



Academic Workload Planning (AWP) Line Manager Handbook

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For more information on the University's approach to Academic Workload Planning, please visit the staff portal here:

<https://www.gre.ac.uk/articles/public-relations/academic-workload-planning>

For specific queries relating to Academic Workload Planning, please contact the AWP Support Team at the following e-mail address: AWPsupport@gre.ac.uk

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1 Introduction

This document is intended for use by Line Managers (or nominees) who will be responsible for the allocation of academic staff workload and is a technical guide support the use of the Academic Workload Planning (AWP) software, aka “AWP”.

1.1 How to access the AWP tool

The Academic Workload Planning (AWP) tool is hosted online via <https://awp.gre.ac.uk>

On the landing page click the “Log in to AWP” button and use your University credentials.

You will see several tabs – click on the AWP tab to access the tool’s functionality:



Please note: only Line Managers (or nominees) will be able to see the AWP tab.

If you are responsible for the allocation of workload to Academic staff but are unable to see the AWP tab, please get in touch with the AWP Support Team in the first instance with information about your role and line management/allocation responsibilities.

1.2 Where to go for support

You can find further information via the AWP portal including the Academic Framework document and Guidance document for all staff:

<https://www.gre.ac.uk/articles/public-relations/academic-workload-planning>

If you require assistance with performing the tasks outlined in this document or have any other queries about academic workload management please email the AWP Support Team via awpsupport@gre.ac.uk

2 Key concepts

2.1 Categories

As a Line Manager, you will allocate staff hours to activities (or vice versa) within the AWP tool. The list of activities you will see in the system will be organised into **categories** as follows:

- A – Teaching and Learning
- B – Research and Knowledge Exchange
- C – Leadership and Management
- D – Administration and Academic Citizenship

You can refer to the AWP Guidance or AWP Framework Quick Reference Guide to see which activities fall under each category. This structure is designed to help Line Managers and Academics to think about and discuss workload.

2.2 Work Unit Types (WUTs)

When you make an allocation, the hours will fall under one or more of the following work **unit types** (WUTs), or, 'types of effort':

- FST – Formal Scheduled Teaching, e.g. delivering lectures
- TRA – Teaching Related Activity, e.g. preparation, assessment
- RKE – Research and Knowledge Exchange (RKE) activity, e.g. hours on a research project
- L&M – Leadership & Management activity, e.g. hours on a defined role
- OTH – Other defined activity, e.g. RSA allowance

Capturing allocations in this way allows for Academics, Line Managers, and the University to be able to see the distribution of work hours against the different kinds of effort. For instance, this can be when viewing teaching delivery allocations and monitoring the hours of in-person contact time (FST) and preparation (TRA).

2.3 Activity data structure

The AWP tool organises activities according to a three-tier hierarchy:

- Level 1: Category, e.g. A – Teaching and Learning
- Level 2: Parent, e.g. BIOC1033/Biochemistry (i.e. a module)
- Level 3: Child, e.g. Seminars (i.e. an activity within the module)

The example below/overleaf is from the AWP system in the 'Allocate to Activities' view, and the numbers represent the levels defined above. The lighter bars represent the parents (level 2) with the darker bars representing child activities (level 3). It is at level 3 where allocations take place. Information then gets rolled up to the parent level.

Activities

A - Teaching and Learning 1

001

Module 001 - UG - 15 2 155 / 284

- Assessment and Feedback 125 / 125
- Field Trip 0 / 0
- Labs 0 / 20
- Lectures 30 / 40
- Module Leadership 0 / 75
- Seminars 0 / 24

3

3 School Dashboard

3.1 Change year or school focus

Data (activities and staff/users) within AWP is structured firstly by **Year** and then by **School**. You may have access to multiple year instances at different times and multiple Schools depending on your line management role.

You can navigate between different years or schools using the **change buttons** above the Dashboard area, as shown below:

Me Organisation AWP Actions

AWP ▼ Activ

Year: 2022/23 Change

School: School of Health Sciences Change

3.2 Provisional and Published data

You can set the Dashboard to display two types of data:

- **Provisional data** – that reflects the latest changes made by you or other Line Managers regardless of whether those changes have been published out to staff or not
- **Published data** – that reflects the latest published data only.

