Reviewer processes - faculty development fund Workday applications

Reviewers are notified by Outlook email when an application has arrived in their Workday inbox.

Reviewers cannot edit application contents beyond adding comments and unit funding.

Chair / dean can approve, deny, or send back for edits (Workday My Tasks inbox).
> DEAN can send back to applicant for edits _or_ to chair for revision of dept funding/ chair comments. If sending back to chair, select "Update application by chair" option.

Approving is completed in **two** Workday steps (Workday My Tasks inbox).

1. Review: Select Approve. (May disregard business process comments here since they are _not_ viewable to committee nor within the completed application.)

2. Update Application & Submit: Scroll down to enter support amount if applicable and _required_ comments (these comments _are_ viewable _within_ application during and after review), then click Submit.

> Contact the Provost's Office if your comments or support amount require editing after completing your approval.

Exceptions to usual process

WD Extend may route a form to two or more individuals at the same time due to a submitter's previous or concurrent role. This will be viewable in Administration View (see below) in the application's Worker Assigned Next column. If the current chair/dean is listed, the other(s) listed can ignore their WD notification to review. If current chair/dean is not listed, see Add Approver below.

Add Approver option (as of 9/12/24)   Adding an approver _inserts them between steps 1 and 2_ above.
> Example of usage: Faculty form routes to program coordinator _instead of_ department chair.
> - Program coordinator selects "Add Approver," adds department chair, then "Approve and Send to Approvers".
> - Form arrives in dept chair inbox where they can approve, send back, or deny. If approving, they type comments / dept amount in business process comment area and Approve.
> - Form goes back to program coordinator. They adds department chair's comments / funding to the chair / department boxes within the form and then Submit to move forward to dean review.

Administrative assistants are notified in WD when faculty in their unit submit an application and when funding is approved by the Provost.

Options to view/review multiple forms

- Review and act on multiple FDF applications (not simultaneous). In your Workday inbox (My Tasks), select Advanced Search. Under Parameters, select Type and Faculty Dev App Form B-P. If this is not a Type option, there are no FDF applications in your WD inbox. Save the search for future use.

- Administration View - *chair/dean/admin assistant* This read-only sortable view may aid with group review or later processing of awards. (Applications cannot be acted on here.) See FORM ACCESS below. Select Administration View. Chair/dean/admin assistant can see university-wide applications. Sort as needed by a single column or multiple items (see example below). Within your sorted list, right click on View App and select See in New Tab. The *sort order will be lost* if an application is not opened in a new tab.

  Sort list by multiple fields:
  All columns have a sort option except event title.
  Example: For a list of department applications approved in the September 24-25 cycle, select the column headers one by one and filter for 24-25, September 20, department name, and Successfully Completed. The resulting list may be sorted by any other columns except event title. Filters can be added or removed as needed.

- Export to Excel from Administration view for a sortable and printable list.

Examples of Administration View sorting. *Filtered columns will be marked with a small blue filter icon.*

Printing an application to PDF or paper:
  Select View App OR right click on View App, See in New Tab (if needing to keep list sort order).
  Then Control P or use browser's Print option.

  If print version's page 1 is only the Back button, set first print page as 2.

FORM ACCESS:

Access the form and administration view in one of three ways in Workday.
- Type Faculty Development Application Form in the Workday search bar.
- Type Workflow Apps in search bar. Select Academic Affairs.
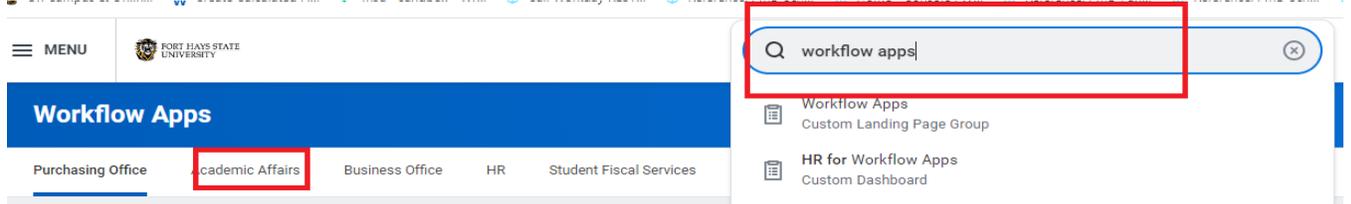
- Go to your Workday Menu and add the app (limit 20) to your list.

Chair/Dean/Administrative Assistant view *Faculty do not have Administration View.*

View applicant instructions, faculty development fund definitions, criteria, and procedures at
https://www.fhsu.edu/academic/provost/faculty_dev_fund/index or using the Guidelines link at the top of the form.

Contact Janet Kohl in the Provost's Office by email or phone (4207) with questions or correction requests.