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/Al 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/Al: 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/Al 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/


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
Enter 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 access 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.html?q=change%20name
https://wd5.myworkday.com/wsu/d/search.html?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 Success, 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 in 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.

<table>
<thead>
<tr>
<th>General Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior and External Work Experience</td>
</tr>
<tr>
<td>Employment Type</td>
</tr>
<tr>
<td>Activities Added</td>
</tr>
<tr>
<td>Faculty Development Activities Attended</td>
</tr>
<tr>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Media Contributions</td>
</tr>
<tr>
<td>Professional Memberships</td>
</tr>
<tr>
<td>References</td>
</tr>
</tbody>
</table>

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 Academies 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 screen.

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.
  - Academic Advising

- Graduate committee membership, supervised research not in myWSU, and DNP advising.
  - Directed Student Learning

- Any mentoring or counseling given to NON-STUDENTS (e.g. postdocs, junior faculty, research staff).
  - Mentoring

- WSU group taught courses or individually taught courses (e.g. 800, 700, 702, 499, etc.).
  - 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, postgraduate 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:

- Academic Advising
- Directed Student Learning (e.g., theses, dissertations)
- Mentoring
- Non-Credit Instruction Taught
- Other Teaching
- Teaching Innovation and Curriculum Development
- Engagement in Program Assessment Activities
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.
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.

![Image of NSF Biosketch screen]

2. Click “Add New”

![Image of Add New button]

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.

![Image of Edit NSF screen]

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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:


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**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.”

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**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

(Not all colleges have this option.)

Clinical Service entries should be recorded on the Clinical Service screen.

Institutional

(Not all colleges have this option.)

Veterinary Clinical Service entries should be recorded on the Veterinary Clinical Service screen.

Professional

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.

Personal

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.
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.

