TRAC Survey Application 2019/20:

Departmental Managers' Guide

November 2019

1 TRAC SURVEY

1.1 What is the TRAC Survey Application for?

The TRAC Survey is an LSE application in which members of academic staff submit the number of hours spent on teaching, research and other activities. These records are required to comply with the Transparent Approach to Costing (TRAC) procedures that will qualify the School for additional funding.

The survey is run every three years and it will be hosted during the current academic year, 2019/20 (the previous survey being in 2016/17). This will happen throughout six selected weeks, where all academic staff will be surveyed. The surveys will cover the seven days of the weeks listed.

The participants have two weeks from the end of a survey's week to submit their records. For instance, if the survey is for week 25/11/2019 – 01/12/2019, the deadline for their survey submission will be on 15/12/2019.

The 6 weeks selected for testing for the 2019/20 academic year are as follows-

Sample weeks for Academics to complete	Available for completion on app
25/11/2019 - 01/12/2019	25/11/2019 - 15/12/2019
20/01/2020 - 26/01/2020	20/01/2020 - 09/02/2020
06/04/2020 - 12/04/2020	06/04/2020 - 26/04/2020
04/05/2020 - 10/05/2020	04/05/2020 - 24/05/2020
25/05/2020 - 31/05/2020	25/05/2020 - 14/06/2020
20/07/2020 - 26/07/2020	20/07/2020 - 09/08/2020

1.2 TRAC Survey Application for Departmental Managers

The TRAC Survey application allows departmental users to:

- View survey participants from their respective department
- View app information about each participant (i.e. Username, Email, TRAC role)
- View participants' survey status
- Communicate with single or multiple participants via the app

As a departmental manager, for each week's survey, you will be able to view and filter all participants of your department who have-

- Submitted the survey
- Started the survey (but not yet submitted)
- Not yet started the survey

This will also enable you to email reminders to relevant participants to request submissions.

1.3 Navigate through TRAC Survey for Departmental Users

Home Page

In the main page after logging in with your LSE credentials, you will find two red links and the logout button (please see screenshot at the bottom of the page):

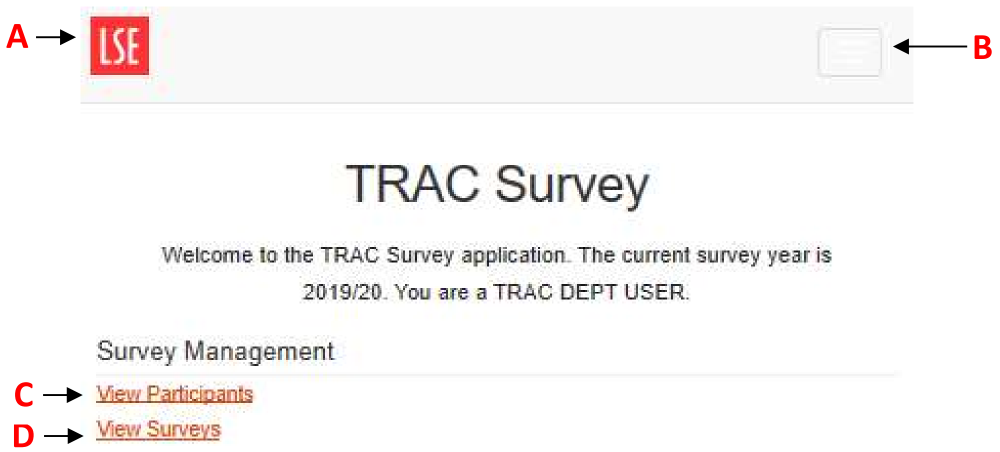
A) 'LSE' button
By selecting here you can click anytime to return to the main page (screenshot below)

B) Logout button
You can end your session by clicking this button and then clicking 'logout'

Within the main page are the Department Managers' main 2 viewing links ('View Participants' and 'View Surveys') listed below-

C) 'View Participants' link
Selecting this link will take you to a webpage where you can view the survey participants allocated to the department you manage. This page has email functionality, but it is probably more useful to use the email functionality on the 'View Participants' link below.

