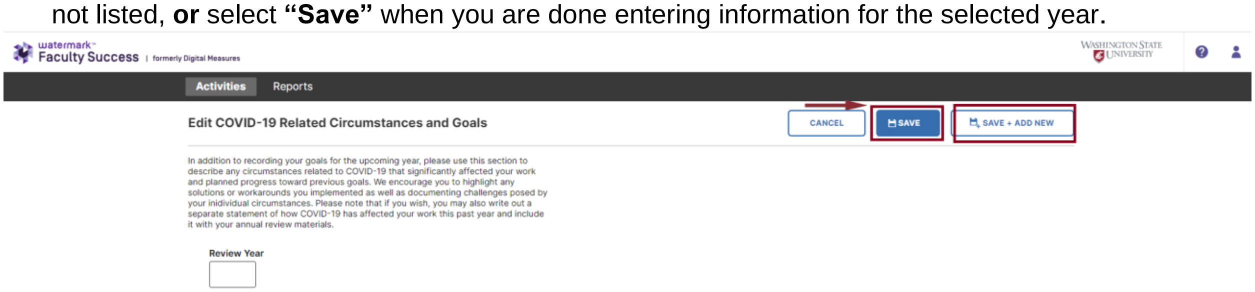
1. To add entries, select **"COVID-19 Related Circumstances and Goals"** under **Appointment and Administrative Information.**



2. Click **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **"Review Year"** is required to save the information. Note that there should only be **ONE** entry per calendar year, though you can include multiple goals within that year.
4. Select **"Save + Add Another"** if you need to add information for a different year that is currently not listed, **or** select **"Save"** when you are done entering information for the selected year.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (for more information on editing existing activity, please refer to *Getting Started* section "Adding Vs. Editing").
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

WSU Institutional Priorities

Source

Faculty.

Purpose

Please use this screen to record some specific priorities that are highly valued by the university and not easily reported in faculty performance review materials. Please describe your contributions and impact in the following four areas: (1) High-Impact Learning Practices, (2) Inclusion, Diversity, Equity, and Access, (3) Community Engagement, and (4) Internalization.

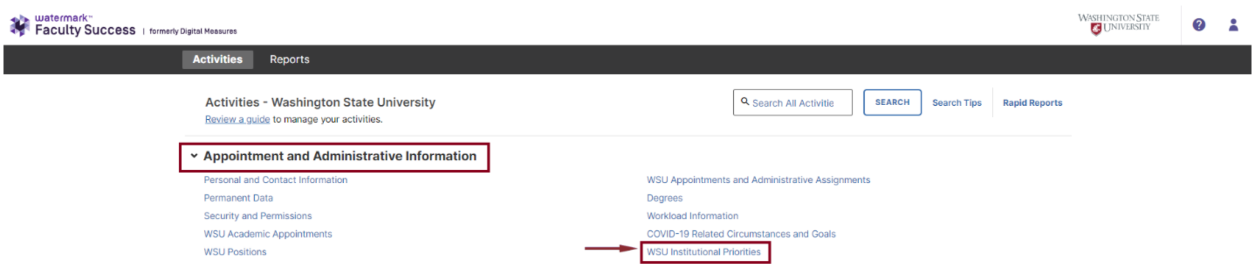
One Entry per Year

Entering a year is required to save a record. Please ensure you record all your contributions and impact for a given year in ONE single entry. However, only one entry will be included in your annual review report if you enter more than one record for a calendar year. All information for a review year should be entered on one screen.

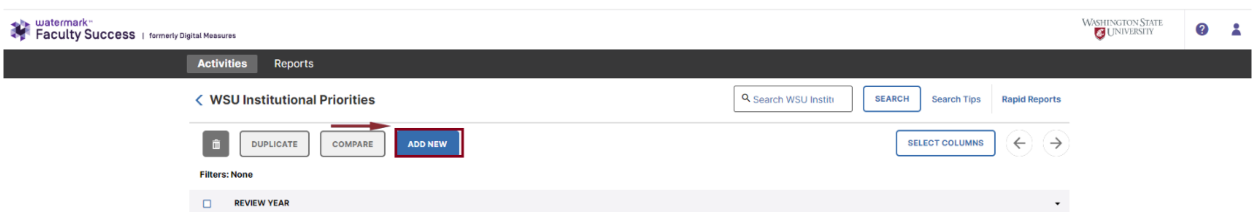
How to Add Items

Ensure the year you wish to add goals does **not** already exist. If it does exist, **edit** it. If it does not exist, **add** a new item as follows:

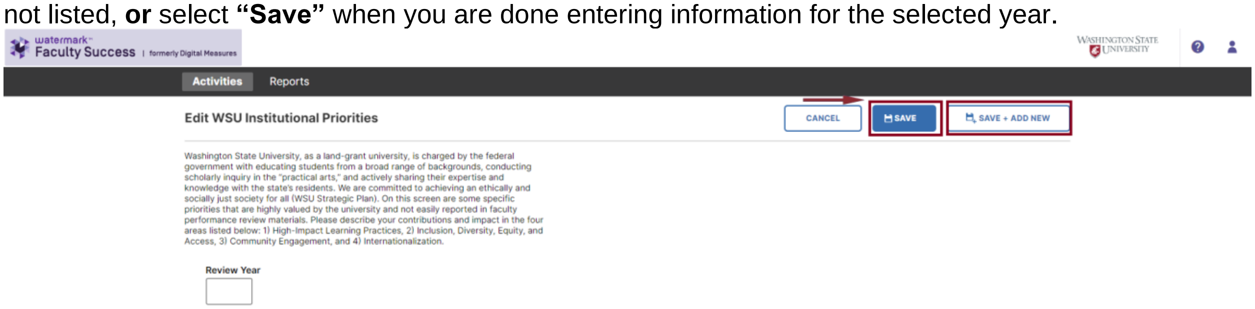
1. Select "WSU Institutional Priorities" to add entries under **Appointment and Administrative Information.**



2. Click **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **"Review Year"** is required to save the information. Note that there should only be **ONE** entry per review year.
4. Select **"Save + Add Another"** if you need to add information for a different year that is currently not listed, **or** select **"Save"** when you are done entering information for the selected year.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (for more information on editing existing activity, please refer to *Getting Started* section “Adding Vs. Editing”).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **“Activities”** to return to the main screen.

General Information Screen

Prior and External Work Experience

Source

Faculty.

Purpose

Please use this section of your profile to record relevant non-WSU work history and relevant work experience occurring both prior to and at the same time as your appointment at WSU but external to the university (e.g., small business ownership).

Appropriate Items to Report

Academic positions held at other institutions, business ownership, and professional positions held outside of higher education.

Inappropriate Items to Report

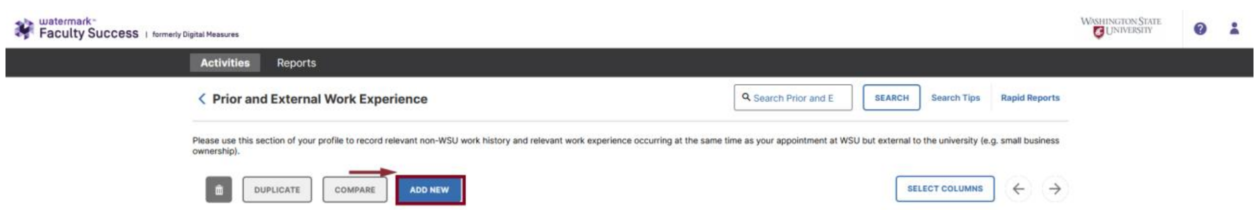
WSU positions (record in WSU Appointments and Administrative Assignments) and unpaid service positions (record in appropriate Service category).

How to Add Items

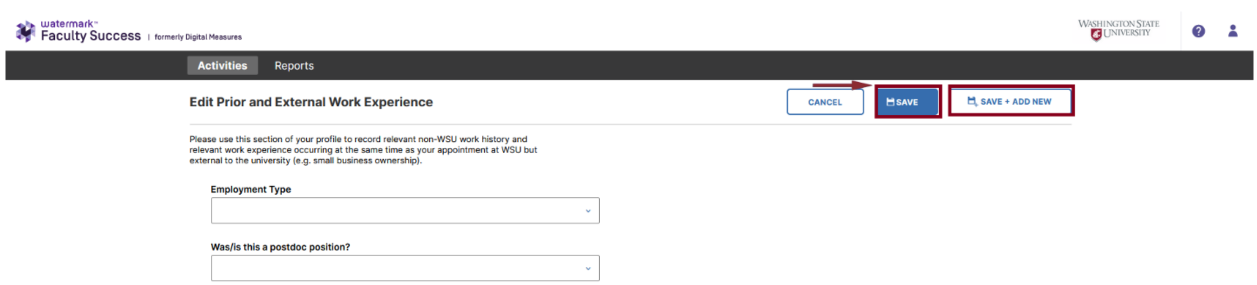
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add your non-WSU work experience, select **"Prior and External Work Experience"** under **General Information.**

2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*For more info on date entering, please refer to Getting Started section "How to Enter Dates" above).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (For more information on editing existing activity, please refer to *Getting Started* section “Adding Vs. Editing”).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **“Activities”** to return to the main screen.

Awards and Honors

Source

Faculty. You would find it here if you had pre-loaded data from WORQS (a prior annual review tool).

Purpose

Awards and honors capture recognitions, nominations, and honoraria given to faculty by their department, college, institution, or external organization.

Appropriate Items to Report

Awards (nominated or received), Fellows/Honorary Fellows, Outstanding Mentor/Advisor/Teacher, Excellence in Teaching/Research/Service, elected as a member, service recognitions, and team awards.

Inappropriate Items to Report

Grants and contracts, serving on faculty senate, awards to your students, invited papers/keynote speaker, editor/author, committee/board service, becoming an elected officer of a professional organization, becoming a member of the graduate faculty, patents, being cited within a research paper, affiliate appointments, press releases, and serving on a review panel.

One Screen per Award or Honor

Each Award or Honor should be entered as a separate item, meaning only **ONE** of the six (6) award fields should be filled in per entry. Once all the related information for the selected award is complete, you can create a new entry to enter information for another award. If you won an award that you currently have listed in Activity Insight/Faculty Success as Nominated, you would edit the nomination entry to indicate it was Awarded rather than creating a new entry, thus listing the same award twice.

Prestigious Awards Dropdowns

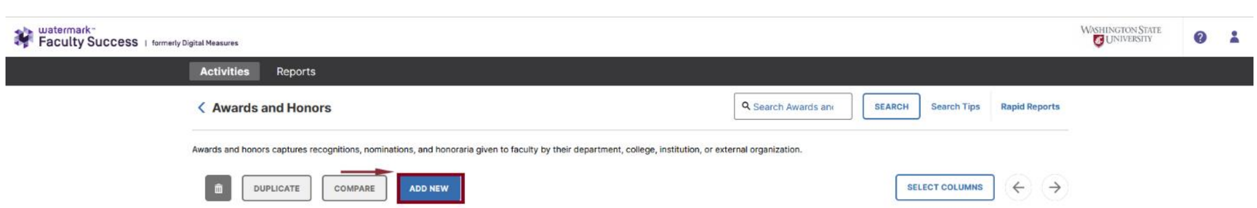
These are awards identified by the **National Academ**ies as prestigious; approximately 1,400 of these awards are organized into four (4) groups. The dropdown menus organize the awards by area of emphasis and are type-ahead enabled. Also, note the dropdown specific to **Washington State University Provost's Awards**.

How to Add Items

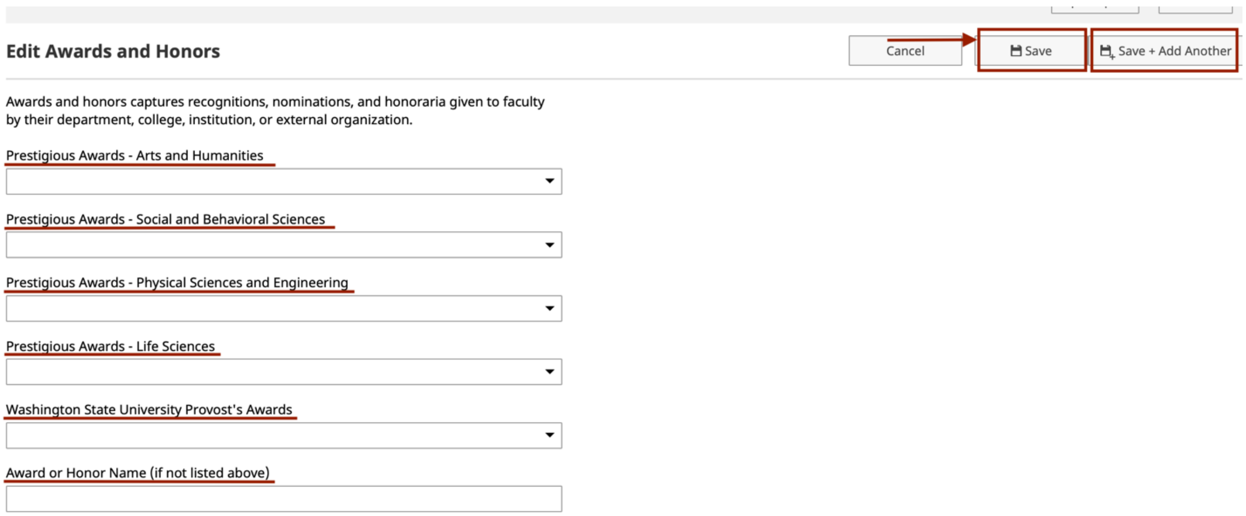
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Awards and Honors"** under **General Information**.

2. Click "**Add New"** to add new entries. Once you've selected this screen, you will see a list of the awards entered using your WORQS data.



3. **Each entry should specify only one of the first six (6) fields on the screen.** After selecting an award/honor or filling in the **"if not listed above"** description for an award/honor not found in the dropdowns, complete all fields for the activity which are required or relevant to your annual review.
4. Entering a Year for **"Date Nominated/Received"** is required to save the record. Note that there should be only **ONE** entry per award/honor per cycle of the award/honor.
5. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



6. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (For more information on editing existing activity, please refer to *Getting Started* section "Adding Vs. Editing").
7. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Consulting

Source

Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose

Use this screen to record consulting that you have done both as a member of WSU and as a private individual.

The WSU Faculty Manual defines consulting as follows: "Consulting, which must be consistent with the University's mission and enhance the faculty member's professional development, includes consulting […] for others in areas of professional competence for which Washington State University employs the faculty member."

Appropriate Items to Report

Paid or pro bono consulting for ad hoc projects, subject matter expert/scientific advisor, litigation support/expert witness, advisory boards, public health/animal health/health regulatory work/veterinary consults, outside evaluator, program/curriculum development, program evaluation, and product design improvement.

Inappropriate Items to Report

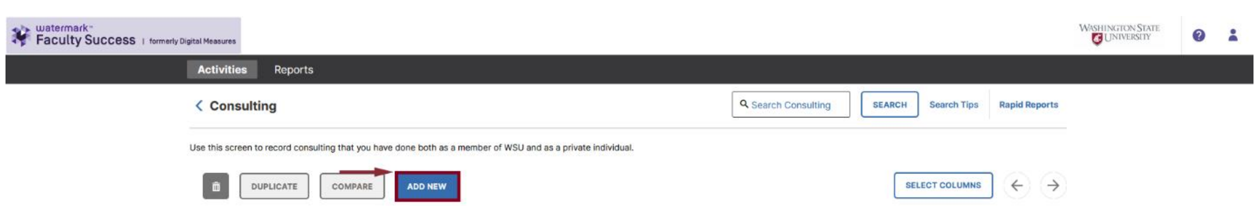
Owning a small business, long-term appointments with a single external firm, private practice in health/legal fields, editorial board/editor, conference presentations, mentoring, advising, teaching at other institutions, guest lectures, non-credit instruction taught, and editorships.

How to Add Items

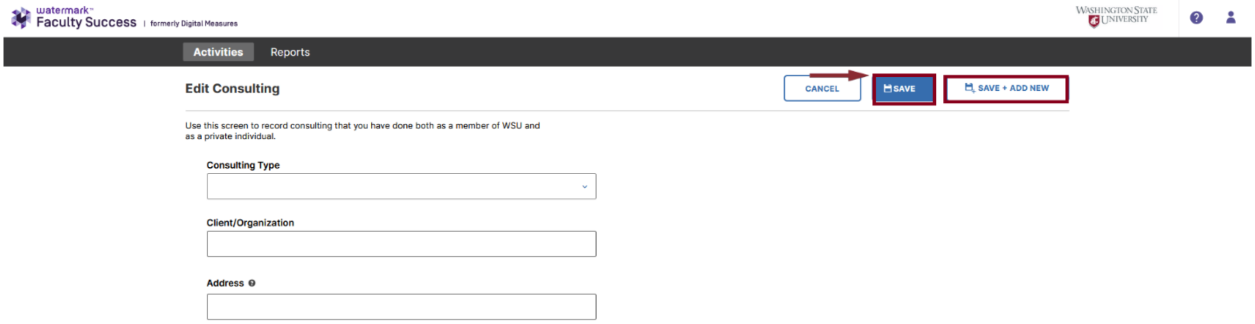
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Consulting"** under **General Information**.

2. Click "Add New" to complete all required fields relevant to your annual review. Once you've selected this screen, you may still see information imported from WORQS (a prior annual review tool).



3. Entering a **Year** is required to save the information (*for more info on date entering, please refer to the Getting Started section "How to Enter Dates" above).*
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (for more information on editing existing activity, please refer to *Getting Started* section “Adding Vs. Editing”).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **“Activities”** to return to the main screen.

