SYSTEMS STARTER GUIDE FOR MTSU DEPARTMENT CHAIRS

Just the Basics

Note

This document is provided by the Tech Committee of the Chairs Council as a basic overview/getting started guide for new MTSU Department Chairs. It is updated each summer; some information may have changed since the date the guide was last updated. (ALA, 08/25/2023)

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Application	Uses	Contact Person(s)
APS **(Academic Performance Solutions)**	Comprehensive **end-of -term data** (originating in Banner) on enrollments, students, courses, departments, programs, and instructional staff, including dashboards to support course planning, faculty line requests, annual department health checks, and more. ***Important:*** *APS is the system of record for the Provost's office; when making requests for resources, be sure to use APS data (all cross-checking/verification of data will be done in APS).*	Brian Hinote Provost's Office

Information for users:

- Log into APS at www.mtsu.edu/aps with your MTSU/FSA credentials
  - Then go to the training page
- You can navigate multiple dashboards via the APS drop-down menu.
- Be sure to clear them out if you're making a new query
- There's a save option, so if you want a repeatable result, use the save feature
- There are many handy dashboards in APS, so do some exploring
  - the one that will be your bestie at registration time is Course Planning Optimization (dashboard) →Registration Status (tab, top navigation bar)
  - The Provost's Office will provide
- **Tip**: *pay close attention to your filters! If the results don't make sense, it's likely that your filters are asking a question you didn't intend to ask.*

Application	Uses	Contact Person(s)
Argos	Argos allows for timely and informed data-driven decision-making and meets MTSU's various reporting needs. Argos is a common location for various divisions to house their reports, pull lists of majors/minors, look up course data, and more	ITD Help Desk

Information for users:

- Login from the MAPS Launch page
  - Argos can be used in any browser; however, Chrome tends to work best.
- Select either the Argos desktop app or the web viewer
  - **Notes**:
    - *if you are not on campus, you will likely need VPN to connect*
    - *there are additional steps for Mac users. See the FAQ.*
  - Argos desktop app is best for larger reports with longer runtimes - will prompt you to install the Evisions Application Launcher (EAL)
  - Argos web viewer works on a variety of devices & is more streamlined
- In the web viewer, the left navigation bar is set up like your computer's file explorer.
  - **Most of the reports departments access will be in the "Student-General" folder**
  - When you open that folder, all subfolders will show in the left navigation pane
  - The right side of the screen displays the DataBlocks that exist in the currently selected folder; DataBlocks are the foundation for all dashboards and reports
  - You can use keywords to search for a report via the search bar at the top of the left navigation pane

- Any custom reports you have asked for will be in Student-General→folder associated with your college
- To request a custom report, use the instructions in the FAQ (highly recommend you do so if you can't get a report that gives you what you need)
- **Tip**: for the web viewer (in Chrome), you can set up a home folder link by right clicking on the folder, probably Student-General, selecting Save As, and then saving the link to your desktop. Click, login, & (voilà!) it takes you directly to your home folder.
- **Note**: *if you need training, put in an ITD work order & they will set you up with the appropriate person to help you*
  - The College Advisors in your Advising Office are usually really good at Argos & may be able to point you in the right direction.
- **Helpful reports**:
  - Courses & Instructors – lets you pull all of the classes for your department to check enrollments
  - Studs Enrl wAdvisors By Studs Major – pulls a list of your majors
  - Students Intending to Graduate – list of students in your major who have filed an intent to graduate form
  - Student Information by Minor –it will not allow you to multi-select if your department has more than one minor. If you have multiple minors in your department, request a custom report (FAQ above); they can base it on "Political Science and Intl Relations Dept – Minors" (navigate Student General→CLA folder)

Banner Finance	Budget and other financial information.	Carol Rozell helps with Banner. Ben Jones can help with understanding your budget. Contact Page

Information for users:

- https://www.mtsu.edu/inb/index.php--> Banner Admin Pages (Banner 9)
- You must apply for each Banner app separately. On the Banner Finance application, (in the "why you need access" section) indicate who you are replacing & your title. This should tell the application team exactly what permissions you need. If you're requesting access for a new position, list all the screens the person will need (the cheat sheets can help with this).
- Banner Finance Cheat sheet: the commonly used Banner codes for looking up budget information
  - **Tip**: *if you want to see if there is documentation associated with a particular line item, highlight the line, click "Related" in the upper right corner, select "Transaction Detail information," and then put your cursor in the "Document" box of the line for which you want the document. Then click "Retrieve" in the upper right corner.*
- Account codes: "account" is defined below
- Business office resources page: resources that give you a deeper dive into the navigation & inner workings of Banner Finance
- ***Helpful terms:*** *The info below is basic/just a starting point. Ben Jones can help explain any exceptions or complexities your department may have.*
  - **Chart**: put in an M if you're looking for non-Foundation indexes (starting with 2, 08, 5, explained below), an F for Foundation indexes (starts with 09, explained below)
  - **Index**: the umbrella under which the money is sheltered; an index connects to a **fund**, which is where the money resides.

- If it **starts with a 2**, it's an unrestricted index; for example, your department's budget is nested under a 2-index & the money resides in the much larger general fund. You'll look up your 2-index in the FGIBDST Banner screen
- **Other index types**: Each of the index types below has an associated fund in which the money resides. These indexes have a one fund-to-one index relationship, unlike the 2-indexes that all connect to the same general fund. You'll look at the balance for these indexes via their associated funds in the FGITBAL screen, which uses the fund (tip below!) as the look up.
  - If it **starts with 09**, it's a Foundation index; the associated fund is where your restricted scholarships/endowed monies are. (You may have more than Foundation index & each has its own associated fund.)
  - If it **starts with 08**, it's an Agency index. These belong to student orgs. The faculty advisor has an advisory role; students cannot spend without approval, but students should manage the money. (If your department has associated student orgs, you may have one or more of these.)
  - If it **starts with a 5**, it's a restricted index; in general, these are used for grants/contracts, and you are unlikely to have one *unless* your faculty have gotten grants.
- **TIP**: *if you don't have the fund number at hand, start in FGIBDST, look up your index, then go back to the home screen & put in FGITBAL. Your fund will carry over from your FGBDST look-up. This trick works across much of the Banner platform – your lookup on page A carries over to page B.*

- **Account**: think of these sort of like line items in your budget. The index is the umbrella under which your budget is sheltered, the fund is where the money resides, and the account is (essentially) the line item in the budget so you can track your spending
  - When you look at your 2-index (use FGIBDST), you'll see that there are two main accounts for discretionary spending: the Operating pool (74000) and the Travel pool (73000). You'll then see account codes under those pools that tell you exactly how that money was spent (ex: Individual out-of-state travel).
  - Mandatory spending (like salaries and benefits) have 60000 account codes and generally cannot be used for discretionary spending.

- **Note**: *your EA will likely have a Budget self-service tab in Pipeline (it makes the info prettier). Chairs do not have that tab because Chairs are MT$ource Approvers*

Banner HR	Chairs are rarely in Banner HR, but it can be useful for finding employee information, faculty status, etc.	Contact the main HR line (615-898-2929 or hrs@mtsu.edu) & tell them what you need help with. They'll route you to the right place. If you need access, contact Kathy Musselman

Information for users:
- https://www.mtsu.edu/inb/index.php--> Banner Admin Pages (Banner 9)
- You must apply for each Banner app separately. On the Banner HR application, indicate who you are replacing & your title. This should tell the application team exactly what permissions you need. If you're requesting access for a new position, list all screens the person will need (the cheat sheets can help with this).
- Banner HR Cheat sheet

- Additional navigation information regarding Banner HR

Banner Student	Student information, class assignments, registration permits, etc.	Rick Henegar Enrollment Technical Services

