Initiate Faculty Input Workflow

The activity input workflow process allows faculty members to input and manage their information and activities in the Activity Input Form.

1. Click on the Admin tab.
2. Click on Administration.
3. Click on Activity Input.
4. Click on Initiate Faculty Input Workflow link. A list of previously scheduled input workflows will display.

1. Click on the edit (pencil) icon to adjust an existing input workflow, or click on the Add button to create a new faculty input workflow.

Note: You will potentially see other Departments/Colleges that have an active Initiated Faculty Input form. This is due to faculty who may have a shared appointment within your department. However, you only have the ability to edit a form if you are listed as the creator.
Section 1: Input Workflow Details

1. Enter the **Title** of the workflow. The recommendation is to enter the Department abbreviation, in order to distinguish between other initiated input forms and the timeframe that the faculty will be updating/reviewing.
2. The **Dashboard Message** can be different than the Title. It is up to your Department/College in what they would like to display in the Action Item section.
3. Click into the **Faculty Input Opens** field to display a calendar. Select the date in which you would like the form to be available for faculty.
4. The **Faculty Input Is Due** field will default to Ongoing, but if you want this to end on a specific date, uncheck the Ongoing checkbox and click into the field to select the end date from the calendar.

Note: If you opt to leave the form set to Ongoing, remember to come back and end date the form.

Section 2: Faculty Input Settings

1. Click on the dropdown menu for **Available Forms** and select Input Form.
2. Click on the dropdown menus to select the **Start Semester** to be reviewed.
3. Click on the dropdown menus to select the **End Semester** to be reviewed.
4. Click on the dropdown menu to select the **Vitae Template for Preview**.
Section 3: Workflow Steps

Before

1. The default first step in the approval workflow is the faculty member self-submission of the activity input form. New functionality allows us to adjust the text displayed on the Submit Button Label. The button will default to “Submit for Review” the recommendation is to change it to “Submit”.

2. When changing the button label remember to change the Instructions, so it reflects the name of the button.

3. The approval workflow allows for multiple levels of approval. To add an approval step for administrators click on the Add Step button. The current recommendation is to only include the first step.
Section 4: Participating Faculty

1. Click on the Select Faculty button.
2. Using the Faculty picker select the faculty that are intended to update/review their activities. This may be a select few or the entire Department/College. You may need to select the Assigned to Unit As dropdown menu if the faculty member has a shared appointment with your unit, select ‘Both’.
3. Click on the Select (nbr.) Faculty button.
4. Click on the Save button.
Initiate Faculty Input

Faculty View
Dashboard: Action Items

Forms & Reports: Initiated Activity Input Forms

Note: When the Initiated Faculty Input form becomes available a link on the faculty members Dashboard under Action Items will display. When they click on the link it will take them to the Activities associated with the Start and End Semesters set in the initiated form section 2. If the link is removed from the Action Items, but is still within the active timeframe the link can still be found under Forms & Reports>Initiated Activity Input Forms. If a faculty member has a shared appointment they may have multiple activity input forms to complete.