

Workload Planner

Approver's Guide



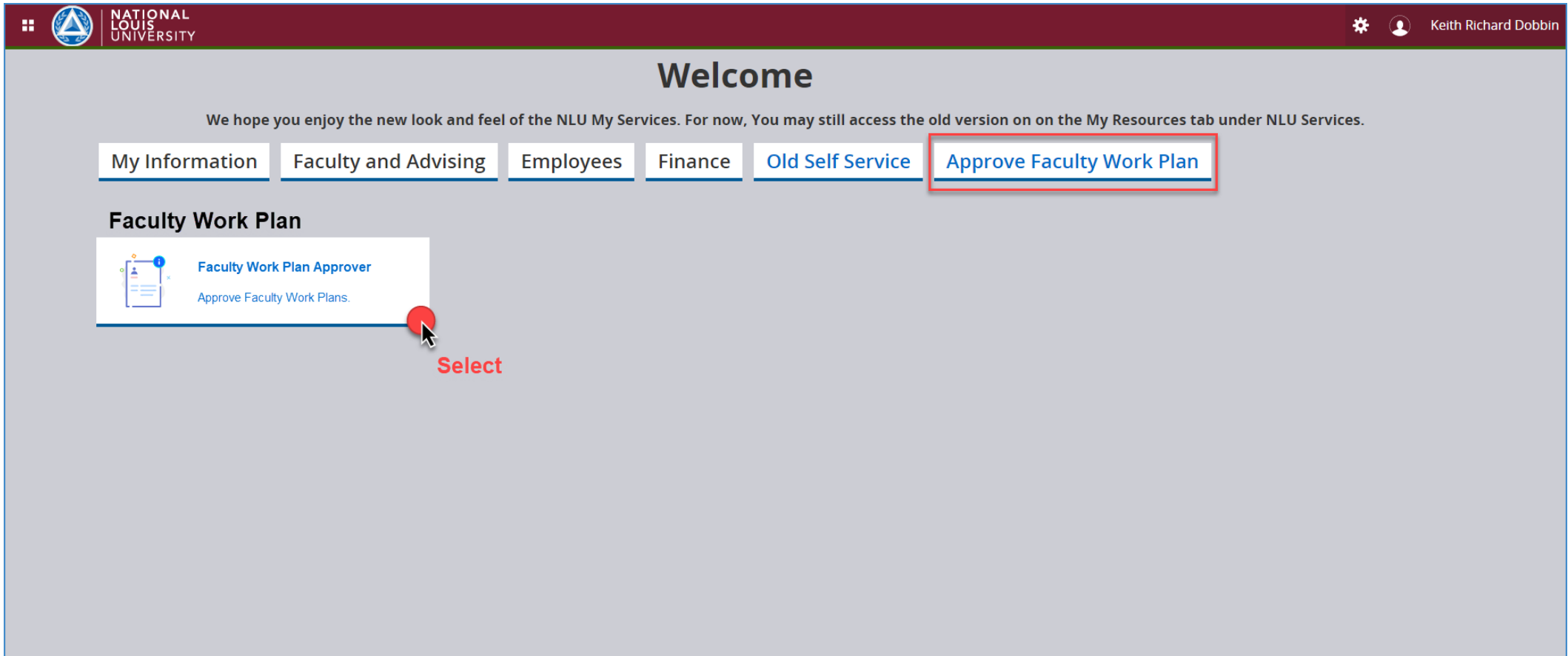
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The **Faculty Work Plan Approver** application provides the Deans and other designated approvers the capability to review and approve their faculty's planned Teaching Load, Reassign Time, and Research/Service time for the upcoming academic year.

