This paper provides an analysis on the best practices in collecting data on out-of-classroom faculty activity for purposes of the expanded Delaware Study.

Prepared by
Michael F. Middaugh
Assistant Vice President for Institutional Research and Planning
University of Delaware
Director, Delaware Study of Instructional Costs and Productivity

Available on the Web:
The Delaware Study of Instructional Costs and Productivity
http://www.udel.edu/ir/fipse

Published July 2004
INTRODUCTION

Over the past decade, the Delaware Study of Instructional Costs and Productivity has established itself as the tool of choice for benchmarking data on faculty teaching loads, instructional costs, and externally funded scholarship—all at the academic discipline level of analysis. Nearly 400 colleges and universities across the United States have participated in this data-sharing consortium, which annually produces benchmark data on variable such as, but not limited to:

- Undergraduate and graduate student credit hours taught per FTE faculty, by category (arrayed separately by tenured and tenure track; other regular faculty; supplemental faculty; graduate teaching assistants; and total faculty)
- Undergraduate and graduate organized class sections taught per FTE faculty
- Total student credit hours taught per FTE faculty
- Total organized class sections taught per FTE faculty
- Direct instructional expense per student credit hour taught
- Direct instructional expense per FTE student taught
- Personnel expense as a percentage of total direct instructional cost
- Research and public service expenditures per FTE tenured and tenure track faculty

Delaware Study data have been used at the institutional level to help assess the extent to which academic departments are making effective and efficient use of human and fiscal resources. The data have also been used at the state and system level to clarify resource allocation decisions, and at the national level to help explain variation in instructional costs across four-year institutions in the United States. While Delaware Study data have found widespread utility since the project’s inception in 1992, there are limitations in the information that the Study has historically provided. Faculty have obligations other than teaching, and time spent meeting those obligations may result in lower teaching loads and higher instructional costs. The magnitude of each of the benchmark variables listed above can be profoundly impacted by what faculty do outside of the classroom, i.e. activities related to advising, curriculum development, research and scholarship, professional development, and institutional and public service. While the data collected on expenditures for research and public service may capture some of this activity, not all research and service is externally funded, and out-of-classroom faculty activity is by no means restricted to those two categories.

A complete discussion of the content, instrumentation, and methodology for the Delaware Study can be found at http://www.udel.edu/ir/cost.
With these limitations in mind, the University of Delaware, having received a grant from the Fund for Improvement of Post Secondary Education (FIPSE) from 1996 through 1999 to underwrite the cost of developing the data collection instrumentation and methodology for the original Delaware Study, again turned to FIPSE for financial assistance in developing measures of out-of-classroom faculty activity. A multiple year grant for this purpose was formally awarded to the University of Delaware in September 2001.

Capturing data on out-of-classroom faculty activity is not a trivial matter. Unlike data associated with teaching loads and instructional, research, and service expenditures, which are usually found in centralized course registration and financial data bases, information regarding what faculty do outside of the classroom are often not centrally collected, and frequently reside only in a department chair's file cabinet. The current FIPSE grant supports the activity of an Advisory Committee, charged with responsibility for developing a data collection instrument and methodology that effectively captures selected measures of out-of-classroom activity that are representative of what faculty do at four-year colleges and universities across the nation. While it is understood that the relative emphasis on faculty activity associated with instruction versus research and scholarship versus service will vary across institutions as a function of a college or university's mission, the intent was to develop an instrument and methodology that would capture a broad spectrum of out-of-classroom activity measures. A copy of the current data collection instrument is found in Appendix A. The initial data collection for Measures of Out-of-Classroom Faculty Activity took place in Spring 2003, and the data collection instrument, data definitions, and a general description of the research methodology can be found at http://www.udel.edu/ir/fipse.

INSTITUTIONAL EXEMPLARS

An important component of the current FIPSE-funded activity is the identification of colleges and universities that are engaged in exemplary practices with respect to collecting data on the full range of faculty activities, particularly those occurring outside of the classroom. The purpose of this expanded Delaware Study data collection is to provide valuable contextual information for examining the traditional teaching load and expenditure benchmark data associated with the Study. However, as previously noted, the data associated with out-of-classroom faculty activity are quite frequently not centrally located and accessible. Consequently, in addition to developing appropriate data collection tools and strategies, FIPSE funds are being used to develop a series of annual “Briefing Papers,” examining data collection practices at institutions where faculty activity analysis is part of the institutional fabric. The Briefing Papers will describe the data collection framework and tools at
selected institutions, as well as how the data are utilized. Needless to say, the data collection frameworks are also examined within the context of the extent to which they facilitate completion of the Delaware Study Measures of Out-of-Classroom Faculty Activity Data Collection Form.

In this first of those Briefing Papers, data collection practices at Binghamton University (New York), Clemson University (South Carolina), and Montana State University will be described. While each of these exemplars is a public institution of some size, the reader will quickly see that the methodologies used by these universities to gather faculty activity data are elegant in their simplicity, and are easily transportable to other institutions, regardless of size or public/private charter.

BINGHAMTON UNIVERSITY

Binghamton University is one of four university centers within the State University of New York (SUNY) System. Total enrollment exceeds 13,000, with 10,328 matriculated undergraduates and 2,771 graduate students. Full time faculty number just under 500, with 94 percent holding the Ph.D. as the terminal degree. The University is comprised of six schools—Harpur College of Arts and Science; Decker School of Nursing; School of Education and Human Development; Thomas J. Watson School of Engineering and Applied Science; School of Management; and the Graduate School. Binghamton University has degree programs ranging from the baccalaureate to the doctorate, as appropriate, in 67 fields of study.

Faculty at Binghamton University, as part of the 64 campus SUNY System, are required to file an Annual Report detailing major activities and accomplishments during the preceding academic year. The focus is on out-of-classroom activity, and Binghamton University's Office of Institutional Research and Planning fully documents classroom teaching activity as part of the SUNY System-mandated Course and Section Analysis (CASA) statewide reporting system. While completion of an Annual Report is mandatory, compliance with that mandate had proven problematic over the years. In an attempt to enhance participation in the Annual Report process, the University took two important steps. The first was the creation of a web-based data collection system that would make it far easier for faculty to comprehensively and systematically describe their activities. The second was a “carrot and stick” approach to encouraging faculty to use the web-based system. Sabbatical leaves and other discretionary incentives were tied to regular and routine completion of the web-based Annual Report. It should also be noted that Binghamton University is a long-time participant in the teaching load, instructional cost, and externally funded scholarship portion of the Delaware Study. It was immediately obvious to the Office of Institutional Research and Planning that, in addition to meeting State
reporting requirements, the web-based faculty activity data collection would also allow Binghamton University to participate in the Out-of-Classroom Faculty Activity portion of the Delaware Study, thereby providing valuable contextual data for looking at the traditional Delaware Study measures of teaching loads and instructional costs.

In creating a web-based data collection system, Binghamton University's Office of Institutional Research and Planning opted for Microsoft FrontPage as the tool for building and managing the gathering of information on faculty activities. FrontPage is a commercial software package that allows non-programmers and those individuals with rudimentary HTML skills to create dynamic and interactive websites. Binghamton University was seeking a capability wherein they could effectively lead a faculty member through the process of completing a web-based submission of prescribed categories of faculty activity data. FrontPage allowed the Office of Institutional Research and Planning at Binghamton University to design a website that met the needs of the Provost, while at the same time, providing the capability for extended data analysis by Institutional Research and Planning. Readers of this paper are encouraged to view the website at http://facultyreporting.binghamton.edu/start.htm.

The choice of FrontPage was appropriate for Binghamton University, as they had data needs that went beyond the data elements being collected in the Out-of-Classroom Faculty Activity portion of the Delaware Study. A screen capture of the Binghamton University Faculty Activity Data Collection Web Form is found in Appendix B. The Office of Institutional Research and Planning was fully cognizant that a cadre of faculty on campus either lacked the technological skills to complete the web-based form, or were simply disinclined to do so. For that group, a hard copy Data Collection Form was distributed in order to maximize the overall faculty response rate.

