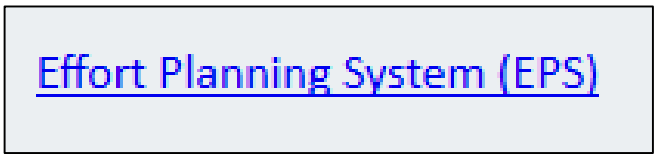
Quick Reference Card – Effort Planning System (EPS)

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).

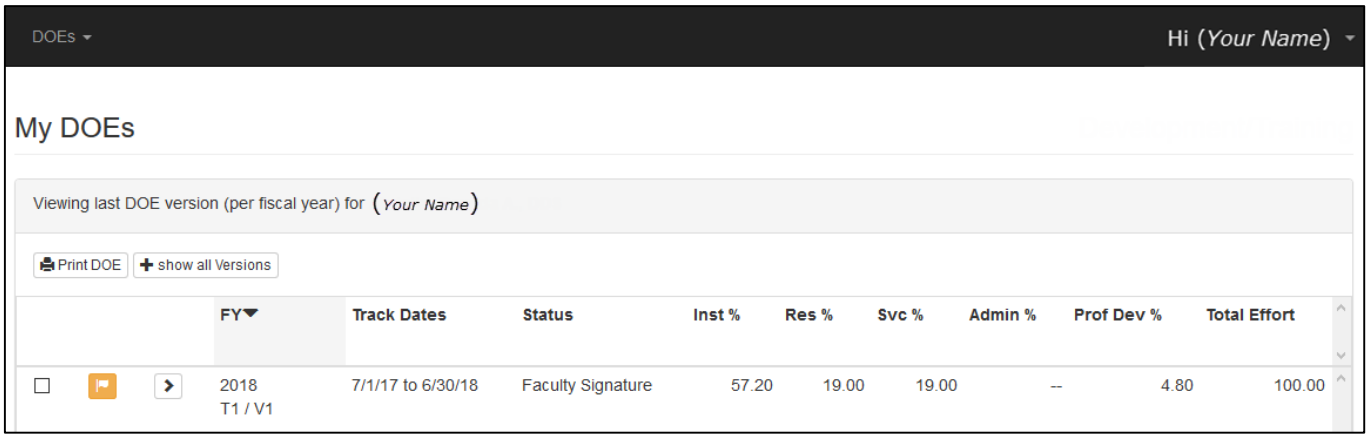
More detailed information on EPS for faculty members can be found in the **EPS Faculty Tutorial** on the myUK/Enterprise Services/Effort Planning page.

Accessing the Effort Planning System (EPS)

Log into myUK with your linkblue credentials	https://myUK.uky.edu/irj/portal
Click on the **Enterprise Services** tab	
Click on **Effort Planning** in the toolbar below the **Enterprise Services** tab	
Click on the **Effort Planning System (EPS)** link on the Effort Planning page	

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.



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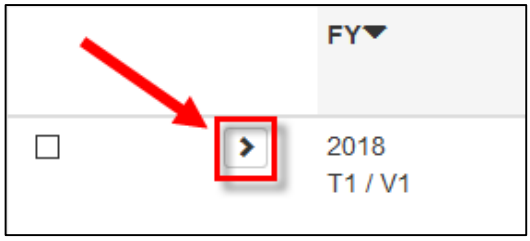
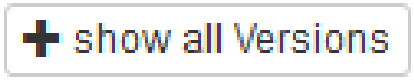
Display the desired DOE version's details by clicking on the select button (with the greater than sign) to the left of the FY column.

