CSU SYSTEM
COLORADO STATE UNIVERSITY

Academic Faculty Partner Role Overview

What is an Academic Faculty Partner?

An Academic Faculty Partner perform academic faculty management functions for assigned academic units. Examples include creating and maintaining academic appointments and viewing academic faculty setup data.

This role is not assigned at the supervisory organization level. Instead, it is assigned at the academic unit level.

An Academic Faculty Partner is not an approver on any business processes.

Responsibilities

An Academic Faculty Partner can:

- Add new appointments
- View and modify existing appointments
- End an appointment track

Note: This role is assigned academic unit level rather than sup org or department.

How the Role Fits into Workday

An Academic Faculty Partner often:

- Tracks the tenure status and rank in Workday alongside the job that the person's paid.
- Maintains the academic appointment of the person as they move into other positions. For example, an administrative professional, department chair, or associate dean.
- Provides information that the graduate school reviews for graduate appointment eligibility.

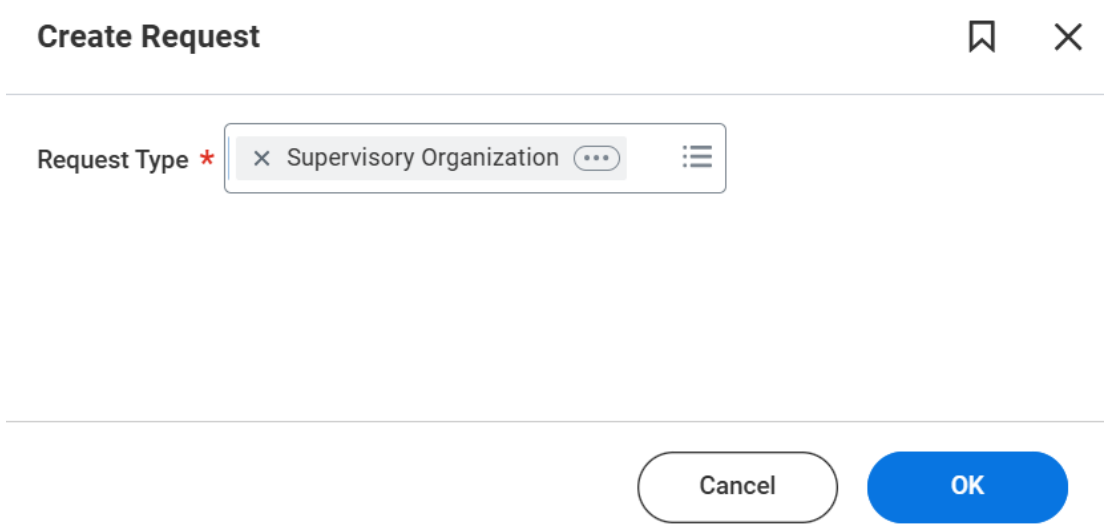
What the Role is NOT

To help set expectations, an Academic Faculty Partner is NOT typically:

- ✗ A Workday system administrator
- ✗ A security configurator
- ✗ Tied to other roles (Not automatically assigned with other roles)
- ✗ Not an approver for any business processes.

What is a Supervisory Organization?

A Supervisory Organization (or “Sup Org”) in **Workday is only created when a worker has direct reports.** If a current employee who does not currently manage others (i.e., has no direct reports) will now supervise a new worker, a Sup Org must first be created via the **Create Request Task in Workday** before the department proceeds with creating the new position (if position-managed) and job requisition.



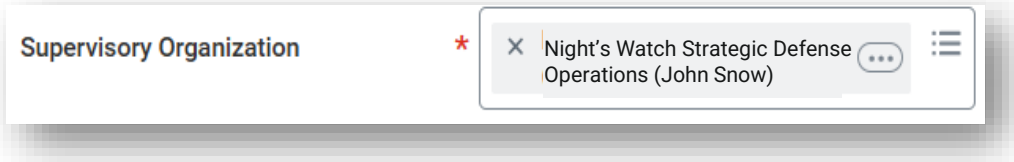
Workday supervisory organizations group employees under a manager to show reporting relationships, drive staffing and security assignments, and ensure that business processes – like hiring, position changes, and approvals—route to the right people in the organization.

Two Types of Supervisory Organizations in Workday

There are **two types of supervisory organizations** in Workday: position managed and job managed.

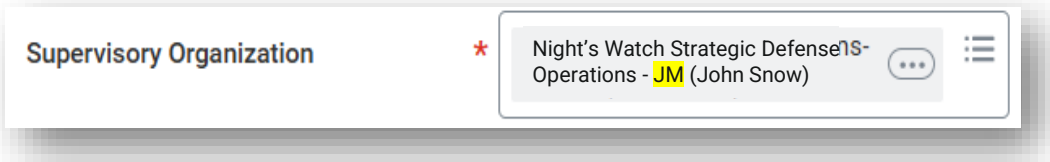
Position Managed

- **Used for:**
  - **Admin Pro, Faculty (not Adjunct), State Classified, Post Docs**
- **Requires:**
  - **Position**
- **Example:**



Job Managed

- **Used for:**
  - **Non-Student Hourly (NSH), Students, Adjuncts, and Graduate Assistants**
- **Requires:**
  - **No Position needed**
- **Example:**



Reporting Overview

Workday Reports

Impact Area	Description
Real Time & Drillable Data	Workday Reporting provides real time, drillable data where you can have everything in one place. Think: Blue is a Clue!
Historical Data	Workday will maintain a history of data starting in January 2026. **Note:** For data, prior to January 5, 2026, you can contact HR for assistance in accessing historical data that you need access to.

Workday Search

The **Search** bar on the Workday homepage, allows you to access reports. Workday will list the related tasks or reports as soon as you type in a few words.

Workday Search
• Find List of Reports • View Spotlight Reports • Run Specific Reports • Leverage Tags and Prefixes • Access Dashboards

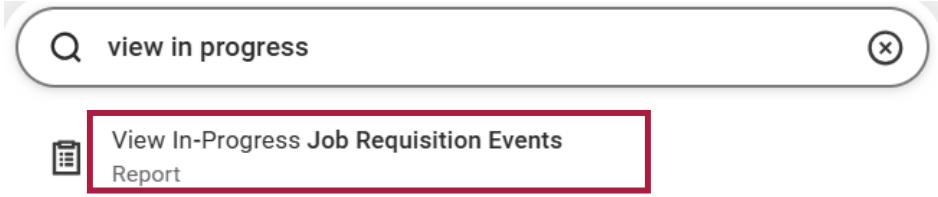
The **Search and Generate Reports** guide provides steps on how to search for and generate reports in Workday.

Note: Standard reports automatically open and custom reports allow you to add additional features.

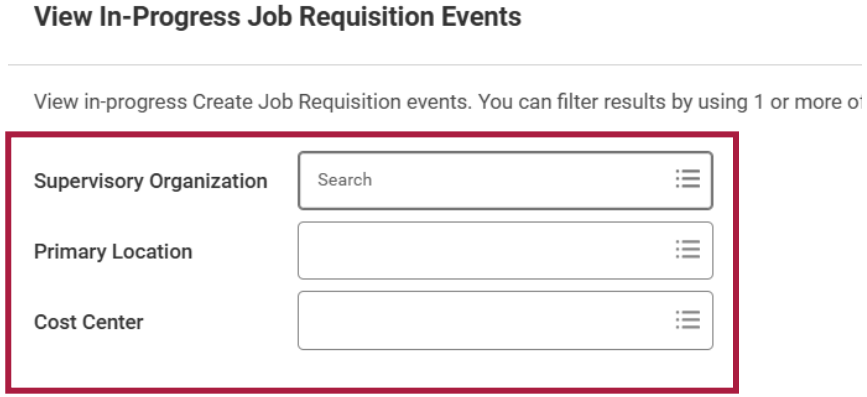
Searching Workday for Specific Reports

From the Workday Search bar, you can also access **specific and custom reports** you would like to run and view.

To Start – Type the name of the specific report in the search field. For example, you can search "**View In-Progress Job Requisition Events**" and select the report.



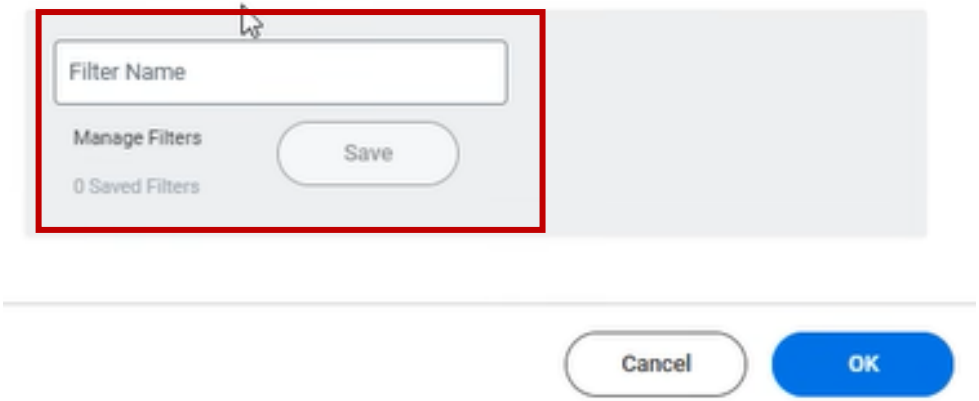
Report Prompts – You will then be navigated to a screen with multiple fields. These fields allow you to **filter** criteria to **narrow down** your search and **display specific information**. You can use these field to **customize** your report to match your **specific needs**.

