AI Workflow Processes-2016-2017

1. AI Coordinator/Department Chair/Director will solicit from the faculty:
   - Department FAAR Pro Forma Worksheets/Faculty CVs
   - any requested changes to the web profile (including any change to the publication list order/awards list order)

2. For Faculty Activity Annual Reports (FAARs) Start with the CV/Dept Pro Forma:
   - double check that basic data is correct (i.e. contact info address of office and phone numbers).
   - then look for any new items for the current academic year (1/1/16 to 12/31/16)
   - double check that past information was entered
   - when you go to the Faculty Narratives page, enter current date of at top of screen. Only Narrative that feeds to FAAR from this screen is the Executive Summary.
   - As you enter data in the appropriate location on the AI data entry screen, it will be helpful for you to highlight the items on the CV or FAAR worksheet. *(If you are working off of hard copies rather than the computer screen, you should check off the items entered).*

   -Note: Symplectic Elements will be used to enter any new Journal publication additions. All other publications (eg. Conference Proceedings, Book chapters, etc.) will still be entered using the AI entry screens (see separate instructions on Symplectic Elements).

   - After claiming Journal articles through Symplectic, email Wendy *(wpb48@cornell.edu)* with faculty net ID and dates you claimed articles for that faculty member. She will email you once those citations are “pushed through” to AI. Once they show in AI, check for doubles and delete, remove “SE:” from before citation title, mark “Yes” to make citation public (bottom of page).

   - Continue with other data entry

3. Run Faculty Activity Annual Report (FAAR) for 1/1/16 to 12/31/16 and save in WORD. Depending on Department preferences, you will either provide a copy directly to faculty for review and approval OR provide a copy directly to Department AI Coordinator.
4. For Web Profile updates/other web profile input, make changes in Activity Insight that feed to the web profile (changes could be in any of the following: Biography, Teaching Interests, Research Interests, Service Interests. Also Top 5 Publications and Top 5 Awards)

5. AI narrative changes need to first feed from AI to the Managed Interface/CommonSpot. To see if narrative changes have made it from AI to Managed Interface/CommonSpot, go to “Faculty Biographies” in CommonSpot. Go to Faculty name. If it says “Update formatting,” then your narratives have made it to CommonSpot.

6. To “push through” web profile edits from Common Spot/Managed Interface to the Web Profile see additional instruction sheet. Make sure to check formatting of any documents cited in Faculty Bio’s before copying text from right side of screen to the left side of the screen—look for missing italics or bolding. Then click on “Submit” button.

7. Review the Web profile to make sure the AI edits are in fact changed on the web profile (may take 24-48 hours)

8. Once changes show, send link to web profile either directly to faculty, or to Dept AI Coordinator depending on Department preferences

Other Notes:

Engineering Sort Order for Public Items: This report is used when faculty have expressed specific publication/award order for their website. Running this report allows you to see if they already have a web sort order in place. In this case, you will want to remove old sort order numbers before entering new ones. (E.g., if a faculty wants publications A and B listed first, and you gave them web sort order #s 5 and 4, but publication C already had sort order 5 from a previous year and you don't delete it, the profile would show A, C, then B.) Can be confusing! When running the report, there's no set year, but go as far back in time as you think is necessary to cover the professor's publications (no harm in picking 1950, for example).

Excel Progress Sheets You will want to create excel spread sheets to track your progress broken down by department and then by faculty, such as if FAAR worksheets/CVs and web profiles have been submitted to them, when submitted Worksheets/CVs and profiles were updated in AI, when they were submitted for review, when requested edits were made, when approval was requested, and when/if it was received. Also, notes about follow-up when requested items/approvals were not received. We will provide a sample. These tracking sheets will be different depending on Faculty preferences.

Tracking Progress Wendy will request weekly progress from our temp workers by department. Specifically: 1) # we are waiting for submission on 2) # submitted to us, but not yet started, 3) # Data Entry Completed 4) # Reviewing 5) # Completed for this review year (1/1/16-12/31/16) 6) # Dept self-entry 7) # late due date 8) total # for department

Updated 12/2/16