Faculty Development Activities Attended

Source

Faculty. If you had pre-loaded data from WORQS (a prior annual review tool), you will find it here.

Purpose

Please record training and development activity here, including conferences that you attended but did not present.

Appropriate Items to Report

Continuing education programs, fellowships, internships, self-study programs, seminars, tutorials, webinars, conference attendance, and workshops.

Inappropriate Items to Report

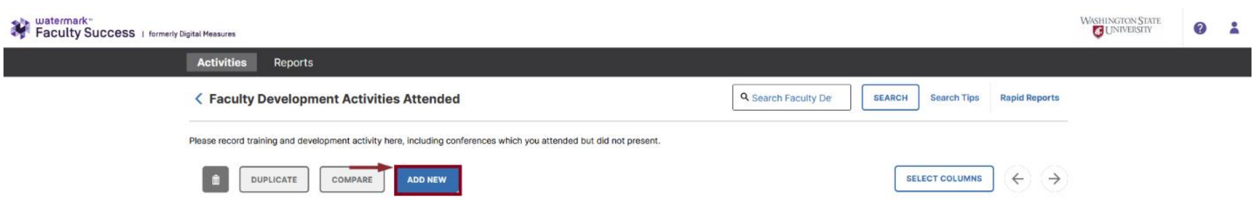
HRS-type training courses on purchasing cards, OBIEE and financial data warehouse training, travel, conference presentations, recertification of professional licenses, degrees obtained, journal subscriptions, and faculty meeting attendance.

How to Add Items

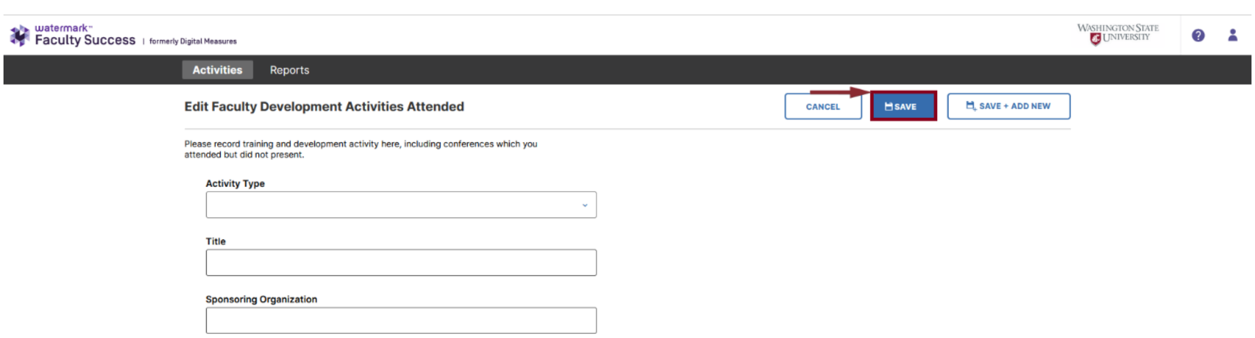
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. Select **"Faculty Development Activities Attended"** under **General Information to add entries**.

2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on the date, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Licensures and Certifications

Source
Faculty.

Purpose
Faculty should use this screen to record any professional licensures and certifications held.

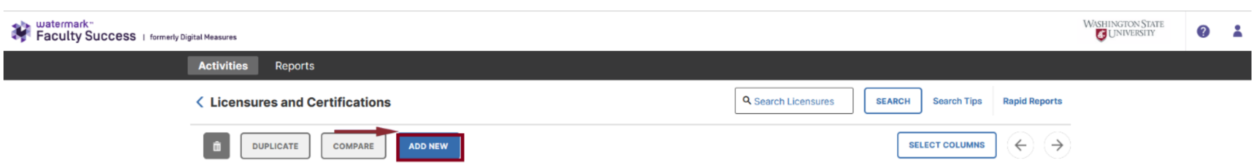
Appropriate Items to Report
American Bar Association, CPR certification, teaching certifications or endorsements, Certified Public Manager, Licensed Dietician, Licensed Professional Counselor, Certified Forester, commercial driver's license, Registered Nurse, Licensed Clinical Social Worker, Professional Engineer, and Pesticide Applicator License.

Inappropriate Items to Report
OBIEE, purchasing cards, and travel training. More examples can be found in the Activity Index by Screen table toward the end of this guide.

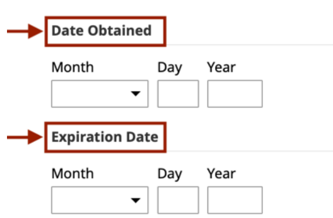
How to Add Items
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Licensures and Certifications"** under **General Information.**

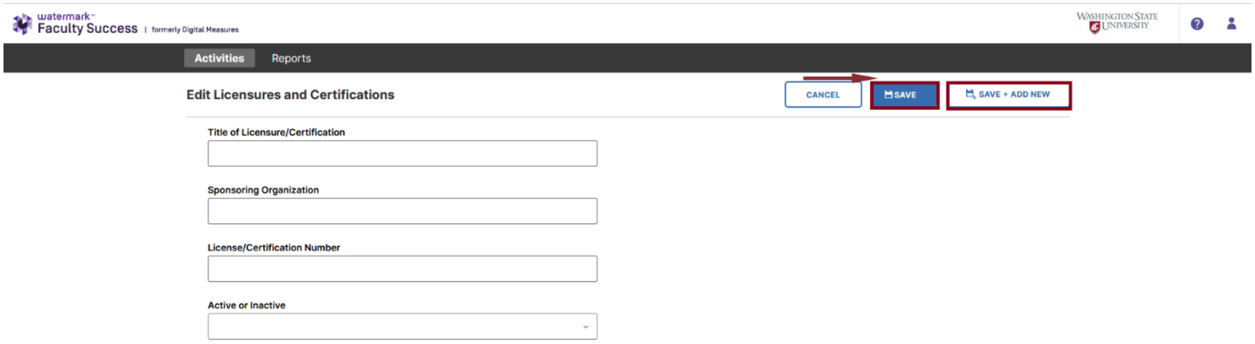
2. Click **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a Year in **"Date Obtained"** or **"Expiration Date"** is required to save the information.



4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Media Contributions

Source

Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose

Please use this screen to report your accomplishments in popular media outlets and/or participation as a university representative in popular media. Published works should be listed in Publications.

Appropriate Items to Report

Interviews of you that were conducted for radio/TV/print/social media/web articles, popular press articles/press releases that you wrote for radio/TV/print/social media/web articles, guest spots on a radio show that were broadcast, and programs that you participated in that were originally broadcast on radio/TV/social media.

Inappropriate Items to Report

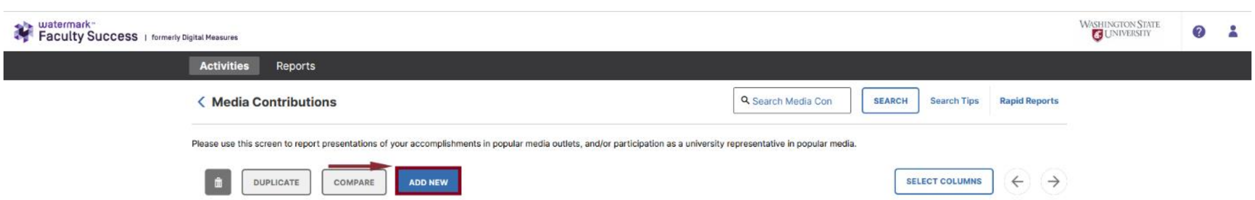
Participation as a private citizen in popular media and web or social media videos of you from a performance or event. For example, if you performed in a concert hall, list it on the performances tab, even if it was recorded and later uploaded to YouTube or a website.

How to Add Items

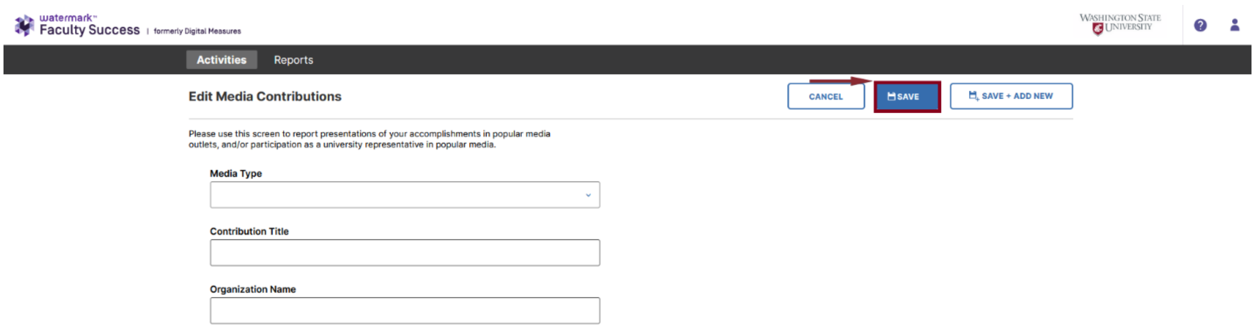
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. Select "Media Contributions" under General Information to add entries on this scree**n**.

2. Click **"Add New."** Complete fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on the date, please refer to the "How to Enter Dates" section on the Getting Started page***).**
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Professional Memberships

Source
Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose
Please use this screen to record memberships in organizations related to your profession or discipline.

Appropriate Items to Report
Honor societies and local, regional, national, or international organizations are made up of those in the same or similar professional fields.

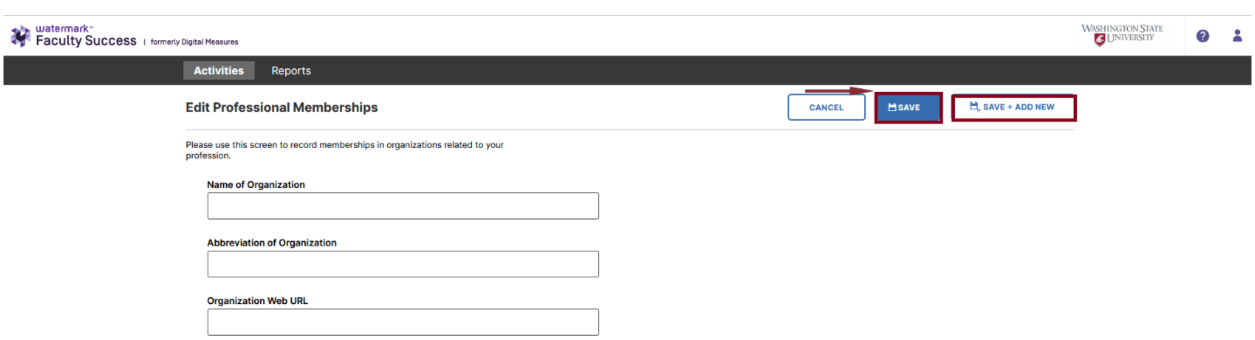
Inappropriate Items to Report
Service on university committees (should go on University service), and memberships in civic clubs or fraternal organizations (e.g., Boy Scouts, Kiwanis) – can be put on public service if you are in a volunteer role. Leadership roles in a professional organization should be recorded on Professional Service.

How to Add Items
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries in this screen, select **"Professional Memberships"** under **General Information**.

2. Click **"Add New."** Complete all fields for the activity relevant to your annual review.

3. Entering a **Year** is required to save the information (*for more info on the date, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

References

Source

Faculty.

Purpose

Use this screen if you are interested in including contact information for professional references on your curriculum vitae.

Appropriate Items to Report

Professionals (within or outside of academia) who can comment at an expert level on your accomplishments and abilities.

Inappropriate Items to Report

Relatives (regardless of their professional status) and people with a conflict of interest in your success.

Blank Record

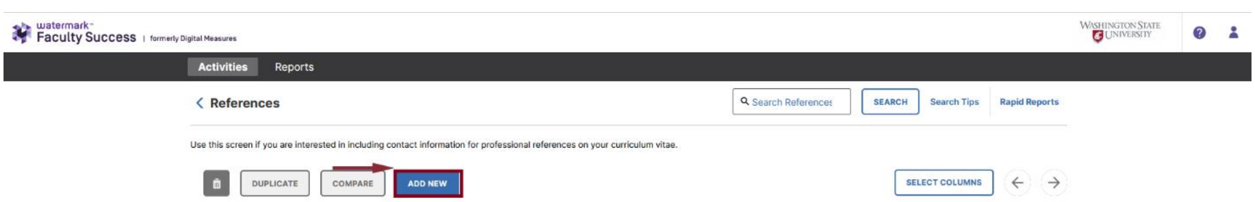
Note that saving a blank record is possible on this screen. If you have done so, you will see **"Item has blank values for the display fields"** on the Summary screen. **Blank records should be deleted.**

How to Add Items

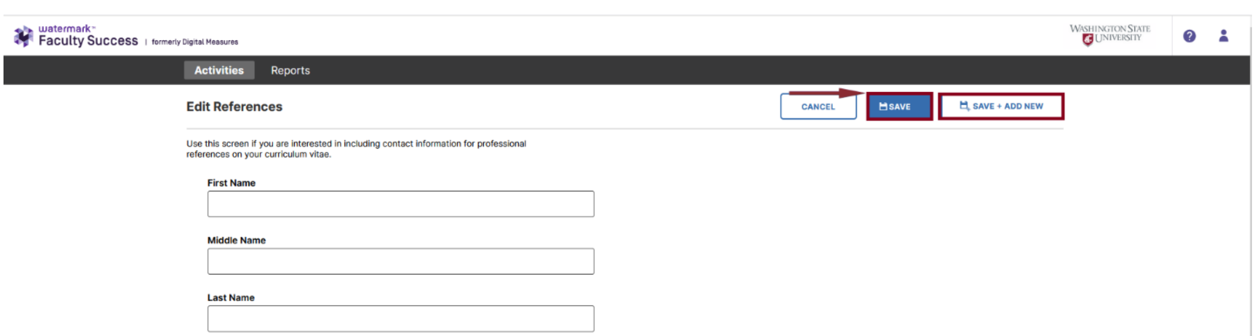
Ensure the reference is **not** already listed. You can edit the entry (i.e., update contact information, etc.) if listed. If they are not listed, **add** a new reference as follows:

1. Select "References" under General Information to add entries to this screen.

2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



4. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" in the Getting Started page*).
5. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Teaching and Mentoring Screens

Decision Tree for Teaching/Mentoring

Where should you enter information regarding your Advising, Directed Student Learning, Mentoring, or Scheduled Teaching?

Q: What is/was the type of advising, directed student learning, mentoring, or teaching?

Advising related to student's program of study or career options, NOT research/special projects. Helping students make decisions about which major to choose, navigating college, study skills, which courses to take, information about internships, information about applying to graduate/professional school, career options, and counseling regarding work/life balance. Postdoc supervision included.	Graduate committee membership, supervised research not in myWSU, and DNP advising.	Any mentoring or counseling given to NON-STUDENTS (e.g. postdocs, junior faculty, research staff).	WSU group taught courses or individually taught courses (e.g. 800, 700, 702, 499, etc.).
↓	↓	↓	↓
Academic Advising	**Directed Student Learning**	**Mentoring**	**Scheduled Teaching**

Academic Advising

Source

Sourced from advising tables in myWSU (primary); faculty (secondary).

Purpose

Academic Advising captures curriculum, major, minor, and career advising to students at all levels. Data on this screen are pre-populated from the advising tables in myWSU once each academic year on the 10th day of classes (Census) for the Spring term. After this date, faculty will need to update and edit this information manually. Once updated, the new information will override the updated information from myWSU. The counts of the student by academic career are a distinct count of students for whom a faculty member has a formal advising role. The counts are by academic career, summed across all programs. Because faculty often interact with or serve as an advisor to students without a formal advising role, faculty may modify the numbers in these fields to reflect their correct academic advising load more accurately. Faculty may also enter a description of the types of academic advising they conduct and an estimate of the amount of hours spent per academic year on advising activities if they wish.

Appropriate Items to Report

Advising related to student's program of study or career options, helping students make decisions about which major to choose, navigating college, study skills, which courses to take, information about internships, information about applying to graduate/professional school, career options, and counseling regarding work/life balance.

Inappropriate Items to Report

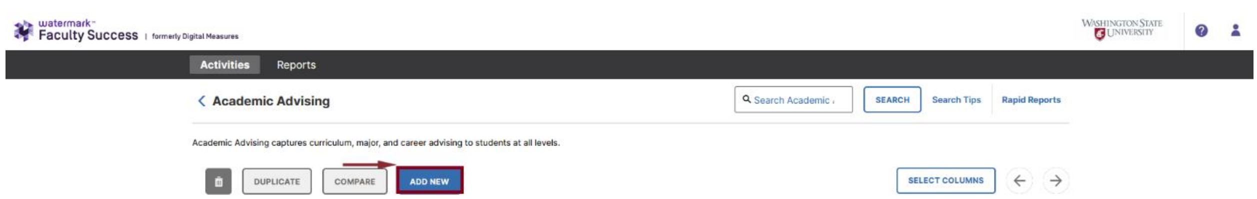
Advising related to research/special projects. More examples can be found in the Activity Index by Screen table toward the end of this guide.