The actual time and staff requirements for developing the FrontPage code for the Binghamton Faculty Activity Data Collection Form is best gleaned from conversation and correspondence with staff in the Office of Institutional Research and Planning. Suffice to say that this office was able to develop this website using a commercial software package, without extensive involvement of programming staff from the central computing center. As a result, the Office of Institutional Research and Planning was able to obtain precisely the website design they sought to achieve. Readers wishing a more technical description of the development of the Faculty Annual Report Form should contact Peter J. Partell, Director of Institutional Research and Planning at partell@binghamton.edu, or Dan Jardine, Research Analyst for Faculty Productivity at djardine@binghamton.edu.
Those interested in more traditional forms of correspondence can reach Peter Partell and Dan Jardine at:

Office of Institutional Research and Planning
Binghamton University
P.O. Box 6000
Binghamton, NY 13902
Phone: (607) 777-2365
Fax: (607) 777-4513

MONTANA STATE UNIVERSITY

Montana State University is a component of the Montana University System. Total enrollment is over 12,000, with 10,750 undergraduates and 1,385 graduate and professional students. Full time instructional faculty exceed 500, with 83 percent holding a terminal degree. The University is comprised of six colleges—Agriculture; Arts and Architecture; Education, Health and Human Development; Engineering; Letters and Science; and Nursing. Montana State University offers baccalaureate degrees in 51 fields with many different options, master’s degrees in 40 fields, and doctoral degrees in 17 fields. The University also offers a specialist degree in Education. The College of Nursing offers a Post-Master’s Nurse Practitioner (FNP) certificate as well as a Clinical Nurse Specialist (CNS) degree.

Montana State University’s experience with collecting out-of-classroom faculty activity data is distinctly different from Binghamton University. Montana State is not required by a central authority to collect these data and submit them to the Montana University System Office. However, other factors drove the institution to gather this information. A presidential succession, coupled with other academic and administrative changes, resulted in an emphasis on strategic planning. The current Executive Director for Planning and Analysis was selected to re-shape the office and its capabilities in support of strategic planning activity.

One of the first decisions made by the Office of Planning and Analysis at Montana State University was to seek benchmarking information to describe the current institutional position along a variety of dimensions, and to help identify aspirational objectives to move the institution forward.

One of the first decisions made by the Office of Planning and Analysis at Montana State University was to seek benchmarking information to describe the current institutional position along a variety of dimensions, and to help identify aspirational objectives to move the institution forward. In the academic arena, the teaching load, instructional cost, and externally funded scholarship portion of the Delaware Study was adopted a few years ago. As the institution became comfortable with the more traditional teaching load and financial benchmark data provided by the Delaware Study, the decision was made to move forward with the Out-of-Classroom
In moving toward full participation in the Out-of-Classroom Faculty Activity phase of the Delaware Study, Montana State University decided to develop a web-based data collection form that exactly mirrored the data elements being collected on the Delaware Study Data Collection Form. The software tool of choice for Montana State University was Microsoft Access, which enables the creation of web-based data collection forms, and the manipulation and management of data collected therein.

Appendix C contains relevant views of the Montana State University Data Collection Form, which replicates the Delaware Study Data Collection Form as it appeared in the initial data collection cycle. The form was modified for the 2004 data collection cycle and is reflected in Appendix A. Each of the six views guides the user through the data submission process. Each of the data elements on the Data Collection Form has a “button” that enables verification of the quantitative totals entered for each variable. The Office of Planning and Analysis has developed two key strategies that are embedded in this web-based interaction with campus faculty. When an individual faculty member chooses “Instructional Activities” from the menu in View 2 in Appendix C, he/she is afforded the opportunity to verify their teaching activity in each semester. In selecting “Delaware Data” from the same menu in View 2, the faculty member inputs the quantitative information for each of the Delaware out-of-classroom faculty activity variables. However, as evident in Views 4 and 5 in Appendix C, it is not sufficient to simply enter a number for each variable. If, for example, a “2” is entered under the “number of refereed articles published,” the data collection form requires the faculty member to provide citations for the articles being counted.

The Montana State University use of Microsoft Access in developing this web-based data collection form is elegant in its simplicity. Interested readers are encouraged to contact the primary architect of the Access system, Ben Sharp (bsharp@montana.edu), who is a Research Analyst in the Office of Planning and Analysis. Other valuable contact persons in the office who are familiar with Montana State's Delaware Study Activity are Research Analyst, Chris Fastnow (cfastnow@montana.edu), and Executive Director, Jim Rimpau (rimpau@montana.edu). For those preferring the U.S. Postal System, the mailing address is:

Office of Planning and Analysis
Montana State University-Bozeman
Montana Hall, P.O. Box 172435
Bozeman, MT 59717-2435
CLEMSON UNIVERSITY

Clemson University is a public, Land Grant University, that is part of the South Carolina Higher Education System. Total enrollment is approximately 17,000, with 13,800 undergraduates and 3,200 graduate students. Full time faculty total over 960, with 88 percent holding a terminal degree. Clemson University is comprised of five colleges: Agriculture, Forestry and Life Sciences; Architecture, Arts and Humanities; Business and Behavioral Science; Engineering and Science; and Health, Education, and Human Development. The University has degree programs ranging from the baccalaureate to the doctorate, as appropriate, in 70 fields of study.

Clemson University has participated in the Delaware Study since its inception in 1992, and has a long history of using the Delaware Study’s teaching load, instructional cost, and externally funded scholarship data in academic planning and decision-making. When the opportunity arose to participate in the Delaware Study Out-of-Classroom Faculty Activity Data Collection, Clemson University was one of the first institutions to sign on. In fact, Clemson's then Director of Institutional Research and Planning was a member of the original Delaware Study Advisory Committee for this FIPSE-funded project.

Clemson University was uniquely positioned to be both a Delaware Study participant and advisor owing to their ongoing involvement with their Faculty Activity System, which systematically collects information for all teaching, research, and service activity by faculty at the institution. Clemson initiated development of the Faculty Activity System primarily to help deans and department chairs assess the extent to which individual academic units and their faculty were contributing to the overall institutional mission of teaching, research, and service. However, the data base was also envisioned as a resource for talking with legislators and other non-academic personnel about the non-instructional dimensions of faculty activity.

Unlike the Binghamton University and Montana State University faculty activity data collection systems, which were developed by the Institutional Research and Planning Office at each respective institution, the Clemson University Faculty Activity System is the product of collaborative activity between Institutional Research and Information Technology at that institution. The Technical Information section at the end of Clemson's Faculty Activity System Primer, found in Appendix D, attests to the complexity and sophistication of this data collection system. The added complexity, however, provides more versatility in both use of the system and the reports generated.
Clemson University’s Faculty Activity System has enabled the institution to fully participate in the out-of-classroom activity phase of the Delaware Study, while at the same time meeting a broad range of information needs from the Provost, Deans, and Department Chairs. The system yields information relevant not only to academic planners, but to those on campus who wish to explain—both internally and externally—the full range of faculty activity at a major Land Grant University. Those wishing a fuller understanding of the evolution and use of the Faculty Activity System are encouraged to contact either Catherine Watt, Director of Institutional Research (cwatt@clemson.edu), or Wickes Wescott, Assistant Director of Institutional Research and a primary architect of the system (westc@clemson.edu). The mailing address is:

Office of Institutional Research
Clemson University
Clemson, SC 29634

CLOSING THOUGHTS

This first, in what will be a series of Briefing Papers on best practices in collecting data on out-of-classroom faculty activity, brings together three quite different approaches to that process. Ranging from Montana State University’s objective of collecting sufficient data to participate in this new portion of the Delaware Study, to Binghamton University’s need for internal and System-level reporting data, to Clemson University’s comprehensive approach to gathering information on faculty activity, these truly are exemplary institutions in their approach to collecting data on out-of-classroom faculty activity. And while all three are large, complex universities, the information they gather is easily applicable to comprehensive or baccalaureate institutions. Furthermore, the institutional research office-based approaches to data collection employed by Binghamton University and Montana State University most certainly lend themselves to smaller institutions. The next set of Briefing Papers, to be published in late 2004 or early 2005 will, in fact, focus on best practices at exemplary comprehensive and baccalaureate institutions.