Most of the time, you will want to focus on the **provisional data** focus, but you can make the selection via the drop-down option that features on the top-right of the Dashboard area.

Provisional ▲

Provisional

Published

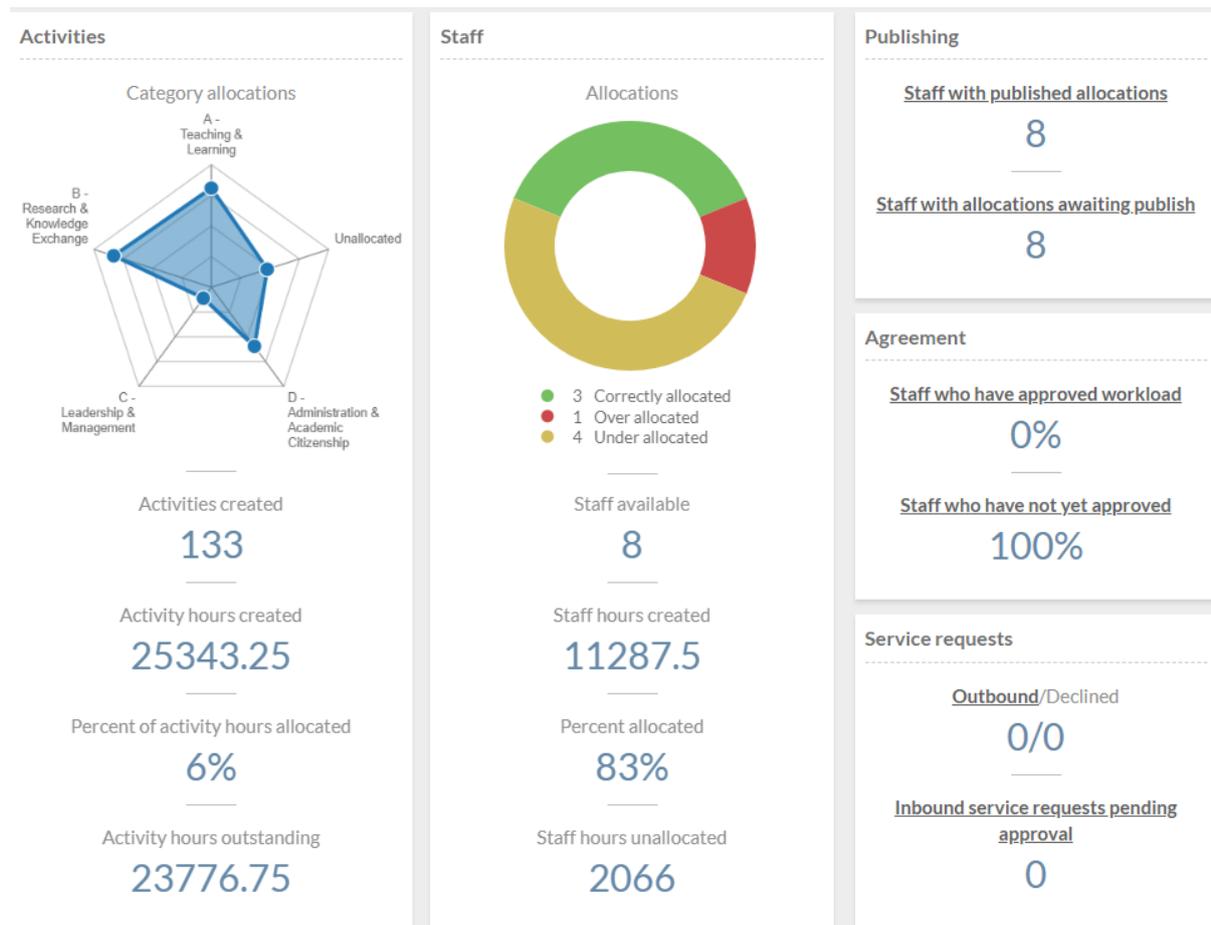
3.3 Dashboard panels

3.3.1 Overview

The School Dashboard will display when you click on the AWP tab, based on the Year and School selections. The Dashboard is comprised of 5 panels:

- Activities
- Staff
- Publishing
- Agreement
- Services Requests

An example of the Dashboard is shown below:



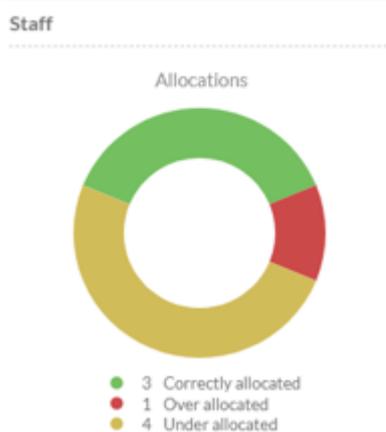
3.3.2 Activities panel

This panel shows the number of activities that have been created within the year and School. Some activities in AWP will possess a 'bucket', or an estimate of the number of hours to deliver it, which populates the number of activity hours created in this panel.

However, not all activities available for allocating against have a bucket – so you should be aware that the values in this panel will not likely represent the full extent of resources needed within the School.

Note: in the future, the way buckets are determined may be updated to enable this panel to show the full extent of the hours needed.

3.3.3 Staff panel



This panel shows the number of academic staff linked to the School and the amount of staff hours they generate in total.

The donut chart shows the number of staff that are **correctly allocated** in green (defined as between 85%-100% allocated).

Below 85% a staff member will be under allocated (yellow) whilst those flagged red are allocated beyond 100%.

The donut chart is **interactive**, and you can click on one of the segments to be taken to an on-screen allocation report that lists the staff according to the categories above.

For example, if any staff are allocated into the red (over 100%) then Line Managers can quickly get to this list of staff to investigate.

3.3.4 Publishing panel



It is best to treat the two values given separately as it is unlikely that they will sum and match the number of staff available within the School.

The first line is showing how many staff your School has published out to.

The second line is showing you how many staff have had changes made to their provisional allocations since the last publish point, and therefore require Line Managers to publish the updates out to the academics.

The text links are clickable and will take you immediately to the publish allocations screen – see Section 8 for more details.

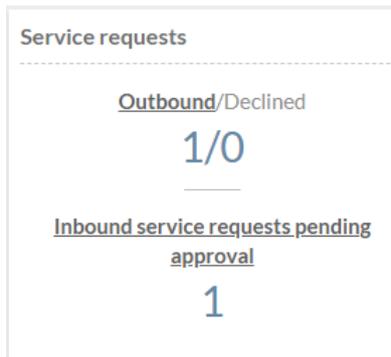
3.3.5 Agreement panel



This panel is simply showing the percentage of staff within the School that have agreed to their workload, versus those that have either queried or not yet responded to their work plan.

The text links are clickable and will take you immediately to the publish allocations screen – see Section 8 for more details.

3.3.6 Service Requests panel



This panel provides an overview of activity in the service requests inbox and outbox, which is covered in Section 0.

The upper element shows the number of requests **from your School** that are awaiting a response from the School that 'owns' the Academic staff time you've requested. The number of declined requests (where further action is advised) is also given.

The lower element shows the number of requests from other Schools for **your staff members' time** for their activities.

The text links are clickable and will take you to your School's service request outbox and inbox respectively.

