



College of Science

INSTRUCTIONS FOR THE USE OF LSU FACULTY360 AND THE GENERATION OF ANNUAL FACULTY REPORTS

- A. Navigating Faculty360
- B. Entering Data into Faculty360
- C. Generating Your Annual Faculty Report
- D. Additional Documents
- E. Submitting Your Annual Faculty Report

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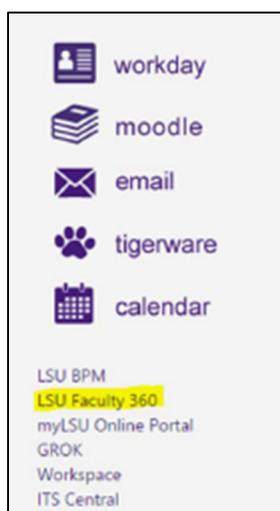
Faculty who were reviewed for tenure and/or promotion in the 2018-19 academic year are exempt from filing a 2018 faculty report and from the regular annual review process. You should still enter information on teaching, research, and service for 2018, and you still need to go to your Workflow and register your exemption (see Step E).

New items for 2018 reports:

- It should be simpler to get grants to show properly in your report. However, there are still errors in grant data, and some grants are missing again this year. (p. 4)
- Classes you taught should be entered for you, but student numerical feedback (evaluations) were not. You do NOT need to enter these numbers yourself. (p. 5)
- You will enter your self-evaluations under Self-Evaluations on the main screen, not during the Workflow process. (p. 7)
- Please refresh your report and check it carefully before submitting! (p. 8)

After these instructions, on pp. 10-12, is additional information on submitting your report through the Workflow process after you have entered your data.

A. Navigating Faculty360



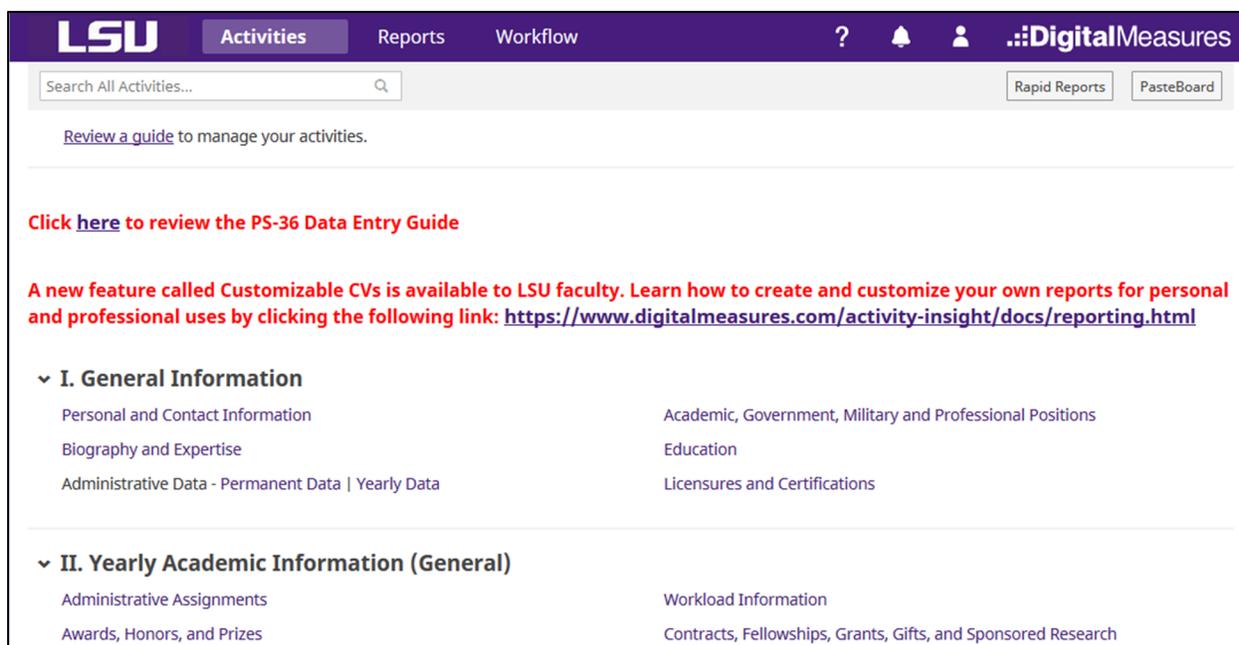
Logging in: You can first log in to MyLSU. Then, on the left side, you should see a link to Faculty360 (highlighted in screenshot at left). Clicking on that should take you directly to your Faculty360 page.