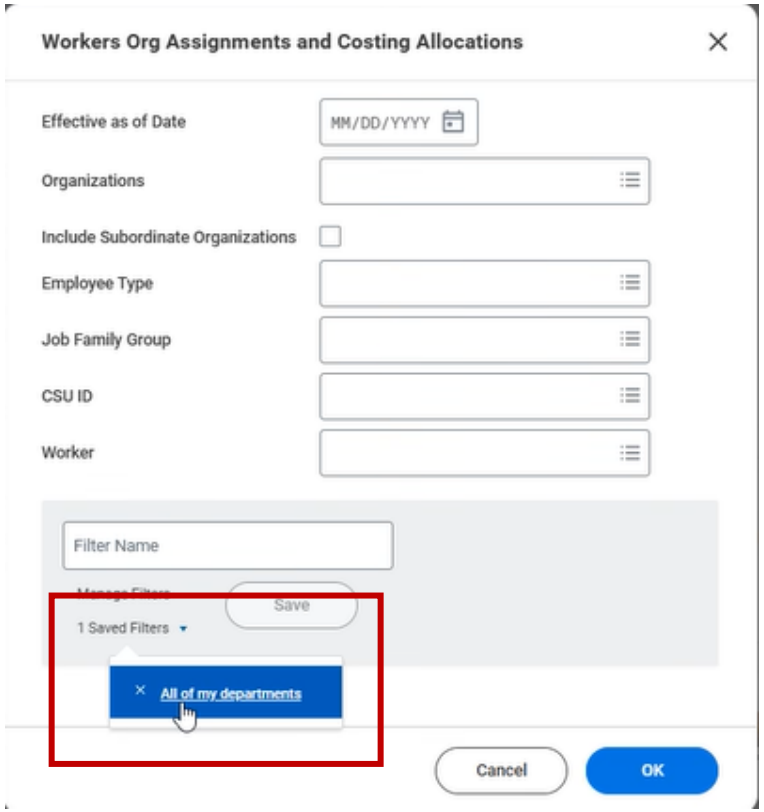


Please Note: *The available fields may vary from one report to another.*

Filtering the Report Fields

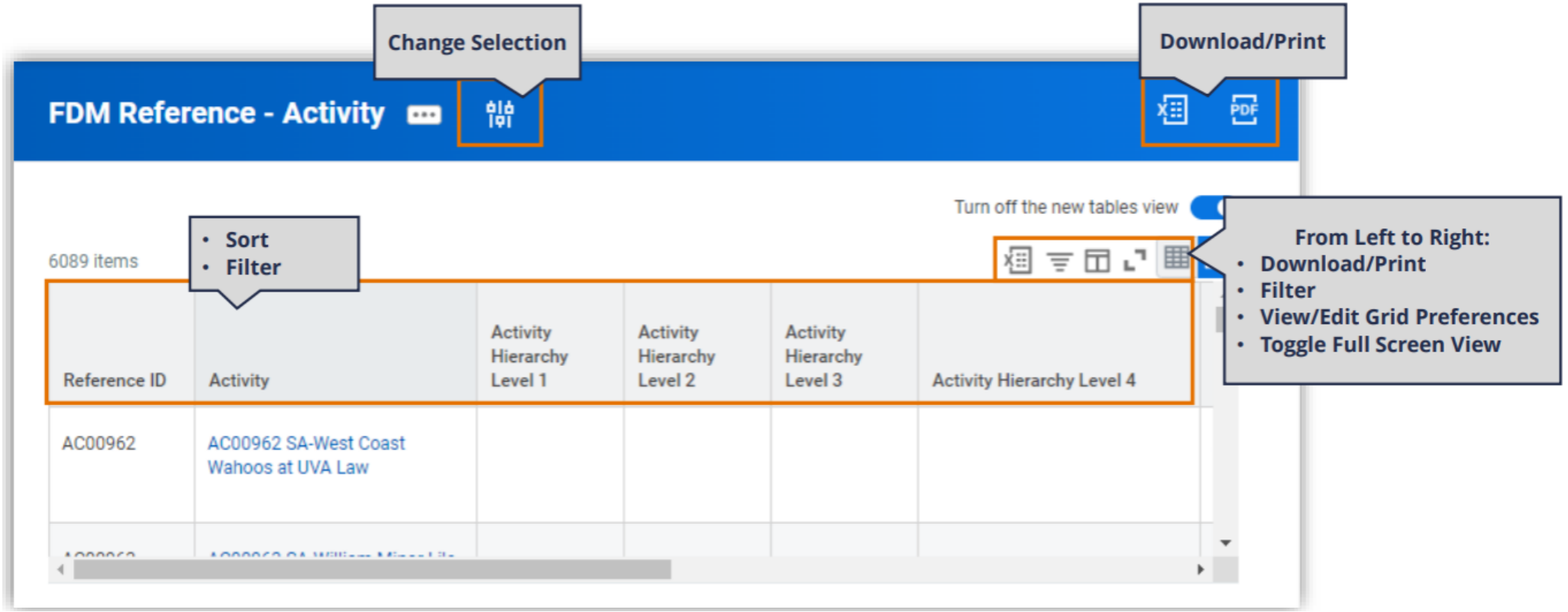
To save the report fields, select the options from a field, for example, Organizations, enter a **Filter Name**, and select **Save**. Next time you run the report select the option from the **Saved Filters** dropdown menu and options will automatically populate for the field.





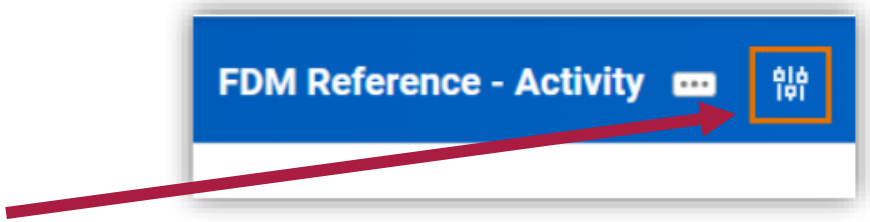
Report Functionality Overview

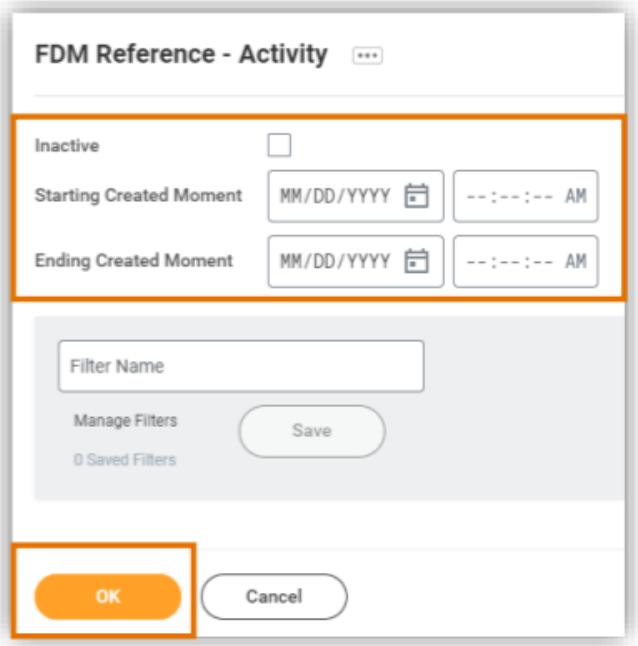
When viewing a report, there are various **reporting functionalities** available in Workday. Each functionality is displayed in the form of icons that represent various actions you can perform.



Change Selection

- **Change Selection** is used to reset, update, or change the prompt settings of the report.
- Select the **Change Selection** icon to change the data displayed in your report. These fields allow you to update or add any **filter** criteria. You can use these prompts to **customize** your report to match your **specific needs**.