Login:

- Access the NLU Portal and select Self-Service
- On the Self-Service Menu select Approve Faculty Work Plan



The screenshot displays the National Louis University (NLU) My Services portal. At the top, a dark red header bar contains the NLU logo, the text 'NATIONAL LOUIS UNIVERSITY', a settings gear icon, a user profile icon, and the name 'Keith Richard Dobbins'. Below the header, a large 'Welcome' message is centered. A horizontal row of navigation buttons includes 'My Information', 'Faculty and Advising', 'Employees', 'Finance', 'Old Self Service', and 'Approve Faculty Work Plan'. The 'Approve Faculty Work Plan' button is highlighted with a red rectangular border. Below this row, a section titled 'Faculty Work Plan' contains a card for the 'Faculty Work Plan Approver' application, which includes a document icon and the text 'Approve Faculty Work Plans.'. A red circle with a mouse cursor points to this card, and the word 'Select' is written in red below it.

Dean - Faculty Work Plan Maintenance:

- Select faculty name from the *Choose Faculty Name* drop-down menu. (All faculty from your college or program should appear in the drop-down menu.)
- Enter the *Fiscal Year* that you are planning. (Example: For the 2022 – 2023 fiscal year, enter 2223)

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Dean - Faculty Work Plan Maintenance

Enter both parameters: Faculty Name and Fiscal Year

Choose Faculty Name:   Enter Fiscal Year (Ex: 2122): 

Select Faculty Name Enter the fiscal year 2223 and click on Go.

Summary Section

Faculty Information

NLU ID	Full Name	Class	College	Rank	Track	Required Teaching Load
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Total Workload Summary (All Four Terms)

Teaching	Reassign	Total Hours (in SH)	Teaching Load Remarks
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Term Workload Summary

Term	Teaching	Overload	Total Teaching
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Just like the faculty planning tool, the Approval Application is divided into three sections: Summary, Approved, and Enter and Maintain.

Summary Section

Here you'll find the selected Faculty's Information and two workload summary sections:

- Total Workload Summary (All Four Terms) consolidates the planned workload into the academic year totals
- Term Workload Summary displays the planned workload by term.

Summary Section

Faculty Information

NLU ID	Full Name	Class	College	Rank	Track	Required Teaching Load
N1234567	Jane Doe	10 Month Faculty	National College of Education	Assistant Professor	Non-Tenured, Tenure Track	21.00

Total Workload Summary (All Four Terms)

Teaching	Reassign	Total Hours (in SH)	Teaching Load Remarks
Total SH: 23.00 Total Approved SH: 23.00	Total SH: 00.00 Total Approved SH: 00.00	Total : 23.00 Total Approved : 23.00	Over the required load

Term Workload Summary

Term	Teaching	Overload	Total Teaching
Summer 2021	Term SH: 10.00 Term Approved SH: 10.00	Term SH: 00.00 Term Approved SH: 00.00	Term SH: 10.00 Term Approved SH: 10.00
Fall 2021	Term SH: 10.00 Term Approved SH: 10.00	Term SH: 00.00 Term Approved SH: 00.00	Term SH: 10.00 Term Approved SH: 10.00
Winter 2022	Term SH: 03.00 Term Approved SH: 03.00	Term SH: 00.00 Term Approved SH: 00.00	Term SH: 03.00 Term Approved SH: 03.00
Spring 2022	Term SH: 00.00 Term Approved SH: 00.00	Term SH: 00.00 Term Approved SH: 00.00	Term SH: 00.00 Term Approved SH: 00.00

The **Approved Section** is populated after you have reviewed and approved the faculty's entries. This section includes:

- **Assigned CRN's** – reflects the courses and CRNs assigned in Banner
- **Approved Teaching Load** – reflects the planned courses approved by the Dean or designate
- **Approved Reassign Time** – reflects the approved reassign time
- **Approved Research/Service** – reflects the approved research and service time

Approved Section

Assigned CRN's (Courses cannot be modified here, you can mark the course as Overload in the Enter and Maintain Section)

Term	Subject	CRN	SH	QH
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Dean Approved Teaching Load from Workplan Table

Term	Load Type	Subject	CRN	SH	QH	Approved	Approved Date	Certified to Teach
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Dean Approved Reassign Time from Workplan Table (Re-assigned time is deducted from target teaching load)

Fiscal Year	Type of Work	Description of Work	SH	QH	Approved	Approved Date
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Dean Approved Research or Service from Workplan Table (Will not effect the Teaching Load)

Fiscal Year	Type of Work	Description of Work	Approved	Approved Date
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The **Enter and Maintain** section is split into three areas:

1. Enter and Maintain Load (Teaching/Overload)
2. Enter and Maintain Reassign Time
3. Enter and Maintain Research/Service

This is the section where you will approve or decline your faculty's planned workload for the academic year.