D) 'View Surveys' link
Selecting this link will take you to a webpage where you can view all the surveys and participants by survey status. This page has email functionality from which you can send out reminders to participants based on their survey status

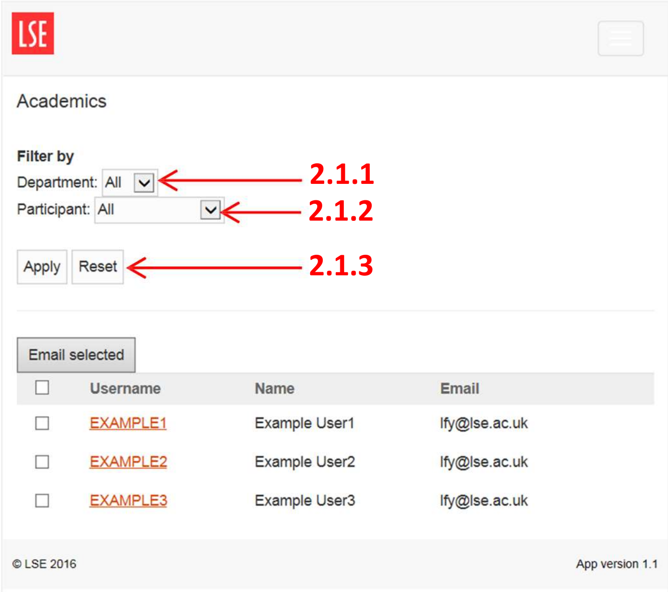


2 ‘VIEW PARTICIPANTS’ PAGE

After selecting the ‘View Participants’ link you will be directed to a webpage that looks similar to the screenshot below.

2.1 Amend view settings

You can use different filters to find participants that you wish to view

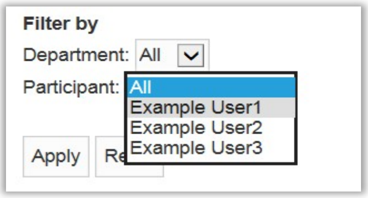


2.1.1 Filter by department

This option was made available if any Department Managers managed 2 departments. For 2019/20’s iteration of the TRAC time allocation survey, this isn’t applicable.

2.1.2 Filter by participant

You can use this option if you wish to find a specific participant. You will see listed all the existing participants from your department. After selecting your option, click ‘Apply’. The results list will be filtered according to your choice.



2.1.3 Clear your filters

If you wish to clear your filters, just click ‘Reset’.

2.2 Viewing participants details

2.2.1 Selecting user

In this case, the participants list was filtered by a specific participant, named “Example User1”. You can view a particular user’s details by clicking on the red username link (i.e. EXAMPLE1)- see 2.2.2.

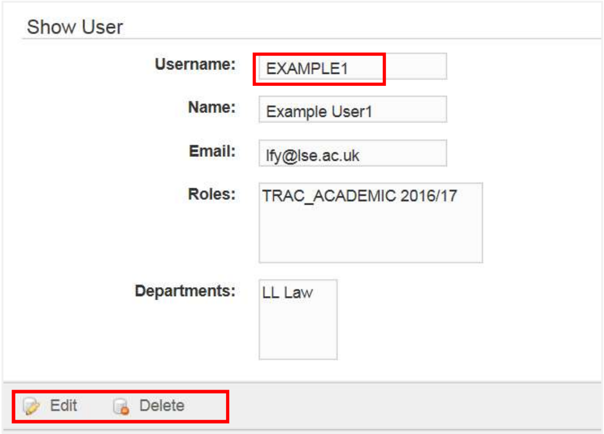
2.2.2 Viewing user

You will see the details of a user as follows after clicking on their Username link (i.e. EXAMPLE1). This will bring you to an example screen below.

As a departmental user, note these details are read-only and, therefore, not editable. **You will not be able to use the 'Edit' or 'Delete' buttons that are shown on the page.**

If there is any information that is not correct, please contact trac@lse.ac.uk.

At any time, you can go back to the main page by clicking the 'LSE' button.