One Entry per Academic Year

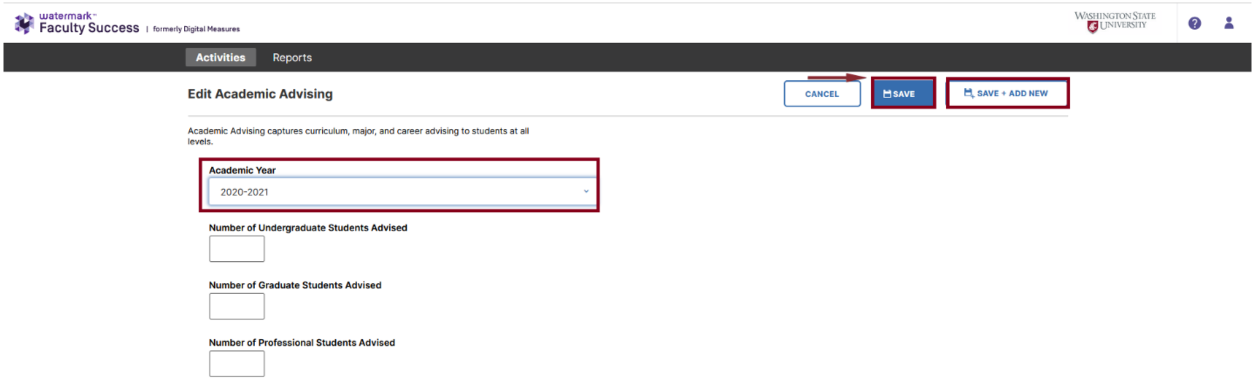
Selecting an Academic Year from the dropdown is required for this screen. Each **Academic Year** should have only **ONE** entry. If you need to add an entry for the existing academic year, you will need to click the entry to edit it instead of creating a new entry. If there is no entry for the academic year you need to edit, you must create a new entry.

1. To add entries, select **"Academic Advising"** under **Teaching/Mentoring.**

2. Click "**Add New.**" Complete all fields for the activity relevant to your annual review



3. Entering an **Academic Year** is required to save the information (*for more info on the date, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Directed Student Learning (e.g., theses, dissertations)

Source
Graduate Research Management tables in myWSU (primary); faculty (secondary).

Purpose
Directed Student Learning reflects faculty instructional effort as a project advisor, student mentor, or committee member for students working on a thesis, dissertation, undergraduate research, special project, internship, or lab rotation.

Appropriate Items to Report
Serving on graduate committees, being a member of the Graduate Mentor Academy, and supervising students involved in research/internships/creative works/lab rotations whether or not the student is signed up for a course for that purpose.

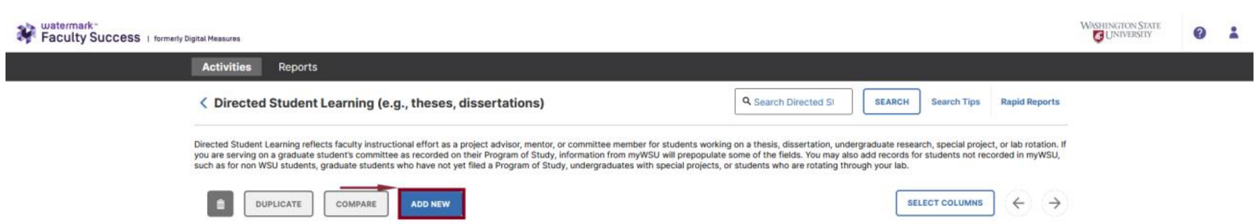
Inappropriate Items to Report
Faculty mentorship and academic advising (advising related to academic program, courses taught, degree completion, placement, post-graduate education, letters of reference, careers, etc.).

Note
If you serve on a graduate student's committee as recorded on their Program of Study, information from myWSU will prepopulate some of the fields. You may also add records for students not recorded in myWSU, such as non-WSU students, graduate students who have not yet filed a Program of Study, undergraduates with special projects, or students who are rotating through your lab.

How to Add Items
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. Select "Directed Student Learning" under Teaching/Mentoring to add supplementary directed student learning activities**.**

2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.

5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Mentoring

Source
Faculty.

Purpose
This screen is meant to record unofficial mentoring activities for non-students, such as the mentorship of a junior colleague.

Appropriate Items to Report
Supervision of post-doctoral appointees and/or research associates and advisement of junior faculty.

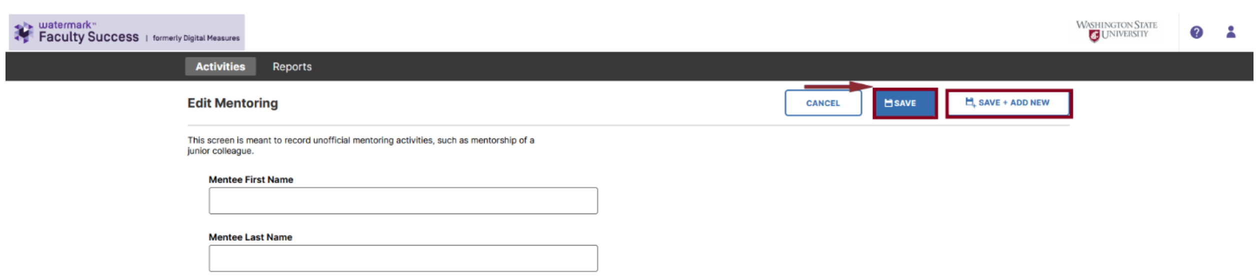
Inappropriate Items to Report
Any work done with undergraduate, graduate, or professional students (report on the Academic Advising tab or Directed Student Learning tab).

How to Add Items
Ensure the Mentee's entry does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Mentoring"** under **Teaching/Mentoring**.

2. To add an item, select **"Add New."** Complete all fields for the activity relevant to your annual review.

3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page)*.
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete.
6. When you are finished entering data on this screen, select either the back arrow button in the top left or **"Activities"** to return to the main screen.

Non-Credit Instruction Taught

Source

Faculty. Some data pre-loaded from WORQS (a prior annual review tool) may be found here.

Purpose

You can use this screen to record and describe any instruction you delivered to people not earning course credit for participating in your session.

Appropriate Items to Report

Non-credit experiences include continuing education courses, guest lectures in a non-credit course, seminars, and workshops.

Inappropriate Items to Report

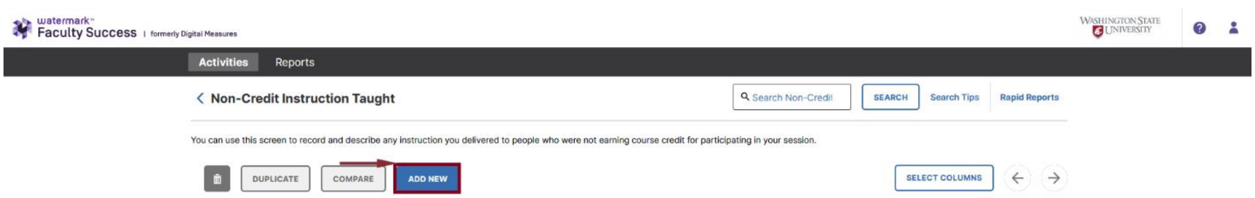
Supervision of student internships (should go on directed student learning) and instruction to non-WSU constituents - for instance, a workshop conducted at your professional organization's annual meeting (should go on Professional or Public service).

How to Add Items

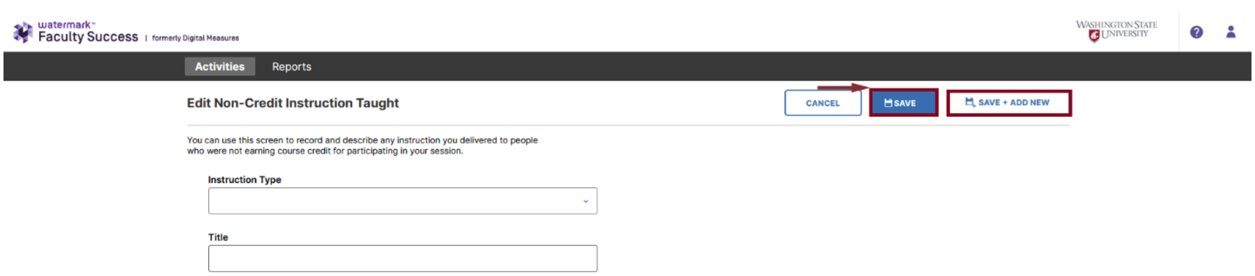
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Non-Credit Instruction Taught"** under **Teaching/Mentoring.**

2. Click on **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more*

information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page).

6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.]

Scheduled Teaching

Source

Class tables in myWSU and instructor.

Purpose

This screen contains official teaching records from myWSU for each primary or secondary instructor of record with more than 0% effort. It excludes courses with catalog numbers > 900, IALC, audit-only, and courses with no enrollment.

Please review this data at the beginning of each term to ensure that you have a record for each course you are serving as an instructor of record. If you see any omissions or errors, contact your unit administrator (typically whomever handles course scheduling). Instructions for validating teaching records in OBIEE are included in the Appendix.

Note

For your record to show up here, ensure that the information under Teacher Assignment in OBIEE on myWSU is correct. It is not possible to change existing records in this screen except by requesting your unit administrator (typically whomever handles course scheduling) make changes to the source record in myWSU. However, there are several fields (as shown below) within individual records to which you can add supplementary material.

How to Edit a Course Record to Add Supplementary Material

To add supplementary material for a course in Activity Insight/Faculty Success, select **"Scheduled Teaching"** under **Teaching/Mentoring**, then select the course record you wish to add. Once you are in the individual course record, you can edit any of the following non-myWSU fields:

Other Teaching

Source

Faculty.

Purpose

Please use this screen to record and describe your participation as an instructor in for-credit experiences other than your regularly scheduled teaching.

Appropriate Items to Report

For-credit experiences such as guest lectures in a university course, teaching a module in a university course, and preceptorship.

Inappropriate Items to Report

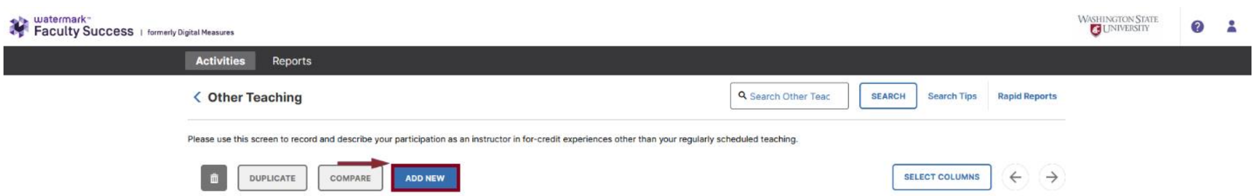
Presentations to community groups, adjudication, continuing education courses, executive development, and guest lecture in a non-credit course (these can be reported in Non-Credit Instruction Taught).

How to Add Items

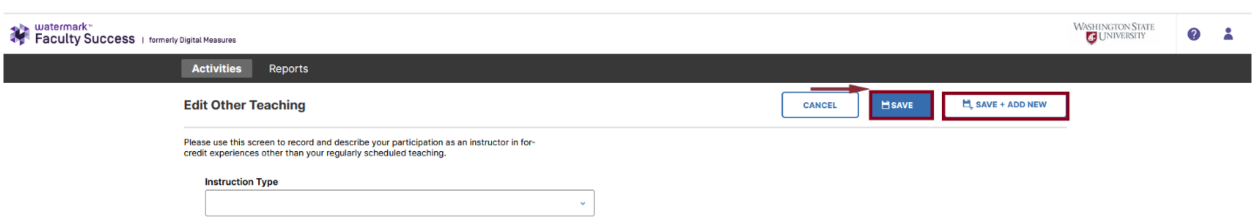
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Other Teaching"** under **Teaching/Mentoring**.

2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete.).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Teaching Innovation and Curriculum Development

Source
Faculty.

Purpose
Please use this screen to record the development of new courses, significant revision of an existing course, or implementation of a new teaching tool. These activities are not driven by the assessment of student learning outcomes (see Engagement in Program Assessment Activities).

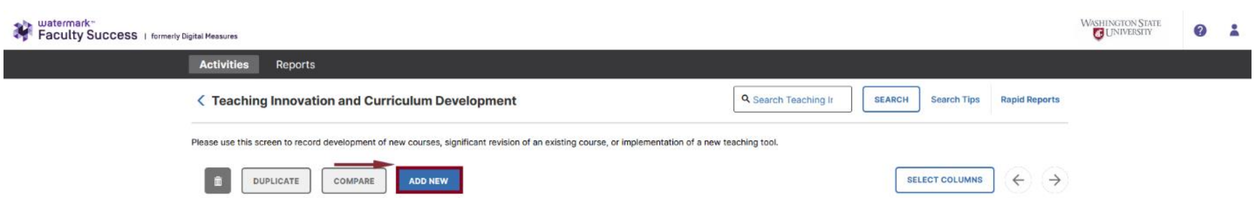
Appropriate Items to Report
Activities not driven by assessment of student learning outcomes such as participation in higher education teaching/curriculum development workshops, attendance of conferences on higher education instruction, involvement in continuing-education-type instructional activities (webinars, online development modules, certificate programs), conversion of an existing class to a flipped-classroom format, migration of an existing class to Global Campus, and integration of writing assignments into an existing class.

Inappropriate Items to Report
Activities such as the following do not constitute Innovation on their own: revision of a syllabus, change of textbook in an existing class, use of a new exam format in an existing class, increase of a course enrollment cap, and inclusion of guest lecturers in an existing class. If these activities are a part of or are combined with other activities, they may be appropriate to include.

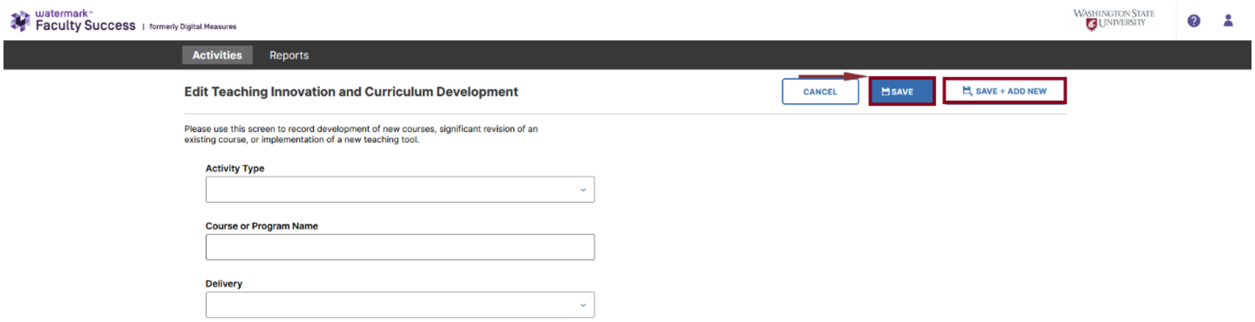
How to Add Items
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. Select "Teaching Innovation and Curriculum Development" to add entries under **Teaching/Mentoring.**

2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Engagement in Program Assessment Activities

Source
Faculty.

Purpose
Please use this screen to record your participation in program assessment activities recognized as teaching activities. For example, activities driven by the assessment of student learning outcomes for a degree program or UCORE. These activities help faculty think about student learning across the entire curriculum and how their course supports the program's learning outcomes.

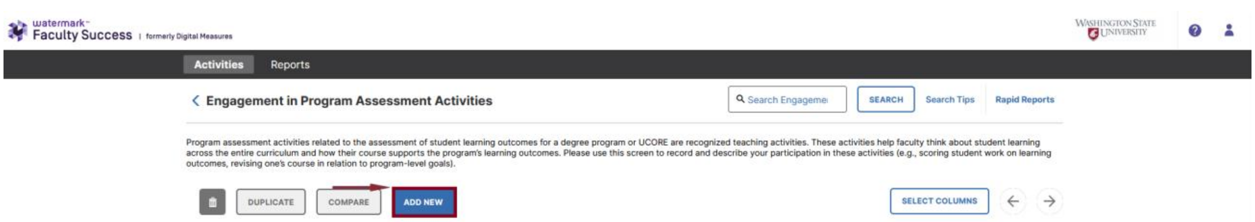
Appropriate Items to Report
Activities are appropriate to include if they are related to instruction and curriculum and are driven by outcomes of assessment activities such as: revising one's course in relation to program-level goals as a result of performance in student work that has been scored on learning outcomes, restructuring a class to include guest speakers because the assessment has shown there is a learning outcome that would benefit from this restructuring, and redesigning core assignments as influenced by the assessment of student learning outcomes.

Inappropriate Items to Report
Activities driven by the desire to improve student's learning experience include adopting a flipped classroom because you think it will better utilize class time (report under Teaching Innovation and Curriculum Development). Serving as the program assessment coordinator, planning assessment activities for a program, and collecting and organizing data (reporting these under University Service).

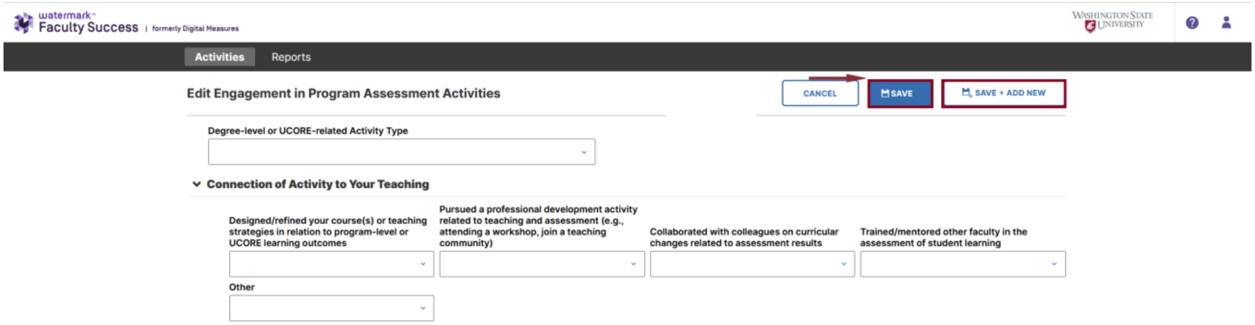
How to Add Items
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. Select "Engagement in Program Assessment Activities" under Teaching/Mentoring to add entries.

