

Workload Effort Guides in FPT

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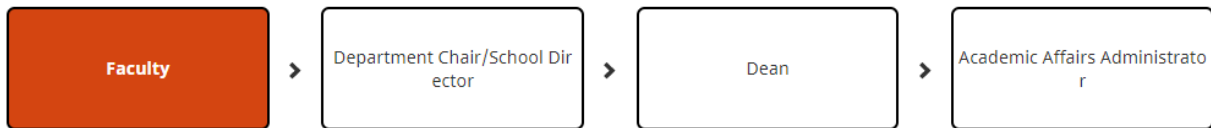
Workload Effort Guide in FPT

Faculty Version

2.12.2021

FPT@utrgv.edu

Purpose: You will learn how to create and submit your Workload form online through Faculty Portfolio Tool (FPT). Below is the Workflow for Workload Effort.



Login Steps:

URL: <https://my.utrgv.edu/home>

1. Log into your my.utrgv.edu using your UTRGV credentials.
2. Click on the FPT icon in your application section.
3. Once logged in, click on the Workflow tab at the top of the screen.

Screen Example:



1

In your inbox, click on the link to your Workload Effort form.

Workflow Tasks

▼ **Inbox**

Name	Step	Subject	Due Date
Workload Effort- Test #3	Faculty	Me	February 11, 2020 @ 11:59 PM

▼ **History**

Name	Current Step	Subject	Last Modified	Actions
<i>No Data to Display</i>				

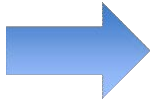
2

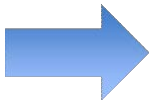
Enter the data needed.

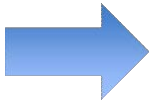
1. During the upcoming academic year (2021-2022); what percent of your time do you propose to dedicate to each of the following Effort Types?

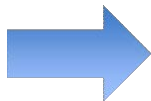
Note: Please provide whole number. Total must add up to 100%

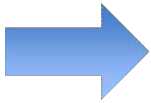
 * Teaching Percentage

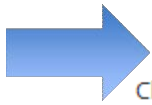
 * Externally Funded Grants (Buyout) Percentage

 * Externally Funded Grants (Cost-Share) Percentage

 * Institutionally Sponsored Research Percentage*

 * Clinical Service Percentage

 * Service (Departmental, College, University Committee, Professional, and Community Service, etc.) Percentage

 * Administrative Assignments (Associate Dean, Chair/Director, Program Coordinator, etc.) Percentage

You will have a section to add comments as an option.

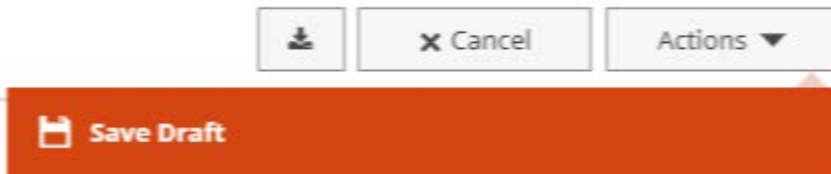
Comments



A rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Undo, Redo, and a Save icon.

3

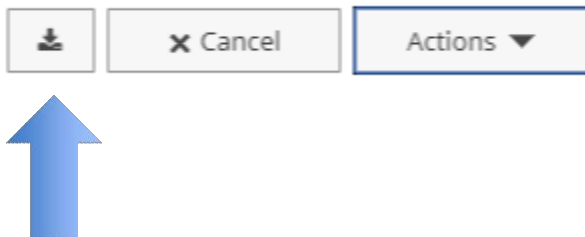
1. You can save at any time by clicking the Action icon at the top of the screen. It will provide you a drop-down menu.



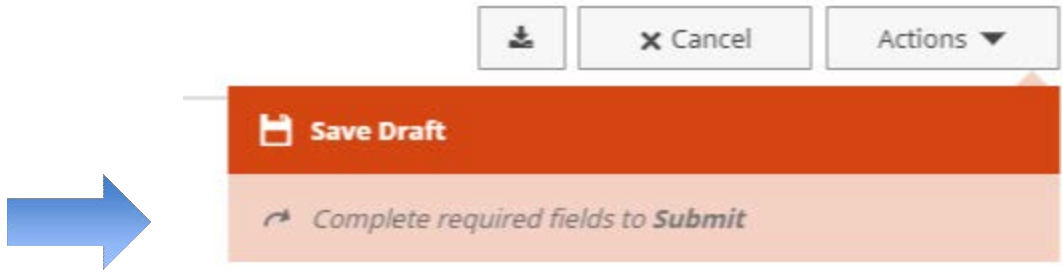
2. The Cancel button will delete anything entered that wasn't previously saved.