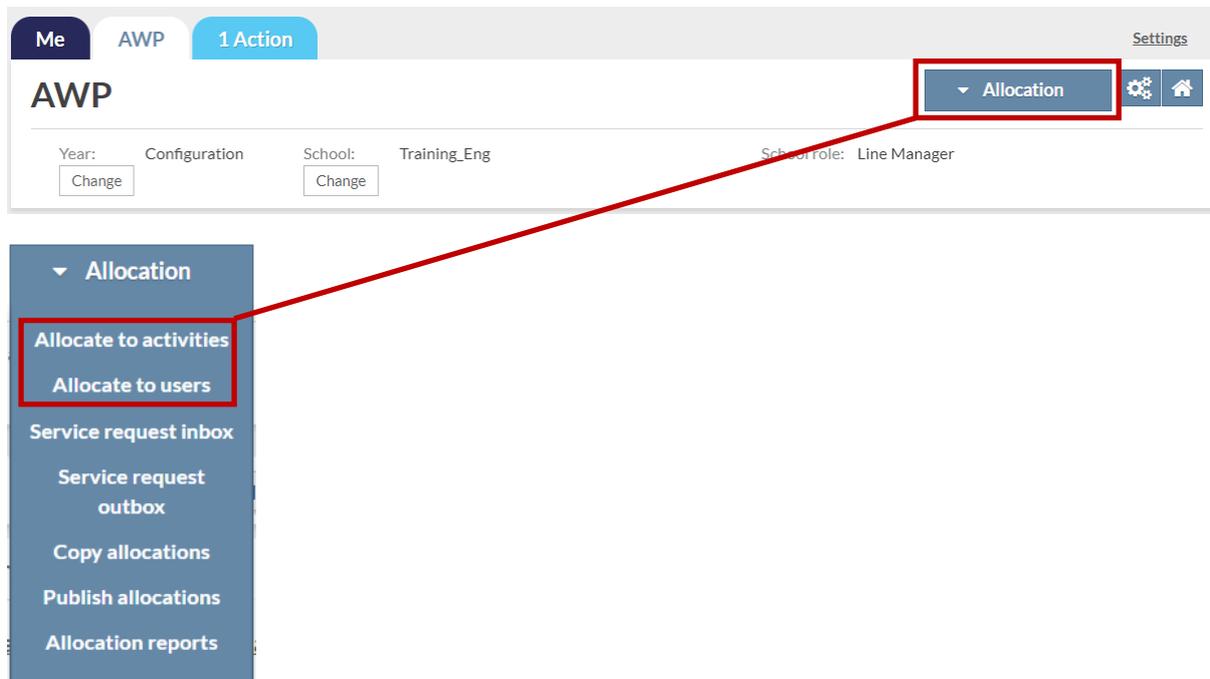
4 Allocation screens

4.1 Allocation overview

As a Line Manager, you can choose to focus on the allocation of staff **to activities** (see 4.2) or activities **to individual staff** (see 4.3).

The list of (child) activities that you can allocate staff hours to (see Section 2.3: Activity data structure for more info) will have been imported by the University and you will be able to navigate through the full range of activities within the academic framework category by category.

The primary way to access the allocation screens is to use the Allocation menu indicated below:



4.2 Allocate to Activities

4.2.1 Overview

With this focus, the list of activities is in the panel on the left whilst the list of available staff is on the right.

The screenshot shows the 'Allocate to activities' interface. The left panel, titled 'Activities', contains a list of activity categories and sub-categories. The right panel, titled 'Users', contains a list of staff members with their allocated and total hours. Red circles with numbers 1 through 8 point to specific elements in the interface.

Activities Panel:

- 1: Activities panel header
- 2: Users panel header
- 3: Category dropdown selector (A - Teaching and Learning)
- 4: Parent activity block (Module 001 - UG - 15)
- 5: Child activity block (Lectures)
- 6: Buckets (Field Trip)
- 7: Staff/User (Admin2, System)
- 8: Allocated activity area (System Admin2)

Category	Hours
A - Teaching and Learning	-80 / 0
!F - Other Teaching and Learning	-80 / 0
!G - Travel Time	-80 / 0
Module 001 - UG - 15	145 / 284
Assessment and Feedback	125 / 125
Field Trip	0 / 0
Labs	0 / 20
Lectures	20 / 40
Module Leadership	0 / 75
Seminars	0 / 24

User	Hours
Admin1, System	447.50 / 1505.00
Admin2, System	656 / 1505.00
Admin3, System	302.00 / 1505.00
Admin4, System	173.00 / 1505.00
User01, Test	196.75 / 1505.00
User02, Test	165.00 / 752.50
User03, Test	97.75 / 1505.00
User04, Test	-162.50 / 1505.00

