RPT Workshop
How to Create and Manage a Case

May 9, 2019
Workshop Agenda

♦ Faculty Affairs Companion Project Overview
♦ Implementation Timeline
♦ RPT Configuration Foundations
♦ Workshop Objectives
♦ Next Steps
♦ RPT Demonstration
HCM For Faculty Affairs = Workday + Interfolio

Workday

♦ System of Record for all academic workers (Standing Tenure Track Faculty, Standing Faculty Clinician Educator, Associated Faculty, Academic Support Staff)
♦ Approval and processing of many current FIS actions (e.g., Named Professorship Appointment, Extension, Leave of Absence)

Interfolio

♦ Job Posting / Ad Creation
♦ Application Processing
♦ Committee Review
♦ Collection of required documents and review and approval workflows for:
  • Appointments
  • Reappointment
  • Promotion

Overall Companion Project Scope:
Implementing new processes and system to manage Faculty Recruiting and Appointment, Review, Promotion and Tenure Approvals
Interfolio’s Product Suite

**dossier institution**
- Apply for Fellowships, Grants, and Faculty Reviews
- Transparency into Institutional Review Guidelines
- Lifetime Curation of Artifacts & Data for Advancement

**interfolio faculty search**
- Efficient Digital Committee Collaboration
- Tools for Diversity Goals & Compliance
- Standard Criteria for Equitable Searches

**interfolio review, promotion & tenure**
- Secure, Configurable & Efficient Workflows
- Clear Candidate Submission Process
- Mitigates Legal Risk with Compliance & Transparency

**interfolio faculty180**
- Validated Faculty Data
- Activity Reporting
- Accreditation & Compliance Reporting

Initial Companion Project Scope
## What will be processed in RPT?

<table>
<thead>
<tr>
<th>Action Type</th>
<th>Provost Review Meeting</th>
<th>Interfolio RPT</th>
<th>Workday Supervisory Org (SO)</th>
<th>Workday Academic Unit (AU)</th>
<th>Workday Processing Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment</td>
<td>Rank Dependent</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Add Appointment in Workday AU- Includes Joint, PIK, and NROTC appointments</td>
</tr>
<tr>
<td>Promotion</td>
<td>Rank Dependent</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Update Appointment in Workday AU</td>
</tr>
<tr>
<td>Reappointment</td>
<td>Rank Dependent</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>Update Appointment in Workday AU</td>
</tr>
<tr>
<td>Secondary Appointment</td>
<td>PSCS</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>Update Appointment in Workday AU</td>
</tr>
<tr>
<td>Secondary Reappointment</td>
<td>PSCS</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>Update Appointment in Workday AU</td>
</tr>
</tbody>
</table>
For appointment, reappointment, and promotion cases that are reviewed by the Provost Staff Conference Subcommittee (PSCS)... 

Once a case is approved in RPT, manual entry in Workday will occur in the supervisory org and/or the academic unit.
Resources

♦ Version 1.0 of a Faculty Actions Guide is being drafted and will be posted on our webpage after our review is completed on 5/15 – we welcome your feedback about how we can make this guide useful for everyone.

♦ Interfolio User Guides by Role:
  • Candidate's Guide to RPT
  • Committee Manager's Guide to RPT
  • Committee Member's Guide to RPT
  • External Evaluators: Guide to Providing Requested Evaluations in RPT

♦ Interfolio Training Videos by Role are posted on our webpage

♦ Interfolio’s Product Help also includes an extensive inventory of articles, searchable by keyword and topic.

♦ Please familiarize yourselves with these resources before your cases are created and encourage your school’s participants to refer to them once their review cases begin.
Today’s Workshop

- Demonstrate how to manage a case in RPT – full training will take place in July
- Increase understanding of faculty review practices as input to Faculty Actions Guide creation

Questions and Comments, Please!!!