3. The Export button will allow you to download your Workload Effort form as a zip file prior to submission for your personal records.

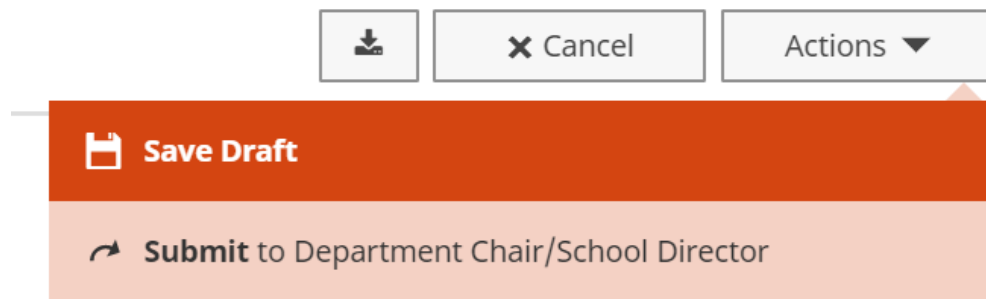


4. You have to complete all of the required sections in order to submit your Workload Effort form the next step in the workflow. You will know if you are missing any section when the Action drop down menu says to complete required fields to Submit.

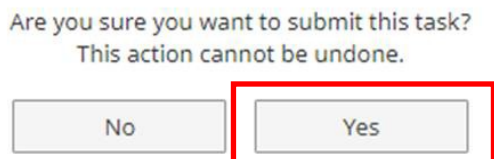


4



When you have completed all of the required sections, the Action button will then say **Submit to Chair** instead of *Complete required fields to Submit*. Review your form one final time before you submit it.



After you click Submit, you will see a pop up window asking to confirm the action. Click Yes and your form will move to the next step.



Once you submit your workload, it will move out of your inbox and into your history. The current step column will allow you to track your workload throughout the review process.

UTRGV Activities Reports Workflow   Digital Measures by Watermark

Workflow Tasks

▼ **Inbox**

Name	Step	Subject	Due Date
<i>No Data to Display</i>			

▼ **History**

Name	Current Step	Subject	Last Modified	Actions
Workload Effort- Test #3	Department Chair/School Director	Me	February 11, 2020	▼

Workload Effort Guide in FPT Chair/School Director Version

2/12/2021
FPT@utrgv.edu

Purpose: You will learn how to submit your review/approval of your faculty's Workload Effort form online through Faculty Portfolio Tool (FPT). Below is the Workflow for Workload Effort.

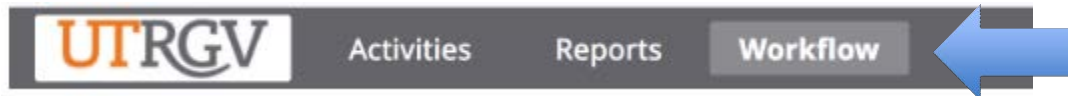


Login Steps:

URL: <https://my.utrgv.edu/home>

4. Log into your my.utrgv.edu using your UTRGV credentials.
5. Click on the FPT icon in your application section.
6. Once logged in, click on the Workflow tab at the top of the screen.

Screen Example:



1

In your inbox, click on the link to your faculty's Workload Effort form.

Workflow Tasks

▼ **Inbox**

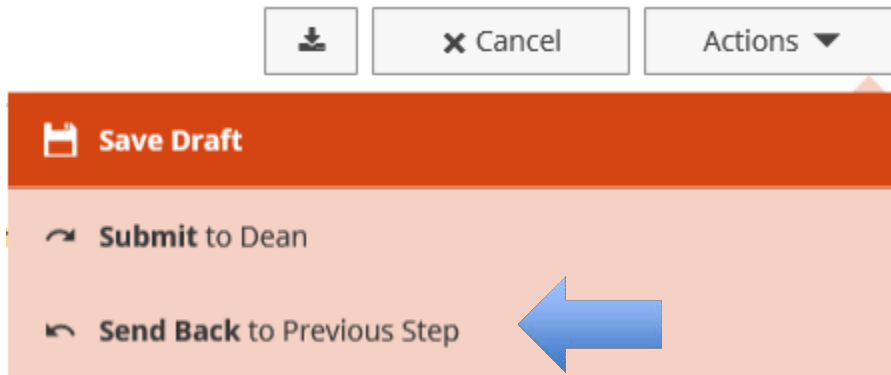
Name	Step	Subject	Due Date
Workload Effort- Test #3	Department Chair/School Director	Test Userff	February 12, 2020 @ 11:59 PM