Alternatively, go directly to Faculty360 via this link:

<http://www.digitalmeasures.com/login/lsu/faculty>

This still requires logging in with your PAWS ID and password.

Main screen: Either way, you should get to a screen that looks like the one below.



Across the top of the Faculty360 window, you see three tabs. The window opens under “Activities”; this is where you will enter information. Under “Reports”, you can generate documents such as an LSU format CV or your COS Annual Activity Report (a.k.a. your faculty report). Under “Workflow” you will submit your report and related documents. Through “Workflow” you will also review and acknowledge your evaluation, when it is complete, and upload a rebuttal if appropriate.

This screen should also show the six areas under which your information is stored. (Only the first two appear in the screenshot.)

Help: The Faculty360 website has several guides available. See the links on this page: <http://sites01.lsu.edu/wp/lsufaculty360/training/>

There is a general guide to the software, and two guides for importing publications (see below).

Errors: Please make notes of errors or omissions in your data as you go through the entering process. We recommend sending a list of all of the problems you see, rather than a separate message for every glitch. You may send these reports to LSUFaculty360@lsu.edu. Some errors may not be correctable in Faculty360 right away, and you may have to deal with that when you run your Annual Report (see below).

You can save your data and exit Faculty360 at any time, and it should all be there when you return later.

B. Entering Data into Faculty360

For your report, there are several important categories of data that can be entered in different ways. We want to make sure data are entered uniformly, so that the data will appear in a consistent manner for all faculty members. As well as the generation of your annual faculty report that provides the basis for evaluation, this information can be valuable in a number of ways at the Department, College and University level.

- I. GENERAL INFORMATION – this should not change greatly from year-to-year, but you should check to see that it is accurate and up-to-date.
 - a. Personal and Contact Information – make sure these data are correct
 - b. Biography and Expertise – enter short statements
 - c. Administrative data
 - i. Permanent data – you should see your rank and tenure status
 - ii. Yearly data –
 1. Click the year in question. For your 2018 annual report, you should see Yearly Data for both 2017-2018 and 2018-2019. These may have been entered for you.
 2. Make the appropriate selections for Graduate Faculty and Graduate Faculty Status.
 3. Full-Time Equivalency is 100% for most faculty, unless you have an unusual appointment. Summer appointments for research or teaching are not included in determining this number.
 - d. Academic, Government, Military, and Professional Positions
 - i. If you have academic experience outside of/prior to LSU, this seems like a good place to enter that information. Examples include your postdoc(s) or previous faculty positions.
 - e. Education – enter your BS, MS, and PhD data here (some is probably pre-populated; then you just need to check it and edit if necessary)
 - f. Licensures and Certificates (e.g. Professional Geologist or Engineer)

II. YEARLY ACADEMIC INFORMATION

- a. Administrative Assignments: This means positions of responsibility, *e.g.*, associate chair, program director etc., *not* service assignments such as committee memberships. These may not show up in the Annual Report, so be brief!
- b. Awards, Honors, and Prizes (departmental, college, LSU, and external)

If you have been named an honorary fellow or member of a society or academy, please select the HONOR category for this under the “Type” pull down menu. Under the category of “Award, Honor, or Prize Name” please spell out the entire name of the conferring organization. For example, AAAS could be either American Academy of Arts and Sciences, or American Association for the Advancement of Science. Please use the following styles:

“Fellow of the Geological Society of America”

“Member of the Chinese Academy of Sciences”

Please use this only for honors, not for ordinary society memberships.

Be sure to use the full name of your award. For example if you received the 2017 LSU Rainmaker Emerging Scholar Award in STEM, do not just say “Rainmaker” (you might be a Rainmaker again later in your career!).