Information for users:

- https://www.mtsu.edu/inb/index.php--> Banner Admin Pages (Banner 9)
- You must apply for each Banner app separately. On the Banner Student application (in the "why you need access" section) indicate who you are replacing & your title. This should tell the application team exactly what permissions you need. If you're requesting access for a new position, list the screens the person will need (the cheat sheets can help with this).
- Banner Student Cheat Sheet
- **Tip**:
  - "term" is year + one of the following:
    - 80 (fall, which starts in August, hence the 80)
    - 10 (spring, which starts in January)
    - 50 (summer, which starts in May)
    - Ex: 202280 is Fall 2022
- **Note**: *if you get to a page that says you're running in Query Mode, it means you have read-only access to that screen. If you think "Query Mode" is an error/you should have edit access to that screen, contact Rick. If you are in Query Mode for any of the screens on the Cheat Sheet, your permissions may be set up incorrectly.*

Campus Labs	MTSU uses Campus Labs to house the University's assessment process.	Lisa Bass

- Login using SSO: https://mtsu.campuslabs.com/ (you can also go in through Pipeline)
  - Go to the Planning tab
  - Make sure you're in the correct academic year
  - Select the unit (AKA program) that you want to assess
- The University's Annual Institutional Effectiveness (IE) Timeline
  - Check with your dean for assessment timeline specifics for your College
- The University Assessment Committee site is out there but still under construction.

CES **(Course Evaluations & Surveys)**	MTSU uses Watermark CES technology to gather student evaluations of teaching and several other types of data. There are also many custom survey/assessment applications of this technology available to deans, chairs, etc.	Brian Hinote

Information for users:

- SSO Login: same login for CES & Faculty Success
- Find course evals, organized by term
  - Also viewable by department, instructor, course, or section
- Custom reporting features are available
- Can also export data to do your own longitudinal reports

Chrome River	This is the travel system, implemented 2023. Travelers will complete travel pre-approvals	Carol Rozell

	(formerly TAs) and expense reports in Chrome River.	

- APPROVALS: You will get approval requests for pre-approvals (formerly TAs) and expense reports via email & you can click APPROVE or RETURN right there in the email
  - The details (like index allocations) are in the email, but you can also check out all of the details in Chrome River itself. (There's a link in the email)
- Start from Pipeline's Chrome River link
- Your travelers will enter a pre-approval, including all of the expected costs for out-of-state and out-of-country travel.
- At the end of the page, there is an ALLOCATIONS section. This is where the traveler puts in the index to which their travel will be charged. As you add indexes & amounts, Chrome River will tally the total amount and percentage allocated to each index. At the end of the process, go back and verify that you entered the right the dollar amounts as needed for each index code in the Allocations section.
  - They will need to input the appropriate index for every area from which they are getting $$ (department, dean, provost, grant, etc.). It *can* do an index look-up, but some business units have multiple indexes, so make sure your travelers know to get the index info they need from the get-go.
  - **When the traveler will be paying part of the travel out of pocket, they must put in a line for that in ALLOCATIONS, & rather than an index, they input NONREIMB Non-Reimbursable Cardholder Responsible**
  - The traveler no longer needs to know the account code (i.e., out-of-state/international); the system knows that AND it knows the chain of approvers – no need to input those anymore either
    - The system will always start the approvals with the traveler's supervisor
    - If you want your department's EA to review your faculty's pre-approvals & expense reports before they come to you, then your faculty will have to set up your EA as a "Delegate" and then email the EA to let them know to review the pre-auth.
      - The "Delegate" only has to be set up once, FYI
      - Click on your name in the upper right corner of the landing page, then Account Settings→Delegate Settings
  - **Tip:** pre-approvals will NOT allow revisions once completed, so once it's approved, you're set (don't revise if your traveler gets additional funding after they've gotten pre-approvals finalized – and don't do a new pre-approval. Just add those new funds/indexes to the expense report.)
    - The pre-approval can be recalled and adjusted **if** it has not completed the approval process – so depending on when they find out they have additional funding, they 'could' recall the pre-approval if it's before the final approval.
- When they return, travelers will create a new expense report
  - The system lets the traveler IMPORT the approved pre-approval into a new expense report
    - **Tip:** in-state travel does not require the use of IMPORT since pre-approval is not required.
  - The traveler can upload their receipts directly into to the system & attach them to the expense report (see tip about mobile apps below)
  - If your traveler has gotten new funds since the pre-approval, TRIPLE check that they've added the additional index(es) and allocated the right amounts to each index on the expense report. It defaults to putting the whole amount in the initial index, but who has enough travel money for that?
    - If the traveler has delegated to your department's EA, then your EA can do the initial triple-checking before submitting the expense report.
- **Tip**: there are MOBILE APPS (WOOT!) that will allow travelers to do all of their receipts & reporting from their mobile device – they can upload receipts to Chrome River's "wallet" and then attach the receipt to the expense report right there in Chrome River. Everyone will need to add their personal email address to their