▼ **History**

Name	Current Step	Subject	Last Modified	Actions
<i>No Data to Display</i>				

2

After you have read the faculty's Workload form and see that something is missing you have the option to send it back to the faculty so they can add it. Click on the Actions drop-down button and then click the **Send Back to Previous Step**.



This will prompt a pop up that will allow you to send a message to the faculty informing them why you are sending it back. Click **Send Back** when ready.

Send Back to Previous Step >

▪ Subject

▪ Message
B I U 0/3800

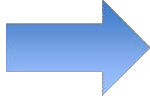
▪ Due Date

If the initial form is fully completed, you can continue on with your response.

3

Enter the data needed.

1. I have reviewed and approved the workload effort plan for the 2021-2022 academic year?

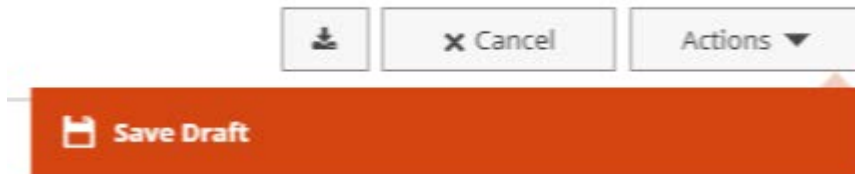


* Answer Answer Approved Denied

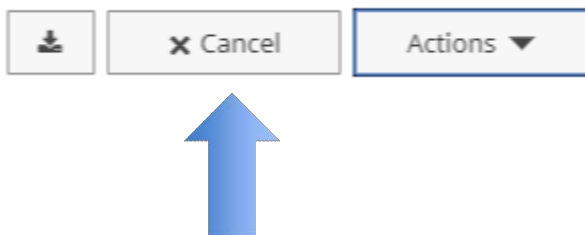
Comments

B I U [List icons] [Link icon] [Table icon] [Undo icon] [Redo icon] [Eraser icon] [Code icon]

You can save at any time by clicking the Action icon at the top of the screen. It will provide you a drop-down menu. Click **Save Draft**.



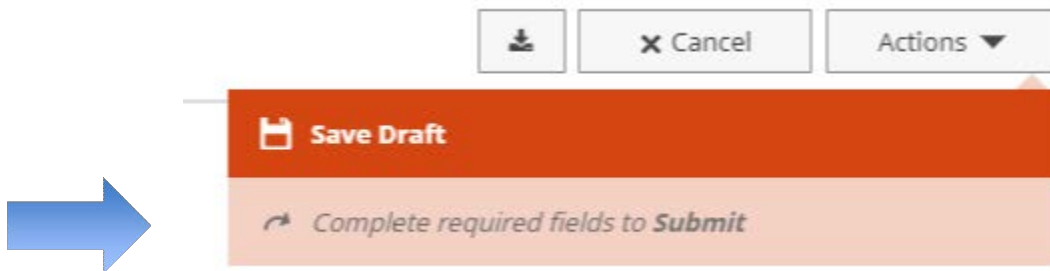
Click the Cancel button to delete anything entered that wasn't previously saved.



The Export button will allow you to download your response form as a zip file prior to submission for your personal records.

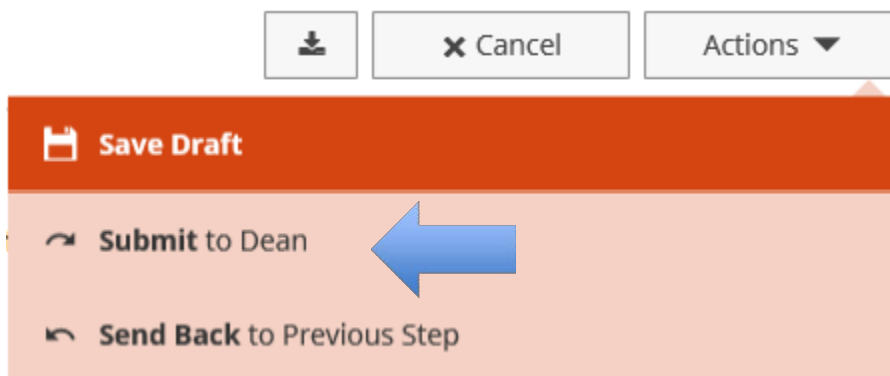


You will have to complete all of the required fields in order to submit your response to the Dean. You will know if you are missing any section when the Action drop down menu says to **complete required fields to Submit**.

