

Quick Reference Card – Effort Planning System (EPS)

Faculty DOE Review & Processing

Process: This Quick Reference Card (QRC) contains brief, direct instructions for faculty members to access, review and process their DOEs in the UK Effort Planning System (EPS).

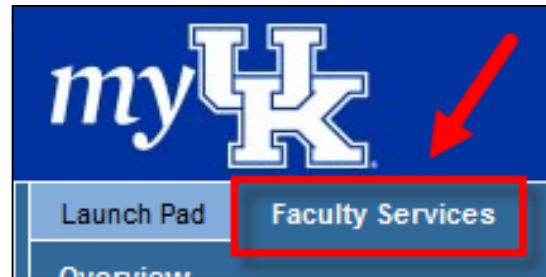
More detailed information on EPS for faculty members can be found via the **EPS Faculty Tutorial** link on the myUK/Enterprise Services/Effort Planning page.

Accessing the Effort Planning System (EPS)

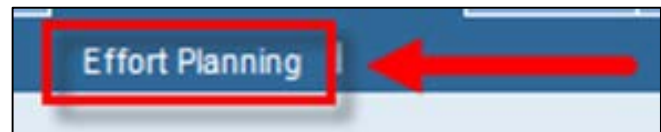
Log into myUK with your linkblue credentials

<https://myUK.uky.edu/irj/portal>

Click on the **Faculty Services** tab



Click on **Effort Planning** in the toolbar below the **Faculty Services** tab

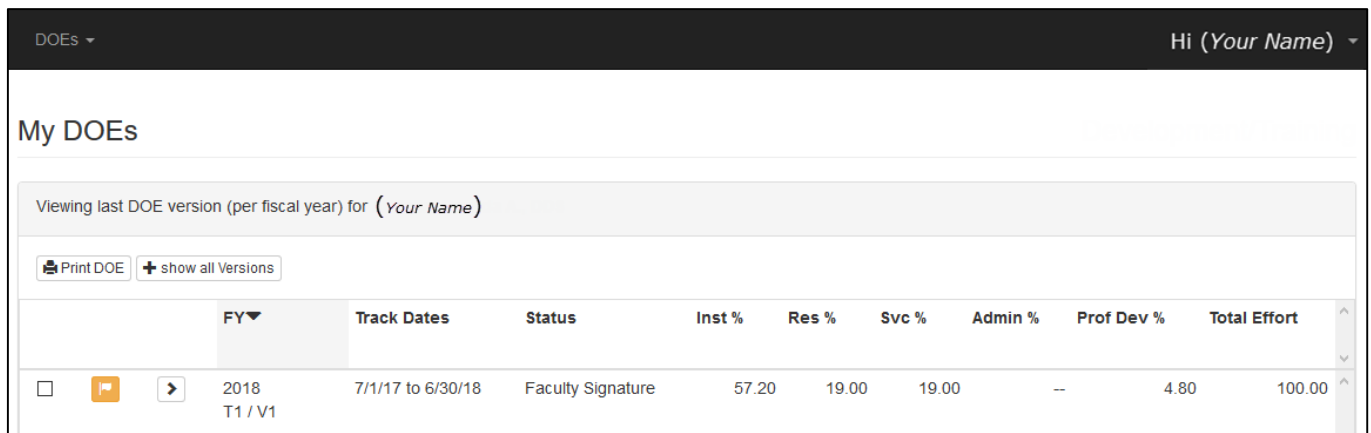


Click on the **Effort Planning System (EPS)** link on the Effort Planning page

[Effort Planning System \(EPS\)](#)

UK Faculty Effort Planning System – My DOEs Home Page

A separate browser window will open to the **UK Faculty Effort Planning System**, and you will be at your EPS – **My DOEs** home page.



	FY	Track Dates	Status	Inst %	Res %	Svc %	Admin %	Prof Dev %	Total Effort
<input type="checkbox"/>	2018 T1 / V1	7/1/17 to 6/30/18	Faculty Signature	57.20	19.00	19.00	--	4.80	100.00

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Display the desired DOE version's details by clicking on the select button (with the greater than sign) to the left of the FY column.

NOTE: If the desired DOE version is not initially visible, click on the **show all Versions** button above the FY column.



