LSU

College of Science

INSTRUCTIONS FOR THE USE OF LSU FACULTY360
AND THE GENERATION OF <u>2020</u> ANNUAL REPORTS

A. Navigating Faculty360

B. Entering Data into Faculty360

C. Generating Your Annual Report

D. Submitting Your Annual Report

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If you are being reviewed for reappointment, promotion, or tenure during the current academic year, you are exempt from filing an annual report and from the regular annual review process. You should still enter information on teaching, research, and service for 2020, and you still need to go to your Workflow and register your exemption (see pp. 9-13).

After these instructions, on pp. 9-13, is a document from HRM on submitting your report through the Workflow process after you have entered your data.

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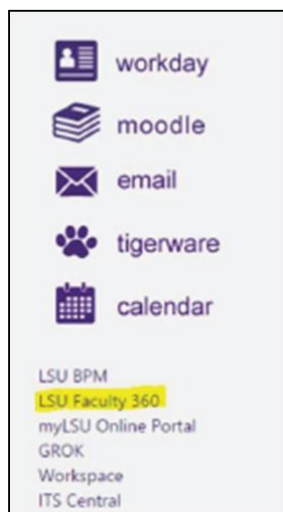
Logging in: You can first log in to myLSU. Then, on the left side, you should see a link to Faculty360 (highlighted in screenshot at left). Clicking on that should take you directly to your Faculty360 page.

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.
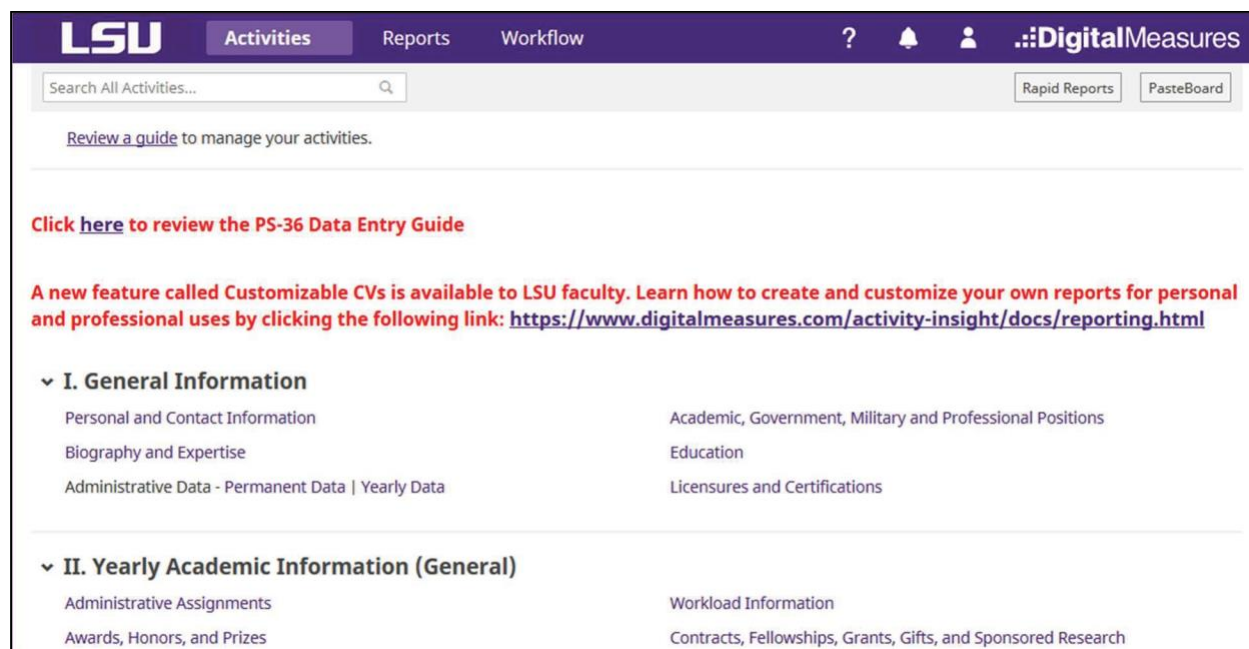
Across the top of the Faculty360 window, you see tabs. The window should open under "Activities", but if it does not, click on "Activities"; this is where you will enter information. Under "Reports", you can generate documents such as an LSU format CV or your "College of Science Annual Activity Report" (a.k.a. your "faculty report" or "annual 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 2020 (calendar year) annual report, Yearly Data for the current academic year and the previous academic year may be relevant. 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 LSU Rainmaker Emerging Scholar Award in STEM, do not just say "Rainmaker".

   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 2020
      ii. Proposals submitted during 2020: still pending, funded, or declined.
      iii. New grants funded in 2020
      iv. If you had an active grant in the previous year, but you had a transaction on it in 2020, 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.

III. TEACHING
   a. Academic Advising (NOT research mentoring)
      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 2020 annual report, you may need to enter advising data for both the previous and current academic years.

 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. Note that you must enter a "stage of completion" for an entry to appear in your Annual Report.

 b. Scheduled Teaching and Student Evaluations. This should be populated for you, as follows:

   i. Most classes are there for Spring and Summer 2019. We're sorry, but we don't know when the data will be there for Fall 2019.

