

## Annual Report System: Frequently Asked Questions

**Q: How do I access the Annual Report?** To access the Annual Report system, visit <https://www.scranton.edu/annualreport>, or click the **Annual Report System** link in the Employee tab of the my.scranton portal. When you log in, you will see the Main Menu screen. You may be asked to authenticate or log in more than once using your my.scranton log in credentials. Your individual view of the main menu screen will vary depending upon which features of the report you have access to.

The left navigation panel provides access to the major sections of the Annual Report: the Department Report, the Department Plan, five areas of individual resource requests, and a space for additional documents and attachments. Each section also includes options for attachments as well.

The bottom navigation is where you click to Submit or Print your report. Those receiving reports from one or more departments will see an option to “Review and Approve” the report and its various components.

The right navigation panel includes links to helpful guidance and additional resources.

Power Apps | AnnualReport

### Annual Report

**Departmental Report**

**Welcome to the Annual Report System!**

The report structure is broken out into several components: summary of departmental activity from the most recent year; plans for the year ahead; and forms for the submission of resource requests (including service and supply, facilities improvement, capital equipment, information technology and new positions). There is also space for storing and attaching additional documents in support of each of these components. Use the buttons on the left to prepare and submit these materials, export or print your full report, or to access related Annual Report resources.

**Academic Departments:**

[View My Department/Program Data](#)

**HELP:**

[Technical Assistance](#)

[General Questions](#)

[Video Tour](#)

**Additional Resources:**

[Annual Report Guidelines](#)

[Department Report Template - MS WORD](#)

[New Annual Report System Orientation Presentation](#)

[Quick Guide](#) [FAQs](#)

[Annual Report Timeline](#)

[Strategic Plan](#)

[Strategic Planning Principles](#)

[University Mission, Goals and Institutional Learning Outcomes](#)

[Planning and Institutional Effectiveness Model](#)

Choose budget to print/submit:

[Submit Annual Report](#) [Print](#) [Review and Approve](#)

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Technical Issues or Questions? Email [techsupport@scranton.edu](mailto:techsupport@scranton.edu) or Office of Institutional Reporting & Data Analytics (OIRDA) at x 7520, email [richard.walsh@scranton.edu](mailto:richard.walsh@scranton.edu)

**Q: I submitted a report last year. Will the content I submitted still be there?**

Yes. First, when the Annual Report for the department was submitted last year, a full PDF of the Report was sent to the designated receiver; the individual submitting the report also received this PDF via email. Preparers and receivers should save copies of each full PDF Annual Report for their records. Following feedback and recommendations from those using the system, the new Annual Report System includes options to view individual sections of this prior report. This facilitates the ability for individuals to copy/paste content from prior reports into the new report, planning, or resource elements of each new year.

To view prior sections, first click the report content you wish to view (e.g., Department Report) from the main menu, then click the “View Previous Years” button, and the year of content you wish to view.

**Q: I understand that content from reports submitted via the old annual report tool (prior to 2019) were not captured in the new system. How do I access prior year’s Annual Reports?** As part of the launch of the new system in spring 2019, departments were reminded to save full copies of prior reports for their records. Copies of the last three years of reporting under that system (2015-16, 2016-17, and 2017-18) have been archived by the Office of Planning & Institutional Effectiveness (OPIE). If for some reason you need to access reports submitted under the old reporting tool, or are a new chair or department director and find you are unable to access prior reports for your area, please contact the Office of Institutional Reporting to assist.

**Q: What technological requirements do I need to access and work in the Annual Report System?** There are no special software needs. The software works well across all browsers. As with any online submission system, users are encouraged to save work frequently during activity, to ensure that content is not lost due to unique browser timeouts, network access/wifi issues, or other settings.

**Q: 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 content from departments. In addition, other offices that have access to view annual reports:

- The Office of Institutional Reporting and Data Analytics, to support the technical aspects of the Annual Report process and to gather data and information related to department budgeting and, for academic departments, student learning assessment content.
- The Office of Planning & Institutional Effectiveness, to gather content related to departmental, college, and divisional planning, including support of the University’s strategic plan, and other continuous improvement activities.
- The Office of Budget and Financial Planning, the Division of Information Resources, and Office of Facilities, to access data within the resource requests sections inform

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budget development. These departments may also review department level requests that have been acted upon by a Dean of Vice President earlier in the process.

- The Office of Educational Assessment, to gather information related to academic department's program assessment reports, plans and related documentation.
- Anyone else you like! The "Print" or "Export" options of the report enables you to create a document that you can save and email to whomever you wish.

**Q: Who can modify or add to my report?** Only the owner of the report can made modifications to its content at this time. As the annual reporting process is based upon the University's budget line structure, there is only one report for each department, and only one user at any given time can be assigned to that budget. If you wish to gather narrative content or resources to include in the report from others, or work with other staff or faculty to prepare content for submission, materials developed via MS word can be easily cut/paste into the various submission screens from other documents. There are unlimited additional file uploads, so you can add as many supporting files/documents as you like. If you wish to share sections of the report as it is drafted within the system 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.

**Q: 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?** Delegation of full access to the report is not possible at this time. However, department heads are able and encouraged to share the report template in MS Word, or working sections of the report via CSV files with their colleagues, and gather content from them to copy/paste into the report as they wish.