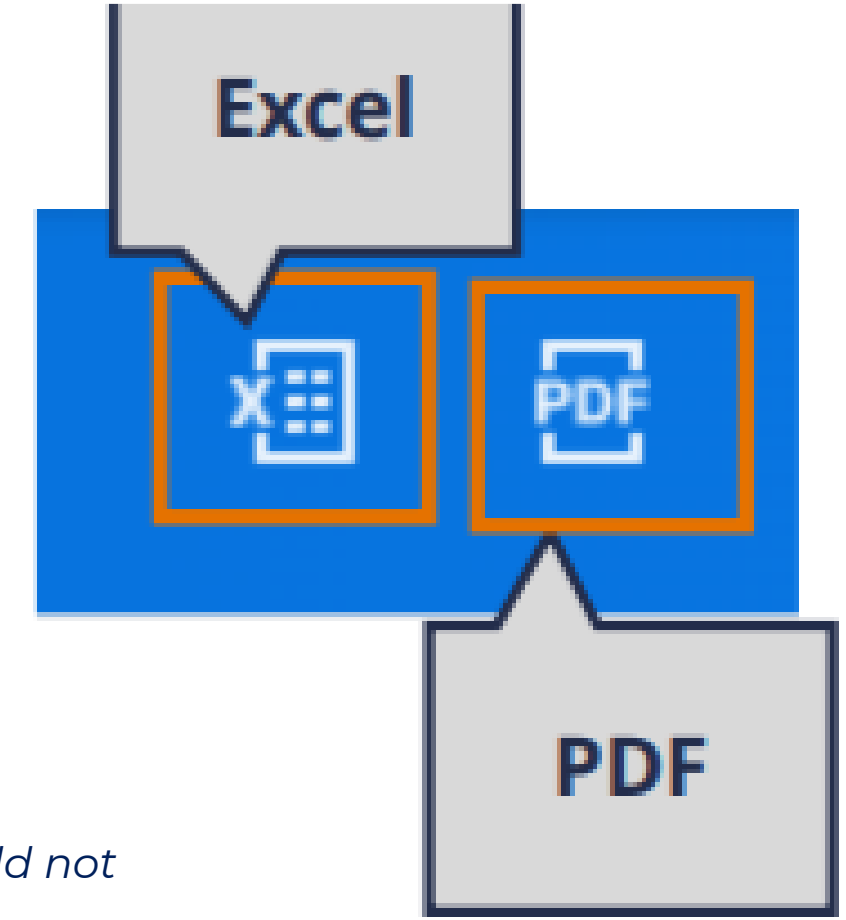




Please Note: *The available fields will vary from one report to another.*

Download / Print Report

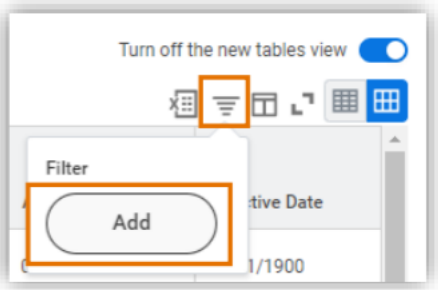
- By selecting the **Download/Print Report** icon you can download a report into a PDF or an excel format by selecting the appropriate icon. Once the report is exported, you can print directly from the document.
- To **download** and **print** document:
  - Select the icon and then click **Download** button to start downloading.
  - Once finished, you can view the downloaded document at the top right corner of the screen.
  - Open the downloaded document to view and initiate printing.

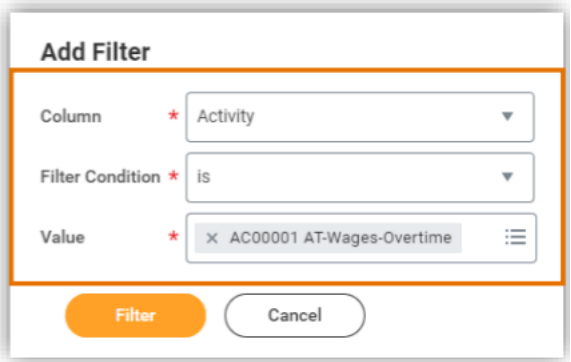


Please Note: *If you applied any filters to the report, this would not appear in your downloaded report as any changes are only applied to your current view in Workday.*

Filtering the Report

- Filters can be used to hide any data you don't want to see. You can filter reports by selecting the **Filter** icon and then the **Add** button.
- In the dropdown, select the appropriate column for which you want to apply the filter to. From there you can indicate:
  - **Column:** The column you want to apply the filter to.
  - **Filter Condition:** You can select the options, **is**, **not equal to**, or **is empty**. These conditions identify the type of data you want to contain (is), do not want to contain (not equal to), to contain no data (is empty).
  - **Value:** The specific information that drives your filter (i.e., specific data you want to directly filter in or out)

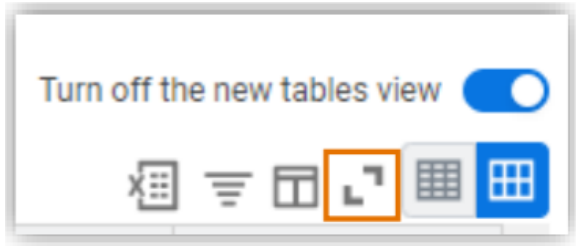




Please Note: *If you applied any filters directly in the report, your download would still include the original prompted dataset. To download the filtered dataset, rerun the report with those selections applied to filters. Once applied, these changes will be reflected in your report.*

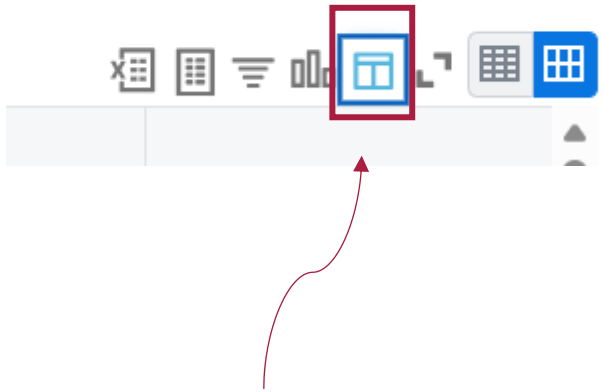
Toggle Full Screen View

- To view the report in full screen, click the **Toggle Fullscreen Viewing Mode** icon.
  - This will **hide** the Workday Toolbar, and other Workday functionality displayed above or below the report.

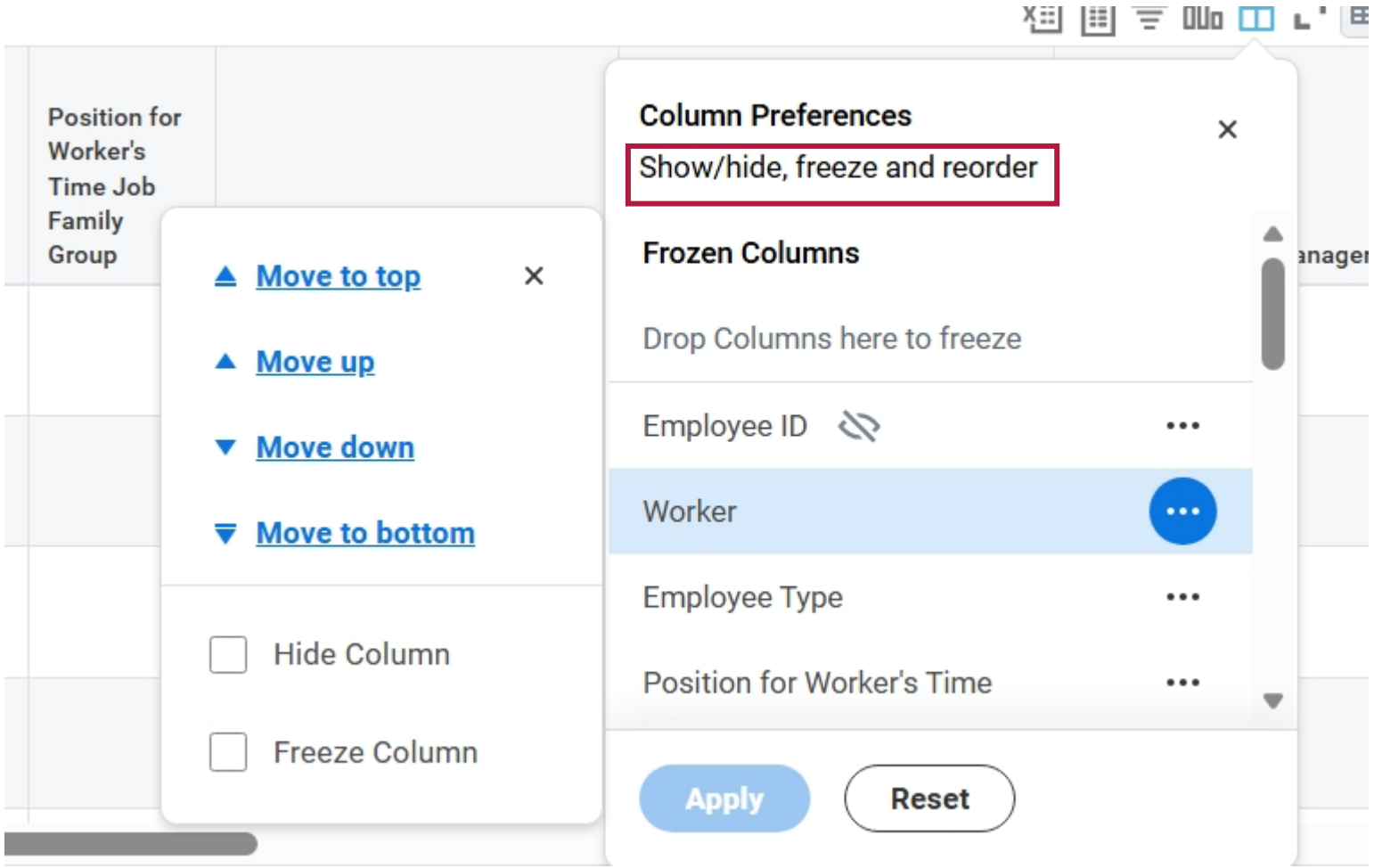


- To **exit out of full screen** mode, select the **Toggle Fullscreen Viewing Mode** icon again.
  - This will **redisplay** the Workday Toolbar and other Workday functionality displayed above or below the report.

