

Workload Planner

Faculty Guide



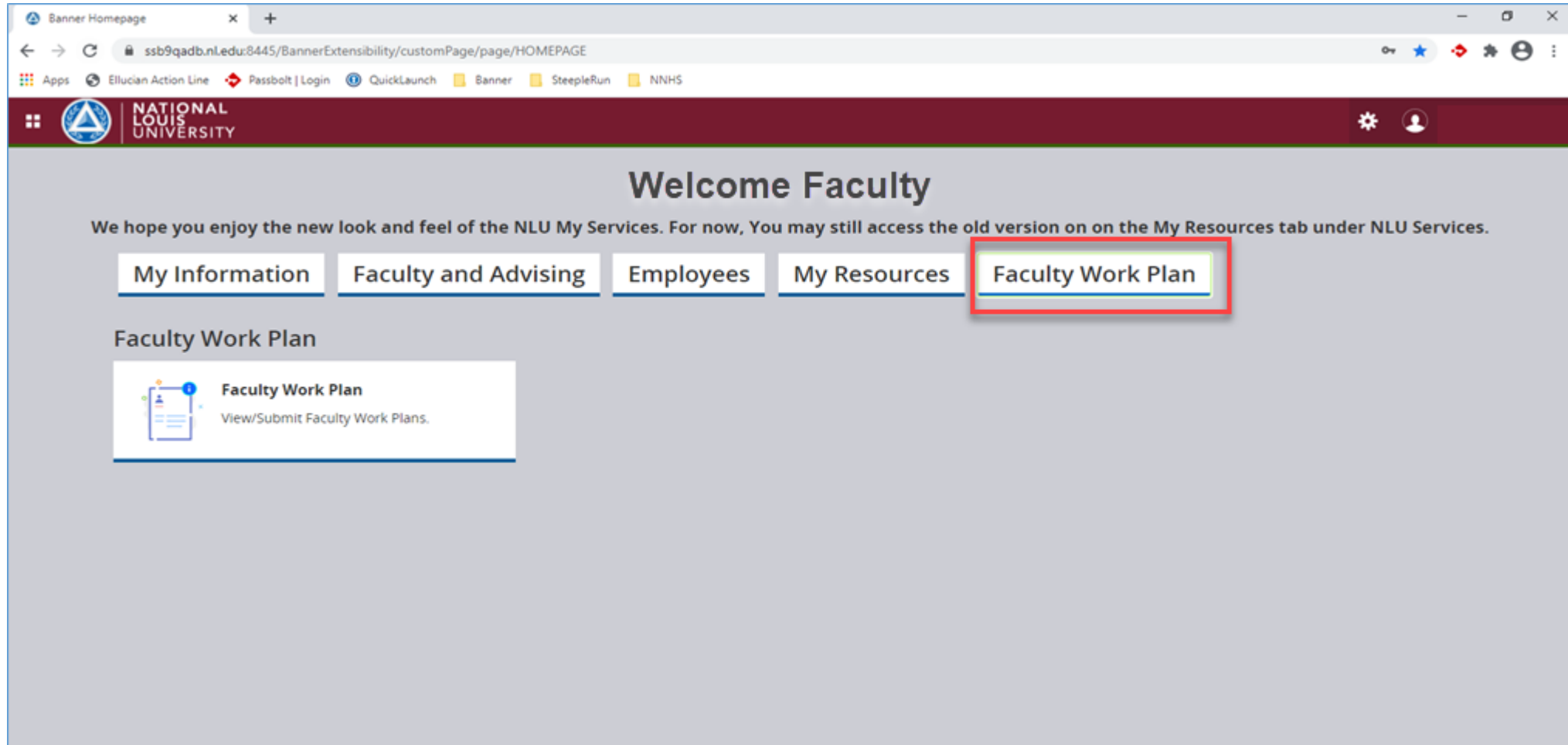
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The **Workload Planning Tool** is an application that allows faculty to plan their Teaching Load, Reassign Time, and Research/Service time for the upcoming academic year. Once a plan is submitted, it can be reviewed by the Dean (or designated approver) for final approval within the application.

Login:

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



Faculty Work Plan Maintenance:

- Select your name from the *Choose ID & Name* drop-down menu
- Your NLU ID number should appear after your name has been selected
- Next, enter the *Fiscal Year* that you are planning. (Example: For the 2022 – 2023 fiscal year, enter 2223)

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Faculty Work Plan Maintenance

Enter both parameters: Faculty Name and Fiscal Year

Choose ID & Name:  Enter Fiscal Year (Ex: 2122): 

Select your name from the drop-down menu. 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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The planning tool is divided into three sections: Summary, Approved, and Enter and Maintain.

Let's take a look at the **Summary Section**. Here you'll find your Faculty Information and two workload summary sections:

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

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Faculty - Work Plan Maintenance

Enter both parameters: Faculty Name and Fiscal Year

Choose ID & Name: Enter Fiscal Year (Ex: 2122):

Summary Section

Select your name from the drop-down menu. Enter the fiscal year (2223) and click Go.

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 your planned workload has been reviewed and approved. 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 enter your 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 Enter a Course:

- 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: PEA062)
- Click on **Save**
- The SH or QH will populate once you have saved the record, and the Certified to Teach indicator will be displayed
- To add more courses, repeat the steps above

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
☐	Fall 2021	▼ Teaching Load	▼ EDL598		.00		Yes

Add New

Save

Refresh

Note: if an entered course has a range of hours (like EDL598 in the above example) the SH or QH will populate as .00

- Faculty should remove the .00 and enter the hours they will teach
- Click on **Save** to save the entry, then click on **Refresh** to view the updated hours

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

Add New

Save

Refresh

To Enter Reassign Work:

- Click on **Add New** to add an empty entry
- Select the Type of Work from the drop-down menu, enter a description of the work and the SH or QH, then click **Save**
- Repeat the steps above to add more reassign time

Save

2: Enter and Maintain Reassign Time

Release Time from Teaching Load (Budget and Grant Work Release Time will not effect the Teaching Load)

DeleteFiscal Year	Type of Work	Description of Work	SH	QH
☐ 2122	Dissertation	Dissertation committee	3.00	

Add New

Save

Refresh

To Enter Research/Service:

- Click on **Add New** to add an empty entry row
- Select the Type of Work from the drop-down menu and enter a description of the Research or Service. Then click **Save**
- Repeat the steps above to add an additional type of work (See note in graphic below)

Save

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
☐ 2122	Service	IPTRC; NCE Assessment
☐ 2122	Research	Research on stakeholder feedback to program

Note: Enter only one entry per Type of Work for an Academic Year

Add New

Save

Refresh

Your planning is done!

Upon completion of your entries, your planned workload is *PENDING* until approved by the Dean or Designated Approver. When your Courses, Reassign Time, and Research/Service have been approved, the approved items will be moved to the Approved Section of the Workload Planner for your review. This section cannot be modified.

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 I'm 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 request approval. 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 

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