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<th>Activity</th>
<th>Record In</th>
</tr>
</thead>
<tbody>
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<td>Creative Works/Projects</td>
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<td>Academic Affairs committee</td>
<td>University Service</td>
</tr>
<tr>
<td>Accolades, &quot;most downloaded paper,&quot; &quot;highly cited researcher.&quot;</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Accreditation self-study documents</td>
<td>University Service</td>
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<tr>
<td>Advising related to an academic program, courses, degree completion,</td>
<td>Academic Advising</td>
</tr>
<tr>
<td>placement, post-graduate education, letters of reference, careers, etc.</td>
<td></td>
</tr>
<tr>
<td>Advising related to projects, mentoring students, serving on</td>
<td>Directed Student Learning</td>
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<td></td>
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<tr>
<td>Advisory Board</td>
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<tr>
<td>Advisory Board memberships</td>
<td>Professional Service</td>
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<tr>
<td>Affiliate appointments</td>
<td>WSU Appointments and Administrative Assignments or Prior and External Work Experience</td>
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<tr>
<td>American Bar Association</td>
<td>Licensures and Certifications</td>
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<tr>
<td>Animation</td>
<td>Creative Works/Projects</td>
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<tr>
<td>Any ad hoc committee or task force at the departmental, College, Campus,</td>
<td>University Service</td>
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<td>or University level</td>
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</tr>
<tr>
<td>Arrangement</td>
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<td>Art Work</td>
<td>Creative Works/Projects</td>
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<td>Assessment</td>
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<td>Becoming an elected officer of a professional organization</td>
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<tr>
<td>Being an invited speaker</td>
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<tr>
<td>Book chapters</td>
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<td>Book reading/book signings</td>
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<tr>
<td>Books</td>
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<tr>
<td>Broadcast media written/produced by the faculty member</td>
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<td>Ceramics</td>
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<td>Certified Forester</td>
<td>Licensures and Certifications</td>
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<tr>
<td>Certified Public Manager</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Chamber Group</td>
<td>Performances/Exhibits</td>
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<tr>
<td>Choir</td>
<td>Performances/Exhibits</td>
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<tr>
<td>Choreography</td>
<td>Creative Works/Projects</td>
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<td>Clinic (e.g., music)</td>
<td>Performances/Exhibits</td>
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<td>Collecting assessment data</td>
<td>University Service</td>
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<tr>
<td>Collection</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Collection</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Commercial driver’s license</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Committee/Board service</td>
<td>University, Professional, or Public Service depending on the organization.</td>
</tr>
<tr>
<td>Competition</td>
<td>Performances/Exhibits</td>
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<tr>
<td>Completed OBIEE, purchasing card, travel training, etc.</td>
<td>Do Not Report</td>
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<tr>
<td>Composition</td>
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<tr>
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<td>Conference proceeding</td>
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</tr>
<tr>
<td>Conference, Attendee, and Presenter</td>
<td>Presentations</td>
</tr>
<tr>
<td>Conference/Workshop/Seminar attendance only</td>
<td>Faculty Development Activities</td>
</tr>
<tr>
<td>Consultation reports</td>
<td>Consulting</td>
</tr>
<tr>
<td>Continuing education courses taught</td>
<td>Non-Credit Instruction Taught</td>
</tr>
<tr>
<td>Costumes</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Course changes supporting program learning outcomes</td>
<td>Engagement in Program Assessment Activities</td>
</tr>
<tr>
<td>Course Syllabi</td>
<td>Scheduled Teaching</td>
</tr>
<tr>
<td>CPR Certification</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Curated Exhibition</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Curricular changes not related to assessment results</td>
<td>Teaching Innovation and Curriculum Development</td>
</tr>
<tr>
<td>Curricular changes related to assessment results</td>
<td>Engagement in Program Assessment Activities</td>
</tr>
<tr>
<td>Curriculum Committee</td>
<td>University Service</td>
</tr>
<tr>
<td>CV Upload to Activity Insight/Faculty Success</td>
<td>COVID-19 Related Circumstances and Goals</td>
</tr>
<tr>
<td>Dance</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Delivered OBIEE, purchasing card, travel training, etc.</td>
<td>Do Not Report</td>
</tr>
<tr>
<td>Demonstration</td>
<td>Presentations</td>
</tr>
<tr>
<td>Digital Media</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Distinguished professorship</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Documentary that you wrote, directed, etc.</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Drawing</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Editor/author of the publication</td>
<td>Publications</td>
</tr>
<tr>
<td>Editorial board/editor</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Editorial positions</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Elected as a member of a prestigious organization (e.g., the National Academy of Science)</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Elected positions in professional associations</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Excellence in Teaching/Research/Service</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Exhibit</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Extension related activities</td>
