UPDATED May 9, 2019

Annual Report System Frequently Asked Questions

1. How do I access the Annual Report?

There are two ways to access the Annual Report System. You may visit https://www.scranton.edu/annualreport, or click the **2019 Annual Report System** link in the Administrative Links tab of the my.scranton portal. When you log in, you will see the Main Menu screen. Your individual view will vary depending upon which features of the report you have access to:

2. I understand that content from prior years' reporting is not rolled over into the new system. How do I access prior year's Annual Reports?

You may still access the old annual report system via the Administrative Links tab in the my.scranton portal. From there, if there is content you wish to add to your new annual report, simply select it and then copy/paste the content into the new template. **Departments are strongly encouraged to save full copies of prior reports for their records.** If you are a new chair or department director and find you are unable to access prior reports for your area, please contact Kate Yerkes at x6567 to assist.

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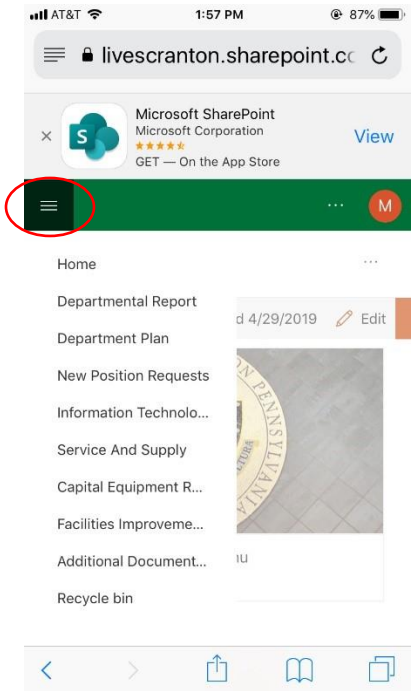
3. What technological requirements do I need to access and work in the Annual Report System?

The Annual Report System is built within SharePoint, a Microsoft Office product. The software works well across all browsers. After initial testing, some limitations in the ability to create and edit records using remote devices – specifically ipads and iphones – have been discovered. Although you may still access the system and view content, please use your desktop to work within the Report to create, edit and share content.



4. Who can view my Annual Report?

- The designated receiver of your report, once it has been submitted. The Vice President for your division, and in the case of academic departments, Provost and Senior Vice President for Academic Affairs, also has the ability to view report contents from departments.
- The Office of Planning & Institutional Effectiveness, to support the Annual Report process and to gather data and information related to department reports' links to the strategic plan and other continuous improvement activities.
- The Office of Educational Assessment, to access the program assessment report(s) submitted by your department.
- The Office of Budget and Financial Planning, to access data within the resource requests sections inform budget development. The Office may also review department level requests that have been acted upon by the Dean of Vice President earlier in the process.
- Anyone else you like! The "Print" option of the report enables you to create a document that you can save and email to whomever you wish.

5. Who can modify my report?

Only the owner of the report can made modifications to its content at this time. If you wish to share sections of the report with others for review or modification, you may do so via the export features of the system. Note that any changes that may be made to these shared files do not automatically populate into the official report. The owner will need to review and select which content to adjust or add, and then make those changes in the system.

6. I'm a department head. I used to be able to delegate access to another in my department to help prepare the Annual Report. Can I still do this under the new system?

Unfortunately, delegation of full access to the report is not possible at this time. However, department heads are able to share the report template, either in whole or in part, with their colleagues, and gather content from them to copy/paste into the report as they wish.

7. I'm working in my report, and see three different fiscal years reflected in the Report sections. Why is this?

The Annual Report process addresses elements of work that occur during three different academic/fiscal years. The Department Report captures activities that occurred during the current academic/fiscal year (so, 2018-2019). The Department Plan includes the development of goals that you wish to pursue in the next academic/fiscal year (20192020), and potentially beyond. Resource request data is gathered for the preparation of the next available budget (2020-2021).

8. I've finished my report. How do I submit it, and what happens next?

- To submit your Annual Report (inclusive of your Departmental Report, Departmental Plan, and Resource Requests), select the "Submit Report" option on the main menu. This will generate a PDF of your report, and an automated email to the designated receiver of your report will deliver it to them. You will be copied on the email.
- Once you've submitted your report, you should meet with your supervisor or dean to review and discuss the report. If the receiver requests changes to the report content, or other needs regarding additions, deletions or other changes to the report emerge during follow up meetings and discussion, the report owner can make those changes at any time. Simply "Submit" the report again to generate the updated version.
- Following submission, data in reports will be accessible by the Office of Planning & Institutional Effectiveness for purpose of overall reporting on the University's strategic and tactical plans, and the Finance Office for budget preparation. For academic programs, assessment data submitted via the Annual Report system is gathered by the Office of Educational Assessment.
- Each Vice President may establish other guidelines regarding the review of resource requests and other feedback to annual reports. Contact your dean, supervisor, or vice president for any guidance specific to your department or area.