System Admin2	FST.	TRA.	Total
			20
Total:	10	10	20
Remaining:			20

1. Activities panel – shows list of activities in the School according to the Category
2. Users (Staff) panel – list of allocatable users
3. Category dropdown selector – to navigate different sets of activities
4. Parent activity – click on the activity block to expand
5. Child activity – click on the activity block to expand
6. Buckets – total hours required to help guide allocation. See Section 4.2.3 for more info.
7. Staff/User – showing remaining hours out of (/) total hours for that person
8. Allocated activity area – shows allocated staff. See Section 4.2.2 for more info.

4.2.2 Allocated activity area

When you click on a (child) activity that has allocations you will see various information and buttons as per the example below:

Lectures		10 / 40		
		FST.	TRA.	Total
System Admin2				20
System Admin3				10
Delivery		5		5
Preparation			5	5
<i>Total:</i>		15	15	30
<i>Remaining:</i>				10

1. Allocated user – with additional detail contracted
2. Allocated user – with additional detail expanded below it
3. Additional detail regarding different types of effort/Work Unit Types
4. Work Unit Type columns – shows split of different types of effort
5. Activity Totals – Indicates hours allocated and hours left to allocate
6. Bucket – visualisation of #5 (hours on left of slash are the hours left to allocate out of the total estimated hours needed to deliver the activity on the right)
7. Action buttons – you can perform several tasks via these buttons as in the table below:

Button	Name	Description
	Create Service Request	Allows you to allocate this activity to a staff member in another School (i.e. not in the user list)
	Edit Allocation	Allows you to re-open the allocation window and edit any of the answers given to questions, etc.
	Notes	This is an in-system notes functionality. However, the University will primarily be asking Line Managers to capture notes only in certain scenarios via text fields in the pop-up window.
	Switch Focus	Allows you to flip the focus of the screen from allocation to activities to allocation to users.
	Delete Allocation	Allows you to remove the allocation. Note: this will immediately remove the item without prompting!

4.2.3 Buckets

In the screenshots used in this document, you will notice colour-coded boxes on the right-side of parent or child activity bars (see examples in 4.2.1 or 4.2.4). These are referred to as “buckets” which are generated based on calculations of the total effort (in hours) required to complete the task/activity.

As a Line Manager, the value of buckets can be seen via on-screen colour-coded displays during the allocation process that help to direct attention. The images below show a singular child activity called Lectures in different states of allocation.

The boxes to the right of the activity block are the bucket indicators, with the value on the right-side of the forward slash representing the total resource bucket (30 hours) and the value on the left-side representing the hours left to allocate to deliver the activity fully (i.e. counting down to zero):

^ Lectures	30 / 30	Yellow: Start of allocation. No hours allocated yet. 30 left to allocate.
^ Lectures	15 / 30	Yellow: Shows the activity is half resourced. 15 left to allocate.
^ Lectures	-10 / 30	Red: Highlights that the activity has been overallocated by 10 hours.
^ Lectures	0 / 30	Green: Shows that 30 hours have been allocated and so 0 left to allocate.

In principle, the aim is to achieve the green 'zero' which would denote that sufficient staff hours have been allocated to the activity for delivery during the academic year.

However, please note that it has not been possible for the University to confirm buckets for all activities, and the AWP tool cannot make the bucket indicators invisible for those activities. You will spot these as the bucket value with be zero, and upon allocating any time to such activity it will go 'into the red' – in this case this would be expected functionality.

During the transition year, the AWP Support Team would welcome feedback on the usefulness of bucket indicators during the allocation process.