   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. Classes you taught in Spring 2019 may be listed twice. Generally, these are not exact duplicates: they have different information entered. If this is true for you, you can attempt to delete one version. (Caution: check carefully to see which of the two listings contains what you want to save.)

   iv. Some numerical student feedback ("teaching evaluation") numbers have been entered. Please enter any data that are missing from the reports in Blue ("Course Eval" on your myLSU homepage). Under "Mean Instructor Evaluation Score", enter your number from "Feedback for Instructor (CS-01)". Then, enter the "Number of Students Submitting Evaluation."

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 need to be corrected after importation. 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: Intellectual Property (where you should include information about copyrights, patents etc.); Scholarship, Research and Creative Works in Progress (papers submitted or in preparation); 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 2020. 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.

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 2020. 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. Science presentation/demonstratino 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 2020. 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 2021) and Accomplishments (2020): 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. If you see this section, DO NOT use it 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.

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.

If you click "refresh" and look at the PDF report, and it has all the information that you want in it, that is great! If information is missing, you can return to the "Activities" module and try to re-enter the information so that it shows up where it belongs 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, 2020 through Dec. 31, 2020. 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 create a document that lists the missing information, and upload that as an "additional document"; see below.

D.   Submitting Your Annual Report

You will submit your report via the Workflow tab. Please follow the directions for this that have been prepared by HRM; see next page.

During the Workflow process, you will be able to upload files under "Additional Documentation". The College requires two specific documents, as follows.

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 during the Workflow process, as "Additional Documentation".

CV: Please upload your best, most up-to-date CV. For many faculty members, this will be a non-LSU CV (Word or PDF).

If you prefer, Faculty360 can generate a CV for you. Under the "Reports" module, select "University PS36 CV."
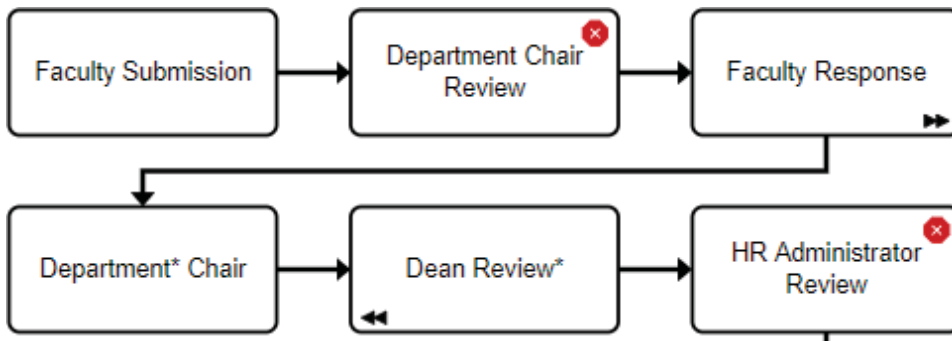
Other material: You may have information that you cannot get to appear in your Annual Report, or other material you wish your department chair to consider. You may submit this material under "Additional Documentation" in addition to the citations and CV. If you submit additional files, please include an explanation of what is in them.

STEPS FOR SUBMITTING AND COMPLETING 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 and completing the faculty response step. The annual review process routes according to the following diagrams:

Departmentalized Units

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┌──────────────────┐      ┌──────────────────┐      ┌──────────────────┐
│                  │      │ Department Chair ⊗│      │                  │
│ Faculty Submission│ ──→ │     Review       │ ──→  │ Faculty Response │
│                  │      │                  │      │               ⏩ │
└──────────────────┘      └──────────────────┘      └──────────────────┘
       ┌───────────────────────────────────────────────────┘
       ▼
┌──────────────────┐      ┌──────────────────┐      ┌──────────────────┐
│                  │      │                  │      │ HR Administrator ⊗│
│ Department* Chair│ ──→  │   Dean Review*   │ ──→  │     Review       │
│                ⏪│      │                  │      │                  │
└──────────────────┘      └──────────────────┘      └──────────────────┘
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HOW TO GET STARTED

1. Log in to your MyLSU account and click on the LSU Faculty 360 link located on the left hand side of the screen. Add activities on the Activities screen according to the Tutorial found here: https://sites01.lsu.edu/wp/lsufaculty360/files/2016/10/LSU-Faculty360- Tutorial-2017.pdf.
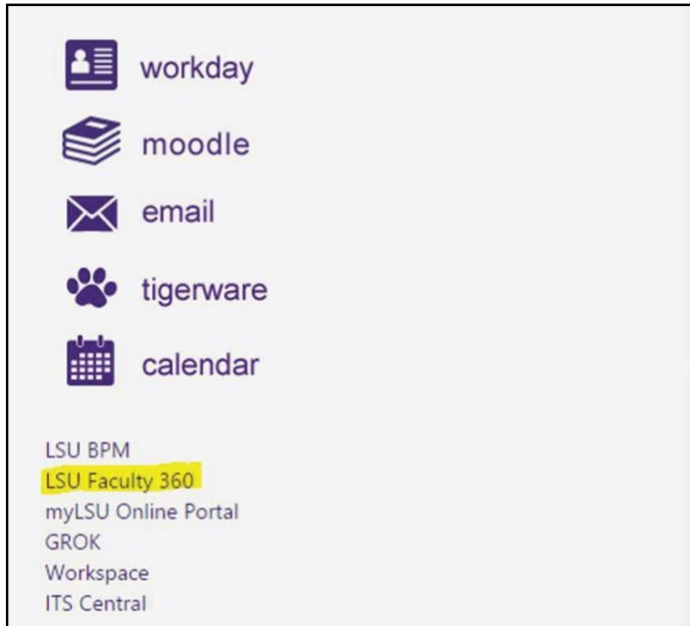
SUBMITTING TO YOUR UNIT LEADER