9. I have submitted my report, but realize I did not include some important information. What can I do?

You can make changes to the report at any time. However, to be sure your changes are included in the report your dean or vice president is reviewing, you will need to resubmit the document.

10. I need a printed copy of my report. How do I do this?

To print a copy of the report, click the "Print" option on the main annual report system menu. This will generate a PDF of the document that you can print or save.

11. I'd like to email a copy of my report to someone.

Once you've generated a copy of the report via the Print option, you can email it to whomever you like. Simply save the document, and then attach it to any email.

Remember that you can also share elements of the report directly as CSV files via the Export features.

12. I feel that the person to whom my report is to be submitted (the receiver) is the wrong person. What do I do?

Contact the Planning & Institutional Effectiveness Office to verify the correct person to receive your report.

13. My department's reporting structure will change with the new fiscal year. Who will receive it?

Contact the Planning & Institutional Effectiveness Office to verify the correct person to receive your report.

14. I'm an academic department chair. I used to submit activities related to service of an academic nature to the community. Where should I submit this?

You may summarize this information in the Department Outcomes section of the Department Report if you like. You should also submit service activities via the Office of Government & Community Relations online community service form.

15. I'm an academic department chair. I used to submit faculty scholarly activity in the Annual Report system, but do not see that option. Where should I submit this?

- The Office of Research and Sponsored Programs has worked with Information Technology to create a Faculty Scholarly Activity reporting link within the my.scranton portal. Faculty can submit scholarly activities through this link at any time during the academic year. The Annual Report cycle is a good time for chairs to encourage the faculty in your department to update and review submitted materials regularly to ensure they are up-to-date and reflect the full volume of activity.
- If you track this activity within your department via some separate means (for instance, a spreadsheet, or other summary required for accreditation or other purposes), you may elect to include that document as an attachment to the Department Report, or save it to the Additional Documents file.
- You may also note particular scholarly activities or achievements in the narrative overview of your department report.

16. I'm an academic department chair. I used to receive a file from the Office of Institutional Research (now Office of Institutional Reporting and Data Analytics) with data about my department and its programs. Why haven't I received that file?

As part of the new Annual Report System, this data is now accessible to chairs via the "View My Department/Program Data" link on the main SharePoint menu.

17. I'm an academic department chair. I understand that I should submit my OEA Program Assessment Report via the Annual Report System. How do I go about doing this?

Each department chair should receive a copy of their PAR report from the OEA. Complete this form, and then upload the MS Word document as an attachment to the Department Report. The form must be in MS Word format. In addition to this OEA submission, departments are encouraged to summarize assessment activity – including any administrative assessment or other evaluations done with respect to planning or continuous improvement efforts – in the Department Reflections: Assessment section of the annual report. This summary may refer to the OEA PAR as a key resource document.

18. I'm an academic department chair. I used to have a meeting scheduled with my dean and the Provost to review the report. Should I expect this meeting as part of the new process?

No. As part of the new process, department chairs will meet with their dean to review and discuss the department's Annual Report. The Dean will then produce a college report for the Provost's Office. Although department chairs will no longer meet with the Provost, departmental reports will be made available to the Provost to inform discussions regarding plans and resource needs.

19. I'm the receiver for departmental reports. I understand that part of the new process involves review and action on resource requests before I prepare my own report. How do I do this?

Click the "Reviewer Approval" menu item. From here, you can sort all resource requests submitted to you by the departments under your purview by type, and then by department/budget line. The new system includes the option for your response to resource requests by either approving them, declining them, or listing their status as pending. You may include description of rationale for your choice. **Before using this component of the system, check with your divisional vice president to verify any particular expectations for this element of the process.** ***Note that approval at the department level does not constitute final approval or resource allocation.***

21. I'm a report owner, and I'm curious as to the status of my resource requests. Is there a way to check on these?

Deans and vice presidents (or, other receivers depending upon the organization level) are expected to review resource requests as part of their review of each department report. The new Annual Report System includes the option for these individuals to respond to resource requests directly within the system. If such action is taken, the report owner can view this status, along with any comment made. The budget preparation process carries forward through the summer and fall, so resource requests may remain under consideration through that period. When in doubt, reach out to your supervisor or dean to discuss request status.

Note that approval at the department level does not constitute final approval or resource allocation.