**Q: I am responsible for reporting for more than one department, each with its own budget. Do I submit a separate report for each?** Yes. The annual report structure is based upon departmental budget lines. If you are submitting a report for more than one budget, you should see and be able to select each line via a drop-down menu in each area of the report. Again, only one individual can be assigned to a departmental budget line at a time.

Many departments have multiple areas or programs within that department. If those areas do not have their own individual budget lines, information for them should be included in one single annual report, under the appropriate budget. In these cases, annual report

preparers may include/attach supplemental information – such as shorter program activity summaries – to flesh out the details of the work of those individual programs. If in doubt, consult your dean, department head, or vice president to discuss the best approach for these areas.

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**Q: I'm working in my report and see three different fiscal years reflected in the Report sections. Why is this?** The Annual Report process collages 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, 2024-2025). The Department Plan includes the development of goals that you wish to pursue in the next academic/fiscal year (2025-2026), and potentially beyond. Resource request data is gathered for the preparation of the next available budget (2026-2027).

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

An important part of the reporting and planning process is discussion between and amongst department membership and leadership. Before you submit, consider ways you might share the report with others for their review and input.

- 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.
- **IMPORTANT NOTE: Each Dean or Vice President may establish other guidelines regarding the submission of particular content, and 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.**

**Q: I submitted my report, but realize I did not include some important information, or my dean has asked for me to add a few things. 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.

**Q: I need a printed copy of my report. How do I do this?** To generate a printable copy of the report, click the "Print" option on the main annual report system menu. This will generate a PDF of the document, which is sent to your email. From there, you can print, save, or email a copy of the report to others.

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**Q: 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 share as you need. Remember that you can also download and share CSV files for each type of resource request within the report directly via the Export features.

**Q: I think that the person who received my report is incorrect, or I have received a report from a department that does not report to me. What do I do?** Contact the Office of Institutional Reporting and Data Analytics to verify the correct reporting assignment.

**Q: My department's reporting structure changed this year or will change with the next fiscal year. Who will receive it?** Contact the Office of Institutional Reporting & Data Analytics to verify the correct person to receive your report.

**Q: 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. You may also submit service activities via the Office of Government & Community Relations online community service form.

**Q: I'm an academic department chair. I used to submit individual faculty scholarly achievements for faculty within my department via the Annual Report System. I do not see this included in the report menu. Is this still part of the annual report?**

The Annual Report System no longer includes a separate faculty scholarly activity submission menu. If you would like to include information about faculty research and scholarly activity in the department report, you may summarize key elements of this important work in the narrative sections of the Department Report. You may also include summary materials as attachments.

In addition, if your department gathers faculty scholarly and research information in some additional manner (for example, for academic program accreditation purposes), chairs are encouraged to attach this information as part of their Department Report. Simply upload the relevant documentation. Departments are also encouraged to share and reflect on student-faculty research activities wherever possible.

**Q: I'm an academic department chair. I used to receive a file from the 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 Annual Report welcome page. If you need additional departmental data, such as enrollment statistics, contact the Office of Institutional Reporting and Data Analytics.

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**Q: 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?** Academic departments should attach their completed Program Assessment Report to the Department Annual Report. They may also use space within the Department Report section to summarize and highlight key outcomes from program assessments, results gathered, and potential implications of results.

**Q: I am preparing my Facilities Improvement (FIP) Requests. I received an email from the Facilities Management staff earlier this year also gathering information about my needs. Do I need to also submit items here?**

Due to the timing of these separate process cycles, please contact the Facilities Management staff to determine the status of your FIP request, and guidance as to whether you should submit your request also with the Annual Report system. If your FIP is part of a large-scale renovation or facilities change, you may wish to include it as part of the report so that the report receiver, VP or Dean is aware of the need as part of larger resource planning.

**Q: I am preparing my Information Technology Requests, and received an email also from the Information Technology team about my department's current computer inventory and renewal cycle. Should I also submit requests for desktops or other devices in the Annual Report?**

Yes. Continue to submit any computing requests via the Annual Report System to be sure your request is received, and to serve as an additional check for the team as it completes the development and testing of the new application.

**Q: I'm an annual 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.***



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**Q: I'm a dean or vice president and am preparing a college/division-wide planning document that shows how we are collectively supporting the strategic plan, as well as goals for our programs and areas of service. Do I also need to submit a Department Plan in the Annual Report System?**

The Department Plan section of the Annual Report is intended to help units prepare, document and submit their annual planning goals for review & discussion with deans, vice presidents, and others within and beyond the operational area. Some departments use this to outline all of their goals, while others may use it to prioritize goals and objectives that are pursued in a particular year, drawn from a larger planning document the department, college, or division may have prepared to cover a broader time period (many, for instance, outline broad goals that mirror the five-year lifespan of the University's strategic plan). If such a document is prepared, it should be submitted as an attachment in the Annual Report. The preparer of the Annual Report, in consultation with whomever is assigned to receive it (generally a dean or vice president, or in the case of vice presidents, the President) can then determine how to draw from their larger plan to populate the annual Department Plan and goals in the Annual Report (again, for example, using the Department Plan to capture and report on goals that have been identified through discussion as priorities for that particular year).

**Other questions? Contact t the Office of Planning and Institutional Effectiveness at x6567, or email [Kathryn.yerkes@scranton.edu](mailto:Kathryn.yerkes@scranton.edu)**