Directions for faculty to view their own DOE using the Effort Planning System (EPS)   **2-13-2019**

Step 1: Login to Effort Planning System (EPS)

==Use Chrome or Firefox browser== and login to myUK portal with your Linkblue ID, and then navigate as described below.

Step 2: Navigate to the appropriate DOE

The initial navigation will vary depending on the EPS roles of the user:
- For faculty users with no other administrative roles, EPS opens on the **My DOEs** page.
- For faculty users with approval roles (e.g. unit directors), EPS opens on the dashboard. Select view all under the **My DOEs** module.

The **My DOEs** page lists the most current DOE for each fiscal year. In the example below, FY2019 has a version 2 in progress at the Faculty Signature status. To find the active (approval workflow completed) DOE, expand the list:

My DOEs   Production

Select + show all versions button to expand the list

Viewing last DOE version (per fiscal year) for

🖨 Print DOE   🖨 Print Worksheet   + show all Versions

		FY ▼	Track Dates	Status	Inst %	Res %	Svc %	Admin %	Prof Dev %	Total Effort
☐	>	2019 T1 / V2	8/1/18 to 5/31/19	Faculty Signature	40.00	40.00	4.00	15.00	1.00	100.00
☐	>	2018 T1 / V2	8/1/17 to 5/31/18	FY2018 last active	40.00	40.00	4.00	15.00	1.00	100.00
☐	>	2017 T1 / V2	8/1/16 to 5/31/17	FY2017 last active	40.00	40.00	5.00	15.00	--	100.00
☐	>	2016 T1 / V3	8/1/15 to 5/31/16	FY2016 last active	40.00	40.00	5.00	15.00	--	100.00

Once the appropriate DOE is identified, use the button with the > symbol to drill down into the detail.

My DOEs

Use the button with the > symbol to drill down into the DOE detail

Production

Viewing all DOEs for

🖨 Print DOE   🖨 Print Worksheet   ➖ show only last DOE version (per fiscal year)

		FY	Track Dates	Status	Inst %	Res %	Svc %	Admin %	Prof Dev %	Total Effort
☐	>	2019 T1 / V1	8/1/18 to 5/31/19	Active	40.00	40.00	4.00	15.00	1.00	100.00
☐	>	2019 T1 / V2	8/1/18 to 5/31/19	Faculty Signature	40.00	40.00	4.00	15.00	1.00	100.00
☐	>	2018 T1 / V1	8/1/17 to 5/31/18	Inactive	40.00	40.00	4.00	15.00	1.00	100.00
☐	>	2018 T1 / V2	8/1/17 to 5/31/18	FY2018 last active	40.00	40.00	4.00	15.00	1.00	100.00
☐	>	2017 T1 / V1	8/1/16 to 5/31/17	Inactive	40.00	40.00	5.00	15.00	--	100.00
☐	>	2017 T1 / V2	8/1/16 to 5/31/17	FY2017 last active	40.00	40.00	5.00	15.00	--	100.00
☐	>	2016 T1 / V1	8/1/15 to 5/31/16	Inactive	40.00	40.00	5.00	15.00	--	100.00

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Step 3: Use the DOE Detail page to view different areas of the DOE

The DOE Detail page

The image shows a screenshot of the EPS DOE Detail page with red annotation callouts:

- **Use collapse/expand button to hide or show the top section**
- **Use drop down menu to navigate to another version for this person.**
- **Use Prev/Next buttons to navigate to next DOE from the Unit List (or list from which you drilled down.)**
- **Top section, with identifying info and prior / current comparison**
- **Tabs to navigate to different information related to the DOE, with Effort Areas tab selected**
- **Sub-tabs for Effort Areas, to navigate to 5 sections of DOE. Note that total percentage appears in tab, and shows running totals when DOE is updated.**

Screenshot content:

DOE Detail - _____ Ph.D.
FY2018 T1 / V1 - 08/01/2017 to 05/31/2018

FY2018 T1 / V1 (current)

PersonID: _____
DOEID: 104546
Rank/Title Series: Assistant Professor / Regular Title Series
Dept.
Linkblue:

DOE Section	FY2017 T1 / V1	Current Effort %
I. Instruction	40.00%	40.00%
II. Research	50.00%	50.00%
III. Service	10.00%	10.00%
IV. Administration	0.00%	0.00%
V. Prof. Dev.	0.00%	0.00%
Effort Total	100.00%	100.00%

Tabs: Effort Areas | Courses | Header Detail | Workflow History | Fac. Apptmts | Messages 1:

Buttons: Update | Initiate Workflow | Print DOE | Filter Out Blanks | Hide Comments

Sub-tabs: I. Instruction: 40.00% | II. Research: 50.00% | III. Service: 10.00% | IV. Administration: 0.00% | V. Prof. Dev: 0.00% | show all 5: 100.00%

Line Item Effort Category/ Activity Description	Prior Version %	Current Effort %	# of Students	Contact Hrs	Faculty or Reviewer Comments for Line Item Effort
a. General Academic Instruction					
Undergraduate Lower Level Courses	5.00 %	5.00 %			

TIP: When viewing or updating a DOE, the top section can be collapsed to show more content without scrolling down the page

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DOE Detail Tab	Description
Effort Areas	Use this tab to view the DOE effort category details for each section. Use the sub-tabs to navigate to different sections. Note that a sixth tab is available to show all five sections at once.
Courses	Use this tab to view the course details for the DOE. The total of effort entered under course details populates Section I. General Academic Instruction on the Effort Areas tab.
Header Detail	Use this tab to view the header information for the DOE. This includes Weeks/Year; UK Average Weekly Hours, and DOE Version Purpose information. Note that entry of this information is optional per college.
Workflow History	Shows the workflow path for the DOE, the current step the workflow is on, who reviewed/approved past steps, and who will review/approve future steps, etc.
Fac. Appoints	Provides academic and administrative appointment data from the Faculty Database for reference and may be helpful in resolving validation messages. In particular, EPS checks for administrative appointments in the Faculty Database to validate presence or absence of effort in particular categories under Administration.
Messages	Shows validation messages for the DOE. Validation messages are inconsistencies which prevent the DOE from moving forward in the workflow.

Tips on viewing Administrative effort. The Administration tab shows the effort assigned. Look for descriptions of the activity under the effort category (example highlighted in yellow).

I. Instruction: 40.00%	II. Resrch/Creativ: 40.00%	III. Service: 4.00%	IV. Administration: 15.00%	V. Prof. Dev.: 1.00%	show all

Line Item Effort Category/ Activity Description	Prior Version %	Current Effort %	Faculty or Reviewer Comments for Line Item Effort
a. College and Department			
Chair	--	--	
Vice Chair/equivalent	--	--	
Academic Division Director/Chief	--	--	
Other position (e.g. center dir., assoc. dean, DGS, DUS, et al) - Director of Undergraduate Studies	15.00 %	15.00 %	
Other administrative activities	--	--	

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The academic appointments and administrative appointments effective in the DOE period, are displayed on the Fac.Appmnts tab