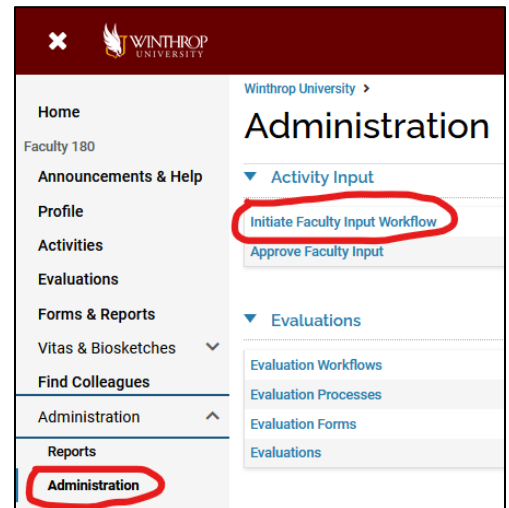# How to set up a faculty annual report input workflow in Faculty 180

1. Go to the **Administration** tab (listed under the Administration heading) in the menu on the left side of the screen. On this tab, select the **Initiate Faculty Input Workflow** link.

2. On this page, you can create a new workflow, by clicking on the **Add** button at the bottom of the page.
   Note: This screen is also where you can view the previous/current faculty input workflows by selecting a date range (this will show all workflows that were active at some point during that range). You can also filter by the specific Workflow Form (i.e. the form template) or by using the Search bar to search by a keyword (such as your college or a specific year). This is useful if you need to check the exact settings from a previous year's Annual Report input workflow, or if you need to edit a current workflow that you have created.
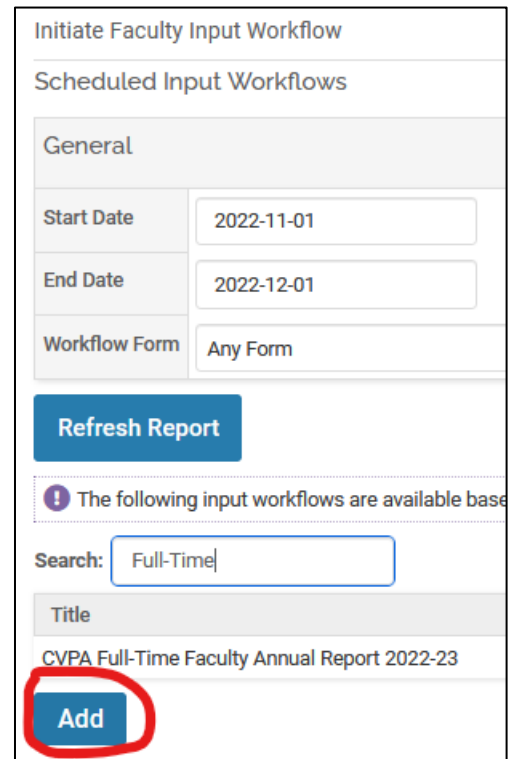
3. The first setup section is where you will specify the name and date range of the input workflow you are creating. The **Title** is what will appear to administrators on the page above (where you can find and edit workflows). The **Dashboard Message** will default to being the same as the Title, but this is the text that appears on the faculty members' home page as a Task so you can change it if that would be helpful. The **Faculty Input Opens** date is the date the Task will appear on faculty members' home pages, and the **Faculty Input is Due** date is the date it will disappear from their home pages. (The **Ongoing** checkbox would be used if you had a workflow that doesn't have a due date.)

4. The second setup section is where you will specify the input and output templates for the data included in the annual report. The input template (labelled **Available Forms**) refers to the fields that will be shown to the faculty member for them to fill out, and the output template (labelled **Vita Template for Preview**) refers to the fields that will be fed into the preview document that faculty can save or print before submitting. You will also need to specify the beginning and ending terms that should be included in the annual report that you are setting up, which will then be reflected in the fields that faculty fill out.

Note: Each college has a slightly different set of forms, but all of them will be available in the dropdown menu for you to choose from, so read the names carefully as you are making your selection. In addition, old/unused forms can't be deleted or hidden in this system, so they are instead renamed to begin with an "x" to distinguish them from the forms currently in use.)

5. The third setup section will already have the faculty submission step filled out, and you don't need to change this unless you want to rephrase the instructions for some reason. You do need to add a step to allow chairs/deans to return a submitted report back to the faculty member for revision, however. To do this, click the **Add Step** button.

6. In the newly added step, you will need to fill out the first four fields. The first field indicates who the step is for, so select "Any Admin". The second field is the step's title, which doesn't show up outside of the setup screens, but the third and fourth fields are the buttons that chairs/deans will see when they view a submitted report through the Approve Faculty Input screen (see the separate tutorial for instructions). You can also include instructions, like "Please use the "Return for Revision" button to return the report for further editing if needed.", but the approval screen is pretty clear so instructions aren't necessary unless you need to specify the circumstances under which a report is returned, or something along those lines.

7. The final setup section is where you tell Faculty 180 which faculty members should be assigned this input workflow. Click on the **Select Faculty** button.

