Instructions for Faculty

Step 1:
Confirm your employee information is correct.

Step 2:
Enter the Date of the Activity, Information regarding the Activity, and the amount of Time spent on the activity, in hours. (ex. 1.5 = one hour and 30 minutes)

Step 3:
Provide the Description or Summary of the Activity.

Step 4:
Place a check in the box for confirmation.

This section is for use by the Payroll Department.
Step 5: Click the "Submit To" button, select "Chairs" group list, and then select or search for the "Chair" to approve your request.

Step 6: Click "Send to Selected" to submit your request for approval.

Approval Routing Workflow
Instructions for Chairs, Deans, and Coordinators

Within Etrieve Central, Click on your inbox and then select the eform in the Package Items list (Tip: two separate clicks of your mouse will display the submitted form into the Right-hand frame for viewing).

CHAIRS:
Email notifications will be sent when requests have made it to the Chair’s Inbox.

Step 1:
The menu at the bottom of the screen will provide options to:
1) Approve to will send the request to the Dean of your choosing for Approval
2) Decline the request
3) Refer will send the request to someone of your choosing.
4) Return will send the request back to the Faculty member who submitted the request.

Step 2:
When clicking on "Approve to", the Group "Deans" will be displayed. Clicking on Deans will then display a list of Deans for you to select or search for. Select the appropriate Deans for Approval of this request. [Do not select Development.]

Step 3:
Select the appropriate Dean and then click Send to Selected. The request will now be routed to the selected Dean for approval.
Instructions for Chairs, Deans, and Coordinators (con't)

DEANS:

After accessing the submitted eform request from the Inbox, the Deans will have access to a menu at the bottom of the screen with options to:

1) **Approve to** will send the request to the Professional Development Coordinators of your choice.
2) **Decline** the request and notify the Faculty Member via email.
3) **Refer** will send the request to someone of your choosing.
4) **Return** will send the request back to the Faculty member who submitted the request. The Faculty member will receive an email notification when it enters their inbox.

Professional Development Coordinators:

Professional Development Coordinators (PDCs) will have the same options available to them as the Deans. PDCs will receive an email notification when a request that has been approved by a Dean has been received in their Group inbox. All requests approved by Deans from each college will collect in the PDC inbox. PDCs will need to review the PDC for their college and act upon it. When the PDC clicks "Approve", the request will automatically be submitted to Payroll for processing.

Request Status and History

**Status** of submitted requests can be viewed in the Activity List. Status would show "In Progress" or "Ended".

**History** will display who acted upon it and whose inbox currently has the request.