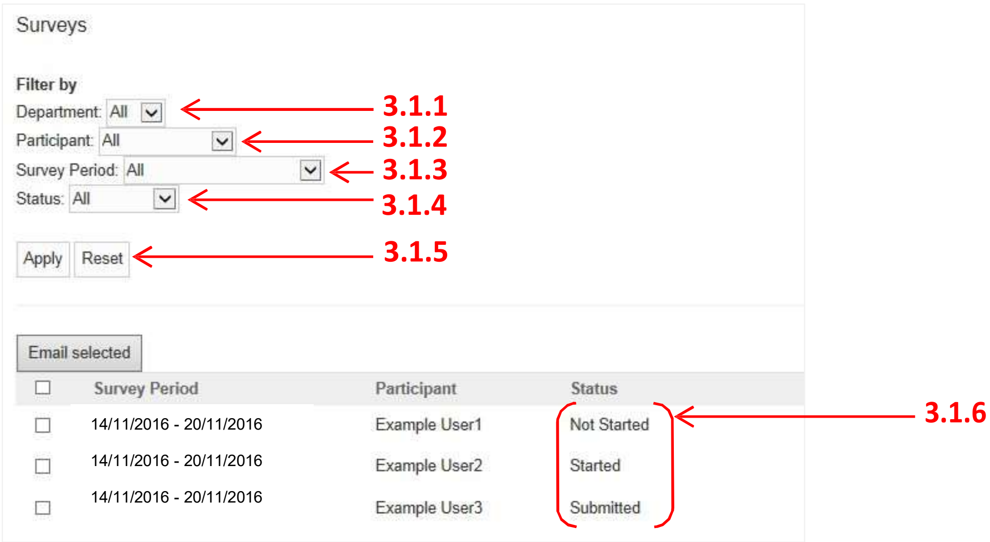
Overall the '**View Participants'** page is useful for checking participants data to identify any errors but less useful in terms of reviewing the status of their surveys. The next section deals with this and is likely the section that Department Managers will find most useful

3 'VIEW SURVEYS' PAGE

After selecting the 'View Surveys' link you will be directed to a webpage that looks similar to the screenshot below.

3.1 Amend view settings

You can use different filters to find participants per survey that you wish to view in the listing shown below the 'Email selected' button. Click 'Apply' once you have chosen your filters.

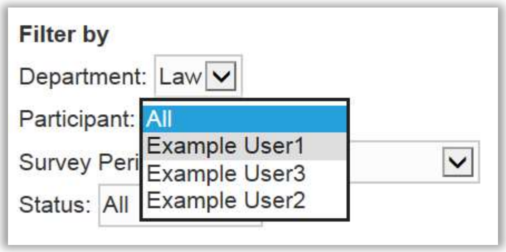


3.1.1 Filter by department

This option was made available if any Department Managers managed 2 departments. For 2019/20's iteration of the TRAC time allocation survey, this isn't applicable.

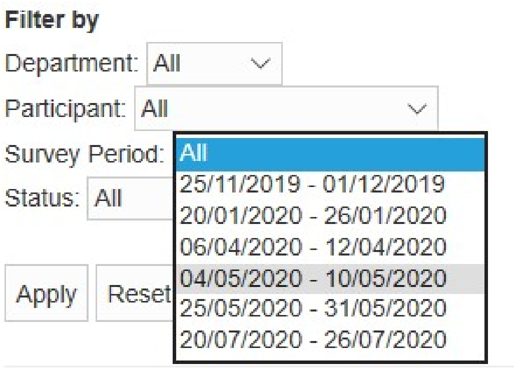
3.1.2 Filter by participant

You can use this option if you wish to find a specific participant. You will see listed all the existing participants from the department you manage. Applying the filter to them will bring up all the surveys that have been allocated to them to complete.



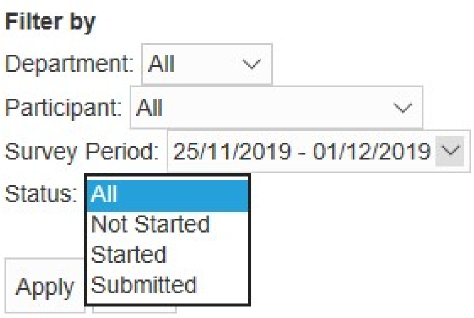
3.1.3 Filter by survey period

If you wish to find a specific survey period, select one of the listed surveys. This is very useful for you to target participant returns in respect of one of the survey weeks, rather than all 6 weeks.