2. Click **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities**" to return to the main screen.

Scholarship and Research Screens

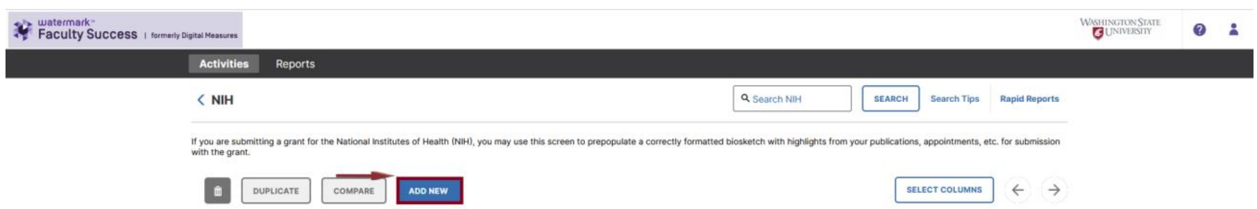
NIH Biosketch

Purpose

In this section, you can bring in relevant Positions and Employment, Academic Experience, Other Experience, Professional Memberships, Professional Service, Awards and Honors, and Research Support from your records within Activity Insight/Faculty Success. You are also able to list relevant publications in support of the activities you list in these categories.

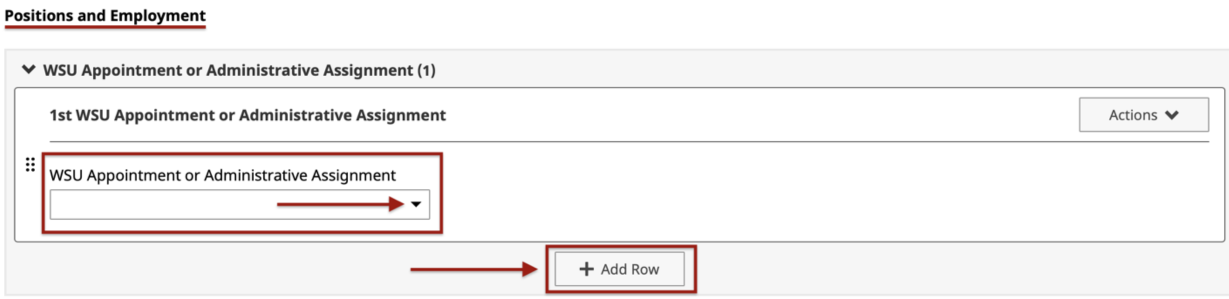
1. To add to your NIH biosketch screen, select **“Biographical Sketch - NIH”** under **Scholarship/Research.**

2. Click “Add New.”

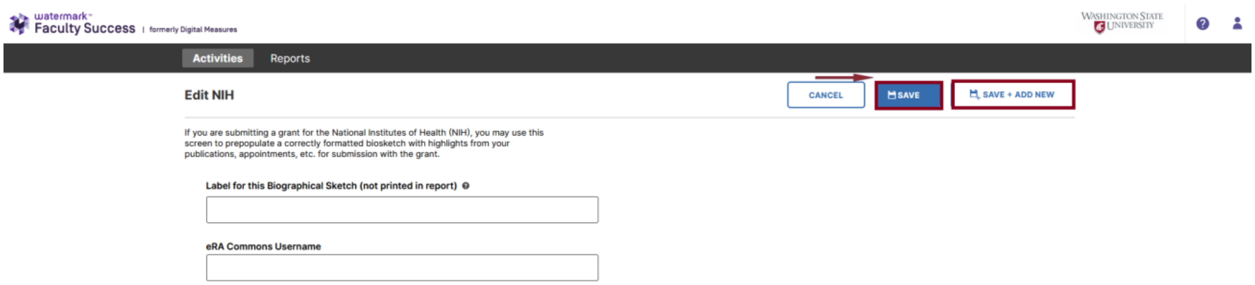


3. From here, you can label your NIH biosketch to suit the purpose it’s needed for. You can create and save as many NIH biosketches as you like.

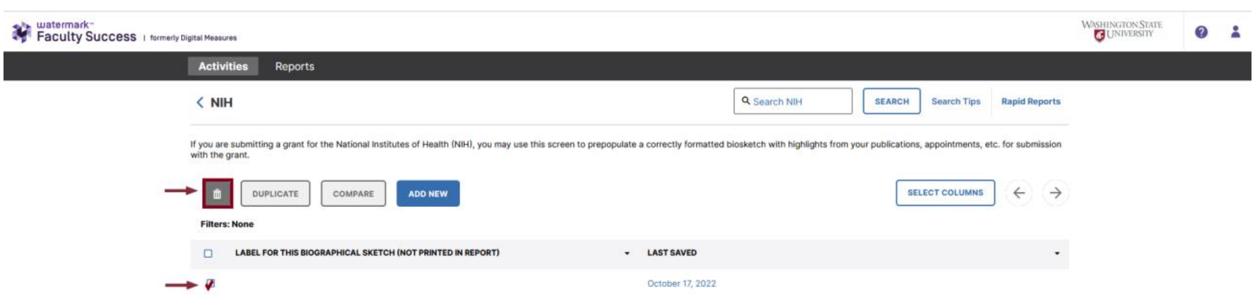
4. In the example below, use the dropdown box to select a WSU appointment or assignment you wish to have appeared on the biosketch. Then, click **“+ Add Row,”** select another WSU appointment or assignment and repeat until all relevant WSU appointments or assignments are listed. Repeat the same process to fill in relevant Academic Experience, Other Experience, Professional Memberships, Professional Service, Awards and Honors, Research Support, and Publications.



5. When you are finished filling out this screen, select **"Save"** or **"Save + Add Another"** at the top of the screen to save your work.



Note that saving a blank record is possible on this screen. If you have done so, you will see **"item has blank values for the display fields"** on the Summary screen. Blank records should be deleted by clicking the entry box on the left side of the screen, followed by the trash can at the top of the screen.



6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen

NSF Biosketch

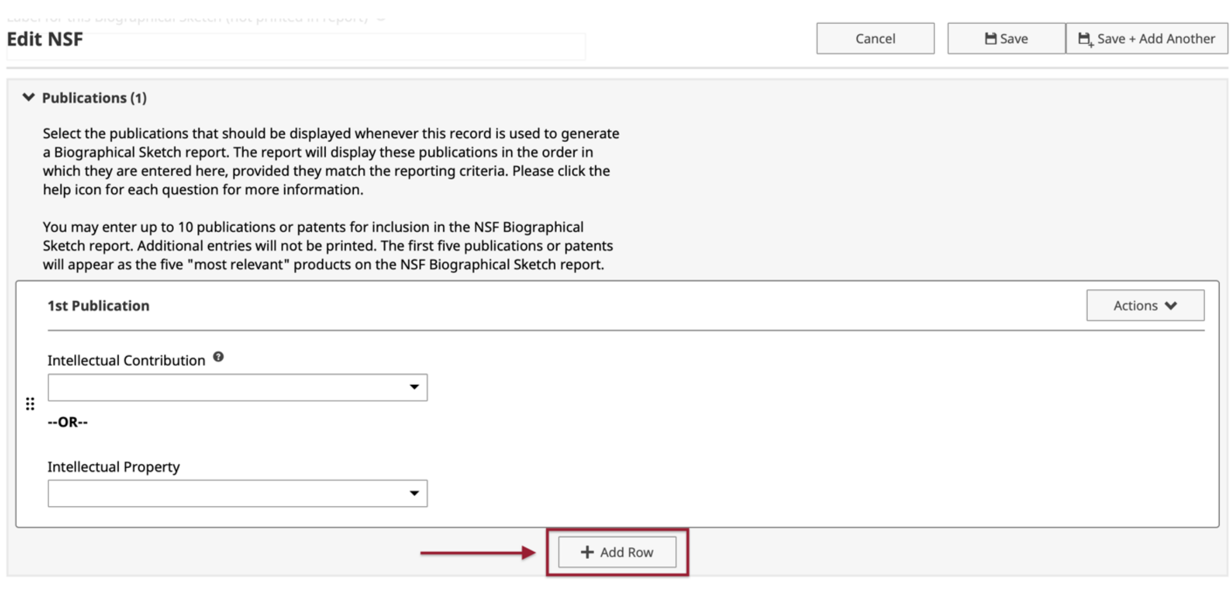
1. To add to your NSF biosketch screen, select **"Biographical Sketch - NSF"** under **Scholarship/Research.**

2. Click "**Add New**"

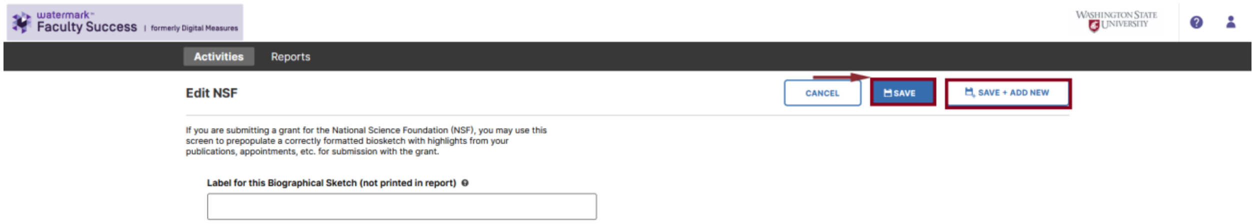
3. From here, you can label your NSF biosketch to suit its intended purpose. You can create as many biosketches as you like.

4. Select **up to 10** relevant Publications or patents from the dropdown lists, using **"+ Add Row"** to add more rows as needed.

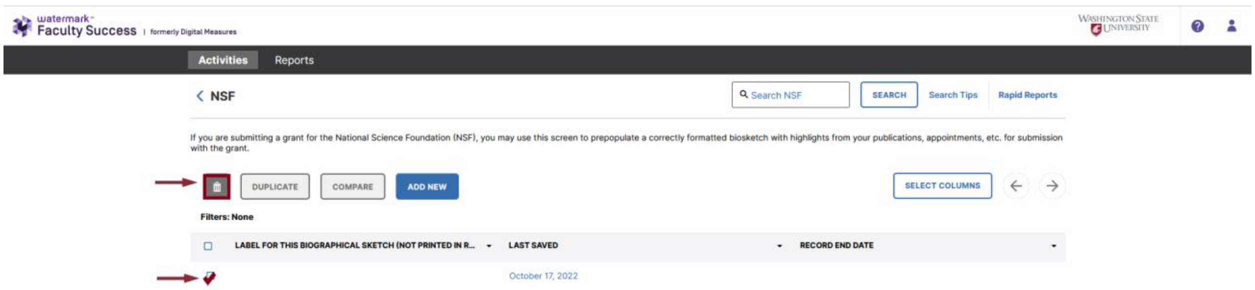
   Note that the first five entries will appear as the "most relevant." *The Publications (Intellectual Contribution) and Intellectual Property sections of your Activity Insight/Faculty Success profile populate information into the dropdowns.*



5. For **Synergistic Activities**, enter up to 5 items to appear on the report, using **"+ Add Row"** to add more rows as needed. You can choose from the **Intellectual Contribution** dropdown list or fill in the "Other Activity" box**.**
6. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



Note that saving a blank record is possible on this screen*. If you have done so, you will see* ***"item has blank values for the display fields"*** *on the Summary screen. Blank records should be deleted by clicking the entry box on the left side of the screen, followed by the trash can at the top of the screen.*



7. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities**" to return to the main screen

Contracts, Grants, and Fellowships

Source

Office of Research database (ORSO) (primary); faculty (secondary).

Purpose

This screen is meant to contain all contracts, grants, and fellowships. Externally sponsored projects are populated from ORSO. **To request corrections to locked source system records, please get in touch with** orso@wsu.edu.

Appropriate Items to Report

Internally funded WSU grant activities such as departmental funding awards or internal reallocations.

Inappropriate Items to Report

Personal research. More examples can be found in the Activity Index by Screen table toward the end of this guide.

A Note on Dates

If an ORSO grant is ongoing with no specified end date, the year 2100 is used to note the end of the project. End-of-calendar-year reconciliation may not be reflected in the system until late January/early February next year. Also, current projects initiated prior to 2002 may not display all data, and some older awards/amounts may not be included.

A Note on Agency/Subagency

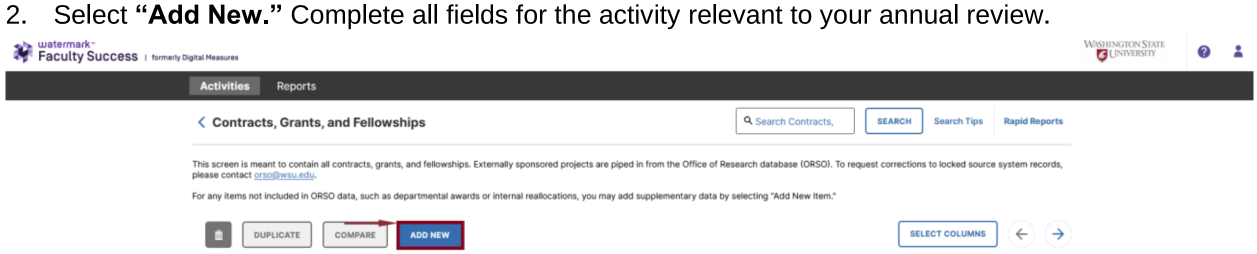
Agency/Subagency is used when the money is directly from a sponsor. Awarding Agency/Awarding Subagency is used if the project flow-through from another organization.

How to Add Items

Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add supplementary entries in this screen that were not included in ORSO data, select **"Contracts, Fellowships, and Grants"** under **Scholarship/Research**.

2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Start** or **End Year** for "Date of Funding" is required to save the information (*for more info on date entering, please refer to the section "How to Enter Dates" on the Getting Started page)***.**

4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.

5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Publications

Source
Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose
Please use this screen to record any popular, scholarly, and creative (e.g., compositions) that you have published.

Media for which a faculty member was consulted (newspaper or magazine interviews, radio shows, television segments, etc.) should be recorded in Media Contributions.

Appropriate Items to Report
Books, book chapters, broadcast media written/produced by a faculty member, reviews, textbooks, conference proceedings, journal articles, instructor's manual, software, technical report, manuscript, monograph, law reviews, research reports, transcription or translation, popular press articles and/or columns relating to teaching/research/public service.

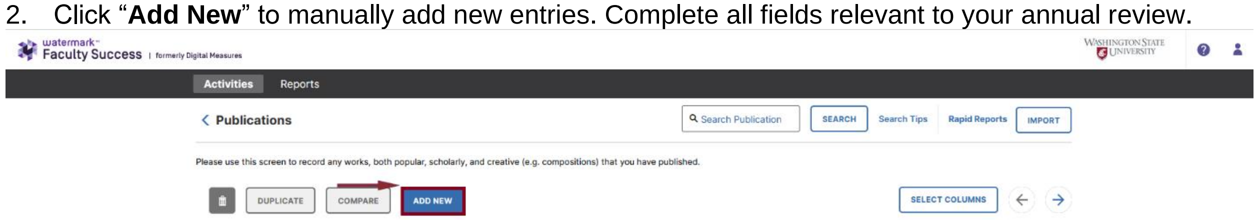
Inappropriate Items to Report
Student research, presentation, accreditation self-study documents, online course development, course syllabi, consultation reports, unpublished artistic/creative work, popular press articles and/or columns unrelated to a faculty position. More examples can be found in the **Activity Index by Screen** table toward the end of this guide.

Note on Dates
You'll have the option to add several types of dates, though filling in one year field is sufficient to save. Complete all relevant dates; if a work is published, you only need the date. For works in progress, you can build on to dates, adding as milestones are reached (submitted, accepted, etc.).

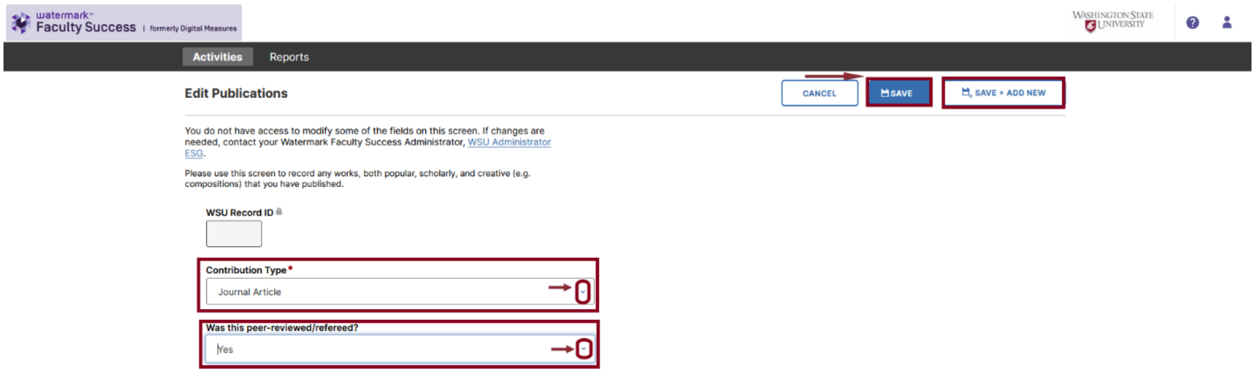
How to Add Items
You can choose to manually enter your publication information or import it directly into Activity Insight/Faculty Success. Ensure the publication's entry does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. Select "Publications" under Scholarship/Research to add entries manually.