8. In the Select Faculty dialog box that pops up, there are several filters you can use to narrow down the list of faculty members. By default, the **Unit** will be set to whichever administrative unit you have administrative rights for, but you can change this if needed. If your faculty rosters have already been updated in Faculty 180, then you should be able to search for faculty with the default **Employment Status** "All Active", and the default current term. Once you have adjusted your filters if needed, click on the blue number in the **Available** column to see the list of faculty members returned by your filters. Use the four buttons between the columns to add faculty to the **Selected** column, which indicates the faculty members who will be assigned the workflow you are building. You can move over the whole list at once with the top button (double arrows), or select faculty one at a time and move just that one person using the second button (single arrow). The third and fourth buttons will move faculty back out of the **Selected** column. If you have a long list of faculty in the Available column and don't want to scroll through it to find individual people, you can also search for them by name using the Search bar at the top of the window, and then select/move them in the same way as from the full list. Once your selection is finalized, click the **Select Faculty** button to return to the main workflow setup screen.

Note: If you have new faculty who don't show up on this list, or if you have former faculty who are showing up even though they no longer teach here or have moved to a different college/department, contact the campus Interfolio administrator to add, update, move, or deactivate users. The administrator will also need to update administrative rights any time there is a new department chair or dean, which will be relevant for the chair/dean evaluation step that you will set up separately and for the ability to approve/return annual report submissions. Also note: You can edit this workflow after it is created, so if you need to add or remove faculty members later in the year you will be able to do that without starting over from the beginning.
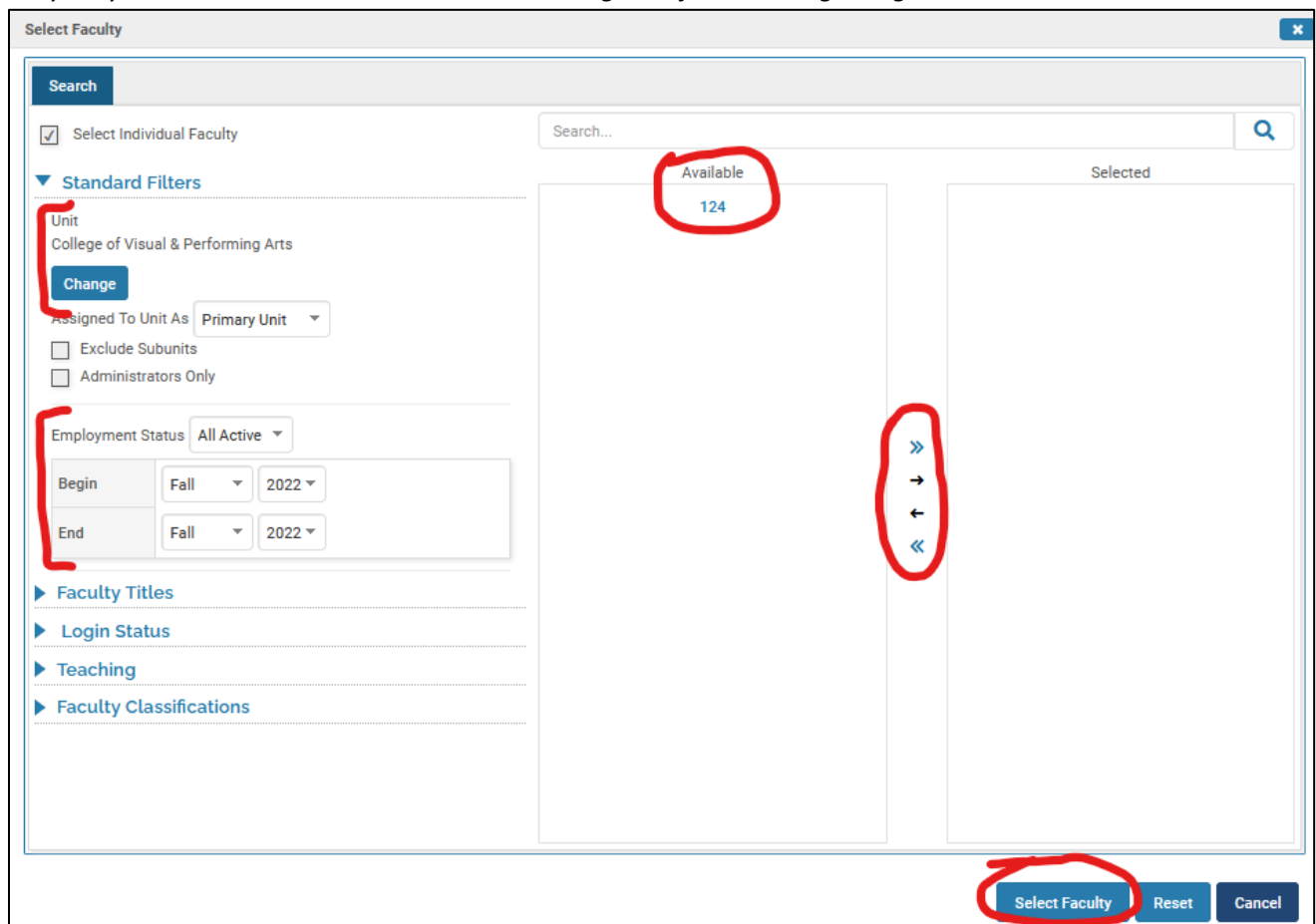
9. After selecting the faculty members to include in this workflow, click the Save button at the bottom of the screen and you're done!

10. If you need to edit the workflow later, return to Initiate Faculty Input Workflow page (Step 1) and then instead of clicking the Add button in Step 2, you will search for and select the workflow you need to edit, and click the pencil icon next to it to reopen the setup page.