In the meantime, we welcome your comments and suggestions on the format and content of these Briefing Papers. Feel free to send e-mail to either Michael Middaugh (middaugh@udel.edu) or Heather Isaacs (hkelly@udel.edu), or write to us at:

Office of Institutional Research and Planning
University of Delaware
325 Hullihen Hall
Newark, DE 19716
APPENDIX A

Delaware Study Data Collection Form
Delaware Study of Instructional Costs and Productivity  
Selected Measures of Out-of-Classroom Faculty Activity - Summary Form

Institution:__________________________________________  FICE Code:______________________
Discipline:__________________________________________  CIP Code:________________________

Degrees Offered in Discipline (check all that apply): ___ Bachelor  ___ Master’s  ___ Doctorate  ___ Professional

This study focuses on the discipline level of analysis.  
Please carefully consult the data definitions accompanying this data collection form before reporting information.  
All data should be reported for the most recent 12-month faculty evaluation period as defined in the instructions.  
Please denote any not-applicable data as ‘na’ and any data element that is truly zero as ‘0’.

**DISCIPLINE SPECIFIC STATISTICS**
A. Total number of FTE tenured and tenure-track faculty.  
   ___
B. Total number of FTE tenured and tenure-track faculty on which your responses below will be based.  
   ___

**ACTIVITIES RELATED TO TEACHING**

1. Number of new courses which faculty have created.  
   ___
2. Number of existing courses where faculty have redesigned the pedagogy or curriculum.  
   ___
3. Total number of course preparations faculty have made.  (*This number should reflect unique courses versus different course sections*).  
   ___
4. Unduplicated headcount of undergraduate academic advisees formally assigned to faculty.  
   ___
5. Unduplicated headcount of graduate academic advisees formally assigned to faculty, excluding thesis/dissertation advisees.  
   ___
6. Number of active thesis/dissertation committees where faculty served as first reader or chairperson.  
   ___
7. Number of active thesis/dissertation committees where faculty served in a non-chairing role.  
   ___
8. Number of undergraduate senior theses (e.g., senior thesis, recital, art show, other capstone experiences) that faculty have advised.  
   ___
9. Total number of students taught individually in independent or directed studies.  
   ___
10. Number of undergraduate students formally engaged in research with a faculty mentor.  
   ___
11. Number of graduate students formally engaged in research with a faculty mentor.  
   ___
12. Number of clinical students (e.g., student nurses), practicum students (e.g., student teachers), and internship students formally assigned to faculty.  
   ___
13. Number of students (undergraduate and graduate) who have co-authored a journal article or book chapter with a faculty mentor.  
   ___
14. Number of students (undergraduate and graduate) who have co-presented a paper at a professional meeting with a faculty mentor.  
   ___

continues
ACTIVITIES RELATED TO SCHOLARSHIP
15. Number of print or electronic **referred** journal articles, book chapters, and creative works published by faculty.

16. Number of print or electronic **non-referred** journal articles, book chapters, and creative works published by faculty.

17. Number of single-author or joint-author books or monographs written by faculty and published by an academic or commercial press.

18. Number of manuscripts (e.g. journal articles, books) submitted to publishers.

19. Number of books, collections, and monographs edited by faculty.

20. Number of books, journal articles, and manuscripts reviewed and formally submitted by faculty.

21. Number of editorial positions held by faculty.

22. Number of juried shows, commissioned performances, creative readings, or competitive exhibitions by faculty.

23. Number of digital programs or development of applications and items for technology transfer (e.g., software development, web-based learning modules) designed by faculty related to field of expertise.

24. Number of provisional or issued patents registered to faculty.

25. Number of faculty works in progress (e.g., journal articles, paintings, musical compositions).

26. Number of invitations received by faculty to perform or present.

27. Number of formal presentations made by faculty at state, regional, national, and international professional meetings.

28. Number of external and internal grant, contract, and scholarly fellowship proposals submitted by faculty.

29. Number of **new** external grants, contracts, and scholarly fellowships formally awarded to faculty or to the institution on behalf of faculty.

30. Total dollar value of the **new** externally funded grants, contracts, and scholarly fellowships indicated in the previous question.

31. Number of **new** internal grants and contracts formally awarded to faculty.

32. Total dollar value of the **new** internally funded grants and contracts indicated in the previous question.

33. Number of continuing external and internal grants, contracts, and scholarly fellowships.

ACTIVITIES RELATED TO SERVICE
34. Number of faculty activities related to institutional service (e.g., faculty senate, faculty committees, peer mentoring, academic programs in residences, recruiting efforts, student activity advisor, other student activity involvement).

35. Number of faculty extension and outreach activities related to field of expertise (e.g., K-12 service, community workshops, invited talks to community groups, seminars, lectures, demonstrations).

36. Number of faculty activities related to recognized or visible service to profession (e.g., service on a regional or national committee, service on a self-study visitation team for another institution).

37. Number of grant proposals reviewed by faculty related to field of expertise.

38. Number of leadership positions in a professional association held by faculty (e.g., elected officer, committee chairperson, conference chair).

Thank You!
Dear Colleague:

Your institution has agreed to participate in the Delaware Study of Selected Measures of Out-of-Classroom Faculty Activity. This is a national data project, underwritten by the U.S. Department of Education Fund for the Improvement of Post Secondary Education. Data will be collected by academic department/discipline at each participating institution, and will be reported in aggregate form for each unit. I seek your assistance in providing your department chair with your personal tally for each of the following variables, which he/she will aggregate and report as department/discipline totals. We will not see your individual responses, only departmental totals. These aggregate data will be used to develop national benchmarks to assist your department to see how it compares with similar departments at similar institutions for each of the variables. I thank you in advance for your cooperation and assistance.

Sincerely,

Michael F. Middaugh
National Director
The Delaware Study

Please report your activity for each of the following measures. Report only what you accomplished in each area during the 2003-04 Academic Year, i.e., your activity which corresponds to your most recent faculty evaluation period. Be sure to review the definitions provided before responding. Please denote any not-applicable data as ‘na’ and any data element that is truly zero as ‘0’.

ACTIVITIES RELATED TO TEACHING

1. Number of new courses you have created.

2. Number of existing courses where you have redesigned the pedagogy or curriculum.

3. Total number of course preparations you have made. (This number should reflect unique courses versus different course sections).

4. Unduplicated headcount of undergraduate academic advisees formally assigned to you.

5. Unduplicated headcount of graduate academic advisees formally assigned to you, excluding thesis/dissertation advisees.

6. Number of active thesis/dissertation committees on which you served as first reader or chairperson.

7. Number of active thesis/dissertation committees on which you served in a non-chairing role.

8. Number of undergraduate senior theses (e.g., senior thesis, recital, art show, other capstone experiences) you have advised.

9. Total number of students you have taught individually in independent or directed studies.

10. Number of undergraduate students formally engaged in research with you.

11. Number of graduate students formally engaged in research with you.

12. Number of clinical (e.g., student nurses), practicum students (e.g., student teachers), and internship students formally assigned to you.

13. Number of students (undergraduate and graduate) who have co-authored a journal article or book chapter with you.

14. Number of students (undergraduate and graduate) who have co-presented a paper at a professional meeting with you.

continues
## ACTIVITIES RELATED TO SCHOLARSHIP

15. Number of print or electronic **refereed** journal articles, book chapters, and creative works you have published.  

16. Number of print or electronic **non-refereed** journal articles, book chapters, and creative works you have published.  