- c. Workload Information: It is not necessary to enter this.
- d. Contracts, Fellowships, Grants, Gifts and Sponsored Projects: These data are supposed to be loaded from SPS, but the data transfer is not consistently accurate or complete. SO, please check all entries. If information is missing or incorrect, try to edit/correct it. *If you are unable to edit/correct it yourself*, please report the problem. Grants uploaded by OSP or SPA will typically have an entry under “Budgeted As Of”. If you entered information for a grant yourself, and there is a duplicate from OSP/SPA, please delete the one you entered.
 - i. Grants active during 2018
 - ii. Proposals submitted during 2018: still pending, funded, or declined.
 - iii. New grants funded in 2018
 - iv. **NOTE:** We have been told that it should no longer be necessary to fudge the Project Dates in order to get submitted proposals to show up in your annual report. If this fails, please tell us!
 - v. **ALSO:** if you had an active grant in the previous year, but you had a transaction on it in 2018, that transaction may replace some previously stored information. Please check and see that the amounts and entire project period are correct.

Please check overall grant amount, which sometimes seems to be inaccurate.

The system should prompt you for data that are required for the entry to show in your annual activity report.

We are expecting new grants-management software later in 2019, so this is probably the last time we will have these particular issues with data import from SPS.

III. TEACHING

- a. Academic Advising
 - i. Do not enter your own graduate students, postdoctoral researchers, or research associates here.
 - ii. Enter data here for all students you have advised during the academic year: undergraduate and graduate; LSU and non-LSU. These data are by *academic year*. Thus, for a complete 2018 annual report, you may need to enter advising data for both the 2017-2018 and 2018-2019 academic years.
Note: this is advising, not research mentoring.
- b. Directed Student Learning: we recommend that you enter information on your individual graduate students here. One advantage of listing your advising of graduate students on this page is that any students on whose committees you serve will be listed automatically in your Annual Report for every year they are at LSU; you can enter when they pass their general exam and graduate, and that information should be automatically reported as well. You may also enter information on undergraduate researchers here.
- b. Scheduled Teaching and Student Evaluations. This should be populated for you, as follows:
 - i. Teaching assignments for Spring, Summer, and Fall 2018.
 - ii. If anything is missing (a teaching assignment, or other data for a class), you can attempt to enter or edit it. Please *do not* enter grade distributions.
 - iii. With the move to online student evaluations of teaching in 2018, it sadly appears that the new software, “Blue”, is not yet coordinating with Faculty360. Your department chair has access to your student evaluations for 2018, so we will not be requiring you to enter those numbers as part of your annual report. Of course you are welcome to comment on your own numbers (e.g. as part of your self-evaluation of teaching; see below). Your results for fall 2018 should be accessible through your MyLSU page by clicking on the “Course eval” button.

IV. INTELLECTUAL CONTRIBUTIONS (For most of us, this is scientific research. Teaching-related research or scholarly work goes in this section as well.)

Scholarly Presentations: this can include university seminars as well as meeting presentations. Use the drop-down menu as your guide to the types of presentations to include. If you gave a talk, and an abstract of the talk was published, you could enter the abstract under Publications, if published abstracts are significant in your field.

Publications: can be entered manually or imported. To enter a publication manually, click “Add New.” Alternatively, click on Import. Two import methods are available:

- a. From a BibTex file. These are text files that can be generated from a database, such as EndNote, Web of Science, Google Scholar, or the LSU Libraries’ Discovery function. Use the database to generate the BibTex file, then click Choose File... to import it. Each BibTex source has its own quirks; none is perfect. For additional details about generating BibTex files from Google Scholar and the Libraries’ Discovery function, see the guides at

<http://sites01.lsu.edu/wp/lsufaculty360/training/>

- b. From Web of Science, Crossref, or PubMed. These are under “Import from Third Party”. They may not import all of your publications, but they can be helpful.

During the import process, it may ask you if your co-authors are currently on the LSU list that they provide. This is to help identify identical publications entered by two different LSU faculty co-authors.

For publications, we especially want to know if any authors are undergraduate or graduate students. For student authors or coauthors, please be sure to select the appropriate category (Graduate or Undergraduate) in the pull-down menu at the right of each author line.

After import or manual entry, be sure to check data for each publication for accuracy. Make any necessary edits. Special characters in the publication titles (Greek letters, math symbols etc.) may not be imported. You can paste them in from a Unicode font in Character Map (Windows), or the Characters palette or Keyboard and Character Viewer (Mac). Italics, some special characters, and many subscripts/superscripts are not available. In our experience, database exports may be missing spaces or have extra spaces.