<td>Appropriate screen in Community Engagement, Extension, and Outreach Activities section</td>
</tr>
<tr>
<td>Faculty advisor for a student organization</td>
<td>University Service</td>
</tr>
<tr>
<td>Faculty/Staff search committees/graduate student screening/selection committees</td>
<td>University Service</td>
</tr>
<tr>
<td>Faculty-led study abroad (non-courses)</td>
<td>Directed Student Learning</td>
</tr>
<tr>
<td>Feature Length Film Performance</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Fellows/Honorary Fellows</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Festival Performance or Exhibit</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Film Performance</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Film that you wrote, directed, etc.</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Flipped classroom – adopted based on assessment results</td>
<td>Engagement in Program Assessment Activities</td>
</tr>
<tr>
<td>Flipped classroom – adopted to better utilize class time</td>
<td>Teaching Innovation and Curriculum Development</td>
</tr>
<tr>
<td>Grant proposal review/panel reviewer</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Grants</td>
<td>Contracts, Grants, and Fellowships</td>
</tr>
<tr>
<td>Graphic Design</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Group Show</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Guest lectures given (for credit)</td>
<td>Other Teaching</td>
</tr>
<tr>
<td>Guest lectures given (non-credit)</td>
<td>Non-Credit Instruction Taught</td>
</tr>
<tr>
<td>Guest on a radio show that was broadcast</td>
<td>Media Contributions</td>
</tr>
<tr>
<td>Honor Society membership</td>
<td>Professional Memberships</td>
</tr>
<tr>
<td>Installation</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Installation</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Instruction and curriculum activities implemented because of outcomes of assessment measures</td>
<td>Engagement in Program Assessment Activities</td>
</tr>
<tr>
<td>Instruction and curriculum activities implemented for reasons other than outcomes of assessment measures</td>
<td>Teaching Innovation and Curriculum Development</td>
</tr>
<tr>
<td>Instruction to non-WSU constituents, for instance, a workshop conducted at your professional organization’s annual meeting not related to your career</td>
<td>Public Service</td>
</tr>
<tr>
<td>Activity</td>
<td>Record In</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Instruction to non-WSU constituents, for instance, a workshop conducted at your professional organization’s annual meeting related to your career</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Instructor’s manual</td>
<td>Publications</td>
</tr>
<tr>
<td>Internal “reallocation” grants</td>
<td>Contracts, Grants, and Fellowships</td>
</tr>
<tr>
<td>Interview of you related to your teaching/research/public service/position in a professional organization conducted for radio/TV/print/social media/web article</td>
<td>Media Contributions</td>
</tr>
<tr>
<td>Interviews of faculty by the media if they are unrelated to their WSU position or position in a professional organization</td>
<td>Do Not Report</td>
</tr>
<tr>
<td>Invited papers/keynote speaker</td>
<td>Presentations</td>
</tr>
<tr>
<td>Jazz Group</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Journal article</td>
<td>Publications</td>
</tr>
<tr>
<td>Judging or adjudicating a show, exhibition, or performance</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Keynote or Plenary Address</td>
<td>Presentations</td>
</tr>
<tr>
<td>Law review</td>
<td>Publications</td>
</tr>
<tr>
<td>Lecture to a professional audience</td>
<td>Presentations</td>
</tr>
<tr>
<td>Licensed Clinical Social Worker</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Licensed Dietician</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Licensed Professional Counselor</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Lights</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Litigation support/expert witness</td>
<td>Consulting</td>
</tr>
<tr>
<td>Long term appointments with a single external firm</td>
<td>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.</td>
</tr>
<tr>
<td>Magazine</td>
<td>Publications</td>
</tr>
<tr>
<td>Manuscript</td>
<td>Publications</td>
</tr>
<tr>
<td>Master Class</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Media recording of a performance given by the faculty member</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Membership in local, regional, national, and international organizations whose members are made of those in the same or similar professional fields</td>
<td>Professional Memberships</td>
</tr>
<tr>
<td>Memberships in civic clubs or fraternal organizations, e.g., Boy Scouts, Kiwanis</td>
<td>Public Service if you are in a volunteer role</td>
</tr>
<tr>
<td>Mentoring committees</td>
<td>Mentoring</td>
</tr>
<tr>
<td>Mentoring a junior colleague</td>
<td>Mentoring</td>
</tr>
<tr>
<td>Mentoring of faculty, postdocs</td>
<td>Mentoring</td>
</tr>
<tr>
<td>Mentorsip of a high school student</td>
<td>Mentoring</td>
</tr>
<tr>
<td>Metal Arts</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Monograph</td>
<td>Publications</td>
</tr>
<tr>
<td>Music Video</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Musical</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Narrative Triptych</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Online course development</td>
<td>Teaching Innovation and Curriculum Development</td>
</tr>
<tr>
<td>Opera</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Orchestration</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Organizing assessment data</td>
<td>University Service</td>
</tr>
<tr>
<td>Outside evaluator</td>
<td>Consulting</td>
</tr>
<tr>
<td>Outstanding Mentor/Advisor/Teacher</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Owning a small business</td>
<td>Prior and External Work Experience</td>
</tr>
<tr>
<td>P&amp;T committee</td>
<td>University Service</td>
</tr>
<tr>
<td>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</td>
<td>Consulting</td>
</tr>
<tr>
<td>Painting</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Paper or oral presentation</td>
<td>Presentations</td>
</tr>
<tr>
<td>Patents</td>
<td>Intellectual Property e.g., copyrights, patents</td>
</tr>
<tr>
<td>Performance</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Performances at University events</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Activity</td>
<td>Record In</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
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<tr>
<td>Pesticide Applicator License</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Photograph</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Planning assessment activities</td>