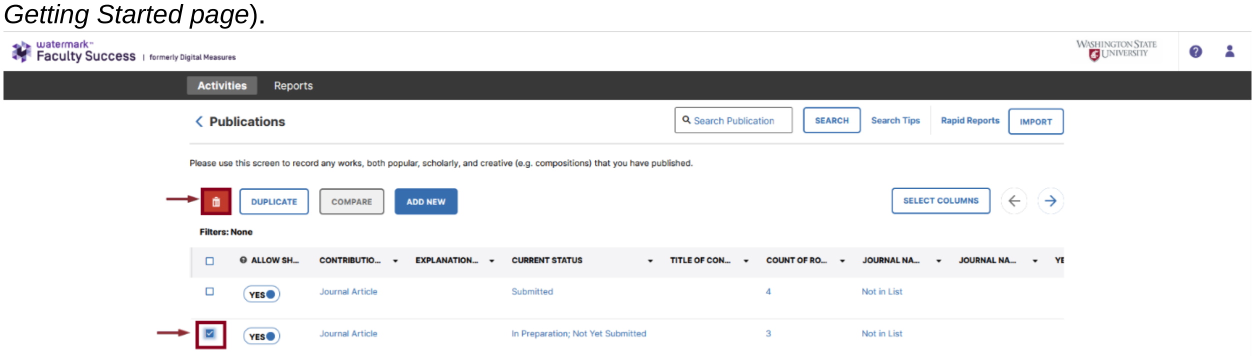
2. Click "**Add New**" to manually add new entries. Complete all fields relevant to your annual review.



3. Enter a **"Contribution Type"** (for example, you can select "Journal Article" and indicate if it is "Peer-reviewed/refereed" by selecting "Yes" or "no"). At least one **Year** is required to save the information (for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



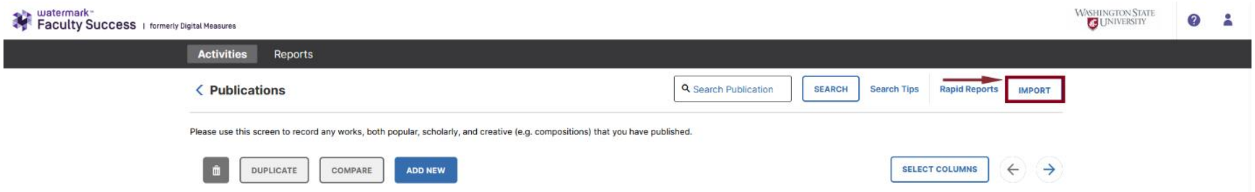
5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).



6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

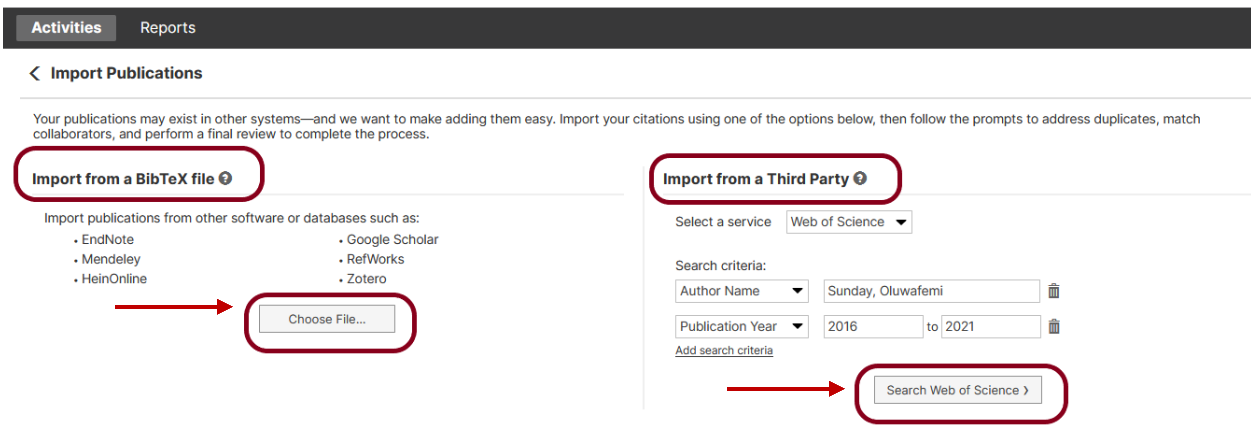
Publication Import Tools

Within the Publications overview area, Click **"Import"** instead of "**Add New.**"



Once you are in the Import Screen, you will have two options (see below). For more detailed instructions, click the question mark next to either section title to open a link. You will be directed to:

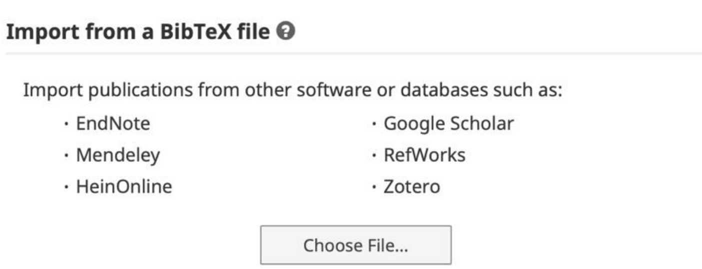
BibTeX: https://watermarksupport.zendesk.com/hc/en-us/articles/5349888615451-BibTeX-Imports
Third-Party: https://watermarksupport.zendesk.com/hc/en-us/articles/5506552558235-Third-Party-Imports



Import from a BibTeX File

Suppose you create BibTeX files of your publications using EndNote, Mendeley, Web of Science, Google Scholar, RefWorks, or Zotero. In that case, you can upload your citation information by selecting **"Choose File"** and then attaching and uploading your BibTeX file directly into Activity Insight/Faculty Success.

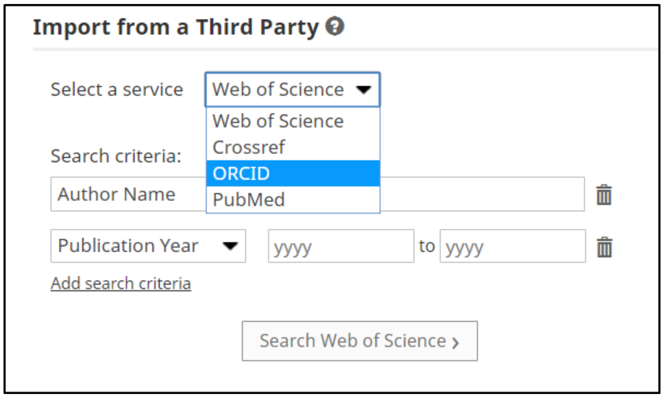
To view instructions from Digital Measures on using BibTeX files in Activity Insight/Faculty Success, visit their article "[BibTeX-Imports](https://watermarksupport.zendesk.com/hc/en-us/articles/5349888615451-BibTeX-Imports)."



Import from Third Party

The third-party import feature allows faculty to search Crossref and PubMed to find, select, review, and import their publication information. Search criteria can be used to find publications, including ORCID ID, Author Name, Title, ISSN, DOI, Publication Title, Editor, Affiliation, and Publication Date.

To view instructions from Digital Measures on using the Import from Third Party feature, visit their articles "PubMed Imports," "CrossRef Imports," "ORCID Imports," and "Web of Science Imports."



Matching Collaborators

When importing publications, Activity Insight/Faculty Success will try to match to other WSU Activity Insight/Faculty Success users. Not all current WSU employees and students have Activity Insight/Faculty Success accounts, so you may not be able to automatically match all WSU collaborators to the institution. Once the publication has been imported, you can manually add institutional affiliations for the collaborators that did not automatically match. Please also indicate if a collaborator was a student or post-doc when the work was completed.

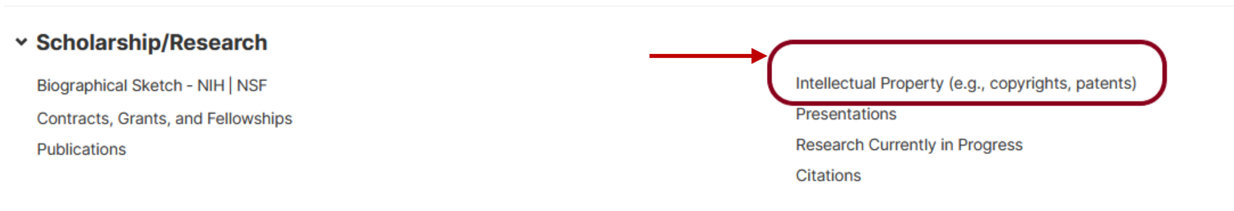
Published Works Appearing as "To Be Submitted"

If you notice your published works appear as "To Be Submitted" instead of "Published," simply move the date from "Expected Date of Submission" to "Date Published," change the "Current Status," and save.

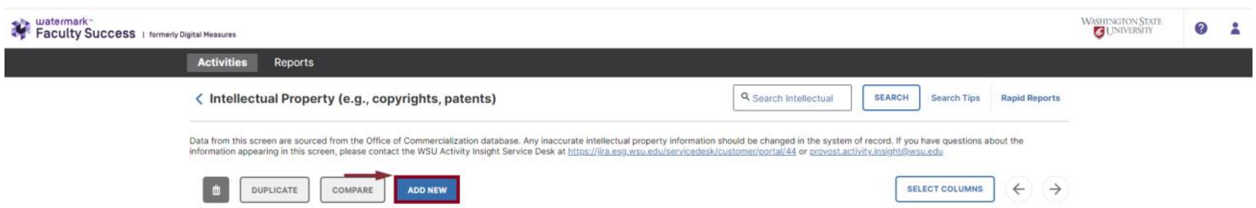
Intellectual Property (e.g., copyrights, patents)

Manual edits of information from the source system are not allowed on this screen. Any inaccurate intellectual property information from the source system should be reported to the Office of Commercialization, which provides the source data listed here using their Inteum software. You can add a new entry if you need to add information that has not been populated from the Office of Commercialization's database.

1. To add entries, select "**Publications"** under **Scholarship/Research**.

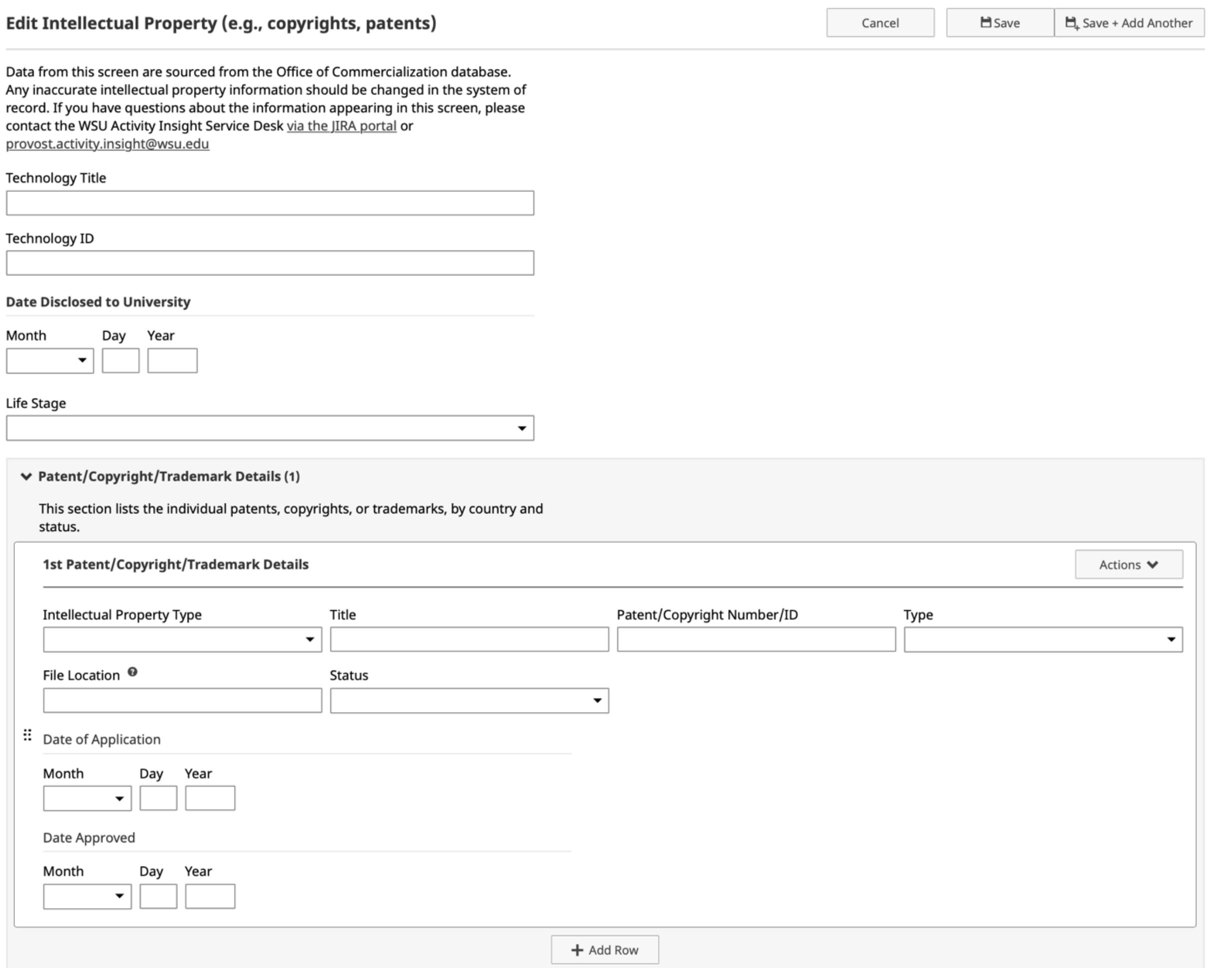


2. Click "**Add New."** Complete fields for the activity relevant to your annual review.



3. Entering a **Year** for either **"Date Disclosed to University"** or **"Date Approved"** is required to save the information.
4. Select "**Save and Add Another**" if you have more than information to add or "**Save**" when you are done entering information for this screen.

5. When you return to the summary screen, you will see your entries listed. You can click on them to "**Edit**" or select the *checkbox* to the item, followed by the trash can icon, to "**Delete**" (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).



6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or "**Activities**" to return to the main screen.

Presentations

Source
Faculty. If you had pre-loaded data from WORQS (a prior annual review tool), you will find it here.

Purpose
Please use this screen to record presentations at academic conferences, keynote addresses, and other formal presentation activities.

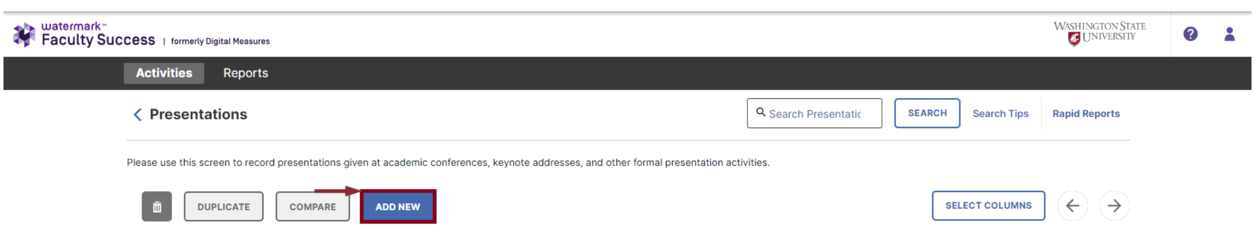
Appropriate Items to Report
Paper or oral presentation, poster presentation, lecture to a professional audience, exhibit (except for artistic/creative exhibits – those should go on Performances/Exhibits), keynote or plenary address, and demonstration.

Inappropriate Items to Report
Artistic/creative exhibits and conference/workshop/seminar attendance where you did not present. More examples can be found in the **Activity Index by Screen** table toward the end of this reference guide.

How to Add Items
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

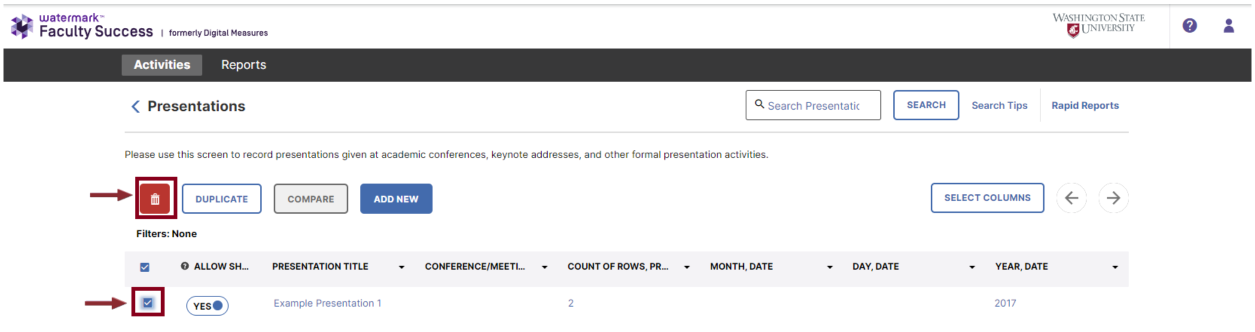
1. To add edit entries in this screen, select **"Presentations"** under **Scholarship/Research**.

