

## Annual Activity Report Submission - Approver Instructions

Chairs, directors and deans have approval tasks in Activity Insight. The approver for a faculty member's annual report submission is determined by the faculty member's primary appointment in SIS.

### **Instructions for Annual Activity Review Procedure:**

1. Go to **Workflow** section (available in the top red bar); Workflow tasks will open
2. Open the **UMD Annual Faculty Activity Review** task available in the Inbox section
3. Fill the form as per the guidelines and **submit it**

*Detailed instructions are available from the next page.*

**Note:** To review annual reports for faculty in joint appointments, generate the annual report for the faculty member using the Reports feature in Activity Insight. Only the head of the faculty member's primary appointment unit will be doing the approval through Workflow in Activity Insight.

**Note:** When the report submission workflow process launches, you will receive a notification from [workflow@watermarkinsights.com](mailto:workflow@watermarkinsights.com) ([sample faculty email](#)). Activity Insight is UMD's branded name for Digital Measures by Watermark. You will receive reminder emails from this email address during the report submission period.

If you encounter issues or find yourself stuck at some point, please reach out to [ai-help@umd.edu](mailto:ai-help@umd.edu) immediately or find our office hours at [faculty.umd.edu/data](https://faculty.umd.edu/data)

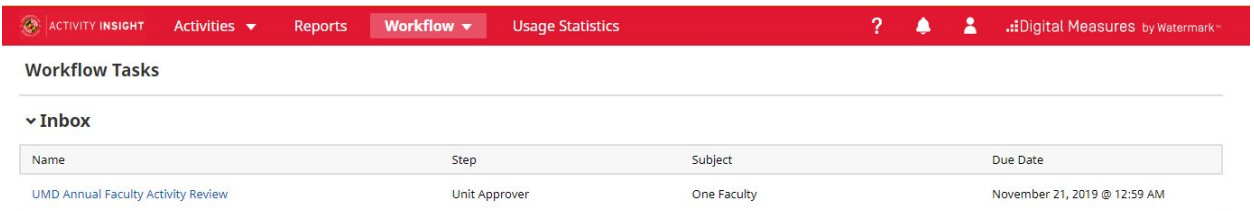
(continued)

## Detailed Instructions

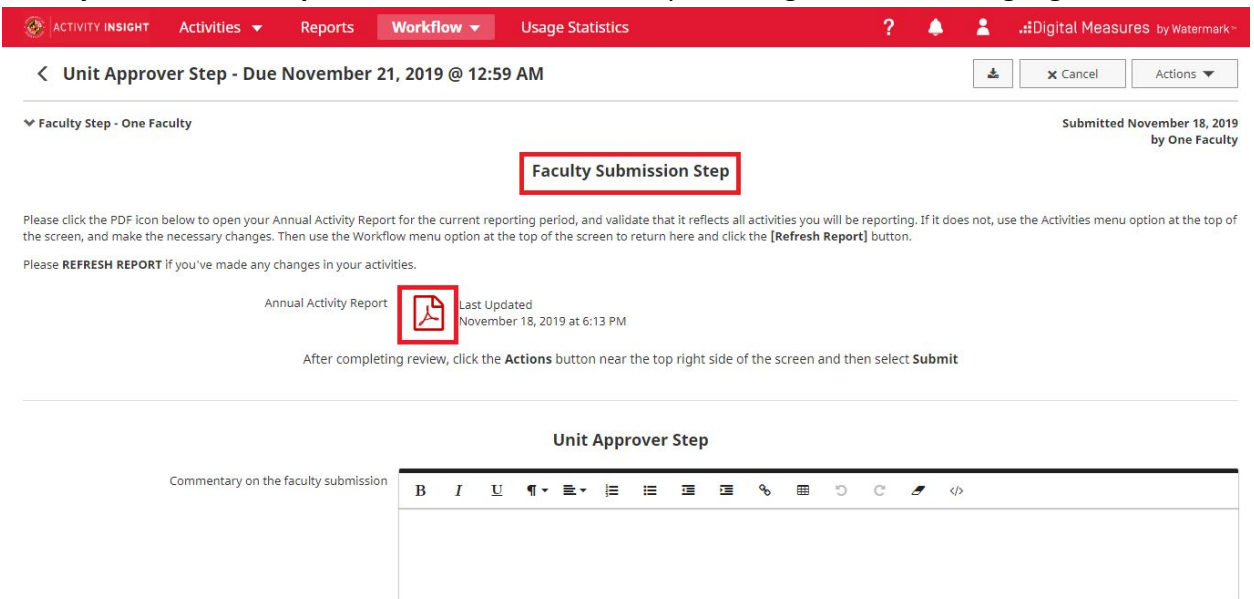
1. Log in to Activity Insight through the homepage available at [faculty.umd.edu/data](https://faculty.umd.edu/data).
2. Open **Workflow** section (in the top red bar).