For each publication, be sure to check the information below, because this information determines where Faculty360 will put these publications in your Annual Report. Some information (such as the year) is required before you can save the entry.

- a. Audience of circulation
- b. Peer-reviewed or not (this is supposed to be set to peer-reviewed by default)
- c. Classification

Other sections here include: Biosketch (NSF/NIH - we had asked if these could be generated by Faculty360; this is clearly still a work in progress); Intellectual Property (where you should include information about copyrights, patents etc.); Scholarship, Research and Creative Works in Progress (papers submitted or in preparations); Research Innovation and Development. Include information here if you think it appropriate.

Research Demographics and Summary

Personnel refers to LSU personnel in your group (not collaborators)

“Number of people in research group” should equal the sum of the other 5 numbers.

This page also asks you to enter the number of citations of your work during 2018. Most faculty will generate this from Google Scholar or Web of Science.

Later in the process, you will be asked to upload a Published Items and Citations (by year) document. Now, while you have your publications showing and have just calculated your number of citations, is a great time to do that!

In Web of Science, while you have a list of your publications showing, click Generate Citation Report. The Citation Report will show a citation graphic but not one of published items. You can make both graphics in one document by clicking in the Export Data drop-down at the top right, and choosing Save to Excel File. Make sure to “send” all of your records, not just the “records on this page”! This Excel file should show Published Items and Citations graphics; save it for uploading later.

In Google Scholar, go to your Profile. This page should show a graph of your citations, though not your published items. (If your work is better documented in Google Scholar, this information

will be sufficient, and you do not need to generate a graph of your published items.) Save a screen capture for later upload.

Other items on the Research Demographics and Summary page should be self-explanatory.

V. SERVICE

Most items are self-explanatory. Note that if you enter hours for activities in hours per week, they will probably transfer to the annual report, but hours per year may not currently transfer.

University: some examples of likely activities include

- a. Department/College/University Committees – give the names of the committees, time invested and what you contributed
- b. Graduate Student Advisory Committees – give name of student, name of advisor and note whether or not a General Exam or Defense took place during 2018. You may also include service as the Dean’s Representative. *Note:* If you have already this information under Directed Student Learning in Section III., Teaching, you do not need to enter it here.
- c. Hosting of seminar visitors

Professional: some examples of likely activities include

- a. Editorial/review boards (select correct category under the “Position/Role” menu)
- b. Conference organization
- c. Session chair
- d. Review of proposals – give organization/agency, panel and mechanism and number of proposals
- e. Reviewing of manuscripts – give names of journals and number of manuscripts reviewed for each

Public/Community: some examples of likely activities include

- a. Judge at a high school science fair
- b. Booth at Super Science Saturday
- c. ChemDemo at local school
- d. Faculty mentor to student organization
- e. Participation in Earth Day
- f. Girls Night at the Museum

VI. EVALUATIONS

- a. Self-Evaluation: you will need to create a Self-Evaluation page for the year 2018. There is a separate box for your self-evaluation in each of the major areas (research, teaching, service), and also for an overall self-evaluation.
- b. Goals (for 2019) and Accomplishments (2018): you can add these if you wish. If you enter an Accomplishment and mark it as related to research, it will show up in the Annual Report as “major research accomplishments for the year”.
- c. Annual Review Documents. **DO NOT** use this to generate or submit your Annual Report. (After the evaluation process is over, you should be able to download your report & evaluations from this page.) To submit your report, use the Workflow tab (see below).

C. Generating Your Annual Report

Once you have entered and saved your data, you can enter the “Workflow” module via the top menu in Faculty360.

Follow the procedure starting on p. 10 of this document, which was produced by HRM. Please DO NOT simply assume your report looks good and submit it! Make SURE that you **refresh** your report (click on the button) **first!** Only then should you look at the PDF. For most people, at least some items will be missing from this report the first time you refresh it.

If you generate the PDF file and it has all the information that you want in it, count yourself lucky. If there are problems, you can return to the “Activities” module and try to re-enter the information so that it shows up where you want it in your report. While you are editing your Activities, you can see what your Annual Report looks like at any time, by clicking on Rapid Reports or Reports at the top of the screen, and choosing College of Science Annual Activity Report. Make sure you set the dates to Jan. 1, 2018 through Dec. 31, 2018. If you cannot figure out how to get activities to show properly, request help from the COS team or faculty360@lsu.edu. If this fails, you can use Reports or Rapid Reports to generate a Word version of your report, add any missing material “manually”, save as Word (convert to PDF if you wish), and plan to upload that edited report during the Workflow process. Submitting a manually edited report is not officially supported, but if you/we can’t figure out how to get something to show up properly, it may be the best option. Or, you can create your own simple Word document listing the missing information, and upload that.