2. Click on **"Add New."** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.

5. When you return to the summary screen, you will see your entries listed. You can click on them to "**edit**" or select the checkbox next to the item, followed by the trash can icon, to "**delete**" (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" in the Getting Started page*).



6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Research Currently in Progress

Source
Faculty.

Purpose
Please use this screen to report work that has not yet produced a formal scholarly output, such as a publication or presentation. Also, you can report work that is not recorded on another screen as contracts, Grants, and Fellowships or Publications.

Appropriate Items to Report
Brief summary of major research foci.

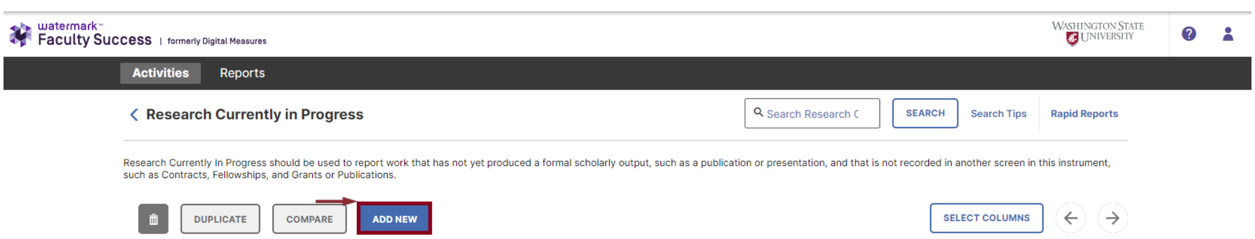
Inappropriate Items to Report
Long narratives.

Blank Record
Note that saving a blank record is possible on this screen. If you have done so, you will see **"item has blank values for the display fields"** on the Summary screen. **Blank records should be deleted.**

How to Add Items
Ensure the activity does **not** already exist. If it does exist, **edit** it. If it does not exist, **add** a new item as follows:

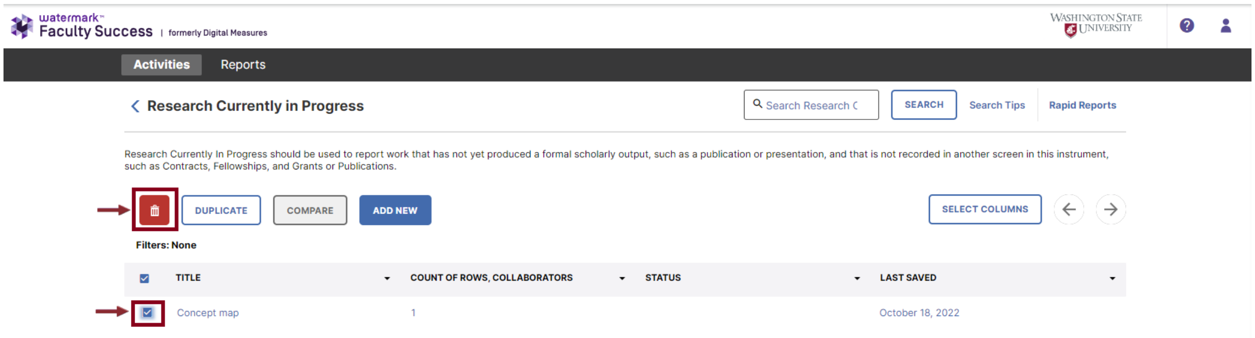
1. Select "Research Currently in Progress" under Scholarship/Research to add entries**.**

2. Select **"Add New"** Complete all fields for the activity relevant to your annual review.



3. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.

4. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).



5. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Creative Scholarship Screens

Creative Works/Projects

Source

Faculty.

Purpose

Use this screen to record any unpublished creative work or intellectual contributions. Published works should be recorded in Publications. Individual works of art may be listed here, but shows, performances, and exhibitions should be listed on Performances/Exhibits.

Appropriate Items to Report

Individual works of art or compositions, digital media, drawing, concert, orchestration, and metal arts.

Inappropriate Items to Report

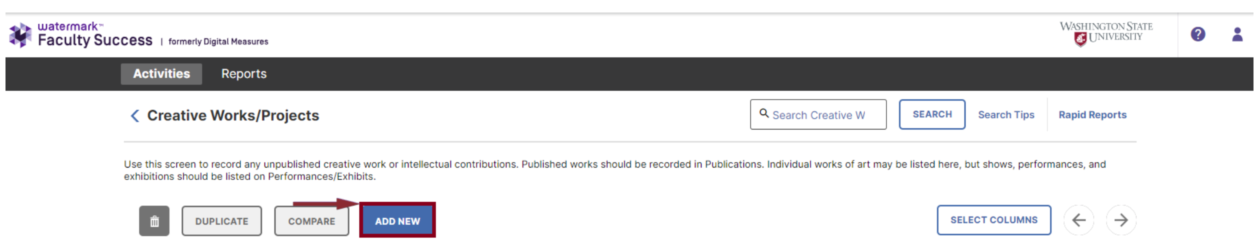
Published works, such as musical compositions or books (should be recorded in Publications), shows, performances, and exhibitions (should be listed on Performances/Exhibits), though individual works of art may be listed here.

How to Add Items

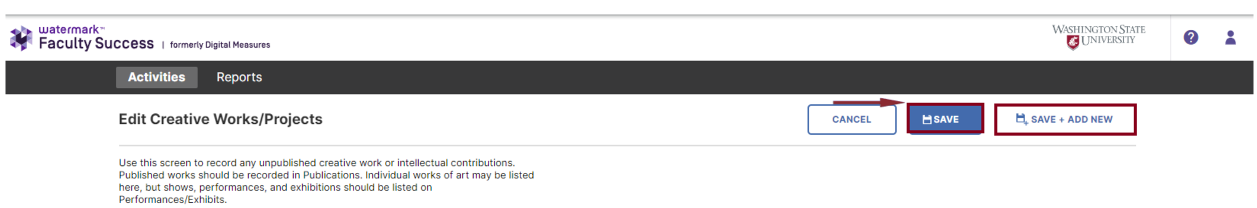
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a **new item as follows:**

1. **Select "Creative Works/Projects" under Creative Scholarship to add entries**.

2. Select **"Add New"** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, refer to the "How to Enter Dates" section on the Getting Started page)*.
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete.
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Performances/Exhibits

Source

Faculty.

Purpose

Use this screen to list performances, exhibits, shows, readings, and arrangements, including those which are juried/adjudicated as well as those that are not. The WSU Strategic Plan reports publications and research/creative output with students.

Appropriate Items to Report

Use this screen to list performances, exhibits, shows, and arrangements, including those that are juried/adjudicated and those that are not.

Inappropriate Items to Report

Unpublished creative work or intellectual contributions. More examples can be found in the **Activity Index by Screen** table toward the end of this reference guide.

Note about Items to Include

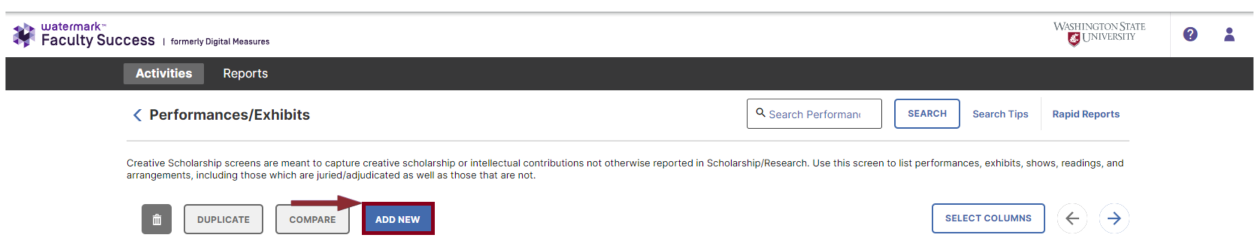
Please indicate whether each activity was juried, curated, or traveling as well as whether an activity was peer-reviewed or invited. For activities that involve collaborators or co-presenters, please indicate whether or not a collaborator was a student at the time of the activity.

How to Add Items

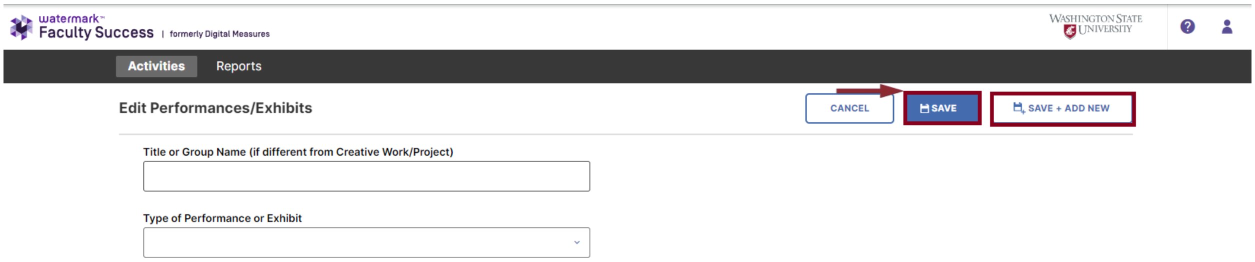
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Performances/Exhibits"** under **Creative Scholarship**.

2. Select **"Add New**" Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, refer to the "How to Enter Dates" section on the Getting Started page)*.
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities**" to return to the main screen.

Reviews of Creative Scholarship

Source

Faculty.

Purpose

Use this screen to record reviews in recognized professional outlets, news publications, news broadcasts, and mentions on blogs or websites maintained by recognized professionals.

Appropriate Items to Report

Reviews appear in recognized professional outlets (e.g., ARTnews, Down Beat), reviews that appear in news publications or news broadcasts, and mentions on blogs or websites maintained by recognized professionals. Please include a Title of Creative Scholarship reviewed for the review year to avoid having items as blank values for the display fields on the summary screen.

Inappropriate Items to Report

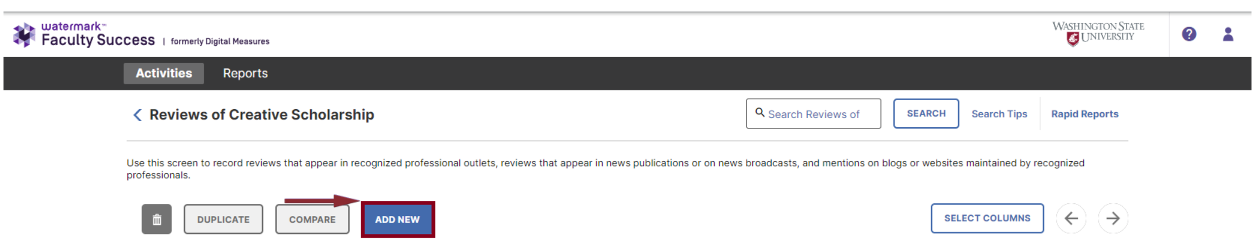
Reviews that appear on personal blogs or websites and comments on personal social media sites. More examples can be found in the **Activity Index by Screen** table toward the end of this reference guide.

How to Add Items

Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Reviews of Creative Scholarship"** under **Creative Scholarship.**

2. Select **"Add New"** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** in **"Date of Review"** is required to save the information (for more info on date entry, please refer to the section "How to Enter Dates" on the Getting Started page).
4. Select **"Save and Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.

5. When you return to the summary screen, you will see your entries listed. Click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete.
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Service Screens

Decision Tree for Service

Where should you enter information regarding your service inside or outside the University?

Q: What is/was the service setting?

Clinical		Institutional	Professional	Personal
(Not all colleges have this option.) Clinical Service entries should be recorded on the **Clinical** Service screen.	(Not all colleges have this option.) Veterinary Clinical Service entries should be recorded on the **Veterinary Clinical Service** screen.	If this service is/was provided to WSU or another academic institution at the university, college, department, or campus levels, record in **University** Service.	If this service is/was related to your career but not provided in service of WSU or another academic institution, record in **Professional** Service.	If this service is/was not provided to an academic institution and is not related to your career, record in **Public** Service.
Example: Unpaid sharing of expertise within a treatment facility.	Example: Activities in the Veterinary Teaching Hospital or WADDL.	Example: Organizational Committee Service, service on Faculty Senate, Search Committees.	Example: Serving as an officer for a professional organization, editing a journal, presenting research to the public.	Example: Kiwanis, Scout Leadership, and other community or civic service.

University Service

Source

Faculty. If you had pre-loaded data from WORQS (a prior annual review tool), you will find it here.

Purpose

University, campus, college, departmental, and unit-level service activities should be recorded here.

Appropriate Items to Report

Serving on Faculty Senate and/or any Faculty Senate committee, P&T committee, Faculty/Staff search committees, graduate student screening/selection committees, Safety/Diversity/Facilities/Budget committee, curriculum committee, assessment, technology, Academic Affairs committee, any ad hoc committee or task force at the departmental, college, campus, or university level, scholarship review committee, and student or faculty award committees.

Inappropriate Items to Report

Advising, mentoring, serving on graduate committees, performances at University events, serving as a reviewer for manuscripts, grants, and books, judging or adjudicating shows/performances, extension-related activities, mentoring committees, and professional appointments.

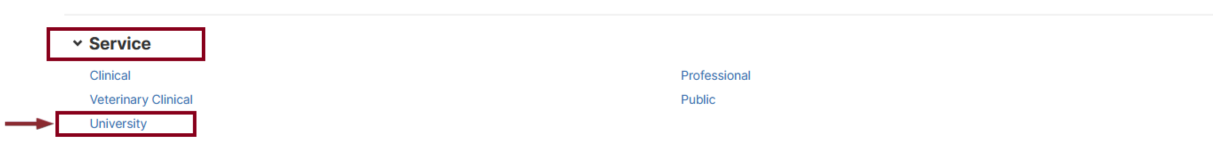
Note

To specify university, college, department/unit, or campus service, select from the **"Service Level"** dropdown.

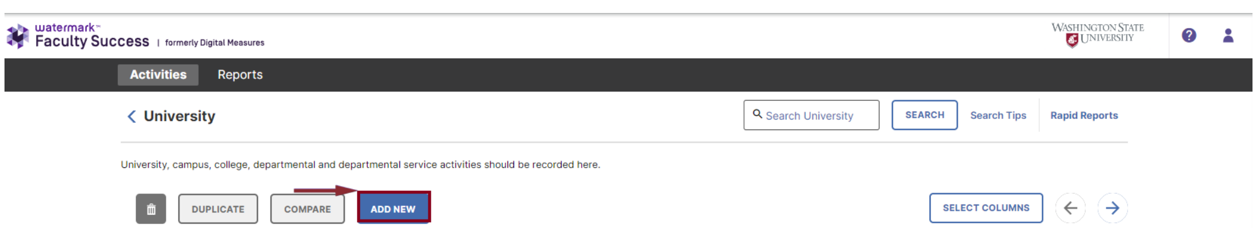
How to Add Items

Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

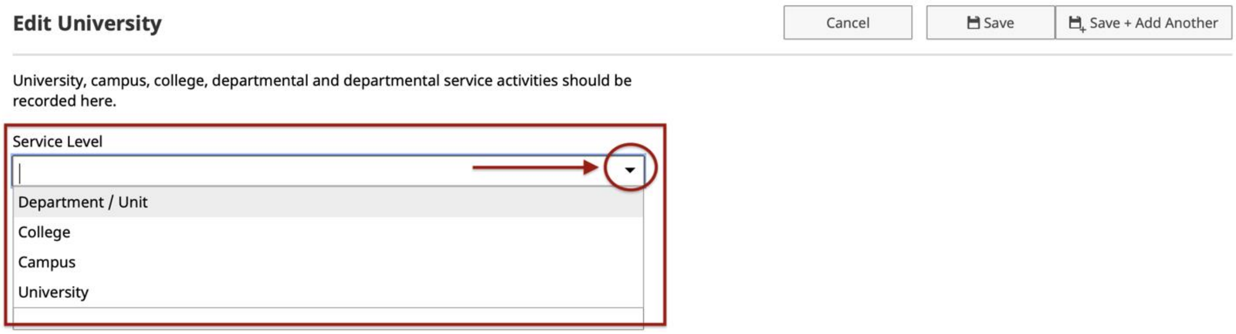
1. To add entries on this screen, select **"University**" under Service.



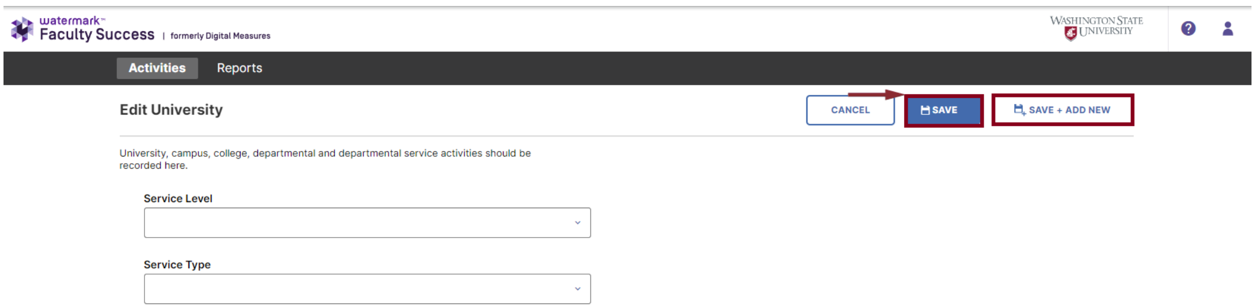
2. Select **"Add New."** Complete all fields for the activity relevant to your annual review.