17. Number of single-author or joint-author books or monographs you have written and have had published by an academic or commercial press.  

18. Number of manuscripts (e.g., journal articles, books) you have submitted to publishers.  

19. Number of books, collections, and monographs you have edited.  

20. Number of books, journal articles, and manuscripts you have reviewed and formally submitted.  

21. Number of editorial positions you have held.  

22. Number of juried shows, commissioned performances, creative readings, or competitive exhibitions in which you have participated.  

23. Number of digital programs or development of applications and items for technology transfer (e.g., software development, web-based learning modules) you designed related to your field of expertise.  

24. Number of provisional or issued patents registered in your name.  

25. Number of your works in progress (e.g., journal articles, paintings, musical compositions).  

26. Number of invitations you have received to perform or present.  

27. Number of formal presentations you have made at state, regional, national, and international professional meetings.  

28. Number of external and internal grant, contract, and scholarly fellowship proposals you have submitted.  

29. Number of **new** external grants, contracts, and scholarly fellowships which have been formally awarded to you or your institution on your behalf.  

30. Total dollar value of the **new** externally funded grants, contracts, and scholarly fellowships which you reported in Item 29.  

31. Number of **new** internal grants and contracts which have been formally awarded to you.  

32. Total dollar value of the **new** internally funded grants and contracts which you reported in Item 31.  

33. Number of continuing external and internal grants, contracts, and scholarly fellowships.  

## ACTIVITIES RELATED TO SERVICE

34. Number of activities related to service to your institution (e.g., faculty senate, faculty committees, peer mentoring, academic programs in residences, recruiting efforts, student activity advisor, other student activity involvement) in which you have engaged.  

35. Number of extension and outreach activities related to your field of expertise (e.g., K-12 service, community workshops, invited talks to community groups, seminars, lectures, demonstrations) in which you have engaged.  

36. Number of activities related to recognized or visible service to your profession (e.g., service on a regional or national committee, service on a self-study visitation team for another institution) in which you have engaged.  

37. Number of grant proposals you have reviewed related to your field of expertise.  

38. Number of positions in professional associations where you held a leadership role (e.g., elected officer, committee chairperson, conference chair).  

---

Thank You!
APPENDIX B

Binghamton University Data Collection Form
Please submit your Annual Faculty Report to the Provost's Office no later than June 1, 2004. Submit this information only once for this recording period. Please feel free to use the "First Name" input box to show your first and/or middle name.

Please provide the following contact information:

First Name: 
Last Name: 
School: Please Select 
Dept./Division: 
Position: Please Select 
Email: 

Remember: The ID created should be easily remembered by you. It will be used as the key identifier on all of your submissions.

Before submitting this page please review all you have just entered.

[ ] Enter the above information into my report and continue

[ ] Exit without forwarding this information

Send a question about your annual report to the site

University
April 21, 1995

Please describe the achievements related to the responsibilities of your position. Each box should represent a discrete responsibility.
Teaching Innovation

Please provide a summary of any innovations that you have developed or initiated in your teaching during this academic year. These might include major alterations in class format, new uses of technology, creative use of traditional materials or any changes in techniques that you have instituted in the past year.

Choose the appropriate Student Level:

Please submit additional Teaching Innovations by using this form as many times as needed.

Teaching Innovation Description:

Principal Advisor

Please list all undergraduate and graduate students individually for whom you served as principal advisor during this academic year. At the doctoral level, this includes the chair of the doctoral committee and major professor/advisor; at the master’s level, this includes the chair of the thesis committee and the faculty advisor for a particular student; and at the undergraduate level, this includes the faculty member that is listed as the advisor for a particular student or the advisor to an honor’s project. A comments field has been included for you to add any additional student information you would like to add.

Please provide the following student information:

<table>
<thead>
<tr>
<th>Student name</th>
<th>Level</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please provide your ID each time you submit this form:

ID: [ ]

Before submitting this page, please review all you have just entered.

Enter the above information into my report

Read us with a curious mind. Your annual list of activities
Nursing Clinical

Please list the total number of undergraduate and graduate students for whom you served as course clinical supervisor during this academic year.

Please provide the following student information:

<table>
<thead>
<tr>
<th>Course #</th>
<th>Section #</th>
<th># of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Committee Member

Please list all students for whom you serve as a committee member, during this academic year.

Please provide the following student information:

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Level</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select Level</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Level</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Level</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Level</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Level</td>
<td></td>
</tr>
</tbody>
</table>

Books / Chapters / Editing

Please individually list all books or book chapters which you have written, edited, or published during this academic year. Please submit this form as many times as you feel necessary to report your works.

When the publication date is close to the dividing line between one reporting year and the next, individuals should use their best judgment as to the year to be credited with the publication, but the same publication should not be listed for both years.

Please Select:
- Book
- Book Chapter
- Editor of a Book or Chapter

Between 01 July 2003 and 30 June 2004 the status of this item was:
- Published
- Accepted for Publication or In Press
- Under Review
- Being Written or Revised
- Other - Please explain in the citation box below

Please cut and paste or type in the citation for the book, or book chapter, that you authored or edited in the format used by your discipline.
Lectures, Presentations & Exhibitions

Presentations

Please list all lectures, seminars, presentations, and exhibitions you presented during this academic year.

Please select the type of Presentation given:
- Individual Lecture
- Keynote Lecture
- Conference Presentation
- Poster Presentation
- Exhibition

Title or Activity:

Exhibits of Interest:

Juried/Refereed:
- Yes
- No
- Not Applicable

Invited:
- Yes
- No
- Not Applicable

Date of Presentation:

Presented to whom:

Journal Art./Conf. Pub./Book Review

Please list each journal article, conference publication, or book review, and its status, during this reporting period. Please use this form multiple times to submit separate entries.

When the publication date is close to the dividing line between one reporting year and the next, individuals should use their best judgment as to the year to be credited with the publication.

Please select:
- Journal Article
- Conference Publication
- Book Review

Between 01 July 2003 and 30 June 2004 the status of this item was:
- Published
- Accepted for Publication or In Press
- Under Review
- Being Written or Revised
- Other - Please explain in the citation box below

Juried/Refereed:
- Yes
- No
- Not Applicable

Please cut and paste or type in the citation (including co-authors) for the Journal Article, Conference Publication, or Book Review in the format used by your discipline:
Other Accomplishments

Use this form to provide information about other accomplishments that you would like to include. (Note to Nursing Faculty: Please include your practice in this section)

Other information that I would like to include:

Fellowships, Honors, Awards & Citations

Please list all the fellowships, honors, awards, or citations you have received during this academic year.

Select one:
- Fellowship
- Honor
- Award
- Citation

Title of fellowship, honor, award, or citation:

Agency awarding:

Date:

Society Memberships

Please list all memberships held in professional or honor societies during this academic year.

Organization 1:

Office Held or Position:

Organization 2:

Office Held or Position:
Please list all agencies or journals for which you have reviewed during this academic year.

Select one:
- Editorial Services
- Proposal Review

Agency or Journal:

Contribution:

Please list all the professional conferences you organized during this academic year.

Other organizations:

Name of Conference:

Venue:

Start Date:

Use this form to provide information about other professional activities that you would like to include for this academic year.

Other information that I would like to include:
Please list activities where you used your professional expertise to serve persons, groups, agencies, organizations or governments external to Binghamton University during this academic year.

Group or Organization:

Service or Activity:

Use this form to report those times during this period when you have been an external reviewer of a graduate thesis or tenure case.

Contribution or Responsibility:
Please list any Internally or Externally Funded Research or Grants for this academic year.

Funding:

- External

Sponsor:

Description:

Are you the Principal Investigator:

- Yes
- No

Principal Investigator:

Amount Awarded this period:

$0

Please list any unfunded scholarship, research and/or creative activities for this academic year.