4.2.4 Drag-and-drop

To allocate a staff member to the activity, simply click on the directional arrows button on the staff/user list and drag-and-drop it into the expanded (child) activity area:

The screenshot shows two panels: 'Activities' on the left and 'Users' on the right. The 'Activities' panel is expanded to show 'Module 001 - UG - 15' with sub-activities like 'Assessment and Feedback', 'Field Trip', 'Labs', and 'Lectures'. The 'Users' panel lists staff members such as 'Admin1, System', 'Admin2, System', 'Admin3, System', and 'User01, Test'. A red arrow points from the 'Admin3, System' user entry in the 'Users' panel to the 'Admin3, System' entry in the 'Activities' panel, indicating the drag-and-drop action.

At this stage, a pop-up allocation window will appear posing questions to you as a Line Manager to complete the allocation calculation (as per the academic workload framework). Since this aspect of the process is the same for Allocate to Users approach, please refer to Section 4.4 for more detail.

4.3 Allocate to Users

4.3.1 Overview

This view shifts the focus to allow Line Managers to concentrate on allocating an individual staff member, taking into account the balance of workload across different categories.

The screenshot shows the 'Allocate to Users' interface. The 'Users' panel on the left displays a table for 'User01, Test' with workload data across various activity categories. The 'Activities' panel on the right shows a list of activities with their respective workload values. Red circles with numbers 1 through 8 highlight key interface elements:

- 1. Users panel header
- 2. Activities panel header
- 3. Category dropdown selector
- 4. User selection button
- 5. Activity selection button
- 6. Activity workload display
- 7. Activity workload table
- 8. User workload display

1. Users panel – shows list of staff allowing focus on individual's whole workload plan
2. Activities panel – shows list of parent and child activities organised by category
3. Category dropdown selector – to navigate different sets of activities

4. User/Staff member – darker bars represent individual staff members. Click to expand.
5. Parent activity – lighter bars represent activity parents. Click to expand.
6. Child activity – darker bars represent allocatable activities. Drag and drop these to the staff.
7. User allocations overview area – shows allocations across all categories (see section 2.1) and work unit types (see section 2.2). Click a category to expand to see related parents and child activities.
8. Buckets – shows allocated hours as under (yellow), over (red) or correctly (green) allocated.

4.3.2 User allocations overview area

As shown in #7 in the image in 4.3.1, the overview area details the individual staff member's workload that is similar to what they will see on their MePage. It initially displays this at a high-level, rolling up allocations from individual activities to give totals against Categories and Work Unit Types. In this way, Line Managers can see the distribution or balance of workload across these domains.

You will be able to dig deeper by expanding one or all categories listed by clicking on their name/label (see #1 in image below). At the next layer of detail, you will be able to see the name of the parent activity as blue text which is centred (see #2).

Beneath the parent will be a list of allocated child activities (see #3) sitting under the parent. You will be able to quickly note the total hours allocated for the activity via the Total column (see #4). You can also dig deeper again by clicking on the name/label of the child activity to reveal additional lines which will display the number of allocated hours under specific Work Unit Type columns (see #5).

	FST.	TRA.	RKE.	L&M.	OTH.	Total
^ A - Teaching and Learning (1)	20	655.75	0	0	10	685.75
!A - Personal Tutoring (2)						
v Personal Tutoring <input type="button" value="edit"/> <input type="button" value="print"/> <input type="button" value="refresh"/> <input type="button" value="close"/> 						130
Module 005 - PG - 15						
v Assessment and Feedback (3) <input type="button" value="edit"/> <input type="button" value="print"/> <input type="button" value="refresh"/> <input type="button" value="close"/> 						7.5
^ Labs (4) <input type="button" value="edit"/> <input type="button" value="print"/> <input type="button" value="refresh"/> <input type="button" value="close"/> 						40 (4)
▶ Delivery (5)	20 (5)					20
▶ Preparation		20				20