profile (under settings) if they will be forwarding receipts from their personal email account to their Chrome River wallet (i.e., Uber receipts).

Curriculog	The system used for curriculum change requests.	Mitzi Brandon

Information for users:

- www.mtsu.curriculog.com
- When you log in, you'll see these instructions for making a new proposal:
    1. FILL IN all required fields marked with an *. The proposal cannot be launched without completing required fields.
    2. SAVE All Changes.
    3. VALIDATE AND LAUNCH PROPOSAL.
    4. EDIT/FINISH proposal as needed.
    5. CLICK on Decisions (right side of screen) to approve as originator and move the proposal forward
- **Tip 1:** Curriculog is fairly easy to use & has a "Walk Me Through" feature in the lower right corner once you're logged in
    - Click Walk Me Through
    - Select the Guided Help tab
    - Select the action you'd like help on (creating a new proposal, for example)
- **Tip 2**: the button in the top right corner shows you the symbols and colors used in Curriculog
- **Note**: ***Step 5 is KEY!!!*** *If you launch a proposal, you are the "originator" in Curriculog. Once you launch the proposal, you need to click the Decisions [✓] button & immediately approve your own proposal.* ***The proposal will not progress until approved by originator.***

Degree Works	DegreeWorks is a comprehensive academic advising and degree audit tool designed to facilitate real-time monitoring of the student's academic progress towards degree completion. DegreeWorks reviews the requirements for a students program of study and uses their academic coursework to create the degree evaluation.	Contact your College's Advising Office for more assistance.

Information for users:

- Use FIREFOX!
- Log into Pipeline & go to the Advisors tab (left navigation)
- Click DegreeWorks under the Student Details list
- Basic instructions & FAQ
- Resource Guide
- **Tip:** You can use the "what if" feature to see how a student will be affected if they change majors, add a minor, etc.

EAB Navigate	Comprehensive student information and analytics platform, with extensive information across individual student profiles and very versatile search features. (Look up the student's advisor, classes, resource needs, and more)	navigate@mtsu.edu

Information for users:

- You can get to Navigate from the Resources list in Pipeline (home or faculty pages)