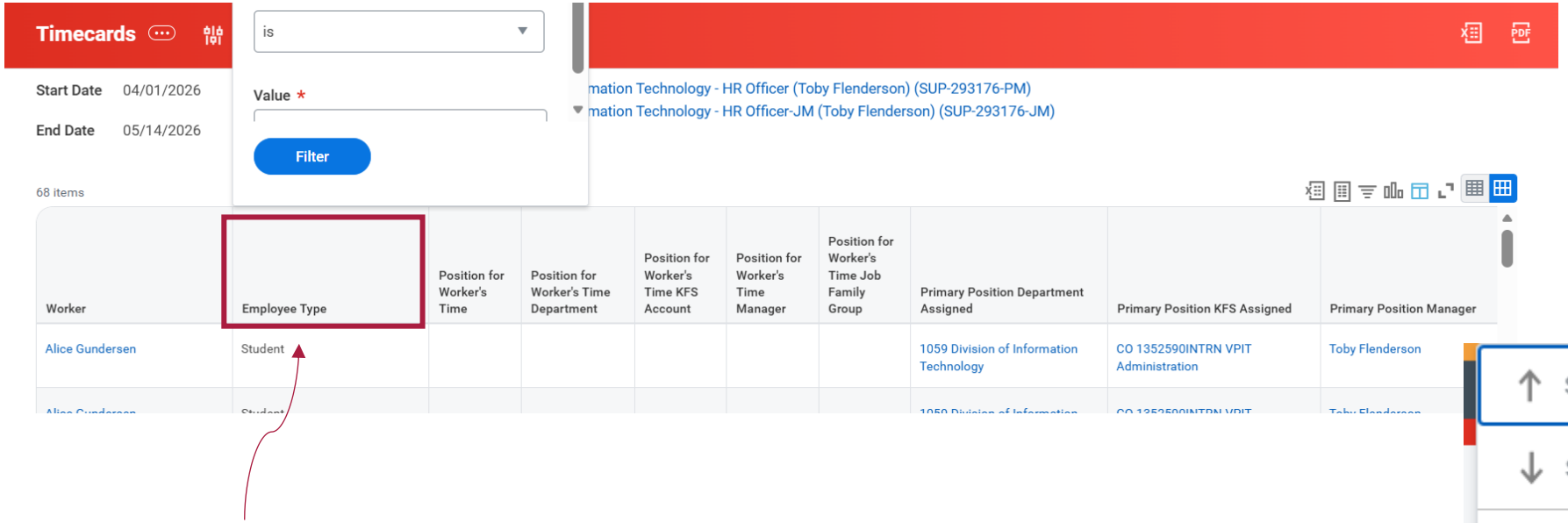
View/Edit Grid Preferences

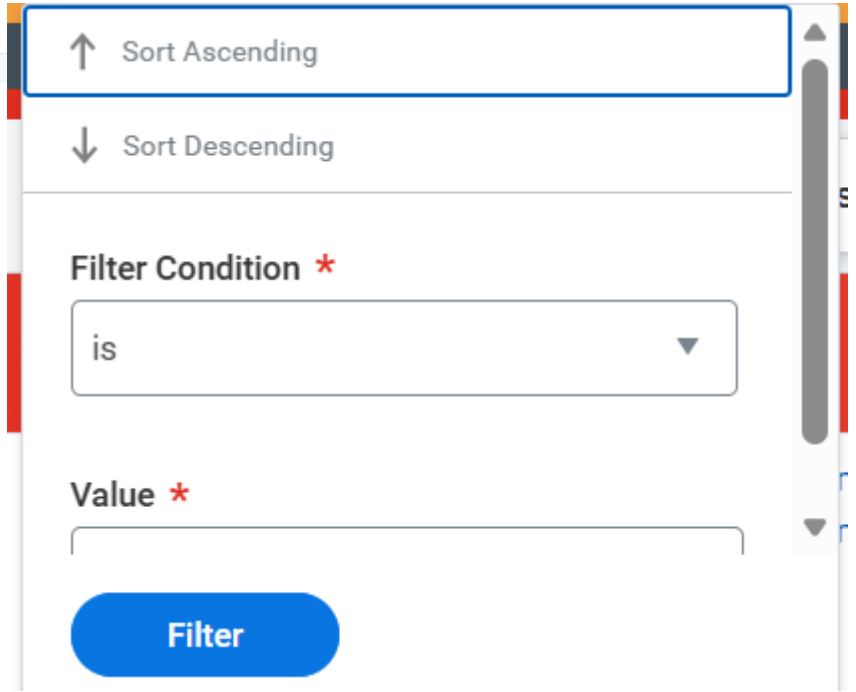


The **'View/Edit Grid Preferences'** button allows you to reorganize and hide data columns when viewing reports. This allows you to focus on the most important fields.



Sort + Filter Specific Report Columns





Select any Column Header in any report to sort column or specifically filter the column.

Running and Scheduling Reports

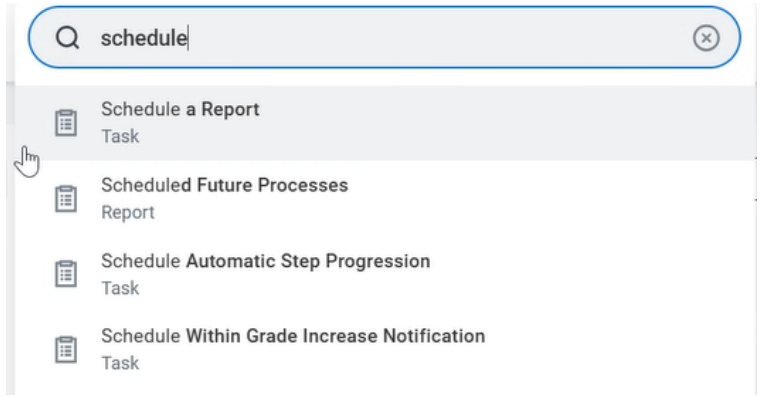
Running Reports and Scheduling Reports

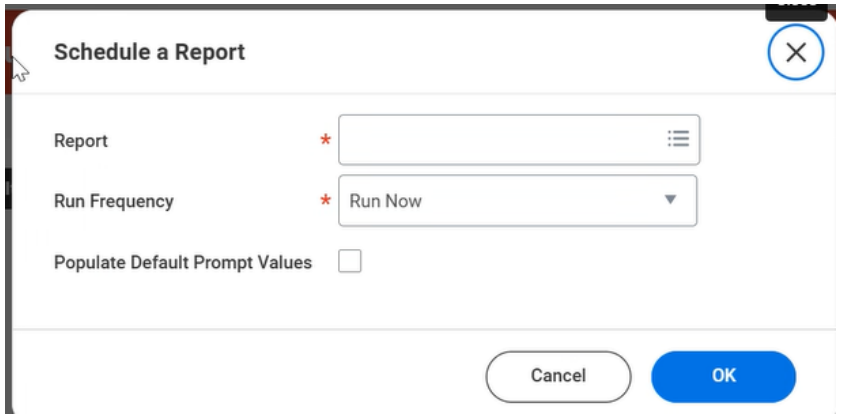
There are two main ways to run reports in Workday:

1. Running the Report manually:
   - Search for the Report or select from Reports worklet
   - Enter report parameters for which you want to run the report
2. Scheduling the Report:
   - Schedule the report to be delivered in your inbox at a specified time interval