1: Enter and Maintain Load (Teaching/Overload)

When you ADD NEW, SH/QH will be populated after you save the record

DeleteTerm	Load Type	Subject	CRN	SH	QH	Certified to Teach	Approved
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Add New

Save

Refresh

2: Enter and Maintain Reassign Time

Re-assigned time is deducted from target Teaching Load

DeleteFiscal Year	Type of Work	Description of Work	SH	QH	Approved
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Add New

Save

Refresh

3: Enter and Maintain Research/Service

Enter only one entry per type of work for an Academic Year

DeleteFiscal Year	Type of Work	Description of Work	Approved
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Add New

Save

Refresh

To Approve a Course:

- Click on the drop-down menu in the Approved column for each entry and select Yes or No
- Click on **Save** to record your selection
- Click on **Refresh** to send approved courses to the Approved Section. (Approved courses will no longer be displayed here.)

1: Enter and Maintain Load (Teaching/Overload)

When you ADD NEW, SH/QH will be populated after you save the record

DeleteTerm	Load Type	Subject	CRN	SH	QH	Certified to Teach	Approved
☐ Summer 2021	▼ Overload	▼ EPS526	60943	3.00		Yes	▼
☐ Summer 2021	▼ Overload	▼ ECE510	60232	3.00		Yes	No
☐ Fall 2021	▼ Teaching Load	▼ ECE523	91737	3.00		Yes	Yes
☐ Fall 2021	▼ Teaching Load	▼ ECE523		3.00		Yes	▼
☐ Winter 2022	▼ Teaching Load	▼ ECE510	10063	3.00		Yes	▼
☐ Winter 2022	▼ Teaching Load	▼ ECE510	10640	2.00		Yes	▼
☐ Spring 2022	▼ Overload	▼ ECE510		3.00		Yes	▼
☐ Spring 2022	▼ Overload	▼ ECE510	30730	3.00		Yes	▼

Add New

Save

Refresh

To Add a New Course on behalf of faculty:

- Click on **Add New** and select the Term and Load Type from the respective drop-down menus.
- Enter a subject in the Subject Field (Ex: BUS101)
- Click on **Save**
- The SH or QH will populate once you have saved the record, and the Certified to Teach indicator will be displayed
- Then approve the new course entry. (See steps above.)

Note: If faculty is not certified to teach, complete a Credentialing Addendum as part of the planning process.

To Approve Reassign Time: Approvers can approve or reject the faculty entries here. Note that only approved hours count toward the workload.

- Click on the drop-down menu in the Approved column for each entry and select Yes or No
- Click on **Save** to record your selection
- Click on **Refresh** to send approved reassign time to the Approved Section
- Note that Approved reassign time will no longer be displayed in the Enter and Maintain section

2: Enter and Maintain Reassign Time

Re-assigned time is deducted from target Teaching Load

Delete	Fiscal Year	Type of Work	Description of Work	SH	QH	Approved
☐	2122	Program Director	Program Director for EC	1.00		
☐	2122	Grant Work	EC4 Grant Program Co	1.00		No Yes

Add New

Save

Refresh

To Add New Reassign Time on behalf of faculty:

- Click on **Add New** and a new entry row will appear
- Select the Type of Work from the drop-down menu
- Enter the SH or QH hours
- Click on **Save** to record the entry
- Approve the entry using the approval steps outlined above

Approve Research/Service: Approvers can approve or reject the entries here.