- Or https://www.mtsu.edu/inb/index.php --> Navigate
- You'll need Banner Student access in order to get Navigate access
  - Before receiving Navigate access you will need to complete MTSU FERPA training.
    - If you completed the training it will say so at the bottom of the FERPA training page.
    - Please take a screenshot of the date your FERPA training was completed.
  - Once you have Banner Access and completed FERPA training your Navigate account can be set up.
    - Complete Navigate Account Request Form
    - Please send the completed Navigate form to navigate@mtsu.edu
- Navigate, like most of our systems, pulls data from Banner. Why use Navigate?
  - The Navigate lead indicates that there are more customization options that give users more control of the data they're pulling which provides some simplicity. Also, users can save searches and make student lists to assist in tracking particular student groups, which Argos cannot do.
  - Users also have access to Navigate's Analytics tools (Population Health Dashboard, Intervention Effectiveness, Historical Population/Course) to really look at departmental numbers more easily than in Argos
    - Once there are materials to help users with these features, those materials will be linked here
- **Tip:** In addition to the search features, **Chairs** can email or **text** a student from Navigate.
  - Use Quick Search to find the correct student
  - On the right navigation bar, click "message student"
  - It defaults to email, but you can click the text tab to switch to text
  - **Note:** *the Provost's Office is working on a protocol for using the text feature; the concern is that we not overwhelm students' text messages. Generally, use the text feature when the message is urgent.*

ePrint	Think of ePrint as a filing cabinet for monthly budget reports; these are the official monthly reports on spending by index	boffice@mtsu.edu

Information for users:

- https://www.mtsu.edu/inb/index.php --> ePrint
- Cheat sheet: same as the Banner Finance cheat sheet above
- Quick Guide for Accessing Reports: you will want to read this before you go spelunking in ePrint. It's not exactly intuitive.
- **Note**: *monthly ePrint reports are generally released around the 7th of the month; the annual ePrint is generally released in October*

Faculty Success	Database into which faculty input information for inclusion in faculty annual reviews, annual evaluations and reports, and P&T. Chairs use this to complete reviews, performance evaluations, and steps in the P&T process.	Brian Hinote Mitzi Dunkley (temporary, FA23)

Information for users:

- SSO Login: same login for CES & Faculty Success
- Faculty can update Faculty Success at any time to record their accomplishments
- Faculty Success has easily navigable workflows that route work through the system – so, if you have a faculty member up for tenure & promotion, the application will be automatically routed as each step takes place. At annual evaluation time, it will notify you when your faculty have uploaded their annual report, etc.
- Videos & User Guides

- Assessment Calendar

MT$ource/P-Card	Procurement system/ Purchasing Card	Demetra Majors Johnny Eatherly Contact Page

Information for users:

- Chairs are generally approvers rather than purchasers
    - *Your EA will have a lovely tab in Pipeline for looking at your budget; you will not have that tab because it is not provisioned to approvers. You're stuck with Banner (also noted above).*
- MT$ource Resources Page

MTOnline Reports (University College)	Pre-set reports that give detailed information about your department's online course and/or program offerings. For quick facts about MTSU Online, click here	Trey Martindale Lane Bryant

Information for users:

- University College has prepared a set of reports to help departments track their online courses and online enrollments.
- 3-Year Online Course College and Department Summaries. This shared folder has reports about each college, and about each department. (You will need to be logged into OneDrive to view). This folder includes:
    - Summary for each dean of online credit hours by department and college.
    - Department-specific reports including credit hours generated, and each individual online course, when it was developed, when offered, and course enrollment.
- A report (PDF) on the last three years of credit hours offered online, by department and college. 2019 to present.
- Four charts about online enrollment from 2017 to 2022 including number of online programs, number of fully online students, number of partially online students, and online credit hours generated.

PageUp	Personnel recruitment/search process system	Mitzi Dunkley

Information for users:

- **STEPS TO HIRE:**
    - Select Candidates Considered for an Interview with "*Applicant Being Considered for an Interview"*
    - Review Search Committee Responses to Selection Criteria Evaluations (before sending to the Dean)
    - Sending Applicants to Dean Pool Review
    - Update any Applicants Who Do Not Meet Qualifications with "Initial Screen Unsuccessful."
    - Move Applicants Not Currently Being Recommended for the Pool with "Under Review by Department"
    - **Complete Salary Recommendation Form**
        - Salary Recommendation for Faculty Candidate Form https://www.mtsu.edu/provost/docs/facsalrec.pdf
        - Fill out form for EACH candidate being recommended for an interview
        - Attach Cover Letter and CV for each candidate
        - Send to the Dean for signature
        - Dean sends to Becky Cole
        - Becky Cole will return to Chair with salary recommendation for EACH candidate
        - This should be completed BEFORE the Department Search Committee recommends a candidate
    - Identifying the Approved Short List (2-3 "shortlisted" candidates)