Scheduling a Report

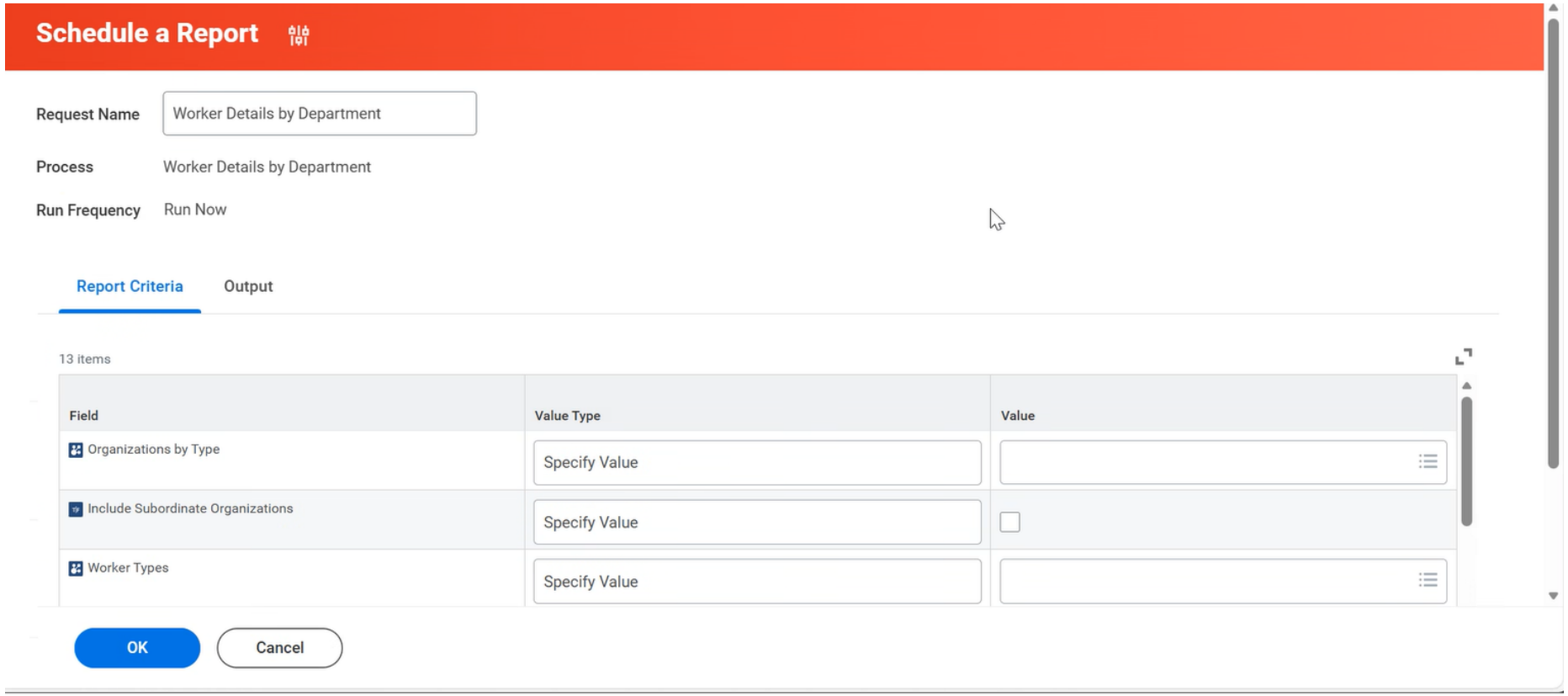
1. Search for the **Schedule a Report** task using the Search bar.
2. Specify the **Report** name and the Run **Frequency** of which you want it scheduled.





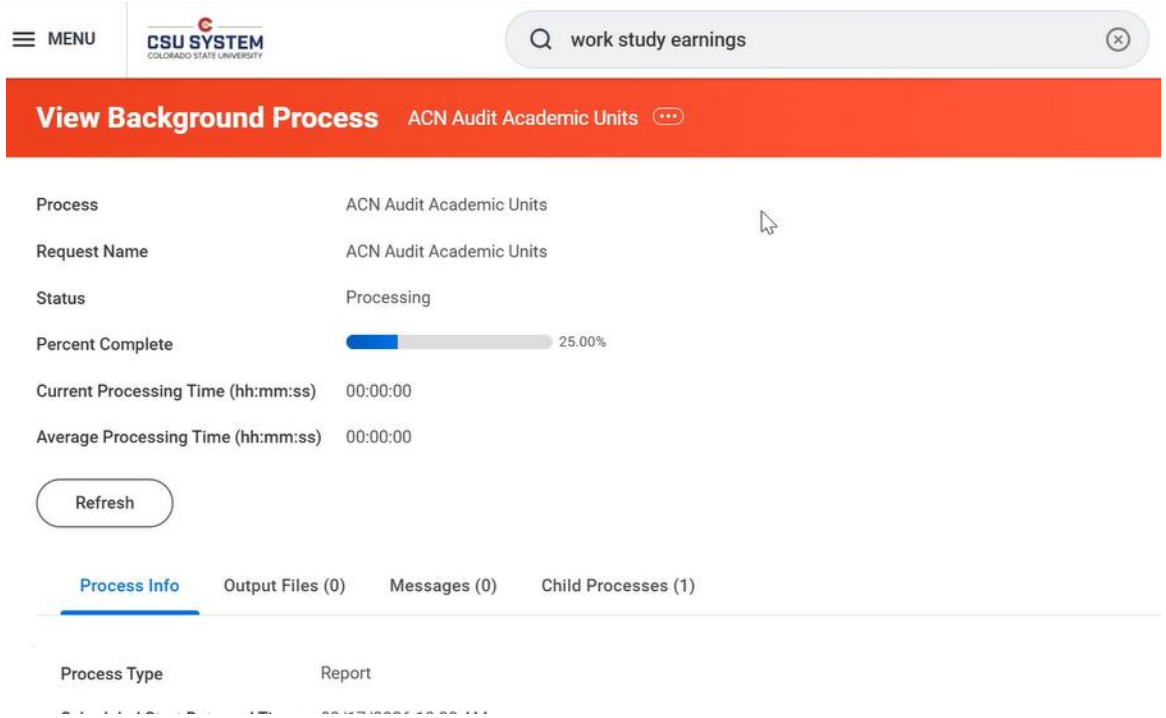
Scheduling a Report, continued

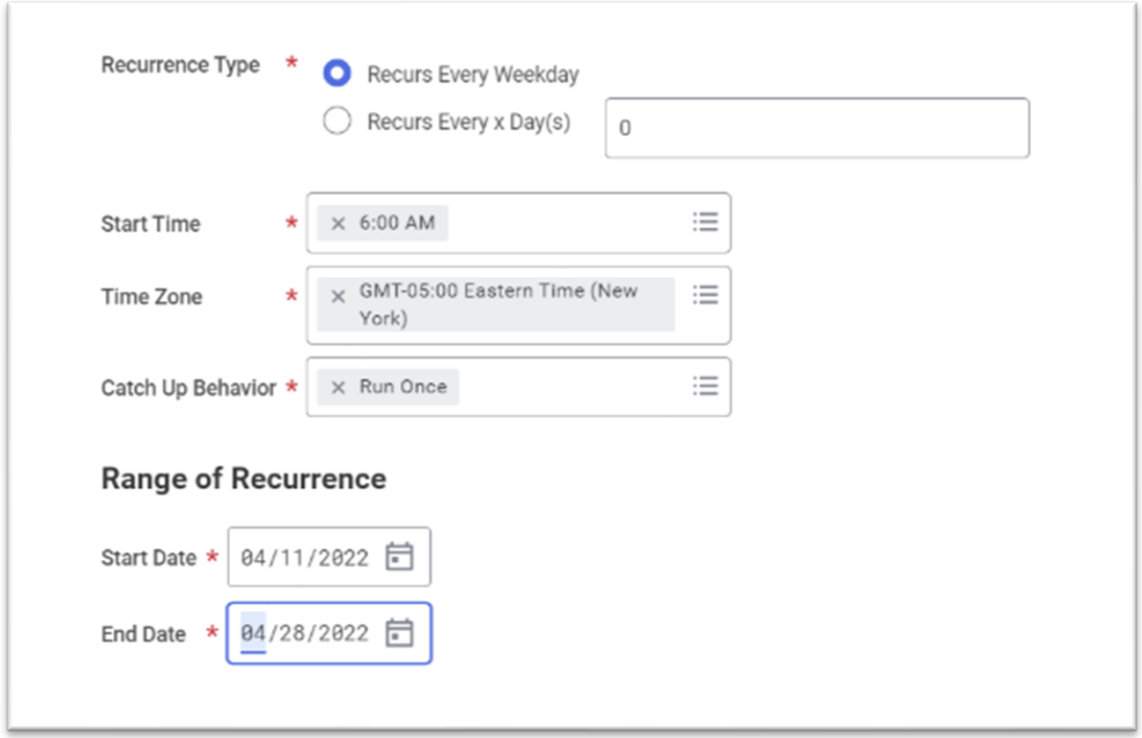
3. Specify the parameters for which you want the report to run. These are the same parameters that you would enter if you were running the specific report manually. For example, select Worker Type = Student.