3. To specify university, college, department/unit, or campus service, select from the **"Service Level"** dropdown.



4. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
5. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



6. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
   When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Professional Service

Source

Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose

Please use this screen to record services related to your career (e.g., service to a professional organization, any non-paid domestic or foreign affiliations*) or conducted as an agent for Washington State University (e.g., discussing your research with K12 students). Domestic or foreign affiliation is any academic, professional, or institutional position. Whether or not remuneration is received, full-time, part-time, or voluntary (including adjunct, visiting, or honorary).

Appropriate Items to Report

Grant proposal review/panel reviewer, editorial positions, serving as a reviewer for an academic publication (e.g., journal, textbook), elected positions to professional associations, judging or adjudicating a show, exhibition, or performance, serving on a conference organization committee (e.g., site selection, program, awards, paper review), presentations of research to the public (e.g., K12, agriculture producers), and serving as an expert witness.

Inappropriate Items to Report

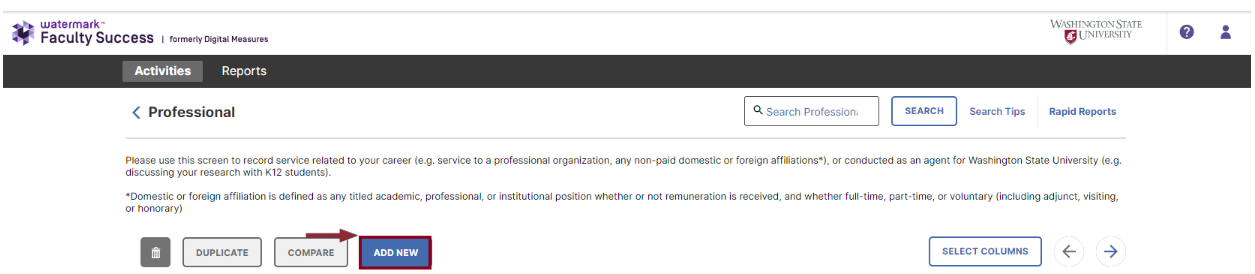
Service to community organizations and being an invited speaker.

How to Add Items

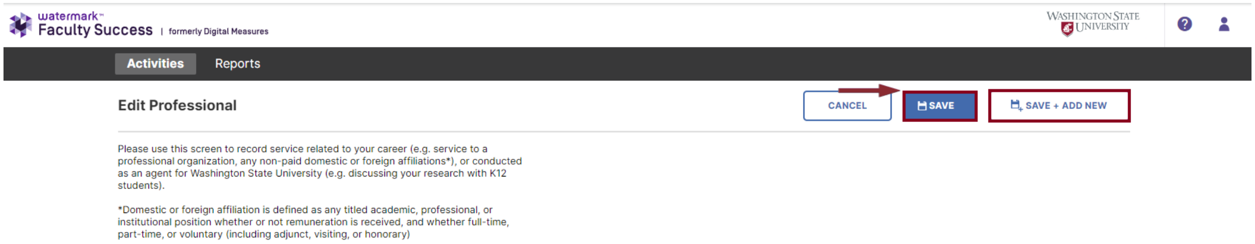
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries on this screen, select **“Professional”** under **Service**.

2. Select **“Add New”** Complete all fields for activity relevant to your annual review.



3. Entering a Year is required to save the information (*for more info on date entry, please refer to the “How to Enter Dates” section on the Getting Started page).*
4. Select **“Save and Add Another”** if you have more information to add **or “Save”** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Public Service

Source

Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose

Please use this screen to record civic, community service, and volunteer work not directly related to your career or position at Washington State University.

Appropriate Items to Report

Memberships in civic clubs or fraternal organizations (e.g., Boy Scouts, Kiwanis), service to community organizations, position in government, service to the school district, involvement with organized youth sports and activities, and board memberships not related to your career.

Inappropriate Items to Report

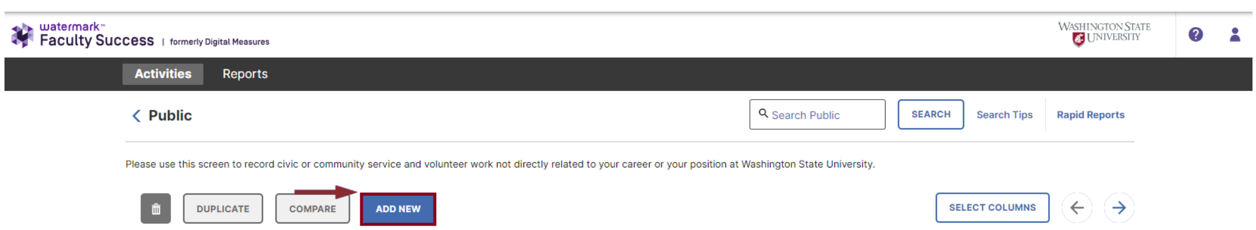
Letters to a local newspaper, spontaneous assistance (e.g., picking up litter while walking), contributions to charity, participation in the Neighborhood Watch program, participation in local performing arts, attendance of open government meetings, and participation in state government initiative process.

How to Add Items

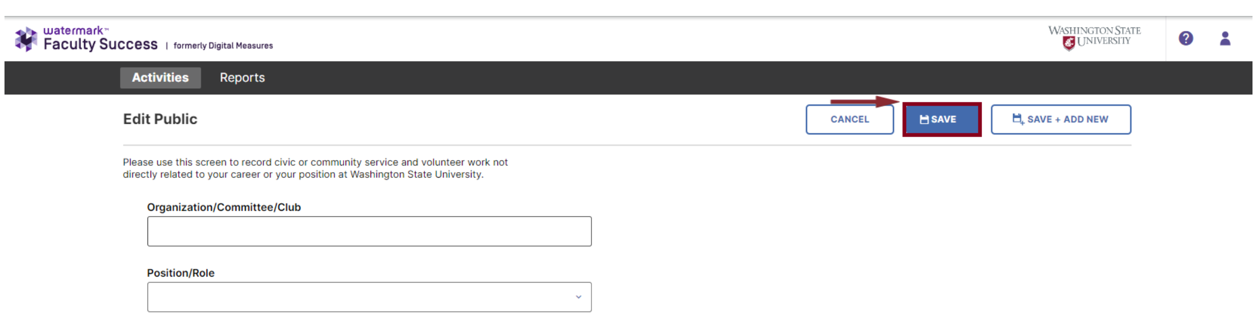
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries on this screen, select **"Public"** under **Service**.

2. Select **"Add New"** Complete all fields for the activity relevant to your annual review.



3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Clinical Service

(*Not all colleges have this option*)

Source

Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose

Use this screen to record the provision of your clinical skills to the public.

Appropriate Items to Report

Work with patients in a professional setting and consult with other professionals in a clinical setting.

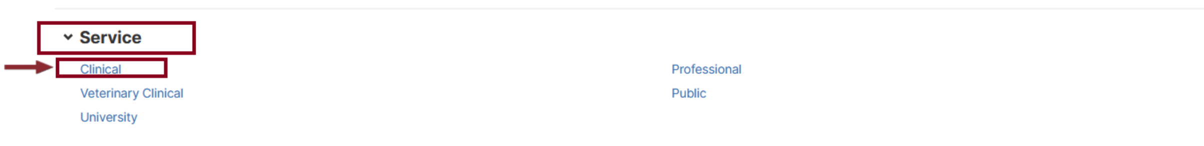
Inappropriate Items to Report

See your chair for guidance on items not to report on this screen.

How to Add Items

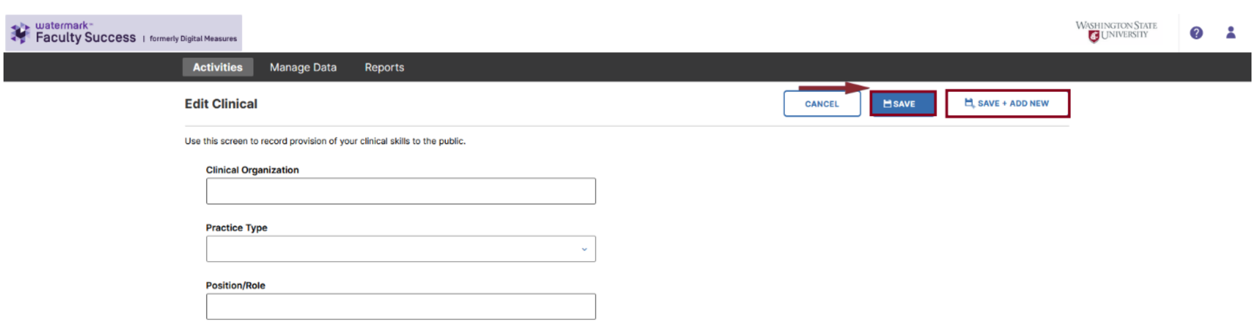
Ensure the activity does **not** already exist. If it does exist, **edit** it (i.e., enter an end date to close a completed activity, update the status of a publication, etc.). If it does not exist, **add** a new item as follows:

1. To add entries, select **"Clinical"** under **Service**.



2. Select **"Add New"** Complete all fields for the activity relevant to your annual review.

3. Entering a **Year** is required to save the information (*for more info on date entry, please refer to the "How to Enter Dates" section on the Getting Started page).*
4. Select **"Save and Add Another"** if you have more information to add, **or** select **"Save"** when you are done entering information for this screen.



5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete.
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Veterinary Clinical Service

(Not all colleges have this option)

Source

Faculty. If you had data pre-loaded from WORQS (a prior annual review tool), you will find it here.

Purpose

Use this screen to record the provision of your veterinary clinical skills to the public—specifically, information pertaining to work conducted in the Veterinary Teaching Hospital or WADDL.

One Entry per Calendar Year

Each Calendar Year should have only **ONE** entry.

How to Add Items

Ensure the activity does **not** already exist. If it does exist, **edit** it. If it does not exist, **add** a new item as follows:

1. To add entries, select **"Veterinary Clinical"** under **Service**.

2. Select **"Add New"** Complete all fields for the activity relevant to your annual review.

3. Entering a **"Calendar Year"** is required to save the information. For a calendar year, enter only one record.
   - **Entering a year is required to save a record. However, only one entry will be included in your annual review if you enter more than one record for a calendar year. All information for a calendar year should be entered on one screen.**
4. To select another calendar year, you should select **"Save + Add Another"** if you have more information to add **or "Save"** when you are done entering information for this screen.

5. When you return to the summary screen, you will see your entries listed. You can click on them to edit or select the checkbox next to the item, followed by the trash can icon, to delete (*for more information on editing existing activity, please refer to the section "Adding Vs. Editing" on the Getting Started page*).
6. When you are finished entering data on this screen, select either the **back arrow button** in the top left or **"Activities"** to return to the main screen.

Appendices

Appendix 1 – Activity Index by Screen

As a guideline, here are some examples of where to list activities. Depending on the context, an activity could be listed in more than one category.

Activity	Record In
3D Design	Creative Works/Projects
Academic Affairs committee	University Service
Accolades, “most downloaded paper,” “highly cited researcher.”	Awards and Honors
Accreditation self-study documents	University Service
Advising related to an academic program, courses, degree completion, placement, post-graduate education, letters of reference, careers, etc.	Academic Advising
Advising related to projects, mentoring students, serving on graduate committees	Directed Student Learning
Advisory Board	Consulting
Advisory Board memberships	Professional Service
Affiliate appointments	WSU Appointments and Administrative Assignments or Prior and External Work Experience
American Bar Association	Licensures and Certifications
Animation	Creative Works/Projects
Any ad hoc committee or task force at the departmental, College, Campus, or University level	University Service
Arrangement	Creative Works/Projects
Art Work	Creative Works/Projects
Artistic/Creative Exhibits	Performances/Exhibits
Assessment	University Service
Author, newspaper/column, or journal in newspaper	Publications
Awards (nominated or received)	Awards and Honors
Awards to your students	Directed Student Learning in comments
Band	Performances/Exhibits
Becoming an elected officer of a professional organization	Professional Service
Being an invited speaker	Presentations
Book chapters	Publications
Book reading/book signings	Presentations
Books	Publications
Broadcast media written/produced by the faculty member	Publications
Ceramics	Creative Works/Projects
Certified Forester	Licensures and Certifications
Certified Public Manager	Licensures and Certifications
Chamber Group	Performances/Exhibits
Choir	Performances/Exhibits
Choreography	Creative Works/Projects
Clinic (e.g., music)	Performances/Exhibits
Collecting assessment data	University Service
Collection	Creative Works/Projects
Collection	Performances/Exhibits
Commercial driver’s license	Licensures and Certifications
Committee/Board service	University, Professional, or Public Service depending on the organization.
Competition	Performances/Exhibits
Completed OBIEE, purchasing card, travel training, etc.	Do Not Report
Composition	Creative Works/Projects
Concert	Creative Works/Projects
Concert	Performances/Exhibits
Conference presentations	Presentations
Conference proceeding	Publications

Activity	Record In
Conference, Attendee, and Presenter	Presentations
Conference/Workshop/Seminar attendance only	Faculty Development Activities
Consultation reports	Consulting
Continuing education courses taught	Non-Credit Instruction Taught
Costumes	Creative Works/Projects
Course changes supporting program learning outcomes	Engagement in Program Assessment Activities
Course Syllabi	Scheduled Teaching
CPR Certification	Licensures and Certifications
Curated Exhibition	Performances/Exhibits
Curricular changes not related to assessment results	Teaching Innovation and Curriculum Development
Curricular changes related to assessment results	Engagement in Program Assessment Activities
Curriculum Committee	University Service
CV Upload to Activity Insight/Faculty Success	COVID-19 Related Circumstances and Goals
Dance	Performances/Exhibits
Delivered OBIEE, purchasing card, travel training, etc.	Do Not Report
Demonstration	Presentations
Digital Media	Creative Works/Projects
Distinguished professorship	Awards and Honors
Documentary that you wrote, directed, etc.	Creative Works/Projects
Drawing	Creative Works/Projects
Editor/author of the publication	Publications
Editorial board/editor	Professional Service
Editorial positions	Professional Service
Elected as a member of a prestigious organization (e.g., the National Academy of Science)	Awards and Honors
Elected positions in professional associations	Professional Service
Excellence in Teaching/Research/Service	Awards and Honors
Exhibit	Performances/Exhibits
Extension related activities	Appropriate screen in Community Engagement, Extension, and Outreach Activities section
Faculty advisor for a student organization	University Service
Faculty/Staff search committees/graduate student screening/selection committees	University Service
Faculty-led study abroad (non-courses)	Directed Student Learning
Feature Length Film Performance	Performances/Exhibits
Fellows/Honorary Fellows	Awards and Honors
Festival Performance or Exhibit	Performances/Exhibits
Film Performance	Performances/Exhibits
Film that you wrote, directed, etc.	Creative Works/Projects
Flipped classroom – adopted based on assessment results	Engagement in Program Assessment Activities
Flipped classroom – adopted to better utilize class time	Teaching Innovation and Curriculum Development
Grant proposal review/panel reviewer	Professional Service
Grants	Contracts, Grants, and Fellowships
Graphic Design	Creative Works/Projects
Group Show	Performances/Exhibits
Guest lectures given (for credit)	Other Teaching
Guest lectures given (non-credit)	Non-Credit Instruction Taught
Guest on a radio show that was broadcast	Media Contributions
Honor Society membership	Professional Memberships
Installation	Creative Works/Projects
Installation	Performances/Exhibits
Instruction and curriculum activities implemented because of outcomes of assessment measures	Engagement in Program Assessment Activities
Instruction and curriculum activities implemented for reasons other than outcomes of assessment measures	Teaching Innovation and Curriculum Development
Instruction to non-WSU constituents, for instance, a workshop conducted at your professional organization's annual meeting not related to your career	Public Service

Activity	Record In
Instruction to non-WSU constituents, for instance, a workshop conducted at your professional organization's annual meeting related to your career	Professional Service
Instructor's manual	Publications
Internal "reallocation" grants	Contracts, Grants, and Fellowships
Interview of you related to your teaching/research/public service/position in a professional organization conducted for radio/TV/print/social media/web article	Media Contributions
Interviews of faculty by the media if they are unrelated to their WSU position or position in a professional organization	Do Not Report
Invited papers/keynote speaker	Presentations
Jazz Group	Performances/Exhibits
Journal article	Publications
Judging or adjudicating a show, exhibition, or performance	Professional Service
Keynote or Plenary Address	Presentations
Law review	Publications
Lecture to a professional audience	Presentations
Licensed Clinical Social Worker	Licensures and Certifications
Licensed Dietician	Licensures and Certifications
Licensed Professional Counselor	Licensures and Certifications
Lights	Performances/Exhibits
Litigation support/expert witness	Consulting
Long term appointments with a single external firm	Prior and External Work Experience – the difference between this and consulting is the nature of the appointment. If you are an employee of another company, use Prior and External Work Experience. If you work on occasional ad hoc projects, then use Consulting.
Magazine	Publications
Manuscript	Publications
Master Class	Performances/Exhibits
Media recording of a performance given by the faculty member	Performances/Exhibits
Membership in local, regional, national, and international organizations whose members are made of those in the same or similar professional fields	Professional Memberships
Memberships in civic clubs or fraternal organizations, e.g., Boy Scouts, Kiwanis	Public Service if you are in a volunteer role
Mentoring committees	Mentoring
Mentoring a junior colleague	Mentoring
Mentoring of faculty, postdocs	Mentoring
Mentorship of a high school student	Mentoring
Metal Arts	Creative Works/Projects
Monograph	Publications
Music Video	Performances/Exhibits
Musical	Performances/Exhibits
Narrative Triptych	Creative Works/Projects
Online course development	Teaching Innovation and Curriculum Development
Opera	Performances/Exhibits
Orchestration	Creative Works/Projects
Organizing assessment data	University Service
Outside evaluator	Consulting
Outstanding Mentor/Advisor/Teacher	Awards and Honors
Owning a small business	Prior and External Work Experience
P&T committee	University Service
Paid or pro bono consulting for ad hoc projects/initiatives, i.e. when you have one or more clients with project-specific contracts, could have repeat clients	Consulting
Painting	Creative Works/Projects
Paper or oral presentation	Presentations
Patents	Intellectual Property e.g., copyrights, patents
Performance	Performances/Exhibits
Performances at University events	Performances/Exhibits