- Recommending Finalist & Resulting Offer (recommended finalist who accepted the negotiated terms)
- Retrieve Letters of Recommendation
    - Only **professional** letters accepted through PageUp on letterhead
    - MUST have all three letters before hiring packet can move forward
    - Print and/or Save Letter as a PDF
- **A complete Hiring Packet of Hard Copy Materials is Required to be Submitted to Academic Resources for an Electronic Contract to be Generated.**
    - Full Time Hiring Checklist: https://www.mtsu.edu/provost/recruit_documents/hiring_paper.pdf

- **ABOUT PAGEUP**
    - In CHROME: https://mtsu.dc4.pageuppeople.com/
    - Step-by-Step Guide for PageUp
    - PageUp Tutorial Videos
        - Search Committee Members' Review of Applicants
        - Search Committee Chairs - Entering Strengths and Limitations
        - Department Chair - Reviewing and Submitting Pool to Dean

Power BI	MTSU staff can easily access and analyze institutional and relevant external data with the Power BI dashboards; these are maintained by our IEPR team. *Power BI uses **census** data (generally), rather than the end-of-term data used by APS.*	iepr@mtsu.edu Jeri Ann Clark

Information for users:

- Login to the employee-only dashboards: MTSU Power BI App
    - Best browsers: Microsoft Edge and Google Chrome
- There are both public & private dashboards, which you can find here
- For more info on navigation & such: Getting Started with Power BI App
- **Tips:**
    - The enrollment reports sent by Student Success come from Power BI
    - If you are looking for specific information & can't find it, email the Power BI team & they will do their best

Scholarship Manager	Students will use to apply for scholarships; faculty will use to review the applications	**foundation@mtsu.edu**

Information for users:

- If your department has any departmental scholarships, students can apply for them in the Scholarship Manager system; your scholarship committee will go to the **same link** to review scholarships.
- The student will fill out a general application, then the system will match them with all scholarships for which they are eligible.
    - Your department may have a department-specific application; if the student is eligible for any of your scholarships, the system will ask the student to complete that application, as well.
- You do need to provide Advancement (Foundation email above) with the names of your scholarship committee members so that the applications are available to the committee for review and selection; make sure to designate a committee chair – that person can pull a report with all of the ratings
- *Helpful information:*
    - Committee members rate the applicants in the system. The system will generate a report that compiles those ratings

- Once the recipients have been selected, the process (as of Sp23) moves to Workflow (see below)
- In early Spring, Chairs get the Foundation Scholarship Report so that you'll know how much money is available to give out each year.

Workflow	Hiring (pre-EPAF, mostly for your EA) But for your purposes, used in the Foundation awards/scholarship process	**foundation@mtsu.edu**

Information for users:

- **Scholarships:**
  - The chair and EA should both apply for Scholarship Workflow Access
    - EA is initiator, Chair is approver
    - Your EA can contact foundation@mtsu.edu to get instructions for the workflow
  - After recipients & amounts have been determined by the committee, the committee should notify the EA and the EA will add the award information to the workflow; the chair will then approve it. **Hopefully this will no longer be needed after AY 23-24.**
  - To get to workflows https://www.mtsu.edu/inb/index.php --> Workflow
- **Note:** *You will also hear about "workflow" in the hiring process; workflow is the step before your EA does an EPAF. You do not have access to this workflow, but you'll see the results when you are later tasked with approving an EPAF – the email you get will tell you what to do!.*

Final note:

I hope this is of use to you. If you need help, I can try (x5656) or you can put in a help desk request. If you find errors or omissions, please let me know! (amy.atchison@mtsu.edu)

Best,

Amy