Scheduling a Report, continued

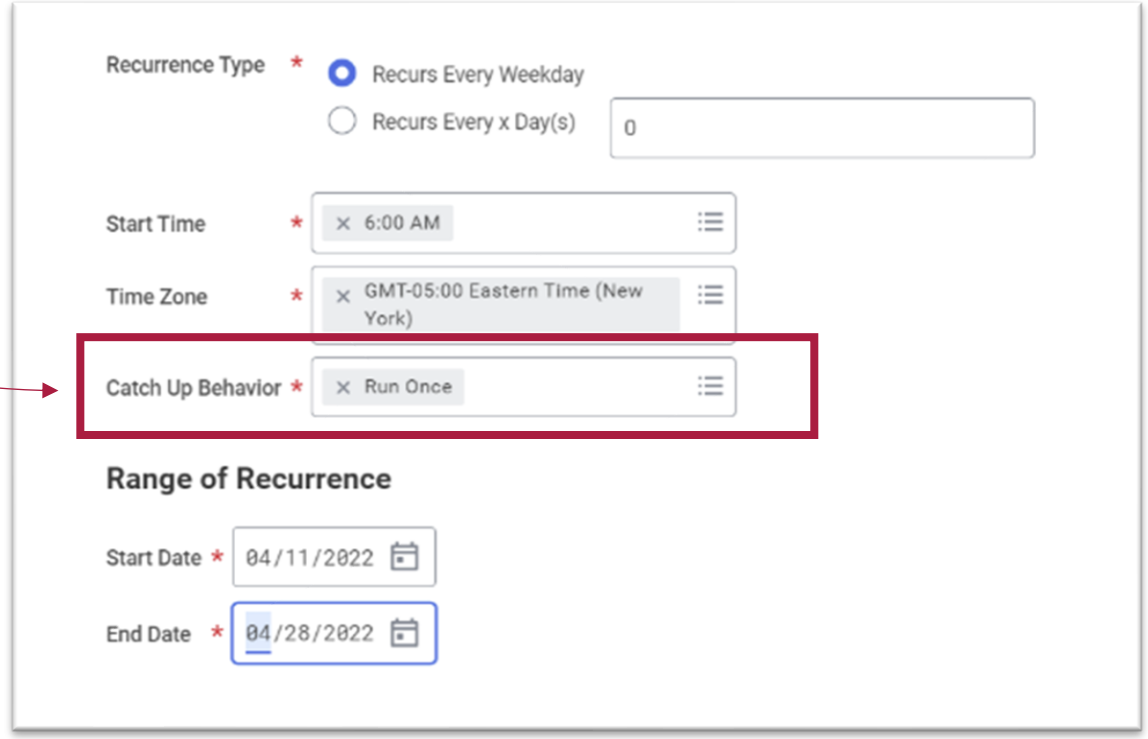
4. Specify the **Frequency Details** for which the report will run.
5. View Background Progress shows the progress of the reports.





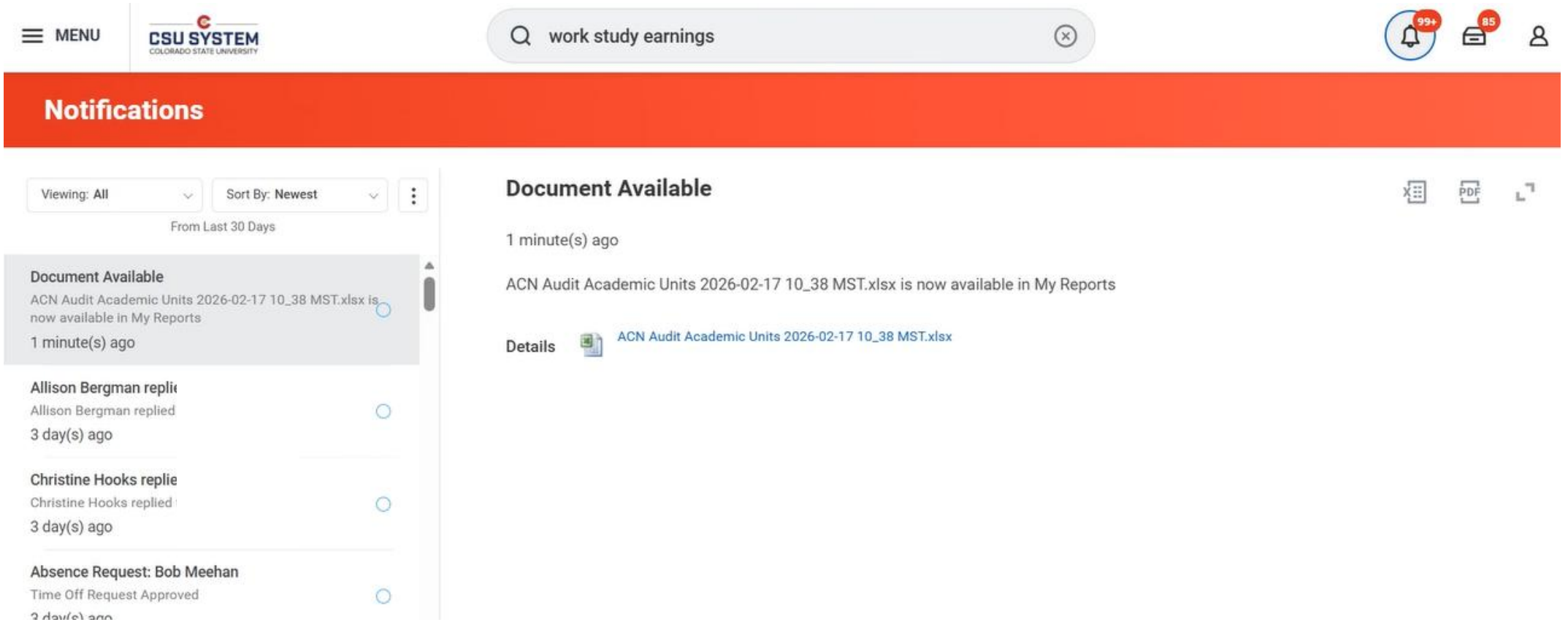
What is Catch Up Behavior?

- Catch-up Behavior determines how the system handles missed scheduled runs (e.g., during outages or maintenance) to ensure critical processes are managed appropriately after recovery.
- There are two options to select:
  - **Run Once:** One report runs after recovery. Executes a single instance after the system is restored.
  - **None:** Missed reports are skipped.