+ show all Versions

DOE Detail Page

Below the **expand header** button are six tabs. The current tab's name will be in a black font with a line across the top and down the sides. The other tabs' names will be in a blue font until selected.

Navigate to DOE details and the other information by clicking on the tabs.

DOE Detail Page – Effort Areas Tab

Below the **Effort Areas** tab you will see sub-tabs for each of the five DOE sections (Instruction, Research, Service, Administration, Prof. Dev.) with the total percentage currently saved for each section. The **show all 5** sub-tab combines the information from all five sections onto one page.

I. Instruction: 55.00%	II. Research: 18.00%	III. Service: 22.00%	IV. Administration: 0.00%	V. Prof. Dev.: 5.00%	show all 5: 100.00%
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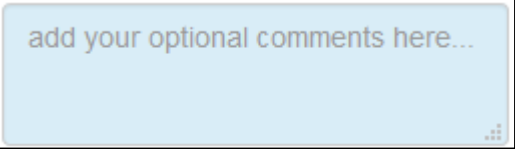





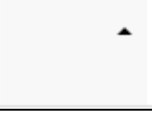



You can hide the line items that have no percentage/comments by clicking on the **Filter Out Blanks** button. This will apply to all six sub-tabs simultaneously.

To show the filtered out blank line items again, click on the **Reset Blank Filter** button.

Filter Out Blanks

Reset Blank Filter

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<p>To add your optional comments for a section and/or any line item, click on the Update button.</p> <p>The comments fields will appear in a light blue color and will state “add your optional comments here...”.</p>	 
<p>Once you’ve completed adding your optional comments, click on the Save Updates button.</p> <p>The Cancel Updates button will take you out of update mode without saving any information you may have entered.</p>	 
<p>If desired, you can print the DOE at any time using the Print DOE button.</p>	
<p>The Hide Comments / Show Comments button applies to only the Faculty or Reviewer Comments for Line Item Effort column.</p>	 
<p>DOE Detail Page – Courses Tab</p>	
<p>The course information on this page is view-only for the faculty member.</p>	
<p>The listed courses can be sorted in ascending/descending order by course prefix/number by clicking in the header box above the first listed course.</p>	 = Ascending Order  = Descending Order
<p>To view all of a course’s details, click on the Display icon to the left of the course prefix/number.</p> <p>You will then need to scroll down the page (below the Your Courses section) to see the View course details section.</p>	 ← PER 841 CLINICAL PERIODONTICS IV
<p>Hover your mouse over any information icon to view the details.</p>	

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DOE Detail Page – Header Detail Tab

The majority of this page is view-only for the faculty member. However, optional comments which pertain to the DOE overall can be added by the faculty member.

To add any optional comments to the **Reviewer Comments: Overall DOE** section, click on the **Update** button.



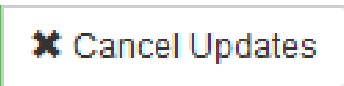
Add a comment:

add your optional comments here...

Optional comments are then saved using the **Save Updates** button.



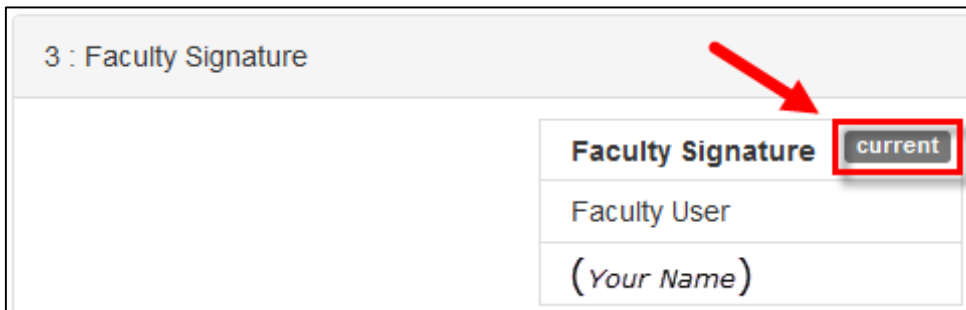
The **Cancel Updates** button will take you out of update mode without saving any information you may have entered.