Click on the drop-down menu in the Approved column for each entry and select Yes or No

- Click on  to record your selection
- Click on  to send approved Research/Service to the Approved Section
- Note that Approved reassign time will no longer be displayed in the Enter and Maintain section

3: Enter and Maintain Research/Service

Enter only one entry per type of work for an Academic Year

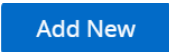
Delete	Fiscal Year	Type of Work	Description of Work	Approved
☐	2122	Research	FCD Grant with Teri Talan: Leading with	No Yes
☐	2122	Service	NCE Tenure and Promotion	

Add New

Save

Refresh

To Add New Research/Service on behalf of faculty:

- Click on  and a new entry row will appear
- Select the Type of Work from the drop-down menu
- Enter the Description of the Work
- Click on  to record the new entry
- Then approve the new entry using the approval steps outlined above

Upon completion of your review, all of the approved workload entries now appear in the Approved Section, and the faculty's workload hours are summarized for the academic year and by each term in the Summary Section.

Approved Section

Assigned CRN's (Courses cannot be modified here, you can mark the course as Overload in the Enter and Maintain Section)

Term	Subject	CRN	SH	QH
Summer 2021	EDL522	60336	00.00	
Summer 2021	EDL520	60537	02.00	
Fall 2021	EDL520	90354	02.00	
Fall 2021	CCD606	90671	00.00	
Fall 2021	EDL521	90355	02.00	

Dean Approved Teaching Load from Workplan Table

Term	Load Type	Subject	CRN	SH	QH	Approved	Approved Date	Certified to Teach
Summer 2021	Overload	EDL521		2.00		Yes	20-APR-2021	Yes
Fall 2021	Teaching Load	EDL598		2.00		Yes	20-APR-2021	Yes

Dean Approved Reassign Time from Workplan Table (Budget and Grant Work Release Time will not effect the Teaching Load)

Fiscal Year	Type of Work	Description of Work	SH	QH	Approved	Approved Date
2122	Dissertation	Dissertation committee chair	3.00		Yes	20-APR-2021

Dean Approved Research or Service from Workplan Table (Will not effect the Teaching Load)

Fiscal Year	Type of Work	Description of Work	Approved	Approved Date
2122	Service	IPTRC; NCE Assessment Committee; AERA SIG Officer; i.e. co-editor; peer reviewer	Yes	20-APR-2021
2122	Research	Research on stakeholder feedback to program	Yes	20-APR-2021



FAQ:

1. What happens if faculty is assigned to courses in Banner after they are already planned and approved?

Those courses will not appear in the *Assigned CRN's* section of the Approved Section, but they will remain listed under the *Dean Approved Teaching Load from Workplan Table* section.

2. Can I remove assigned courses from the Assigned CRN's in the Approved Section?

If faculty wants to mark courses that are already listed in the Assigned CRN's as Overload, add the course in the *Enter and Maintain* section as overload, and approve it using the steps provided. Once approved, the course will be removed from the Assigned CRN's section.

Example: To mark EDL521 for Summer 2021 as Overload:

- Select the term and add subject EDL521 as Overload
- Click **Save** to record your entry
- Click on **Refresh** to send approved overload to the Approved Section

Approved Section

Assigned CRN's (Courses cannot be modified here, you can mark the course as Overload in the Enter and Maintain Section)

Term	Subject	CRN	SH	QH
Summer 2021	EDL522	60336	00.00	
Summer 2021	EDL520	60537	02.00	
Summer 2021	EDL521	60538	02.00	
Fall 2021	EDL520	90354	02.00	
Fall 2021	CCD606	90671	00.00	
Fall 2021	EDL521	90355	02.00	

1: Enter and Maintain Load (Teaching/Overload)

When you ADD NEW, SH/QH will be populated after you save the record

Delete	Term	Load Type	Subject	CRN	SH	QH	Certified to Teach
☐	Summer 2021	Teaching Load	PEA062		1.00		No Certification Found
☐	Summer 2021	Overload	EDL521		2.00		Yes
☐	Fall 2021	Teaching Load	EDL598		2.00		Yes

Add New

Save

Refresh