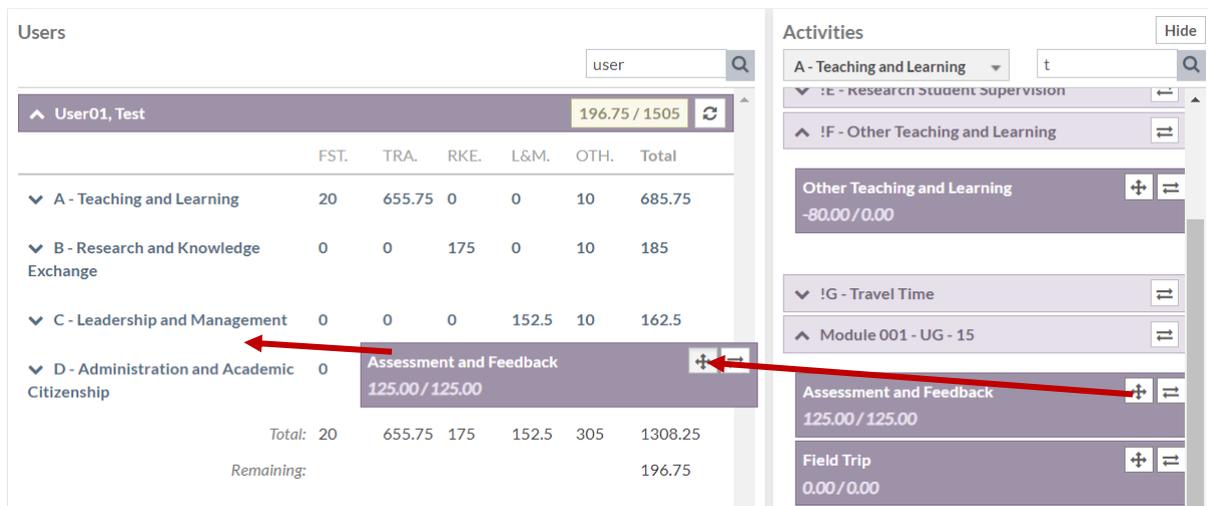
As with the allocate to activities view, you will also be able to edit or remove allocations using the action buttons (see table below).

Button	Name	Description
	Edit Allocation	Allows you to re-open the allocation window and edit any of the answers given to questions, etc.
	Notes	This is an in-system notes functionality. However, the University will primarily be asking Line Managers to capture notes only in certain scenarios via text fields in the pop-up window.
	Switch Focus	Allows you to flip the focus of the screen from allocation to activities to allocation to users.
	Delete Allocation	Allows you to remove the allocation. Note: this will immediately remove the item without prompting!

Please note however the absence of the Service Request icon/button which is only visible in the allocate to activities view (see section 0 for more information).

4.3.3 Drag-and-drop

To allocate an activity to a staff member, simply click on the directional arrows button on the activity panel (see #6 in image in 4.3.1) and drag-and-drop it to the user allocations overview area (see #7).



The screenshot displays two panels: 'Users' and 'Activities'.

Users Panel: Shows a table for 'User01, Test' with a total allocation of 196.75 / 1505. The table lists activities and their allocations across different categories (FST, TRA, RKE, L&M, OTH).

	FST.	TRA.	RKE.	L&M.	OTH.	Total
▼ A - Teaching and Learning	20	655.75	0	0	10	685.75
▼ B - Research and Knowledge Exchange	0	0	175	0	10	185
▼ C - Leadership and Management	0	0	0	152.5	10	162.5
▼ D - Administration and Academic Citizenship	0	125.00	0	0	0	125.00
Total:	20	655.75	175	152.5	305	1308.25
Remaining:						196.75

Activities Panel: Lists activities such as 'Other Teaching and Learning', 'Assessment and Feedback', and 'Field Trip'. A red arrow points from the 'Assessment and Feedback' activity in this panel to the 'Assessment and Feedback' row in the 'Users' table.

The system will only permit the activity to be allocated under the correct Category of work, so you do not need to fully expand the Category elements (i.e. you can drag-and-drop to anywhere in the overview area for that person).

4.4 Allocation Pop-up window

Whether you are focusing on allocating to activities or users/staff, the act of drag-and-dropping will in most cases trigger the allocation pop-up window (which is titled 'Allocation Attributes').

The window will typically pose questions that you, as a Line Manager, will need to answer to complete the calculation that sits behind the allocation. This may rely on knowledge you already possess given your role or require you to seek out the detail from discussions with Academics.