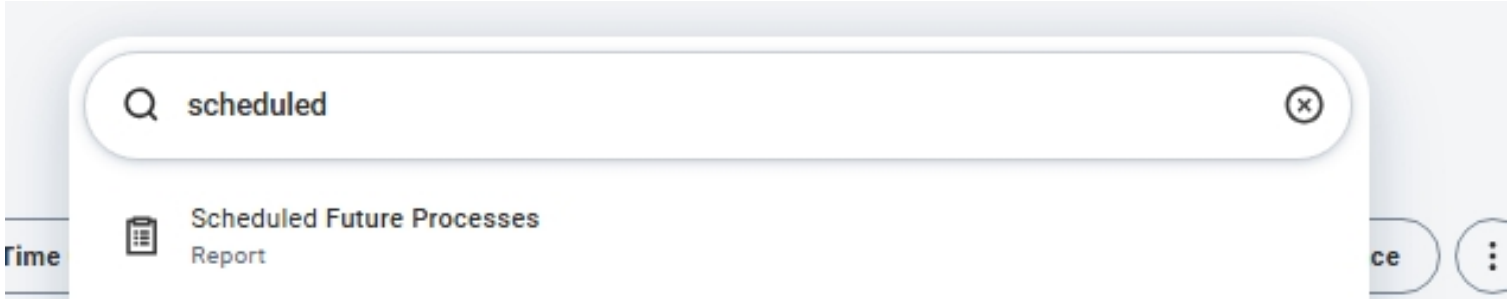
Scheduling a Report, continued

6. Reports delivered to you will show up in your **Notifications**.



Cancelling Scheduled Reports

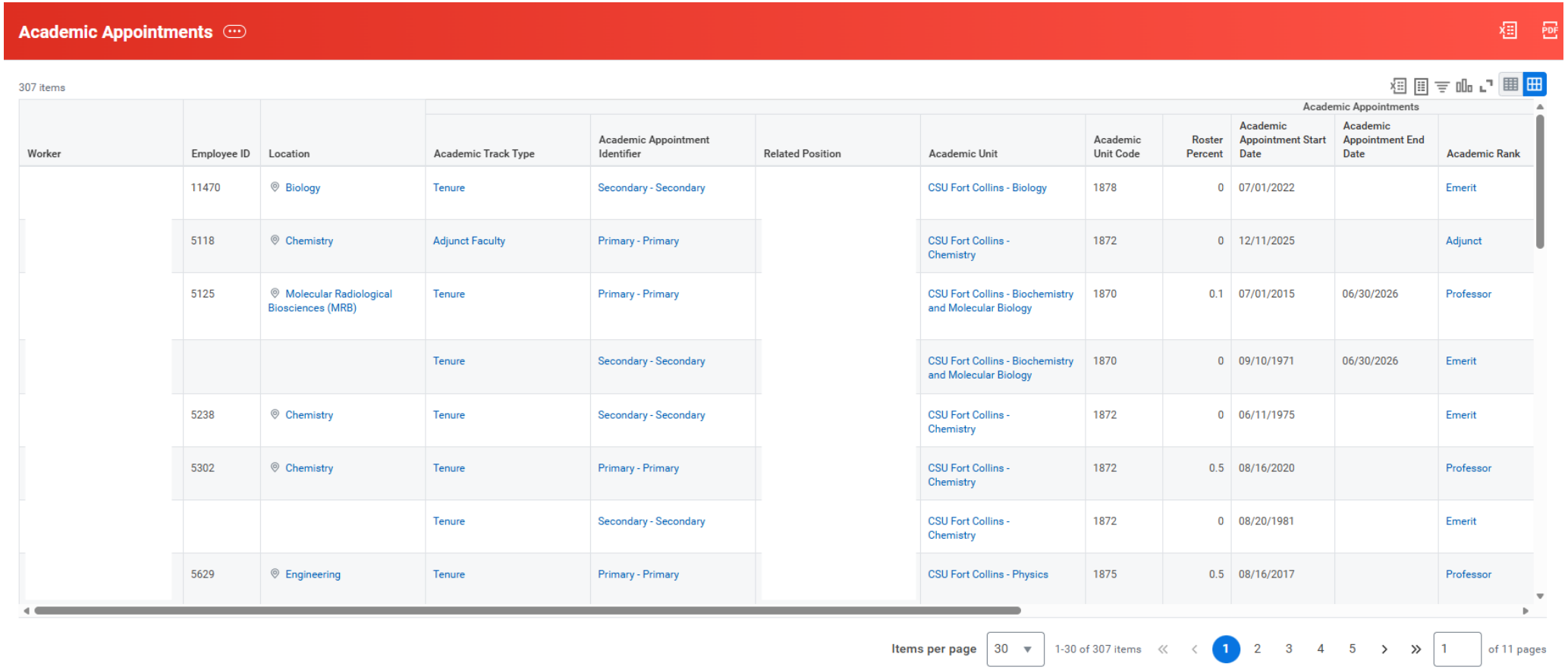
In Workday, you can edit or cancel a scheduled report by using the **Scheduled Future Processes** task. Please refer to the **How to Suspend a Scheduled Report** guide for the step-by-step process.



Reports I Can Run

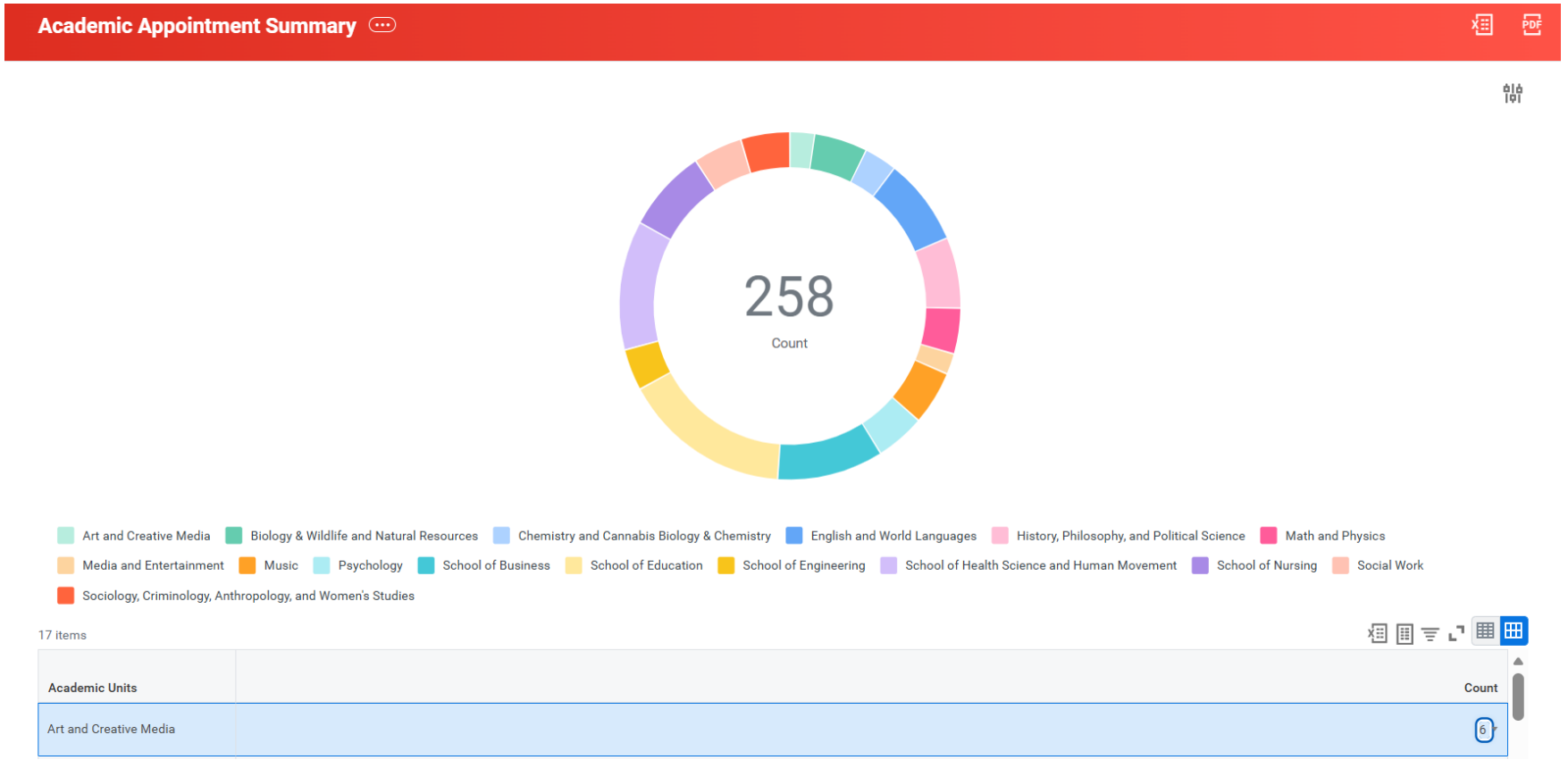
Academic Appointments Report

The **Academic Appointments** Report allows you to view current appointments as an auditing tool.



Academic Appointment Summary Report

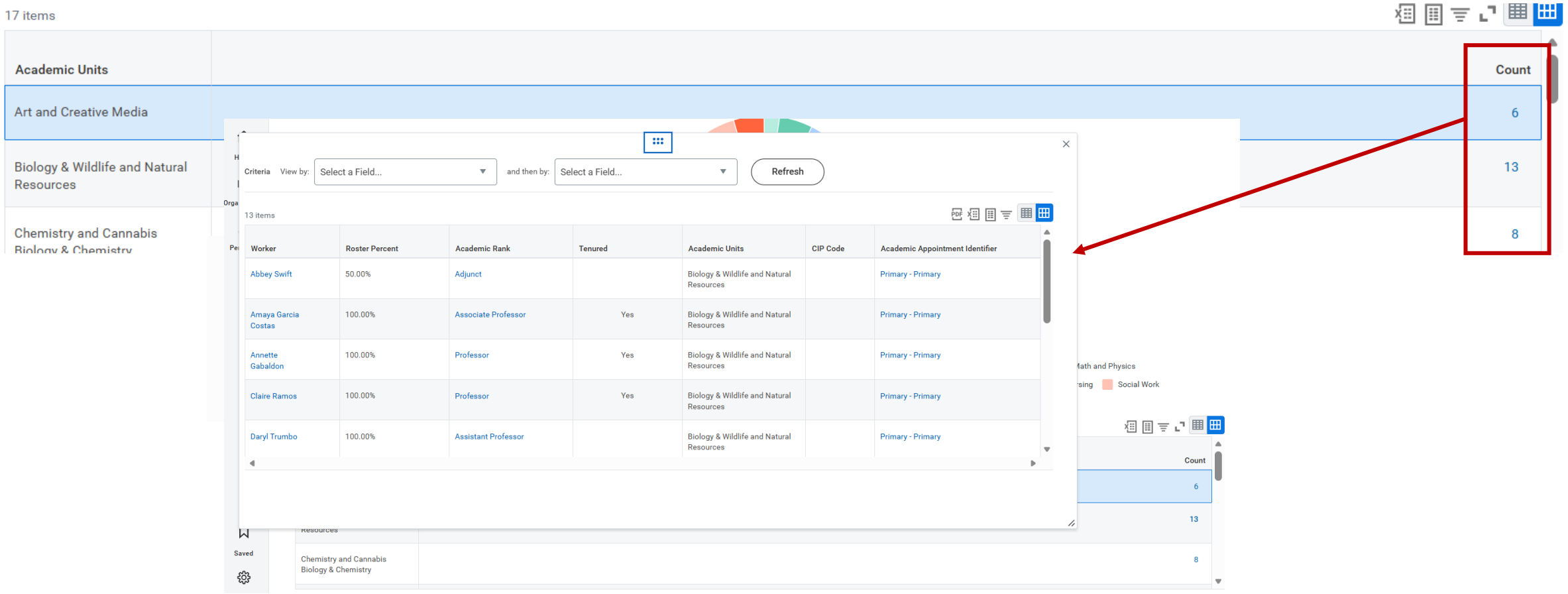
The **Academic Appointment Summary** Report provides a count summary of the Academic Units.