DOE Detail Page – Signing or Returning the DOE

You can view and print any DOE at any time. However, **the buttons used to sign or return your current DOE to your Chair/Director will be available ONLY when it's your turn in the overall workflow!**

This status can be seen on the **Workflow History** tab (covered in more detail in the next section):

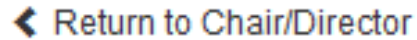


The **Sign DOE** and **Return to Chair/Director** buttons are present ONLY on the **Effort Areas** page.

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Once you have reviewed the DOE details, saved any optional comments and are ready to “sign” the DOE, simply click on the **Sign DOE** button. If you wish to return your DOE to the Chair/Director for further review/discussion/changes, click on the **Return to Chair/Director** button.

 Sign DOE

 Return to Chair/Director


DOE Detail Page – Workflow History Tab

This page displays the workflow/status history for the DOE. This is an informational, view-only page.

A green box indicates a step that has been completed. It lists the step, status and status date, workflow role and role’s name.

Ed. Unit Approval ✓
Approved -- 08/09/2017
Educational Unit Director
(Director's Name)

The current step in the workflow is indicated on the left side of the screen with the double arrow icon...

Current Step
Faculty Signature 

...as well as a gray box with the word **current** in the step boxes.

Faculty Signature **current**
Faculty User
(Faculty member's Name)

DOE Detail Page – Fac. Apptmts Tab

This page will list the **Current Appointments** for the faculty member that have been approved and are effective in the track period.

DOE Detail Page – Messages Tab

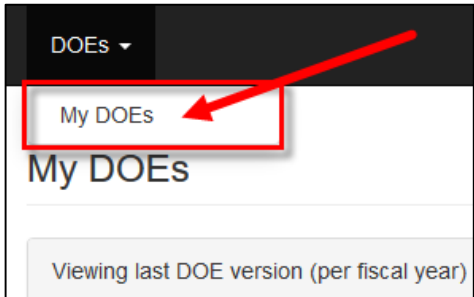
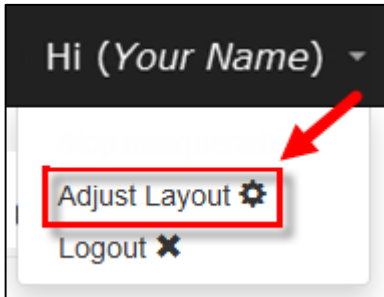
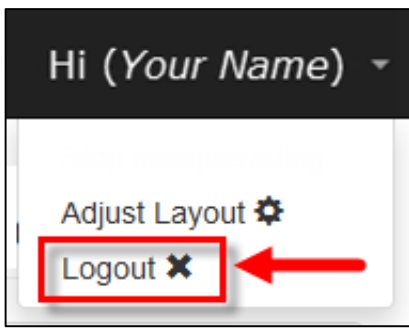
This page will list any error (red flag) and/or warning (orange flag) messages pertaining to the DOE. The red error flag takes precedence over the orange warning flag. The tab will list the number of messages to the right of the word **Messages**. For example:

Messages 0:

Messages 11: 

Messages 10: 

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EPS Menu Bar Functions	
<p>To return to your My DOEs home page, click on DOEs – My DOEs.</p>	 <p>The screenshot shows the top navigation bar with a dark background. On the left, there is a dropdown menu labeled 'DOEs'. Below it, a white box contains the text 'My DOEs', which is highlighted with a red rectangular border. A red arrow points from the top right towards this box. Below the 'My DOEs' box, the text 'My DOEs' is displayed again. At the bottom of the screenshot, there is a grey box with the text 'Viewing last DOE version (per fiscal year)'.</p>
<p>The Adjust Layout option allows you to toggle between the (default) narrow view and wide-screen view.</p>	 <p>The screenshot shows the user profile area. At the top, it says 'Hi (Your Name)' with a dropdown arrow. Below this, there is a white box containing two options: 'Adjust Layout' with a gear icon and 'Logout' with an 'x' icon. The 'Adjust Layout' option is highlighted with a red rectangular border, and a red arrow points from the top right towards it.</p>
<p>To exit EPS, click on your name and then the Logout option.</p>	 <p>The screenshot shows the user profile area. At the top, it says 'Hi (Your Name)' with a dropdown arrow. Below this, there is a white box containing two options: 'Adjust Layout' with a gear icon and 'Logout' with an 'x' icon. The 'Logout' option is highlighted with a red rectangular border, and a red arrow points from the right towards it.</p>