3.1.4 Filter by status

Use this filter if you wish to see the participants by survey status. This is also useful for the Department Manager to review any surveys that are “Not Started” or “Started” and therefore not yet submitted



3.1.5 Clear your filters

If you wish to clear your filters, just click ‘reset’.

3.1.6 Understanding the survey status by participant

The survey status can vary between:

- “Not Started” – the participant has not started the survey
- “Started” – the participant has saved some progress of the survey, but has not completed it
- “Submitted” – the participant has completed and submitted the survey

3.2 Email functionality

You can use the email function to communicate with all or selected participants within your department. This will be useful in order to-

- remind the participants from your department to answer the upcoming surveys
- to inform them about changes in deadlines

3.2.1 Select the recipients

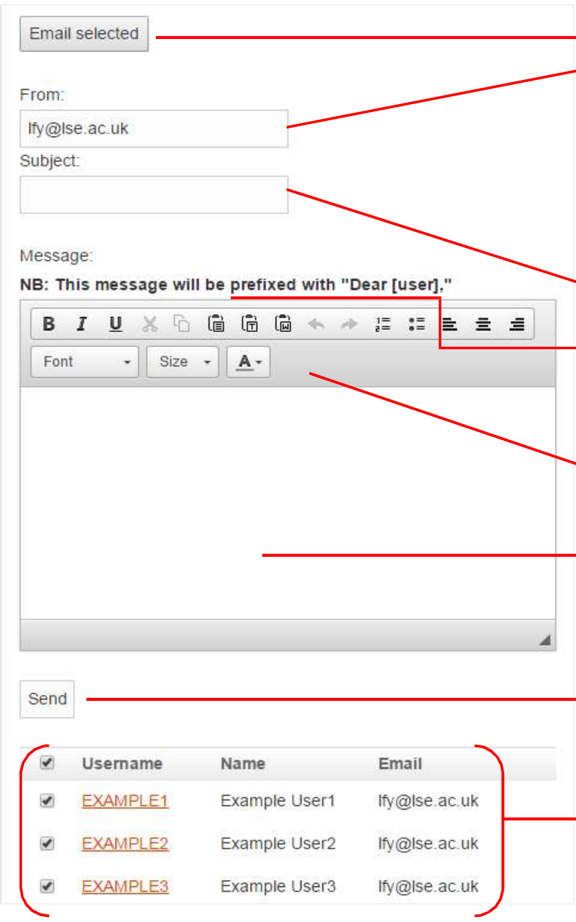
Use the filters mentioned in 3.1.1 - 3.1.4 above to find the users that you wish to email (i.e. all users for survey period “25/11/19 – 01/12/19” that have a survey status of “Not Started”.

After that, you can select all the listed participants by selecting the first tick-box next to the Survey Period column or you can select participants individually by ticking the boxes in front of their usernames.

3.2.2 Compose your email

Once you have selected your recipients above, click ‘Email selected’ to compose an email to them.

You will then be presented with a space that allows new emails to be written (see screenshot below).



Email selected: Originally clicked to write the email

From (Sender): The email address that will be displayed to recipients. This field should be prepopulated with your LSE email address – if you’d prefer to send this email from a departmental mailbox you can specify that email address instead by typing over it.

Subject: Enter the subject of the email.

Automatic prefix: The system will automatically prefix your messages with a personalised greeting to each user (“Dear [first name of participant]”).

Formatting options: Use them to format your email.

Message: The main body of the email.

Send: Select this to send the email therefore confirm your message and the recipients before sending.

Recipients: These users will receive the email; you can still make changes to them before sending the email by selecting or de-selecting as appropriate.

3.2.3 After email is sent

After sending your email, an email report should be sent to your email address detailing how many recipients your email was sent to as well as a copy of the email.s

4 LOGGING OUT

If you wish to end your session, just click on the top-right button and then click 'logout'.

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