Title:

Description:

Publication Anticipated:

- Yes
- No
Please outline your future research activities as you presently see them for the next three years.

Future Research Activities:

Use this form to list extra service provided to the Campus.

Service beneficiary: Please Select

Contribution or Responsibility:

Please provide your ID each time you submit this form.
APPENDIX C

Montana State University Data Collection Form
User is invited to enter ID number to gain entrée to system.

User is asked to select between a display of his/her instructional activity and a display of "Delaware Data," which enumerates out-of-classroom faculty activity.
If "Instructional Activities" is selected, the user is afforded a display of courses in the registration file that are associated with that individual, as well as the section number, enrollment, and student credit hour generation for each respective course. This screen affords the opportunity to verify, and where appropriate, correct data being used for submission to the teaching load/cost portion of the Delaware Study.
If “Delaware Data” is selected, the user has the opportunity to input data for a listing of variables that directly corresponds to the Delaware Study Data Collection Form for Out-of-Classroom Faculty Activity. Note that, in the sample screen, the user has indicated that she has two refereed articles published during the time frame under examination.
It is not sufficient to simply enter a number for refereed journal articles. The adjacent “view refereed articles” button must be used, and supporting citations must be entered.
Once data are entered for all relevant variables, it is then possible to generate a summary report for out-of-classroom faculty activity for each individual faculty member.

<table>
<thead>
<tr>
<th>Academic Yr</th>
<th>Term</th>
<th>Type Of Activity</th>
<th>Information on Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>Spring</td>
<td>Research</td>
<td>Position: Instructor, Title: Faculty, Area of Concentration: Education</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editorial Publications</td>
<td>Annual Review; Thinking Outside the Classroom</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Internet Activities</td>
<td>Conference, Article, Book Publications</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Professional Development</td>
<td>Conference, Workshop, Seminar</td>
</tr>
</tbody>
</table>

Total: 10 entries
APPENDIX D

Clemson University Faculty Activity System Primer
The Clemson University Faculty Activity System (FAS) makes it possible for faculty to systematically report all teaching, research, and service activities for the purpose of record-keeping, evaluation, and personal workload management. FAS also provides administrators with workload information that can be used to make decisions, monitor changes, assess outcomes, and set goals for departments, colleges, and the University.

FAS has been developed using input from faculty members who tested previous versions. Most computer and software configurations in use at Clemson University should be able to access the system on the Web using current versions of Netscape or Internet Explorer.

Please take a few minutes to read this booklet as you begin to use FAS. The directions and illustrations provided on the following pages should help you navigate through the system and begin to understand the types of information requested. If you experience technical problems, please consult Appendix B for more information.

AN OVERVIEW

FAS has been designed to report faculty workload on an annual basis. Effort distribution across 11 activity areas is reported on an annual basis. Work is reported in a selection of predefined electronic forms, Activity Report Pages, designed to include every aspect of faculty activity. All information is saved to a database for use in subsequent reports. Activity Report Pages can be copied from one year to the next for continuing activities.

Annual evaluations will be based on a FAS Report available at the end of each calendar year. Comments and ratings by Chairs are confidential and must be prepared in a written document. This information will not be a part of the FAS data. As each year is closed, information in FAS will be archived but will remain accessible on-line in a read-only version. After FAS has been in place for a number of years, it will provide a significant portion of the information required for tenure, promotion, and post-tenure reviews.

In addition to reporting information about faculty work, FAS is designed to provide summaries of workload in predefined Activity Areas for different academic units of the University. For this to be possible, a measure of the relative emphasis that each faculty member places on various areas of work is required. The distribution of faculty workload across 11 broad Activity Areas previously was measured in credit hour equivalents.
(CrHrEq). Henceforth, all faculty must switch to percentage as the metric for distribution of their effort. Each semester should total to 100%.

For each applicable Activity Area, you will record Goals early in the calendar year along with the planned effort distribution for each semester in the year. Goals will be approved by your Department Chair and should provide a basis for subsequent evaluation at the end of the year. Comments may be recorded near the end of the year to summarize or emphasize important accomplishments in the End-of-Year Summary. Also record the actual effort distribution to indicate any changes in your planned effort distribution. FAS Reports are generated with your goals and end-of-year comments for each Activity Area as well as information for each of your activities/accomplishments as summarized form Activity Report Pages. Chairs may review this information from the FAS Administration System, which produces a report identical to the one available in each faculty member’s FAS.

Generally, the information recorded in FAS will not be directly available to the University community. However, activities flagged with an International Dimension will be accessible to the International Studies Committee, who may summarize the information for posting on the university’s web site. Detailed reports of all FAS activities will be available for the Department Chairs, College Deans, Provost, and President. Release of other summary information to other audiences will require approval by the Provost.

1. Percent Effort Page
   - Summarizes effort distribution and allows update of values.

2. Data Entry Page
   - Gives access to goals, end-of-year summary, and activity report pages.

3. Activity Report Page
   - Allows update of information for activities and collaborations.

4. FAS Report
   - Provides information to faculty member, chair, and dean.

**Figure 1. Four Parts of FAS**
QUICK START GUIDE

Even if you feel more comfortable learning a new application by exploring, you may find the step-by-step instructions presented here helpful. Please be sure that the total distribution effort for each semester is 100%. You may find the Percent Effort page helpful in this respect because it now calculates totals as you make entries directly in the table. This guide provides a list of forms available for entry of your activities. When you are ready, the Web address (URL) is listed under the topic “Lets Get Started” (see below). If you find that you need more detailed guidance for entering goals, describing activities, entering your year-end summary comments, or printing reports, follow the procedures described in subsequent sections.

NOTES ON PERCENT EFFORT DISTRIBUTION

Individual workload is reported as percent effort. Generally, a total of 25% effort is devoted to professional development, normal student advising responsibilities, and university or community service. A total of 75% effort is associated with a combination of teaching, research, and public-service outreach, as defined by our land-grant mission. Activities reported in other activity areas can, however, substitute for a portion of 75%. Please report research in the Research and Scholarship Activity Area (previously divided into the “Sponsored Research” and “Scholarship and Non-Sponsored Research” Activity Areas, depending on the source of funding). See examples of allocation in Appendix A.

If a department chair, in consultation with a faculty member, decides that concentrated activity in an area (such as advising, or a special committee assignment critical to the department or university), would normally provide full or partial “release” from a course assignment, research expectation or regular duties, then the appropriate percent effort can be assigned to this activity. Explanation for these “release” efforts are made in the free-text boxes associated with the Goals and End-of-Year Summaries for each Activity Area (see below for an explanation of Activity Areas). Percent effort assigned to such “release” activities should be approved by the Department Chair. Distribution of effort among the 75% may be different for each faculty member—some teaching more while others are involved in more administrative or research and scholarship activities.

It is important to understand that FAS is designed to report how your major EFFORTS are distributed in each semester during the year, while also providing information on minor activities. Percent effort is assigned to represent relative EMPHASIS placed on major areas of activity, NOT time spent in every activity. Consider a “pie”—if you spend 50% of your effort on course work, you should assign 50% of “the pie” to that activity area. If you devote one-quarter of your effort to sponsored research activities, then report this activity as 25%. It is also possible to assign zero percent effort to an activity area that is not a major emphasis; you may report several minor activities in that area (NOT ALL ACTIVITIES MUST OR NEED TO BE ASSIGNED effort) and during annual evaluation, these activities still will be considered by your Department Chair. There is usually enough resolution to designate some portion to each area with activity, however you may still choose to record a zero for some areas with minor activities you wish to report.
WHAT ARE ACTIVITY AREAS?

FAS information about faculty activities is summarized by **Activity Areas**. There are 11 Activity Areas listed below in bold. Percent effort may be assigned to 10 of the Activity Areas. The Activity Area, **Honors and Awards**, does not accumulate any measure of effort. The Activity Area, **Librarianship**, should be used only by the faculty of the Library. Associated with each Activity Area are several **Activity Report Pages** (reporting forms, preceded by bullets below) designed to make data entry fast and simple (see Figure 1, page 2).