<td>University Service</td>
</tr>
<tr>
<td>Play written by faculty member</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Play performance</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Popular press articles or columns written by faculty member related to</td>
<td>Publications</td>
</tr>
<tr>
<td>their teaching/research/public service</td>
<td></td>
</tr>
<tr>
<td>Popular press articles or columns written about faculty member related</td>
<td>Media Contributions</td>
</tr>
<tr>
<td>to their teaching/research/public service</td>
<td></td>
</tr>
<tr>
<td>Popular press articles/columns/other contributions written by faculty</td>
<td>Do Not Report</td>
</tr>
<tr>
<td>member unrelated to their position (e.g., letters to the editor)</td>
<td></td>
</tr>
<tr>
<td>Poster presentation</td>
<td>Presentations</td>
</tr>
<tr>
<td>Presentation</td>
<td>Presentations</td>
</tr>
<tr>
<td>Press releases</td>
<td>Media Contributions</td>
</tr>
<tr>
<td>Printmaking</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Private practice in health/legal fields</td>
<td>Prior and External Work Experience</td>
</tr>
<tr>
<td>Product design improvement</td>
<td>Consulting</td>
</tr>
<tr>
<td>Professional appointments, e.g., Chair, Interim Chair</td>
<td>WSU Appointment and Assignment Data</td>
</tr>
<tr>
<td>Professional audio recording of music</td>
<td>Publications</td>
</tr>
<tr>
<td>Professional Engineer</td>
<td>Licensures and Certifications</td>
</tr>
<tr>
<td>Program Assessment Coordinator</td>
<td>University Service</td>
</tr>
<tr>
<td>Program evaluation</td>
<td>Consulting</td>
</tr>
<tr>
<td>Program/curriculum development</td>
<td>University Service</td>
</tr>
<tr>
<td>Programs that were written/directed by you or that you participated in</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>that were originally broadcast on radio/TV/social media</td>
<td></td>
</tr>
<tr>
<td>Public health/Animal Health/Health regulatory work/veterinary consults</td>
<td>Consulting</td>
</tr>
<tr>
<td>Radio/Audio</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Radio/Audio</td>
<td>Media Contributions</td>
</tr>
<tr>
<td>Radio/Audio</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Readings of creative works, e.g., poetry reading</td>
<td>Presentations</td>
</tr>
<tr>
<td>Recital</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Registered Nurse</td>
<td>Licenses and Certifications</td>
</tr>
<tr>
<td>Research report</td>
<td>Publications</td>
</tr>
<tr>
<td>Restaging</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Reviews</td>
<td>Publications</td>
</tr>
<tr>
<td>Sabbaticals</td>
<td>Faculty Development Activities Attended</td>
</tr>
<tr>
<td>Safety/Diversity/Facilities/Budget committee</td>
<td>University Service</td>
</tr>
<tr>
<td>Scenery Design</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Scholarship review committee/Student or Faculty Award committees</td>
<td>University Service</td>
</tr>
<tr>
<td>Scholarships awarded when you were a student</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Science/technical writer</td>
<td>Consulting</td>
</tr>
<tr>
<td>Screening</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Screenplay</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Sculpture</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Seminars led</td>
<td>Non-Credit Instruction Taught</td>
</tr>
<tr>
<td>Service on university committees</td>
<td>University Service</td>
</tr>
<tr>
<td>Service recognitions</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Service to community organizations</td>
<td>Public Service</td>
</tr>
<tr>
<td>Serving as a reviewer for an academic publication, e.g., journal,</td>
<td>Professional Service</td>
</tr>
<tr>
<td>textbook</td>
<td></td>
</tr>
<tr>
<td>Serving as a reviewer for manuscripts, grants, books</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Serving on a conference organization committee, e.g., site selection,</td>
<td>Professional Service</td>
</tr>
<tr>
<td>program, awards</td>
<td></td>
</tr>
<tr>
<td>Serving on a conference organization committee, e.g., site selection,</td>
<td></td>
</tr>
<tr>
<td>program, awards</td>
<td></td>
</tr>
<tr>
<td>Serving on Faculty Senate and/or any Faculty Senate committee</td>
<td>University Service</td>
</tr>
<tr>
<td>Activity</td>
<td>Record In</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Serving on graduate committees</td>
<td>Directed Student Learning</td>
</tr>
<tr>
<td>Serving on graduate committees for non-WSU students</td>
<td>Directed Student Learning</td>
</tr>
<tr>
<td>Short Film that you wrote, directed, etc.</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Software</td>
<td>Publications</td>
</tr>
<tr>
<td>Solo Performance</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Stipends</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Student research</td>
<td>Directed Student Learning</td>
</tr>
<tr>
<td>Subject matter expert/Scientific advisor</td>
<td>Consulting</td>
</tr>
<tr>
<td>Supervision of student internships</td>
<td>Directed Student Learning</td>
</tr>
<tr>
<td>Supervision of students involved in research/creative works/lab rotations whether or not the student is signed up for a course for that purpose</td>
<td>Directed Student Learning</td>
</tr>
<tr>
<td>Teaching at other institutions</td>
<td>Prior and External Work Experience</td>
</tr>
<tr>
<td>Teaching Certifications</td>
<td>Licenses and Certifications</td>
</tr>
<tr>
<td>Team awards</td>
<td>Awards and Honors</td>
</tr>
<tr>
<td>Technical report</td>
<td>Publications</td>
</tr>
<tr>
<td>Television interview</td>
<td>Media Contributions</td>
</tr>
<tr>
<td>Television performances</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Textbook</td>
<td>Publications</td>
</tr>
<tr>
<td>Tour</td>
<td>Performances/Exhibits</td>
</tr>
<tr>
<td>Transcription or translation</td>
<td>Publications</td>
</tr>
<tr>
<td>Travel Grants</td>
<td>Contracts, Grants, and Fellowships</td>
</tr>
<tr>
<td>Web Design</td>
<td>Creative Works/Projects</td>
</tr>
<tr>
<td>Workshops led</td>
<td>Non-Credit Instruction Taught</td>
</tr>
<tr>
<td>Workshops led at professional meetings</td>
<td>Professional Service</td>
</tr>
<tr>
<td>Workshops with children or high schoolers</td>
<td>Professional Service unless it was 4-H or similar Extension related activity</td>
</tr>
</tbody>
</table>
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:

   ![my.wsu homepage](image)

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

   ![OBIEE Reporting](image)

   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 (whoever 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).