

SET WORKLOAD PLANNING ROLES

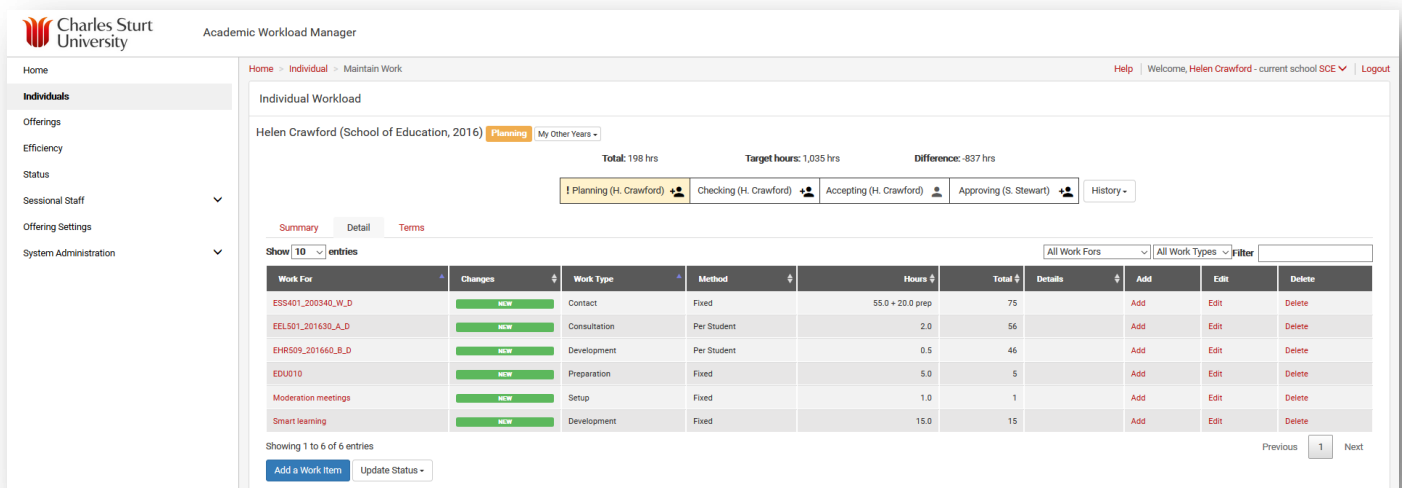
Background

Each Workload has a set of roles associated with the planning steps that are involved.

Set Workload Planning Roles

There are four steps involved for the planning for a Non-Sessional Academic:

- Planning - adding work to the Workload. Creating new Work Items.
- Checking - someone who looks at the planning and makes sure it is consistent with the Workload Policy and it is a well-balanced plan according to the target teaching hours, what other people in the School might be working on, how many hours have been allocated to casual academics and what has been casualised.
- Accepting - always the individual academic accepting the work that has been assigned to him/her for the year.
- Approving - always done by the Head of School or their delegate Workload Approver.



The screenshot shows the 'Individual Workload' page for Helen Crawford (School of Education, 2016). The page displays a table of work items with columns for Work For, Changes, Work Type, Method, Hours, Total, Details, Add, Edit, and Delete. The table shows several entries, including 'ESS401_200340_W_D', 'EEL501_201630_A_D', 'EHR509_201660_B_D', 'EDU010', 'Moderation meetings', and 'Smart learning'. The total hours are 198, and the target hours are 1,035, with a difference of -837 hours.

Work For	Changes	Work Type	Method	Hours	Total	Details	Add	Edit	Delete
ESS401_200340_W_D	NEW	Contact	Fixed	55.0 + 20.0 prep	75		Add	Edit	Delete
EEL501_201630_A_D	NEW	Consultation	Per Student	2.0	56		Add	Edit	Delete
EHR509_201660_B_D	NEW	Development	Per Student	0.5	46		Add	Edit	Delete
EDU010	NEW	Preparation	Fixed	5.0	5		Add	Edit	Delete
Moderation meetings	NEW	Setup	Fixed	1.0	1		Add	Edit	Delete
Smart learning	NEW	Development	Fixed	15.0	15		Add	Edit	Delete

To allocate a person to a Planning Role

- The system automatically assigns the Individual to the Accepting role.
- All other stages need to have a person assigned.
- To do this click on the name of the stage (eg, Planning, Checking, Approving).
- An Assign Approval Step table will appear.
- The Assign Approval Step table will list all people in your school who have been assigned to the particular role you are allocating (eg Checker). From the list you need to choose who the appropriate person for the role is, for that particular Workload.
- A message will appear on your screen stating that person is assigned as the chosen role for this workload.
- The chosen person's name will appear beside their role in the relevant box.