**NOTE:** Distribution of effort for Goals and End-of-Year Summaries are only associated with Activity Areas and **NOT** with individual activities.

**NOTE:** You only need to enter information for Activity Areas that describe your areas of work. Most faculty members will not use all Activity Areas.

**Activity Area Pages** (bold) and **Activity Report Pages** (bulleted)

<table>
<thead>
<tr>
<th>Coursework</th>
<th>Student Advising, Honors and Graduate Committees</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Course Analysis</td>
<td>• Graduate Thesis/Dissertation Committee</td>
</tr>
<tr>
<td><strong>Instructional Activities</strong></td>
<td>• Graduate Advising/Coordinator</td>
</tr>
<tr>
<td>• Continuing Education</td>
<td>• Undergraduate Advising/Coordinator</td>
</tr>
<tr>
<td>• Pedagogical innovations</td>
<td>• Honors Advising</td>
</tr>
<tr>
<td>• Short Courses and Institutes</td>
<td>• Honors Thesis Committee</td>
</tr>
<tr>
<td>• Seminars/Guest Lectures</td>
<td><strong>Committees</strong></td>
</tr>
<tr>
<td><strong>Administrative Assignments</strong></td>
<td>• Department Committees</td>
</tr>
<tr>
<td>• Department Chair</td>
<td>• College Committees</td>
</tr>
<tr>
<td>• Director of Academic Programs (Honors, etc.)</td>
<td>• University Committees</td>
</tr>
<tr>
<td>• Faculty Senate President</td>
<td>• Professional Committees</td>
</tr>
<tr>
<td>• University Ombudsman</td>
<td>• Public Service Committees</td>
</tr>
<tr>
<td>• Administrative Assignments</td>
<td>• Other Committees</td>
</tr>
<tr>
<td><strong>University Public Service</strong></td>
<td><strong>Professional and Personal Public Service</strong></td>
</tr>
<tr>
<td>• Cooperative Extension Service Project</td>
<td>• Professional Service</td>
</tr>
<tr>
<td>• Public Service (non-Public Service Account)</td>
<td>• Editorship</td>
</tr>
<tr>
<td><strong>Librarianship</strong></td>
<td>• Consulting</td>
</tr>
<tr>
<td>• Librarian Services</td>
<td>• Personal Public Service</td>
</tr>
<tr>
<td><strong>Research and Scholarship</strong></td>
<td>• University Development/Fund Raising</td>
</tr>
<tr>
<td>• Funded Research Grant</td>
<td><strong>Professional and Personal Development</strong></td>
</tr>
<tr>
<td>• Scholarship/Research</td>
<td>• Leave/Sabbatical</td>
</tr>
<tr>
<td>• Research Proposal</td>
<td>• Personal development activities</td>
</tr>
<tr>
<td>• Patents</td>
<td>• Professional development activities</td>
</tr>
<tr>
<td>• Publications</td>
<td><strong>Honors and Awards</strong></td>
</tr>
<tr>
<td>• Presentations/performances/exhibits</td>
<td>• Honors and Awards</td>
</tr>
</tbody>
</table>
LET’S GET STARTED

ACCESSING FAS

1. Use a web browser (e.g., Netscape, Internet Explorer) to access FAS. Enter this address in the location bar on your browser [http://fas.clemson.edu](http://fas.clemson.edu). Alternatively, access the Clemson University Home Page [http://www.clemson.edu](http://www.clemson.edu). Scroll down to Faculty/Staff Homepage and click on the link to Employee Web ([http://dcit.clemson.edu/cuweb/](http://dcit.clemson.edu/cuweb/)). Now click on Faculty Activity System (FAS) under University Support Systems found under Information Systems.

   **NOTE:** If you experience difficulty in accessing FAS, see Appendix B or request assistance from your college/departmental technical support person.

2. Bookmark this address to make access fast and easy in the future. Do not bookmark other pages, because the home page is the only one that will be a reliable starting point.

3. The first page you will see is the FAS News Page—this page contains links to helpful information. At the top is the colored navigation bar with links to all parts of FAS. When you are ready to enter information, click the words “Data Entry” in the navigation bar.

   ![Figure 2. FAS Navigation Bar](image)

4. Enter your User Name (User ID) and password to access your personal FAS database. Each logon is good for 2 hours. You will be asked to logon again after that time.

5. Choose the year for which you want to add information by clicking on the ☀ in the gray bar.

FAS is integrated with University databases so that information on your course assignments and data from the Sponsored Programs office are already entered into FAS. On the Data Entry Page you will see short segments of the descriptions in italics for activity records already entered. You may also see some activities for which you are a team member or collaborator (i.e., committees, grants, etc.). You can view these activities by clicking on them or by viewing your Report.

SETTING GOALS

Early each year you should describe and assign your expected effort distribution to your Goals representing the major components of your workload for the year. Each individual, in consultation with his/her Department Chair, will develop these goals and seek approval.
from the Department Chair. The following schedule is recommended for setting goals but may be modified to meet department and college procedures:

- **January** Goals set for the year
- **December** Complete entries and prepare end-of-year comments for annual review.

1. Select the Goals for each activity area by clicking on the (or ) next to each Activity Area. This will open a pop-up menu from which you can choose to “Show Goal.” The page will now show the goal for that particular Activity Area. (Alternatively, you can click on the on the Display Controls panel at the top of the page and show all goals for all activity areas.) You may then click on the next to the goal you want to edit and choose “Edit This Goal” from the pop-up menu. This will open a form you may edit.

2. On this page, enter a description of your goals and the associated effort distribution for the Activity Area in which you anticipate work. **Text boxes** allow information input. You can enter new information or change existing information only in these boxes. You may find it easier to compose and edit information in a word processor and then copy and paste it into the FAS text boxes. To paste into a text box in FAS, copy from your word processor (Edit/Copy) and click on Edit/Paste in the text box. This has the added advantage of backing up your information in a separate file. Note that text entries may be limited to 30,000 characters by the browser.

3. **Click Save** to save your information in the FAS database. Buttons are at the bottom of the page. You will see a confirmation of a successful update and then will be returned to the Data Entry page. The changed goal will be shown on the page with a flashing blue arrow next to it. If you leave a page without clicking the Save button, no changes will be saved to the FAS database. The effort distribution that you assign to each area also will be displayed in the Goals columns on the Percent Effort page, where you can check totals and make further adjustments.

**Use the Save button to SAVE! SAVE! SAVE!**

---

**Figure 3. Recording Goals in FAS**

1. **Data Entry Page**

2. **Goal Entry Page**

3. **Percent Effort Page**
RECORDING NEW ACTIVITIES

1. Click on any ▶️ (or ▶️) next to an Activity Area on the **Data Entry Page** to access a pop-up menu. Click on “Show Activities.” Then click on the ▶️ next to the Activity type for which you would like to create a new activity. Click on “Create New Activity.” You will see an Activity Report Page.

2. On each **Activity Report Page** you may enter descriptions of activities in free text boxes. You may also be asked for specific information that is to be entered into appropriate boxes or can be selected from drop-down list boxes (these boxes have an arrow to the right that allows you to choose from a list of pre-selected topics). Boxed text information can be changed at any time during the year by returning to that Activity Report Page. You can access a new Activity Report Page or return to one that you worked on previously by selecting it from the list on the Data Entry page. New activity forms are preceded by ▶️ and previously recorded activities are indented and preceded by ▶️.

