How to read prior years' Faculty Annual Reports and Chair/Dean Evaluations

Note: This process requires that you have administrative rights within Faculty 180 to the department/college for which you are reviewing annual reports and evaluations. If you are new to the chair/dean role, the Interfolio Application Administrator will need to be notified in order to adjust your user account settings.
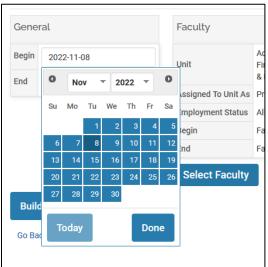
1. Once you have administrative rights, you will see an **Administration** submenu option in the Faculty 180 menu on the left side of the screen. Click on this option and then click the **Reports** option underneath it.
   On the Reports page, go to the **Administrative Reports** section, and select **Evaluations**. You will then see a page with two options, one for a date range you want to look at, and one for the specific faculty you want to look at.

2. In the date section, click into one of the date fields to bring up a date picker popup. You don't need to know the exact date that an evaluation workflow was initiated; any evaluations that were completed during the date window you select will show up in the results. Make sure to select a specific day after changing the month and/or year, and then click **Done** in the date picker popup to confirm the date you select (if you don't select a specific day or if you just click elsewhere on the page to dismiss the popup then it will revert to the default date).
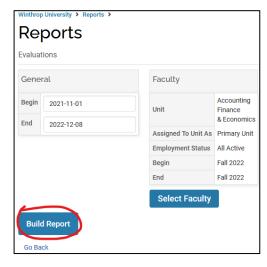
3. Next, you can adjust the list of faculty whose evaluations and annual reports you want to look at. The default will be all faculty active in the current term who are assigned to whichever unit you have administrative rights for. You can't select faculty outside of your unit, but if you want to include faculty who are no longer active, or if you only want to see a subset of the faculty in your unit, click on the **Select Faculty** button. That will bring up a popup window in which you can adjust the filter criteria. There are quite a few options available, but the one you will most likely use is the **Employment Status** field, where you can choose between *Full Time, Part Time, Inactive, Staff, All Active,* and *All Faculty* (note that a faculty member's status isn't updated automatically from Banner, so if you find that someone is categorized incorrectly, contact the Interfolio Application Administrator to let them know what needs to be updated).

Once your filter criteria are set, you will see a list of faculty who meet those criteria listed in the **Available** column. Use the arrows between the two columns to move faculty from this column to the **Selected** column. The double arrows will move the entire list, or you can click on individual faculty member names and move them one at a time.

Once the faculty whose evaluations and annual reports you want to review are listed in the Selected column, click on the **Select Faculty** button at the bottom of the window to confirm the selection and go back to the report builder page.

4. Once you are back to the main report building page, click on the Build Report button to see the results based on the date and faculty filters you set.

Reports

Evaluations

General		Faculty	
Begin	2021-11-01	Unit	Accounting Finance & Economics
End	2022-12-08	Assigned To Unit As	Primary Unit
		Employment Status	All Active
		Begin	Fall 2022
		End	Fall 2022
		Select Faculty	

Build Report

Go Back

5. The initial report you will see just shows the available evaluation processes, along with the number of steps involved (i.e. an initial faculty submission, a chair review, a dean review, and/or faculty acknowledgement of review), the number of faculty involved, and the total number of reviews completed. Click on any of these numbers that show up as blue links in order to go to a page that shows details about either the review steps, the faculty being reviewed, or all of the evaluations themselves. You are most likely to want to see all evaluations for all faculty, so in that case click the number in the Total/Total field (the bottom row of the rightmost column).

#	^	Process Title	^	Unit	^	Evaluation Titles	^	Faculty Being Evaluated	^	Total Number of Faculty Evaluations	^
1		CBA Full-Professor Annual Report - Short Form - 2021		College of Business Administration		4		2		8	
2		CBA Full Time Faculty Annual Report - 2021		College of Business Administration		2		10		20	
		Totals				6		12		28	

6. On the next screen, you will see a list of faculty names, along with an Evaluation Title that is linked in blue. Clicking that link will bring up a screen showing the data associated with that evaluation.

#	^	FacultyID ^	First Name ^	Last Name ^	Process Title ^	Evaluation Title ^	Evaluators ^	Evaluation Authors ^	Started ^	Due ^	Submitted ^	Last Saved ^
1					CBA Full-Professor Annual Report - Short Form - 2021	Chair Evaluates	1	1	2022-02-07 08:01am	2022-03-14 08:00am	Yes	2022-03-11 11:10am
2					CBA Full-Professor Annual Report - Short Form - 2021	Chair Evaluates	1	1	2022-02-07 08:01am	2022-03-14 08:00am	Yes	2022-03-11 11:22am
3					CBA Full-Professor Annual Report - Short Form - 2021	Dean Reviews	1	1	2022-03-14 08:05am	2022-05-02 11:59pm	Yes	2022-05-02 04:55pm

7. This final screen will include a lot of metadata fields, but there will also be fields for the actual **Evaluation Text**, if any was entered, the responses to any custom question fields that are used in your college's evaluations, and links to the associated documents, like the faculty member's annual report used for the evaluation. Clicking on the **View** link next to any listed document will bring it up in a new browser window.

Form Type	Form Title	Field	Chair Evaluates
Evaluation		Process	CBA Full-Professor Annual Report
Evaluation		Author	
Evaluation		Submitted	Yes
Evaluation		Started	2022-02-07 08:01am
Evaluation		Due	2022-03-14 08:00am
Evaluation		Last Saved	2022-03-11 11:10am
Evaluation		Evaluation Text	
Evaluation		Attachments	0
Evaluation	Response	Submitted	No
Evaluation	Response	Last Saved	
Evaluation	Response	Evaluation Text	
Evaluation	Response	Attachments	0
Document	CBA Annual Report - Full Professors (Short Form)	Terms	Spring 2021 - Fall 2021
Document	CBA Annual Report - Full Professors (Short Form)	Locked	Yes
Document	CBA Annual Report - Full Professors (Short Form)	View	View
Custom	Annual Faculty Evaluation - by Department Chair	Input Form - Teaching/Course Reflection Overall Rating	
Custom	Annual Faculty Evaluation - by Department Chair	Input Form - Teaching/Course Reflection Comments	
Custom	Annual Faculty Evaluation - by Department Chair	Input Form - Scholarly Activity Overall Rating	