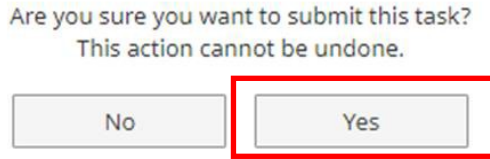


4

When you have completed all of the required fields, the Action button will then say **Submit to Dean**. Review your form one final time before you submit it.



After you click Submit, you will see a pop up window asking to confirm the action. Click Yes and your form will move to the next step.



Once you submit your response, it will move out of your inbox and into your history. The current step column will allow you to track your form throughout the review process.

The screenshot shows the UTRGV Workflow Tasks interface. At the top, there is a navigation bar with 'UTRGV' logo, 'Reports', and 'Workflow' tabs. The 'Workflow' tab is active. Below the navigation bar, there is a section for 'Workflow Tasks' with two expandable sections: 'Inbox' and 'History'. The 'Inbox' section is currently collapsed and shows 'No Data to Display'. The 'History' section is expanded and contains a table with the following data:

Name	Current Step	Subject	Last Modified	Actions
Workload Effort- Test #3	Dean	Test Userff	February 11, 2020	Recall Download

Note: If for some reason you forgot to add something to your response you can recall it from the Dean by clicking the Recall button from the drop-down Action button in your History tab. It will then go back to your inbox where you can reopen and make your changes and send it forward to the Dean.

Workload Effort Guide in FPT

Dean Version

2/12/2021

FPT@utrgv.edu

Purpose: You will learn how to submit your review/approval of your faculty's Workload Effort form and Chair's response online through Faculty Portfolio Tool (FPT). Below is the Workflow for Workload Effort.

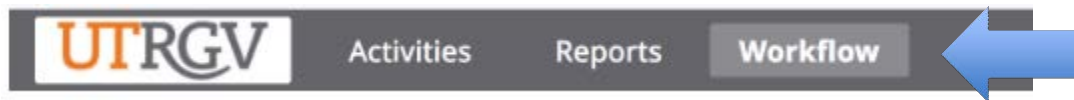


Login Steps:

URL: <https://my.utrgv.edu/home>

7. Log into your my.utrgv.edu using your UTRGV credentials.
8. Click on the FPT icon in your application section.
9. Once logged in, click on the Workflow tab at the top of the screen.

Screen Example:



1

In your inbox, click on the link to your Workload Effort form.

Workflow Tasks

▼ **Inbox**

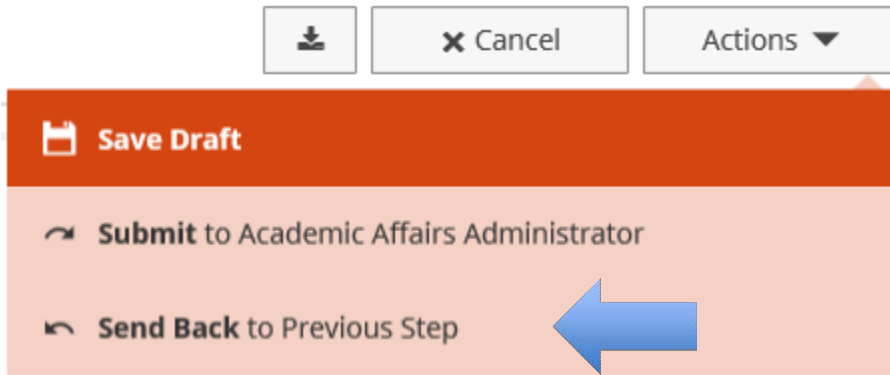
Name	Step	Subject	Due Date
Workload Effort- Test #3	Dean	Test Userff	February 13, 2020 @ 11:59 PM

▼ **History**

Name	Current Step	Subject	Last Modified	Actions
<i>No Data to Display</i>				

2

After you have read the faculty's Workload form and the Chair's response you notice that the Chair forgot to add an item. You have the option to send it back to the Chair. Click on the Actions drop-down button and then click the **Send Back to Previous Step**.