3. On some Activity Report Pages, there is a field marked “**International Dimension (Optional)**.” This field allows you to identify activities that are international in scope or have some international dimension. If you indicate that an activity has an international component by selecting yes for this field, then your information will be included in a public system. The cross-college faculty Committee on International Priorities is developing a searchable database that can be used to identify colleagues who may be interested in international programs or projects. Your participation is optional, but should prove very useful to you and the entire university community. The Committee's database on all Clemson University international activities is available on the University's home page to support internationally-oriented research and interdisciplinary cooperation.

4. On some Activity Report Pages, you are permitted to add “**Team Members**” to an activity if you are involved in collaborative work. Team activities will be visible to all team members, but only the person who originally entered the information can revise the description of the activity. However, some information in team activities is tied to each team member and can be changed (if surrounded by a box) by that member. Also, team members now have the ability to remove themselves from a team activity. This will provide everyone with more control over what appears in his or her FAS Report.

   To add a team member, type his/her User ID and a word or two to describe his/her role. Click on the **Add Team Member** button to retrieve information from the University personnel database for an active employee. The system will automatically add the faculty member’s name. This action will also add a new blank row for an additional team member. If the team member is not an employee, you may enter his or her name in the box provided for names. If you do not know the person’s UserId, you may find it by clicking the link to the University Campus Directory to look up the person. Record only the UserId, not the full email address provided in the Directory.

5. Click on **SAVE** at the top or bottom of the page to preserve the information for this activity in the FAS database. Since information is first collected in a Web form and then written to the database, you must click the Save button on all forms to send the
data to the database. Leaving a form without clicking the Save button will result in loss of data. Using browser back/forward buttons should be avoided as much as possible during data entry because these actions fail to communicate information to the database.

**NOTE:** Saving records will return focus to the Data Entry page after a brief message that confirms the save operation. The newly edited record will have a flashing blue arrow next to it for a few seconds, then will change to a . If you cancel or delete an activity record you will be returned to the page previously visited.

**UPDATING ACTIVITIES PREVIOUSLY RECORDED**

During a year you may wish to update or change information already reported on Activity Report Pages. You may also want to change the names of team members on Activity Report Pages. You can access the appropriate Activity Report Page from the Data Entry page or through the Report with Links. You may prefer to access them from the FAS Report because you can read the complete description of the activity.

1. On the Data Entry Page click the desired activity’s and click on “Edit this Activity.” Alternatively, click on Report on the navigation bar at the top, and then click “Display Report with Links.” Then click on the description (which will be in blue) of the desired activity. If you find yourself in the printable version (with no blue text), click the browser’s Back button to return to the previous page, then click on Report and “Display Report with Links.”

2. Enter new information or change existing information (text boxes only) on the Activity Report Form. Change team members, if necessary by deleting User IDs from the list and save the form. The process of deleting team members on the form by deleting the UserId and then clicking the Add Team Member button does not change information in the FAS database until the form is saved. You may add and delete any number of team members in this way, but remember to click the Save button when you are through to update the FAS database. Note that you may remove yourself from activities others have recorded for you. Simply click the “RemoveMeFromTeam” button. If you do this, it would be appropriate to contact the person who recorded the activity to alert them of this change. If you remove yourself from a funded grant or research proposal loaded from the Office of Sponsored Programs, the record will appear again within a week unless you contact this office to effect permanent corrections.

3. Click on **SAVE** to record changes.

**REPORTING END-OF-YEAR SUMMARY COMMENTS**

Activity Areas are assigned percent effort at the end of each semester as **Actual Percent Effort**. This allows faculty to indicate where their plans established at the beginning of the year were changed due to unforeseen circumstances. Record comments that explain any shifts in effort, emphasize significant events, and call attention to the most important accomplishments. FAS Reports include information on all Activity Report Pages and so there is no need to list any information already recorded. Data entry is similar to that
described for goals (refer to Figure 3), but the information is recorded on a different page accessed from the Data Entry page.

1. Access the End of Year Summary Page by clicking on the [+] (or [ ] next to the Activity Area for which you want to edit the End-of-Year Summary. Click “Show End of Year Summary.” You may then click on the [ ] next to the summary you want to edit and choose “Edit This Summary” from the pop-up menu. This will open a form you may edit.

2. Enter Actual percent effort and comments concerning each area that you reported work. In many circumstances Actual effort recorded will be the same as Goal effort. If this is not the case, you should provide an explanation for the difference. The comments box also provides you with the opportunity to explain any information that you do not feel was adequately covered in Activity Report Forms. You may find it easier to adjust the effort distribution on the Percent Effort page where totals are calculated as you record entries. Remember, you cannot change Goal comments or efforts once the Department Chair has approved them.

3. Click on Save at the bottom of the window to save this information in the FAS database. A message will appear confirming the save and then you will be taken back to the Data Entry page.

COPYING ACTIVITIES FROM ONE PERIOD TO ANOTHER

Often, activities from one year will continue through and into other periods. Activities may also be similar to previous years’ activities but somewhat different. To bring an activity from a prior period so that it can be modified for the current period, or to copy an activity from the current period to a future period, the Copy command may be used. The Copy command will copy an activity into the same activity group of the copy-to year. You can copy entire Activity Areas from the prior period, but you can copy individual goals, activities, and summaries to the next period.

1. Click the [+] (or [ ]) next to the activity area you would like to work with. Choose which options you want to show.

2. If you want to copy the goal to the next year, click the [ ] next to the goal and choose “Copy This Goal to Year xxxx.” If the goal has no information in it, you will receive a message saying, “We are unable to copy your Goals to the next period because we did not find a narrative to copy.” If you have already put information into the next year’s goal, you will receive a message saying that the goal from the current year has been appended to the next year’s goal. Otherwise, you will receive a message that the goals have been copied to the next year.

3. If you want to copy the entire Activity Area from the previous year, click the [ ] next to the activity area and choose “Copy … Activities from xxxx.” If there were no activities from the previous year to copy from, you will receive a message to that effect. Otherwise, you will see a list of all the activities in that Activity Area with boxes next to them. You can check each box next to the activities you want to copy from the previous year. When you click OK, you will see a confirmation page. Please note that this action will create entirely new activities, so you may end up
with several activities of the same name on the Data Entry screen. The maximum number of entries that can be copied at one time is 25.

4. If you want to copy one activity to the next year, click the next to the activity and choose “Copy This Activity to Year xxxx.” This action will create an entirely new activity in the next year, so you may end up with several activities of the same name on the Data Entry screen. When you click OK, you will see a confirmation page.

5. If you want to copy the end of year summary to the next year, click the next to the summary and choose “Copy This Summary to Year xxxx.” If the summary has no information in it, you will receive a message saying, “We are unable to copy your Summary to the next period because we did not find a narrative to copy.” If you have already put information into the next year’s summary, you will receive a message saying that the summary from the current year has been appended to the next year’s summary. Otherwise, you will receive a message that the summary has been copied to the next year.

GENERATING FAS SUMMARY REPORTS

You may view a summary of your goals, accomplishments, assigned percent efforts, and activities by clicking on Report in the Navigation Bar (see Figure 2). This will open a pop-up menu allowing you to choose “Display Printable Report,” “Display Report with Links,” or “MS Word Download.”

- The printable report will open in your browser and appear as a web page. This version can be printed for filing. Use the browser’s Back button to return to the previous screen.
- The report with links will open in your browser and will appear similar to the printable report. However, the individual goals, end of year summaries, and activities will be highlighted blue. If you click on these items, you will be taken to the form where you can change the information about that item. Again, use the browser’s Back button to return to the previous screen.
- The MS Word Download option will prompt you to either open the file or save it. If you choose to open it, Word will open automatically and display the report. If you choose to save it, you will be prompted for a location on your computer on which to save it. Make note of the location if you choose to save the file so that you can easily find it if necessary.