2. Once activities have been entered and saved, click on the link titled "Workflow" in the heading at the top of the screen.
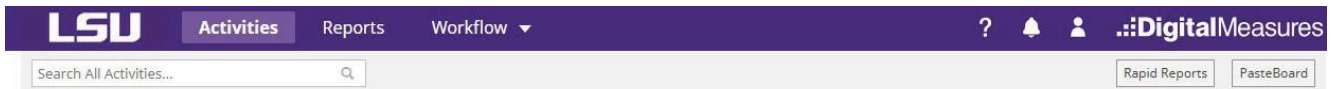
3. Under "Inbox", click on the link titled "[Department name][Evaluation year] Annual Review".

Workflow Tasks

∨ Inbox

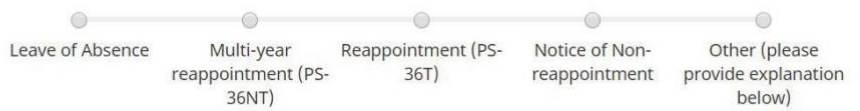| Name	Step	Subject	Due Date
Annual Review	Faculty Submission	Self	January 31, 2018

4. 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

B	I	U	¶ ▾	≣ ▾	≣	≔	⇥	⇤	%	⊞	↺	↻	✎	</>

5. 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 15, 2017 at 1:03 PM	⟳ Refresh Report
LSU Faculty360 Generated PS-36 CV	📄	Last Updated November 15, 2017 at 1:04 PM	⟳ Refresh Report

6. If any items are missing from your annual report or CV and need to be updated, please click on the "Activities" link at the top of the screen and update your activities in the LSU Faculty360 database.
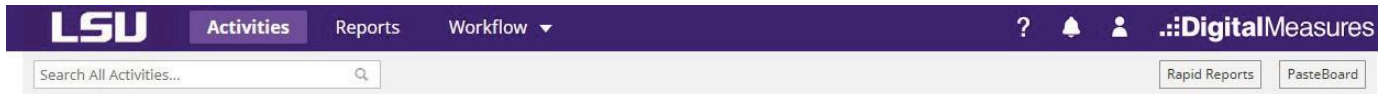
7. After your activities have been updated, return to the annual review screen and click "Refresh Report" again beside each of your reports. Click on the PDF icons to review your reports again and ensure that they are finalized to your satisfaction.

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

9. At the top of the screen, click "Save" to save the submission for later, or click "Activities" and then "Submit to Director/Department Chair" when you are ready to submit your materials to your reviewing officer.

COMPLETING THE FACULTY RESPONSE STEP

After your Unit Leader has completed their evaluation, it will be sent back to you for your review and chance to respond. This step is optional but action still must be taken to move the form forward in the process.

If a response is included:

1. Type your response or rebuttal in the text field or attach as a separate document.

FACULTY RESPONSE (Optional)

Per PS- 36 after a faculty member has been given the opportunity to review the annual evaluation of their job performance that was prepared by their Dean, the faculty member has the right to attach a comment or dissent with materials in support thereof.

If you do not wish to include a response, please click the route button at the top of this screen to submit to HRM.

Comments

Letter of Response/Rebuttal   Drop files here or click to upload

2. Click "Actions" to select "Submit to Department Chair/Director".

⬇   ✕ Cancel   Actions ▼

💾 **Save Draft**

↗ **Submit to Dean** to Dean Review

↗ **Submit** to Department* Chair
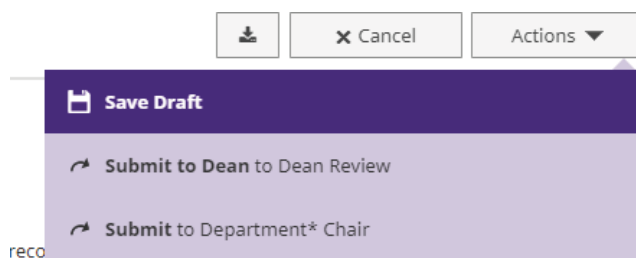
If a response is NOT included:

1. Simply review the evaluation and click "Actions" to select "Submit to Dean Review".

⬇   ✕ Cancel   Actions ▼

💾 **Save Draft**

↗ **Submit to Dean** to Dean Review

↗ **Submit** to Department* Chair