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

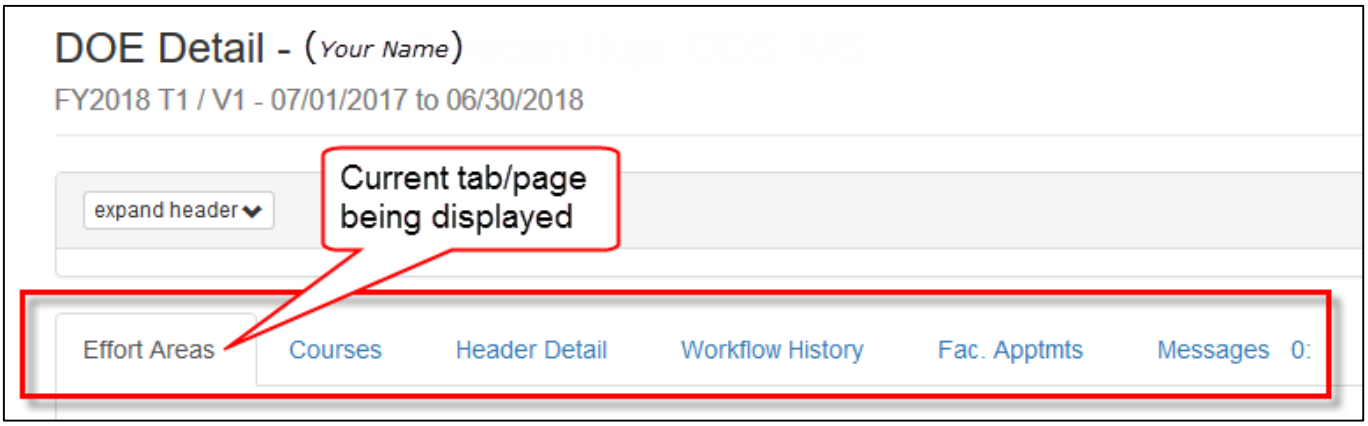




DOE Detail Page

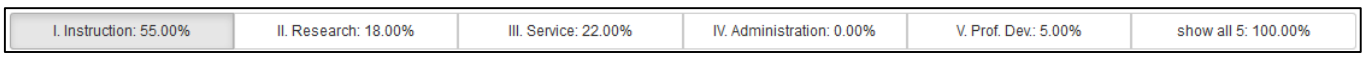
Below the **expand header** button are six tabs. The current tab's name will be in a black font with a line across the top and down the sides. The other tabs' names will be in a blue font until selected.

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

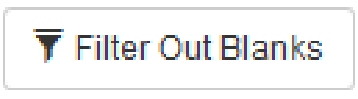


DOE Detail Page – Effort Areas Tab

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.



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.

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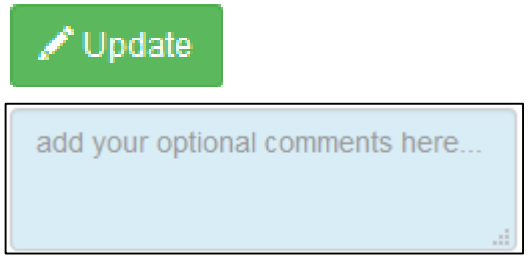
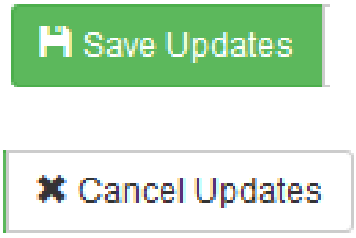
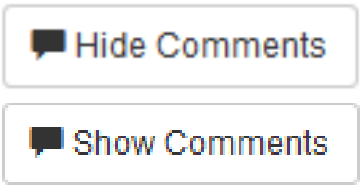
To add your optional comments for a section and/or any line item, click on the **Update** button. The comments fields will appear in a light blue color and will state "add your optional comments here…".	
Once you've completed adding your optional comments, click on the **Save Updates** button. The **Cancel Updates** button will take you out of update mode without saving any information you may have entered.	
If desired, you can print the DOE at any time using the **Print DOE** button.	
The **Hide Comments** / **Show Comments** button applies to only the **Faculty or Reviewer Comments for Line Item Effort** column.	
DOE Detail Page – Courses Tab	
The course information on this page is view-only for the faculty member.	
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.	= Ascending Order = Descending Order
To view all of a course's details, click on the Display icon to the left of the course prefix/number. You will then need to scroll down the page (below the **Your Courses** section) to see the **View course details** section.	
Hover your mouse over any information icon to view the details.	

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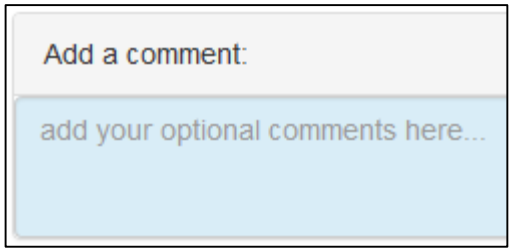
DOE Detail Page – Header Detail Tab

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.



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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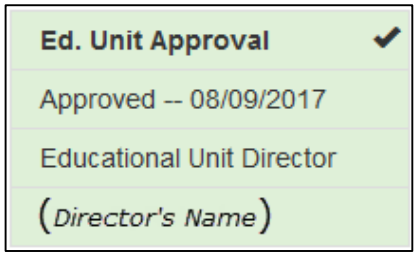
Once you have reviewed the DOE details, saved any optional comments and are ready to "sign" the DOE, simply click on the **Sign DOE** button.

If you wish to return your DOE to the Chair/Director for further review/discussion/changes, click on the **Return to Chair/Director** button.

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.



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

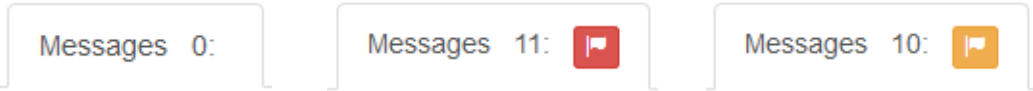
…as well as a gray box with the word **current** in the step boxes.

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:



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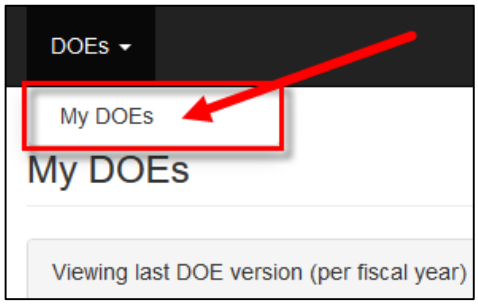
EPS Menu Bar Functions	
To return to your **My DOEs** home page, click on **DOEs – My DOEs**.	
The **Adjust Layout** option allows you to toggle between the (default) narrow view and wide-screen view.	
To exit EPS, click on your name and then the **Logout** option.	

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