LOGGING OUT OF FAS

To log out of FAS, go to the FAS News page and click on the next to Utilities, at the bottom of the page. Click on “Logout of FAS.” You will receive a message saying “Logout Complete,” but no change will occur on the web page itself. You may then close your browser or go to another web site. Closing your browser will also log you out of the system.
APPENDIX A. EXAMPLES OF PERCENT EFFORT DISTRIBUTION

Example 1. Professor X:
(1) Teaches two three-credit-hour courses in the spring and two three-credit-hour courses in the fall,
(2) Oversees a $50,000 sponsored research program,
(3) Is a Faculty Senator,
(4) Serves on two graduate committees,
(5) Advises 20 undergraduates,
(6) Is publishing two research papers from his sponsored program,
(7) Serves on the College Curriculum Committee,
(8) Is Editor of the newsletter for a professional organization, and
(9) Is a local Boy Scout troop leader.

He entered his effort as follows:

<table>
<thead>
<tr>
<th>Percent Effort</th>
<th>Spring</th>
<th>Sum I</th>
<th>Sum II</th>
<th>Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coursework (1)</td>
<td>50</td>
<td></td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Sponsored Research (2) (6)</td>
<td>25</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Advising (4) (5)</td>
<td>8</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Committees (3) (7)</td>
<td>12</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional and Personal Public Service (8) (9)</td>
<td>5</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>100</td>
<td>100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example 2. Professor Y:
(1) Teaches two three-credit-hour and one four-credit-hour course in the spring and only two three-credit-hour courses in the fall.
(2) No sponsored research or PSA activity is taking place. However, Professor Y is engaged in completing a book that represents a major outcome of scholarship. The Department Chair and College Dean have allowed “released time” from the equivalent of a three-hour course in the fall.
(3) Professor Y is the coordinator of undergraduate advising (100 students),
(4) Is serving on two departmental PTR committees, and
(5) Is on the University Grievance Board.
(6) Professor Y works for the City Zoning Board.

She entered her effort as follows:

<table>
<thead>
<tr>
<th>Percent Effort</th>
<th>Spring</th>
<th>Sum I</th>
<th>Sum II</th>
<th>Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coursework (1)</td>
<td>70</td>
<td></td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Scholarship and non-sponsored research (2)</td>
<td>5</td>
<td></td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Student Advising (3)</td>
<td>15</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Committees (4) (5)</td>
<td>8</td>
<td></td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Professional and Personal Public Service (6)</td>
<td>2</td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX B. TECHNICAL INFORMATION AND ERROR MESSAGES

Browser Requirements

This system does make use of JavaScript and Cookies, both of which must be enabled in your web browser. The system also makes use of SSL (Secure Sockets), which guarantees that information that is sent between the web server and your browser is encrypted for security. Version 2.0 requires Netscape 4.0 (4.7 recommended) or Internet Explorer 4.0 or later. If your browser is out of date, then you can update it for free. Clemson maintains an on-campus download site for faculty/staff/students at this URL: http://download.clemson.edu/

Or you could go to either of the following vendor sites to download an updated browser:
http://www.microsoft.com/windows/ie
http://home.netscape.com/computing/download

Each of these links provides various options that depend on what kind of computer you have, what add-ons you want to include, and what level of encryption you want.

One difference between Netscape and Internet Explorer is the maximum length of text that may be edited in FAS. For Netscape the upper limit is 30,000 characters displayed. Internet Explorer has a much higher limit, so this may cause problems. The scrollable areas on FAS web pages in which you enter and edit text are stored in the FAS database as LONG field types. The database is capable of storing as much as 2 gigabytes of text, however, web browsers are considerably more limited. If you switch back and forth between browsers and save very long discussions, be careful that you do not truncate an entry because of the limitation on text size inherent in Netscape. For example, if you entered a text message of 40,000 characters by way of Internet Explorer, and later use Netscape to edit the same entry, only the first 30,000 characters will display. If the user were to save the activity, goal, or end of year summary text the database would be updated with only the first 30,000 characters.

Browser Configuration

You should not have to alter the default browser preferences to work with the FAS system. However, if you are inclined to alter your browser preferences, JavaScript and Cookies should not be disabled. As mentioned above, these features are required for the FAS web application to work. If you suspect a problem, you can check your Netscape 4.x browser settings as follows. From the browser menu, select Edit → Preferences. In the resulting display, click "Advanced" in the left hand side. Make sure that "Enable JavaScript" and "Accept all Cookies" are checked. You can check your Internet Explorer 4.x browser settings as follows. From the browser menu, select View → Internet Options... In the resulting display, click the Advanced tab and under Security, make sure that "Always Accept Cookies" is checked.
Authentication

When you access the FAS 2.0 system and request information by selecting from the menu bar, the system will attempt to authenticate you via the University's Novell authentication system. This application will pop up a small window with fields to enter your UserId and password. Authentication in this application is good for two hours. After that time, you will be asked to re-authenticate. Alternatively, your authentication will be lost when you exit your web browser. This is equivalent to logging out of the system, which can be done through the Utilities on the FAS News Page.

The authentication method used in this system is similar to that used in some other systems on the Clemson Web, such as Student DataWarehouse Web Reporting, WebRegistration, SIS on the Web, and others. If you have already been authenticated for one of those systems, then you should not be required to reauthenticate. However, the authentication time-out for those other systems may be shorter.

For your information, the University's Novell authentication system ties together UserIds and passwords for the network (Novell), email (UserId@clemson.edu), and the mainframe. So when you change your password for one system, you have changed it for all three. As you might expect in such a system, when you change your password in one place, you must wait five to ten minutes to allow your password update to become available in the other systems.

Problems with Internet Explorer 4.0

Some users have reported problems with opening new browser windows on Internet Explorer 4.0 on Windows95 PCs. New browser windows are opened in FAS when you click HELP and for user authentication. This problem has been observed on some, but not all PCs. It is believed that there may be some conflicts in Registry settings. The problem has not been observed on the Macintosh, nor has it been observed with IE 5.0. The manifestation and resolution to this problem are described below.

When a new browser window is opened programmatically, the window comes up and appears to "freeze". In the status bar at the bottom of the window it says that it is downloading (or words to that effect). If you wait a minute or so, and look at the window, your computer will appear to be locked up. If this occurs, simultaneously press the CTRL - ALT - DEL keys and a list of tasks will come up. The first task line should be highlighted and say:

*Microsoft Internet Explorer [Not Responding]*

Click the "End Task" button. Another dialog box will come up with the following in the title line:

*Microsoft Internet Explorer [Not Responding]*

Click the "End Task" button here as well. Once completing the above, you will be returned to the original FAS web page. Click your browser's Reload button, and the system will work fine for the rest of the session. Even if you exit your web browser and restart it, it will continue to work. This behavior should not
recur again until you reboot your PC. To avoid the problem, switch to Netscape or upgrade Internet Explorer.

**FAS System Availability**

FAS Version 2.0 is dependent upon the availability of the web server, the FAS database, and the University's Data Warehouse. Of these three, the Data Warehouse is the most restrictive in terms of availability. The announced hours of Data Warehouse availability are as follows: Monday - Friday 7:00am to 2:00am; Saturday 8:00am to 10:00pm; and Sunday 10:00am to midnight. During these times, one should expect the FAS system to be available for reporting and update. You may find that the system is available during some of the off times, though you should take care to save any updates frequently, since service may be interrupted without notice.

**User Access**

Each employee of the university can view, add, and update descriptions of their own activities, goals, and accomplishments. All information entered into the FAS system is maintained in a database that is backed up nightly. Information that you enter is available to you in the form of reports and displays. FAS users are not provided access to other users’ information.

Users may define activities with team members. These activities will be displayed in the FAS report for all members of the team for which valid UserIds have been used. In version 2.0 of FAS, team members may remove themselves from the team list (in order to prevent the activity from appearing in their FAS report), but may not otherwise alter their activity information.

Department Chairs may view FAS reports and goals for faculty members within their departments via a complementary system, the FAS Administration Web. That system does not provide a means of altering the content of individual's FAS information, but does provide a means of freezing an individual's goal descriptions and goal effort distribution.