Academic Appointment Summary Report, continued

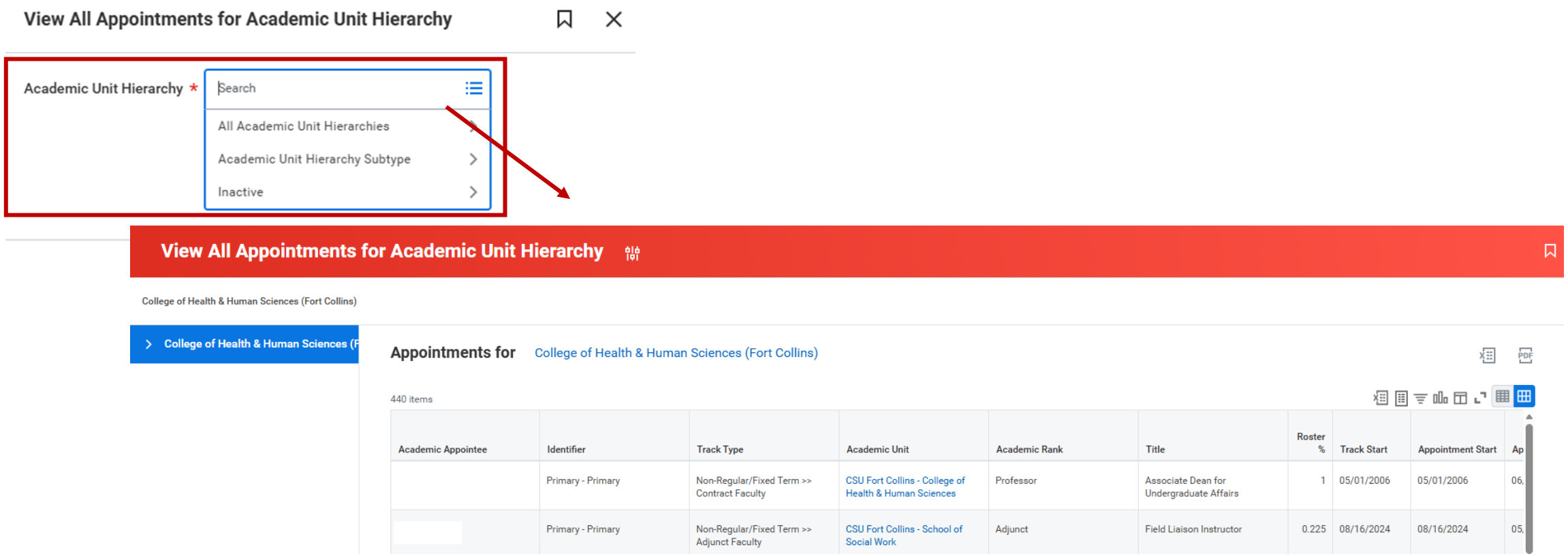
To view additional details about a specific unit, select the number under the **Count** column.

Tip: In Workday, blue text indicates a selectable link.



View All Appointments for Academic Unit Hierarchy Report

The View All Appointments for Academic Unit Hierarchy Report provides all the Academic Appointee's for the selected Academic Unit.



What an Academic Faculty Partner Can Do

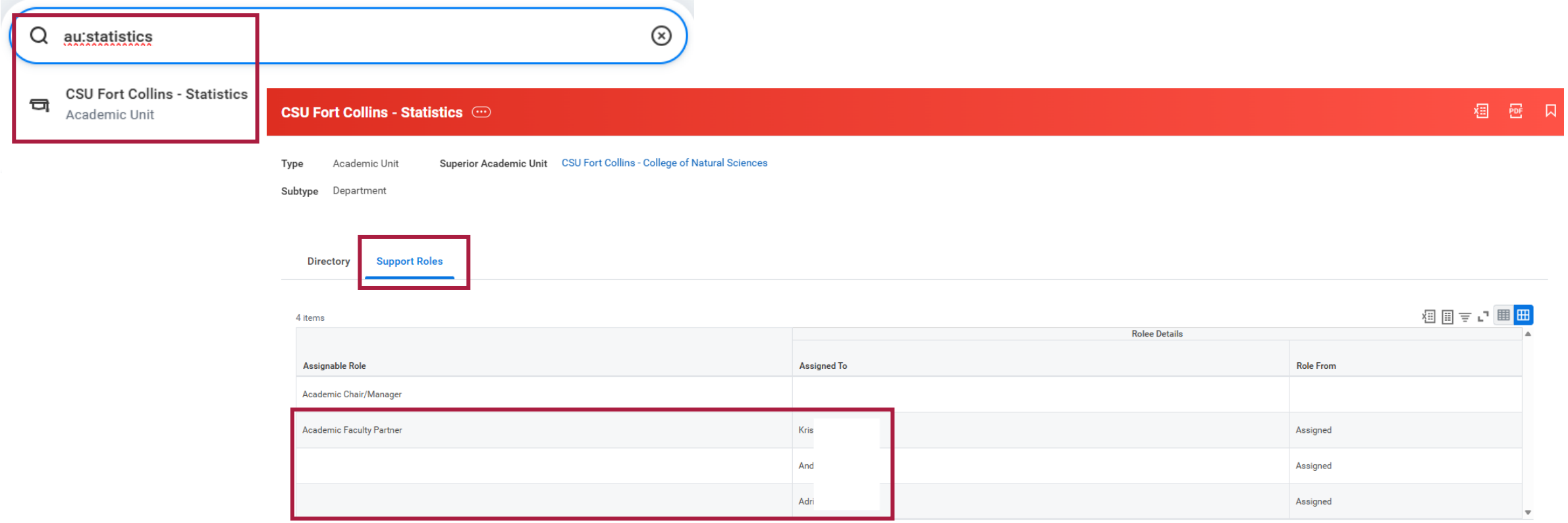
Manage Academic Appointments

Who Can Manage an Academic Appointment?

Academic appointments are only managed by an Academic Faculty Partner, where they can add, update, or end academic appointments in Workday for faculty and other academic appointees.

Identify Academic Faculty Partners

To identify support roles for Academic Faculty Partners, users can search in Workday using **au:department name or number** in the Workday **Search** bar. For example, **au:statistics**. Select the Support Roles tab to view the Academic Partners.



Academic Appointment in Workday

In Workday, an academic appointment connects a person to an Academic Unit through a position, linking role, pay, and hierarchy all in one place.

It is managed using the Academic Appointments business process.

The **Managing Academic Appointments** guide provides detailed steps on how to view, add, update, and end academic appointments in Workday.

Key Takeaways

- If the appointment is part of a hire or job change process, it may be triggered automatically as a subprocess. Always confirm the effective dates match across related transactions.
- Academic Appoints don’t go through an approval process.

Academic Faculty Partner Q&A

- When we need to have faculty or an admin pro serve in a Joint- Appointment role do we use the Add Academic Appointment function since we can't contract them as a contingent worker given that they are a paid employee?
  - *Yes, that is correct. It is sort of the replacement for a secondary associate role, like we would have in Oracle, is to give them an academic appointment, because that does associate them with the other department and a faculty.*
- What is the difference between Joint and Secondary Academic Appointment and when should I use each?
  - *Everybody has a primary department, but they may work jointly with another department on a regular basis, whereas a secondary academic department to me is more temporary and not an ongoing relationship. It's just the label, so right now we're not doing anything different with joint and secondary.*

Academic Faculty Partner Q&A, continued

- Can you clarify how/when academic appointments should be updated to emeritus status (before retirement, after retirement, create a new academic appointment on their retiree profile, etc.?
  - *Yes, you can still update their academic appointment after retirement without problem or before if you have the correct effective date. You'll need to attach the Emeritus Approval Notice.*
- Will the Provost continue to send CSU HR Operations Emerit approvals for them to add to the appointment for retiring faculty?
  - *Yes, they do continue to send approvals.*
- Can you clarify what academic appointment roles are required for graduate committee advisors vs. committee members? For example, to serve as an advisor on a graduate committee is a Joint or Primary academic appointment required? Are all grad committee members (even if they are not the advisor) required to have an academic appointment?
  - *Waiting on the approval of the plan. In the meantime, please ask the Grad School directly what they need.*

Academic Faculty Partner Q&A, continued

- When we use Create Academic Affiliate, is that like adding in a joint appointment?
  - *This option is not currently being used.*
- Should we be entering Academic Appts. for adjunct faculty? I noticed they were listed as an option, but these appointments can be sporadic (sometimes they are employed for some semester, and not for others), so wasn't sure what the best process would be for them.
  - *Yes, in general, it would be good to create academic appointments for adjunct faculty for reporting and tracking purposes.*
- It was mentioned that the add academic appointment task may be automatically triggered during the hire process or change job process. Could you explain this a bit more? I.e. when would this launch and is this a new addition to the hire/onboarding process?
  - *It's one of the steps that comes if their job family group is faculty, then there is a task in the hire process that goes to the academic faculty partner to add an academic appointment for the person (After the completion step).*

CSU SYSTEM
COLORADO STATE UNIVERSITY