D. Additional Documents

In addition to your Annual Faculty Report, COS requires a current version of your CV and a report on your publications/citations.

Published Items and Citations: See the directions under “Research Group Demographics” above for generating this file, which will be either an Excel file or a saved screenshot. Upload it now, during the Workflow process, as “Additional Documentation”.

CV: Faculty360 can also generate a CV for you. Under the “Reports” module, select “University PS36 CV.” Again, you can select the timeframe and format. For those contemplating tenure/promotion or sabbatical applications, it is probably worth working this out. Alternatively, you can use a non-LSU CV and upload it in Word or pdf format.

E. Submitting Your Annual Report

In the “Workflow” module you might see “Department Annual Review 2018” (Department will be substituted by the name of your department). If not, you can try to add it, but this will probably not work; let us know. When you click on “Department Annual Review 2018” you will see a screen like the one below.

FACULTY ANNUAL ACTIVITY REPORT

Please be sure to update your annual activity report by updating the records saved on your Manage Activities screen. Once all new records have been saved, click "Refresh Report" to update the document and click the link to open and review before submitting your file. You may wish to attach a self-generated CV in lieu of the LSU Faculty360 generated PS-36 CV at this time.

NOTE: If you are not submitting annual review documentation and qualify as an exception as outlined in PS-36T or PS-36NT, please select a justification below.

Justification for exemption	<input type="text"/>
Explanation of Other	<div style="border: 1px solid #ccc; padding: 5px;"> <p>B <i>I</i> <u>U</u>        </p> <div style="border: 1px solid #ccc; height: 60px; margin-top: 5px;"></div> </div>
Annual Activity Report	<input type="checkbox"/> Last Updated February 19, 2019 at 6:23 PM <input type="checkbox"/> Refresh report
LSU Faculty360 Generated PS-36 CV	<input type="checkbox"/> Last Updated February 12, 2019 at 2:57 PM <input type="checkbox"/> Refresh report
CV Manual Upload	Drop files here or click to upload
Additional Documentation	Drop files here or click to upload

Electronic Submission

By submitting my documents, I denote that I have brought the contents of my file up-to-date and hereby submit my annual activity report to my department chair for review (Per PS-36).

From this screen, you should be able to:

Enter your justification for exemption from annual reporting (if you have just been reviewed for P&T or if you are about to be reviewed for reappointment), OR

Click on the pdf icons to check your report and CV. Be sure to click "Refresh Report" to ensure that the latest version is uploaded. If you do not do this, your department chair will likely see an old version with very little information in it. Last year, chairs received essentially blank reports in many instances and had to send the reports back and ask faculty to refresh. Annoying as this is, please refresh before submitting.

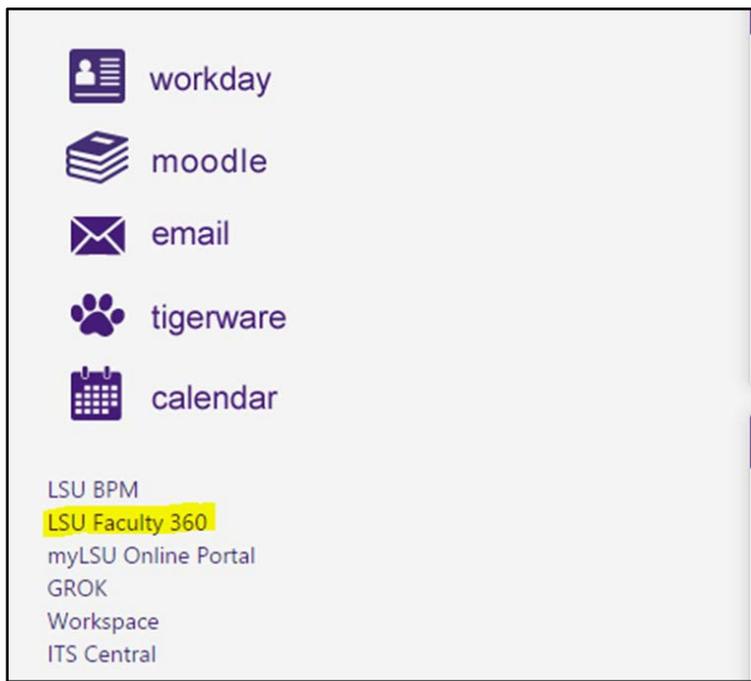
Upload any additional files and submit. Note that you can submit as many files as you wish under "Additional Documentation". We recommend that, if you submit additional files, you also submit an explanation of the additional documentation you are submitting.