This will prompt a pop up that will allow you to send a message to the faculty informing them why you are sending it back. Click **Send Back** when ready.

Send Back to Previous Step

Subject

Message

B *I* U

0/3800

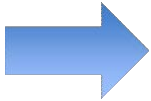
Due Date

If the Chair's response was completed, you can continue on with your response.

3

Enter the data needed.

1. I have reviewed and approved the workload effort plan for the 2021-2022 academic year?



* Answer Approved Denied

Comments

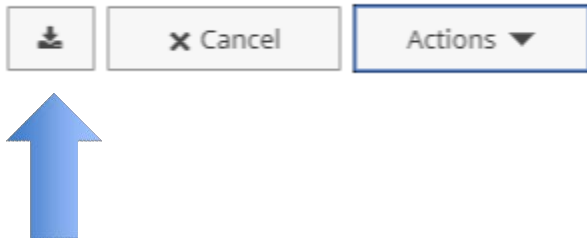
B *I* U

You can save at any time by clicking the Action icon at the top of the screen. It will provide you a drop-down menu.

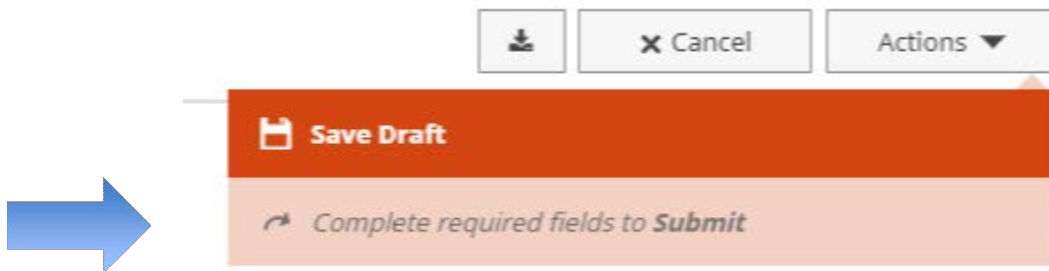
Save Draft

The Cancel button will delete anything entered that wasn't previously saved.

The Export button will allow you to download your response form as a zip file prior to submission for your personal records.

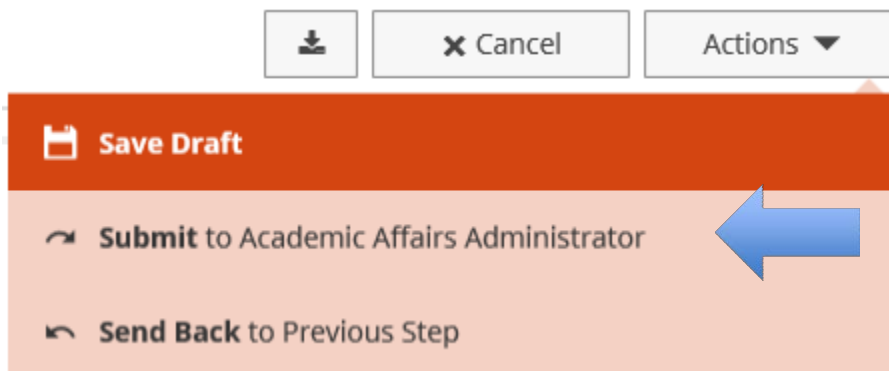


You will have to complete all of the required fields in order to submit your response to the Academic Affairs Administrator. You will know if you are missing any section when the Action drop down menu says to **complete required fields to Submit**.



4

When you have completed all of the required fields, the Action button will then say **Submit to Academic Affairs Administrator**. Review your form one final time before you submit it.



After you click Submit, you will see a pop up window asking to confirm the action. Click Yes and your form will move to the next step.

Are you sure you want to submit this task?
This action cannot be undone.

Once you submit your form, it will move out of your inbox and into your history. The current step column will allow you to track your form throughout the review process.

UTRGV Reports Workflow Digital Measures by Watermark

Workflow Tasks

▼ Inbox

Name	Step	Subject	Due Date
No Data to Display			

▼ History

Name	Current Step	Subject	Last Modified	Actions
Workload Effort- Test #3	Academic Affairs Administrator	Test Userff	February 11, 2020	Recall Download

Note: If for some reason you forgot to add something to your response you can recall it from the Academic Affairs Administrator by clicking the Recall button from the drop-down Action button in your History tab. It will then go back to your inbox where you can reopen and make your changes and send it forward to the Academic Affairs Administrator.