Activity	Record In
Pesticide Applicator License	Licensures and Certifications
Photograph	Creative Works/Projects
Planning assessment activities	University Service
Play written by faculty member	Creative Works/Projects
Play performance	Performances/Exhibits
Popular press articles or columns written by faculty member related to their teaching/research/public service	Publications
Popular press articles or columns written about faculty member related to their teaching/research/public service	Media Contributions
Popular press articles/columns/other contributions written by faculty member unrelated to their position (e.g., letters to the editor)	Do Not Report
Poster presentation	Presentations
Presentation	Presentations
Press releases	Media Contributions
Printmaking	Creative Works/Projects
Private practice in health/legal fields	Prior and External Work Experience
Product design improvement	Consulting
Professional appointments, e.g., Chair, Interim Chair	WSU Appointment and Assignment Data
Professional audio recording of music	Publications
Professional Engineer	Licensures and Certifications
Program Assessment Coordinator	University Service
Program evaluation	Consulting
Program/curriculum development	University Service
Programs that were written/directed by you or that you participated in that were originally broadcast on radio/TV/social media	Performances/Exhibits
Public health/Animal Health/Health regulatory work/veterinary consults	Consulting
Radio/Audio	Performances/Exhibits
Radio/Audio	Media Contributions
Radio/Audio	Creative Works/Projects
Readings of creative works, e.g., poetry reading	Presentations
Recital	Performances/Exhibits
Registered Nurse	Licensures and Certifications
Research report	Publications
Restaging	Creative Works/Projects
Reviews	Publications
Sabbaticals	Faculty Development Activities Attended
Safety/Diversity/Facilities/Budget committee	University Service
Scenery Design	Creative Works/Projects
Scholarship review committee/Student or Faculty Award committees	University Service
Scholarships awarded when you were a student	Awards and Honors
Science/technical writer	Consulting
Screening	Performances/Exhibits
Screenplay	Creative Works/Projects
Sculpture	Creative Works/Projects
Seminars led	Non-Credit Instruction Taught
Service on university committees	University Service
Service recognitions	Awards and Honors
Service to community organizations	Public Service
Serving as a reviewer for an academic publication, e.g., journal, textbook	Professional Service
Serving as a reviewer for manuscripts, grants, books	Professional Service
Serving on a conference organization committee, e.g., site selection, program, awards	Professional Service
Serving on a review panel	Professional Service
Serving on Faculty Senate and/or any Faculty Senate committee	University Service

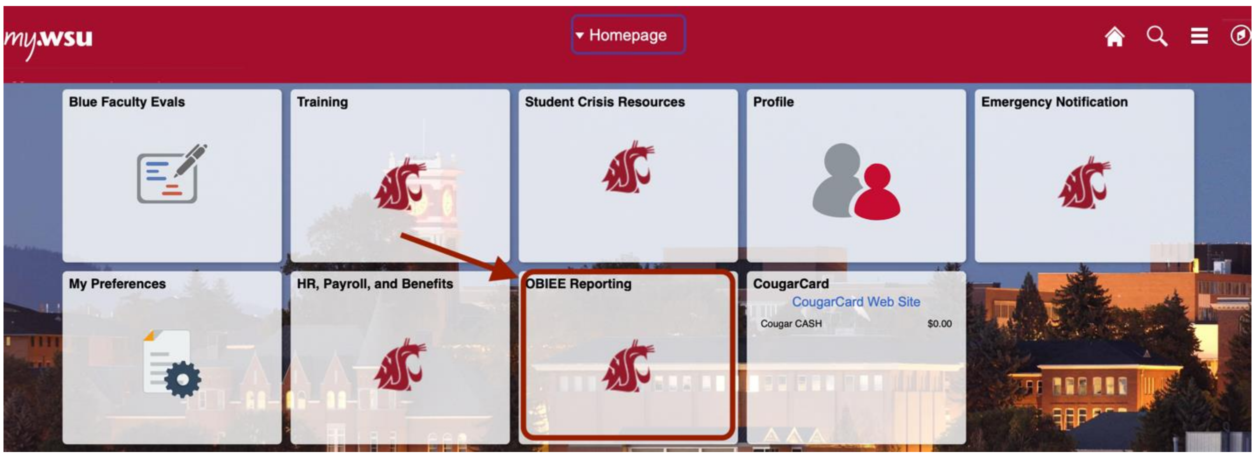
Activity	Record In
Serving on graduate committees	Directed Student Learning
Serving on graduate committees for non-WSU students	Directed Student Learning
Short Film that you wrote, directed, etc.	Creative Works/Projects
Software	Publications
Solo Performance	Performances/Exhibits
Stipends	Awards and Honors
Student research	Directed Student Learning
Subject matter expert/Scientific advisor	Consulting
Supervision of student internships	Directed Student Learning
Supervision of students involved in research/creative works/lab rotations whether or not the student is signed up for a course for that purpose	Directed Student Learning
Teaching at other institutions	Prior and External Work Experience
Teaching Certifications	Licensures and Certifications
Team awards	Awards and Honors
Technical report	Publications
Television interview	Media Contributions
Television performances	Performances/Exhibits
Textbook	Publications
Tour	Performances/Exhibits
Transcription or translation	Publications
Travel Grants	Contracts, Grants, and Fellowships
Web Design	Creative Works/Projects
Workshops led	Non-Credit Instruction Taught
Workshops led at professional meetings	Professional Service
Workshops with children or high schoolers	Professional Service unless it was 4-H or similar Extension related activity

Appendix 2 – Validating Teaching Records

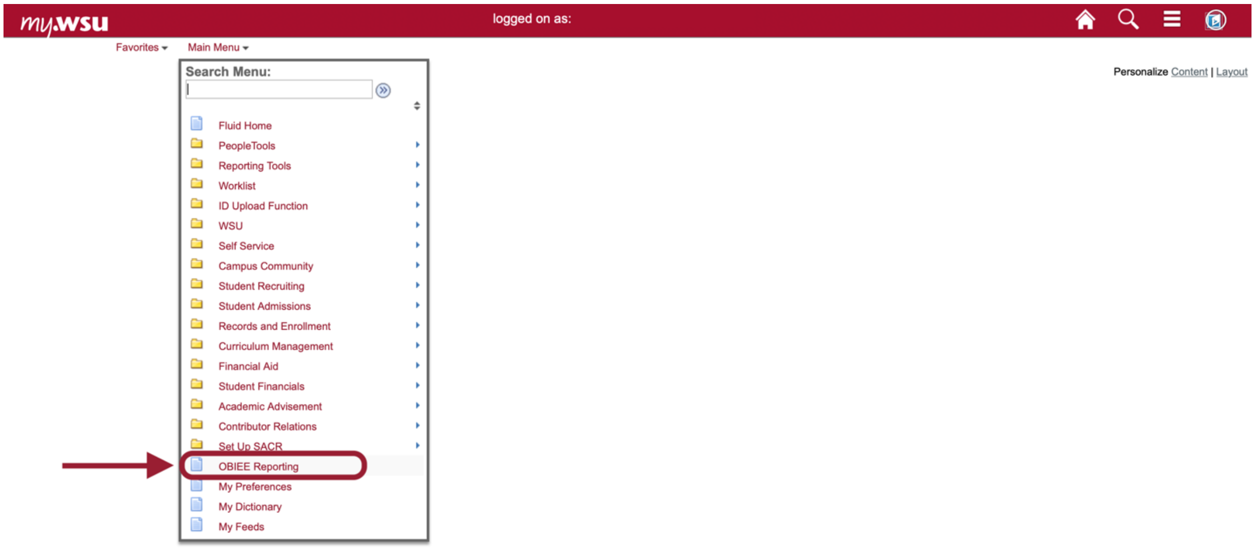
Do the following to confirm that Activity Insight/Faculty Success correctly captures all of your scheduled teachings.

1. Sign in to https://my.wsu.edu. If necessary, use the dropdown in the middle of the top of the screen to navigate to the Homepage:

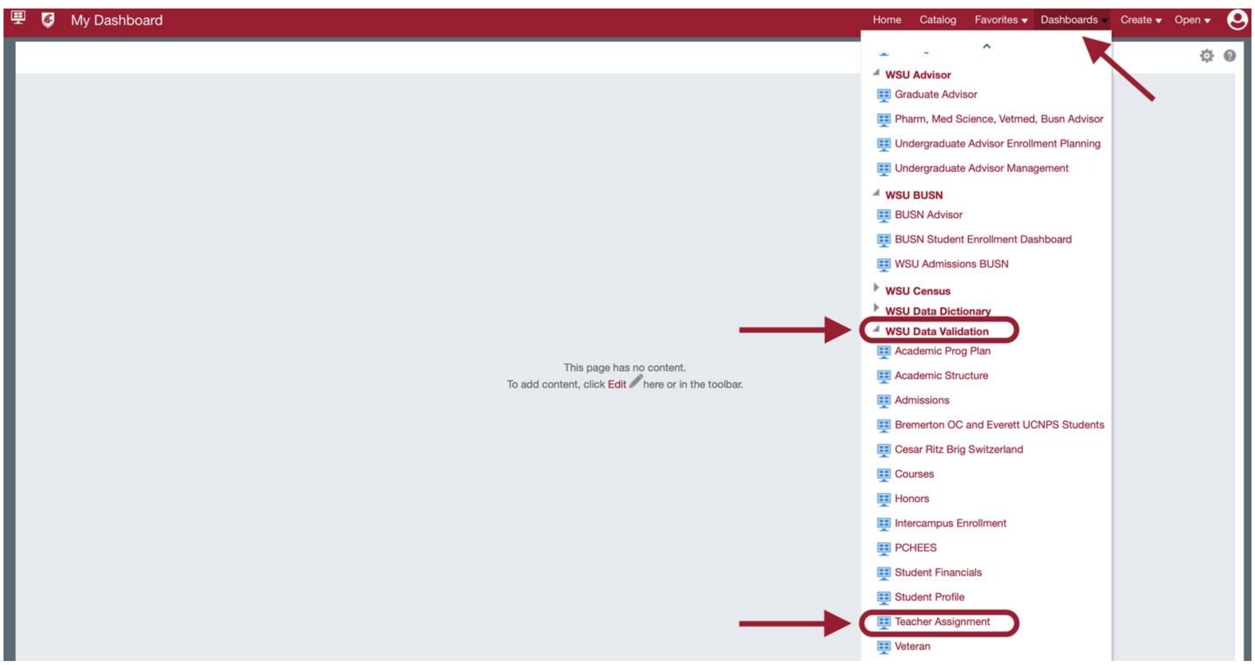
2. Select the **OBIEE Reporting tile** to open a new tab,



Or select the **Main Menu tile** followed by **OBIEE Reporting** from the Main Menu dropdown to open a new window.

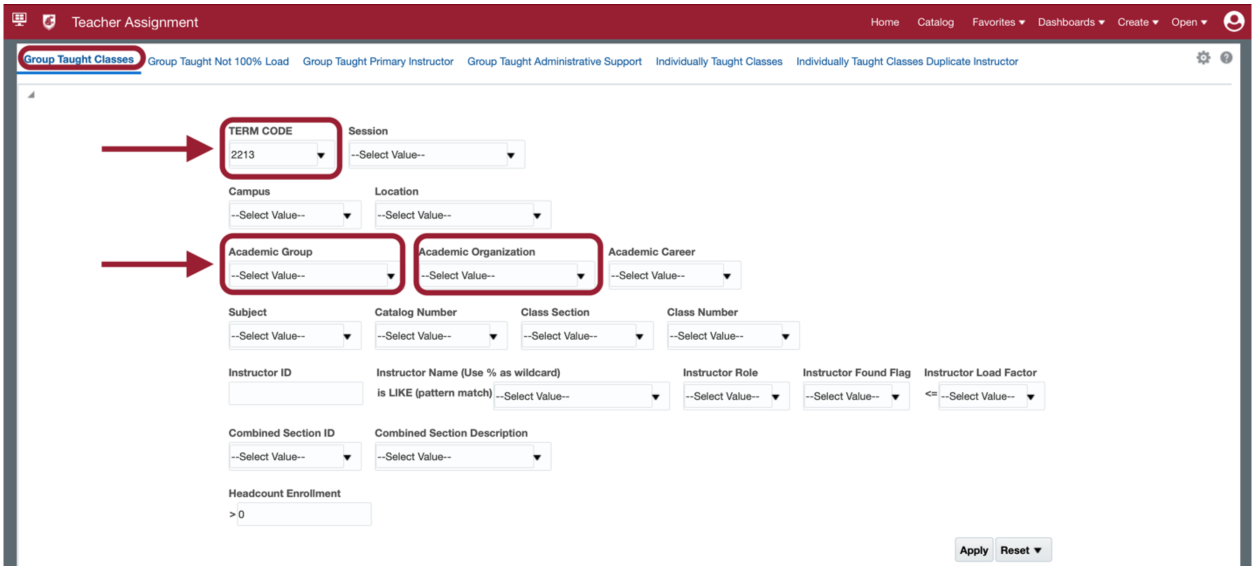


On the top right, select **Dashboards** and find the **WSU Data Validation** dashboards. Click on **"Teacher Assignment."**

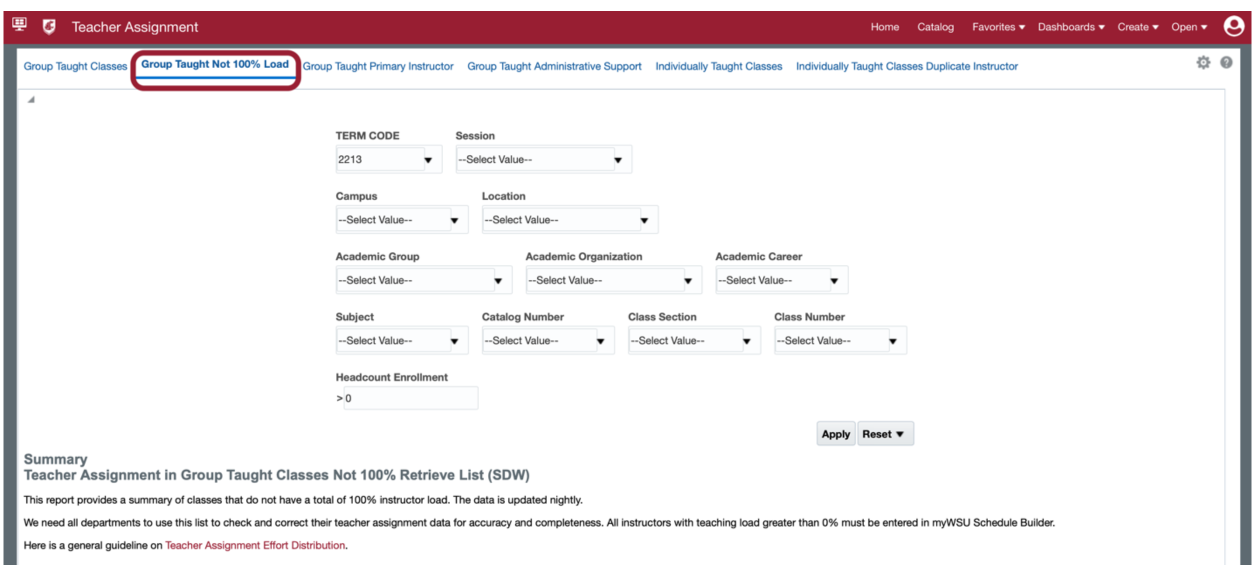


3. **Group Taught Classes:** These classes will be piped into the **Scheduled Teaching** screen in Activity Insight/Faculty Success. On the first worksheet (Group Taught Classes) in OBIEE, select the correct **College** from the **"Academic Group"** field, **Department** from the **"Academic Organization"** field, and **term** from the **"Term Code"** field (you can also select campus or session, if applicable).

   Note: To find courses without an instructor, select **"N"** on the **"Instructor Found Flag."**



4. **Group Taught Not 100% Load:** Class schedulers may look at this, but this is not as useful for individual faculty. Check **"Instructor Load Factor"** in the table produced at the bottom of the page. **Make sure your percentage is correct for each course and that all your classes appear here.** If a class appears that you are not teaching, contact your unit or department administrator (whomever handles personnel actions) to get the class removed. **Instructor Load should sum to 100%** for a class section, so if it doesn't, that could indicate that an instructor is missing. If the instructor load factor is 0%, that would be problematic for Activity Insight/Faculty Success, as we are only importing faculty where the load is > 0% to avoid bringing in administrative support personnel.



5. **Individually Taught Classes:** Make sure to check individually taught classes, such as 600 or 800-level courses, to ensure all of your current students are listed. For these classes, **WHO** you are teaching is what is important. These data will be fed into the **Directed Student Learning** screen in Activity Insight/Faculty Success. If a faculty member is not paired with a student, it will not appear on the faculty member's Activity Insight/Faculty Success screens. To find students enrolled without an assigned instructor, select **"Instructor Found Flag" = "N"** along with the appropriate College

from the **“Academic Group”** field, Department from the **“Academic Organization”** field, and term from the **“Term Code”** field (can also select campus or session, if applicable).