STEPS FOR SUBMITTING YOUR ANNUAL REVIEW DOCUMENTS VIA LSU FACULTY360 (FOR FACULTY)

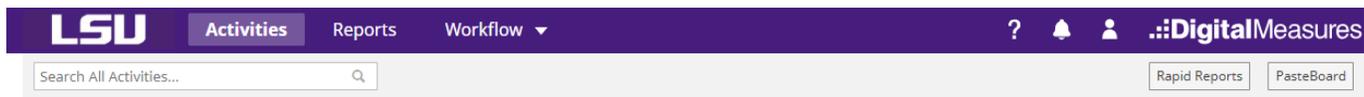
The following steps outline the process of submitting your annual review documents to your reviewing officer using the LSU Faculty360 system.

HOW TO GET STARTED

1. Log in to your MyLSU account and click on the LSUFaculty360 link located on the left hand side of the screen.



2. Click on the link titled “Workflow Tasks” under the “Workflow” heading at the top of the screen.



- Under "Inbox", click on the link titled "Annual Review".

Workflow Tasks

▼ Inbox

Name	Step	Subject	Due Date
Annual Review	Faculty Submission	Self	January 31, 2018

- If you are exempt from the annual review process in accordance with PS36-T or PS36-NT, please complete the following section to indicate the reason why you are exempt.

ANNUAL REVIEW FACULTY SUBMISSION

Please be sure to update your annual activity report by updating the records saved on your Manage Activities screen. Once all new records have been saved, click "Refresh Report" to update the document and click the link to open and review before submitting your file. You may wish to attach a self-generated CV in lieu of the LSU Faculty360 generated PS-36 CV at this time.

NOTE: If you are not submitting annual review documentation and qualify as an exception as outlined in PS-36T or PS-36NT, please select a justification below.

Justification for Exemption

Leave of Absence
 Multi-year reappointment (PS-36NT)
 Reappointment (PS-36T)
 Notice of Non-reappointment
 Other (please provide explanation below)

Explanation of Other

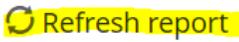
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- If you are **not exempt** from the annual review process, please click "Refresh Report" before clicking on the PDF icon to review the "Annual Activity Report" and "LSU Faculty360 Generated PS-36 CV".

Annual Activity Report

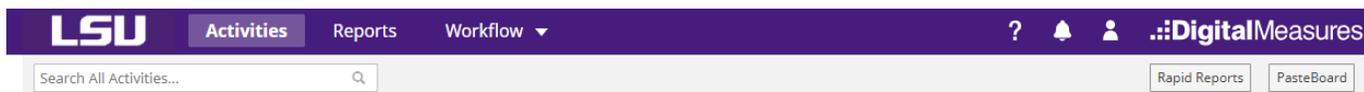

 Last Updated November 17, 2017 at 8:33 AM


LSU Faculty360 Generated PS-36 CV


 Last Updated November 17, 2017 at 8:33 AM


Click to refresh your report, after entering your data.

- If any items are missing from your annual report or CV and need to be updated, please click on the “Manage Activities” link at the top of the screen and update your activities in the LSU Faculty360 database.



- After your activities have been updated, return to the annual review screen and click “Refresh Report” again beside each of your reports. Click on the PDF icons to review your reports again and ensure that they are finalized to your satisfaction.

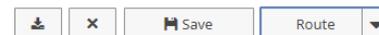


- If you prefer to manually upload your own CV or any additional documentation, you may do so by clicking on the links highlighted below.



- At the top of the screen, click “Save” to save the request for later, or click “Route” and then “Submit to Department Chair” when you are ready to submit the request to your reviewing officer.

< Faculty Step - Due January 12, 2019



Comments

Submit to Department Chair