3. **Workflow** task page will open. Find the **UMD Annual Faculty Activity Review** task in Inbox section and open it.



4. The review page will open with faculty's annual activity report available for review in the **Faculty Submission Step**. To view, **download** the report using Acrobat icon highlighted.



Click **Actions** button near the top right side of the screen and then select **Finish Review**

5. Enter **commentary**, if needed, for faculty's annual activity report in the **Unit Approver Step** section.

The screenshot shows the 'Unit Approver Step' interface. At the top, there is a navigation bar with 'ACTIVITY INSIGHT', 'Activities', 'Reports', 'Workflow', and 'Usage Statistics'. Below this, the page title is 'Unit Approver Step - Due November 21, 2019 @ 12:59 AM'. A 'Submitted November 18, 2019 by One Faculty' status is shown in the top right. The main section is titled 'Faculty Submission Step'. Below this, there is a PDF icon for the 'Annual Activity Report' with the text 'Last Updated November 18, 2019 at 6:13 PM'. A red arrow points to the 'Unit Approver Step' section, which contains a text editor with the label 'Commentary on the faculty submission'. A red arrow points to the text editor with the text 'Enter commentary here'. Below the text editor, there is a red box containing the text 'Unit Approver Step'. At the bottom, there is a red box containing the text 'Click Actions button near the top right side of the screen and then select Finish Review'.

6. Click on **Actions** and then select **Finish Review** to complete faculty's Annual Faculty Activity Review form.

The screenshot shows the 'Unit Approver Step' interface. At the top, there is a navigation bar with 'ACTIVITY INSIGHT', 'Activities', 'Reports', 'Workflow', and 'Usage Statistics'. Below this, the page title is 'Unit Approver Step - Due November 21, 2019 @ 12:59 AM'. A 'Submitted November 18, 2019 by One Faculty' status is shown in the top right. The main section is titled 'Faculty Submission Step'. Below this, there is a PDF icon for the 'Annual Activity Report' with the text 'Last Updated November 18, 2019 at 6:13 PM'. A red arrow points to the 'Unit Approver Step' section, which contains a text editor with the label 'Commentary on the faculty submission'. A red box containing the text 'Unit Approver Step' is shown. At the bottom, there is a red box containing the text 'Click Actions button near the top right side of the screen and then select Finish Review'. The 'Actions' menu is open, showing options: 'Save Draft', 'Finish Review', and 'Send Back to Previous Step'.

- To access submissions, click on **Workflow** dropdown and select **Submissions**. Workflow Submissions page will open.

ACTIVITY INSIGHT									
Activities		Reports		Workflow		Usage Statistics		Digital Measures by Watermark	
Workflow Submissions									
Filters: None									
Template	Schedule	Status	Subject	College	Department	Step/Status	Assignee	Due Date	Actions
Updated Test for Pilot to take screenshots	UMD Annual Faculty Activity Review	Closed	Faculty, One	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Completed	Chair, One	November 21, 2019	
Test OPA Survey	Test OFA Survey - 20190617	Open	Faculty, One	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Department Approver	Chair, One	June 22, 2019	
Test OPA Survey v2	Test OFA Survey - 20190703	Open	Faculty, One	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Department Chair	Chair, One	July 6, 2019	
UMD Annual Faculty Activity Review 20191007	Annual Activity Test 20191011	Open	Faculty, One	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Unit Approver	Chair, One	October 14, 2019	
OPA Collection 20190916	OPA Schedule Test 20190923	Open	Faculty, One	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Completed	Chair, One	September 27, 2019	
Test for Pilot Workflow Annual Reporting	Fake Testing	Closed	Faculty, One	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Completed	Chair, One	November 18, 2019	
Test OPA Survey	Test OFA Survey - 20190617	Open	Faculty, Three	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Completed	Chair, One	June 22, 2019	
Test OPA Survey v2	Test OFA Survey - 20190703	Open	Faculty, Three	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Department Chair	Chair, One	July 6, 2019	
OPA Collection 20190916	OPA Schedule Test 20190923	Open	Faculty, Three	A. James Clark School of Engineering	ENGR-Mechanical Engineering	Completed	Chair, One	September 27, 2019	