As an example, the following image represents module delivery child activity 'Lectures' that sits under the parent 'Module 002 – UG – 30':

Allocation attributes

User: Test User03

Activity: Lectures

Fields:

Scheduled Hours:	20.00
------------------	-------

1

Parent Activity: Module 002 - UG - 30

Fields:

Number of Students:	400
Credit:	30
Level:	UG

2

How many hours for first time delivery will this individual be responsible for? *

How many hours for repeat delivery will this individual be responsible for? *

Please use this area for any notes

3

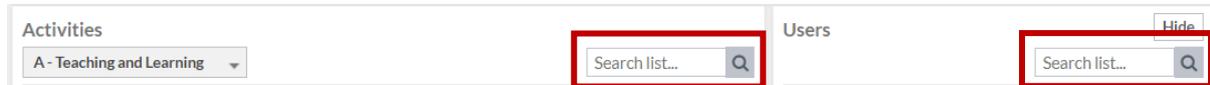
The pop-up window will display contextual information within a light-grey boxed area at the top of the window. The fields from the system displayed here will either relate to the activity itself (the allocatable child) or the parent where this is considered to be useful.

In the example above, you would be able to see the number of 'Scheduled Hours' which has been taken from the timetabling system (see #1 above). This is a piece of data specific to the allocatable child activity only.

You can also see at-a-glance details about the parent (the module, in this case) that the allocatable child activity sits under. In this example it includes details about the module (see #2) including the number of students, credit value, and level which may help you to make decisions when answering the specific allocation questions (see #3).

4.5 Sticky search and Hide functions

You will notice search boxes in the Activities or Users panels. These can be used to help you filter through the lists of items in the respective panels to better target your efforts:



For example, this may come in handy when searching through a long list of modules in the A - Teaching and Learning category or focusing on the staff that you have responsibility for.

It is worth keeping in mind that these are 'sticky' search boxes which means that it is possible to enter text into them, leave this screen, and return with the same search filter in place. If you forget to remove the search text then you will see only a limited selection of the possible items.

This functionality can come in handy especially if you're working with your direct reports on workload and want to show the screen during the allocation process. By using the search box for the Users, you can limit the information displayed on-screen to only that particular user (making sure that specific allocation details of other staff are not visible).

The sticky search can be removed by selecting the Page settings button at the top of the Activities/User panels and unticking 'Retain search values between sessions'.

Similarly, to avoid visibility of other user information on your screen you can also use the 'Hide' button on the right-side panel to temporarily remove it and expand the content of the left-side panel, e.g. if you were explaining to a direct report who else is contributing to a module.

5 Multiple Generic Instances

To explain the use of multiple generic instances of activities within the system this section will initially explore how singular named activities work.

5.1 Allocating to singular activities

The AWP system allows for only one allocation link between a user/staff member and an activity – in other words, you can't allocate someone to the same activity twice (although you can edit an existing allocation to increase it where necessary).

Where possible, the University has used internal data to create a list of individually named or 'singular' activities that you can allocate one or more staff to as needed. For example, let's say there was an externally funded research project 'Case Study in Greenwich Maritime History' you would expect to see an activity with this name in the system:

B - Research - External		-300 / 0	
Case Study of Greenwich Maritime History		-300 / 0	
		RKE.	Total
Test User01		100	
Test User02		150	
Test User03		50	
		Total:	300 300
		Remaining:	-300

In the example above, a Line Manager has allocated three staff to this activity (Test Users 1-3) with a total of 300 hours being spent on this project. The Line Manager can return to this singular activity and see all those working on it and what they're each contributing to the activity. Making adjustments whilst focusing on the activity is clear-cut because it is a singularly named activity.

5.2 Rationale for using multiple generic instances

There are some types of activity where data on singular named instances is unavailable (at present) to pre-populate and/or some activities won't be known at the start of the planning cycle perhaps only arising ad hoc during the academic year.

To avoid a delay between the point where a Line Manager needs to make that allocation and the point where the singular named activity can be created/imported into the tool by System Administrators, you can make use of **multiple generic instances**.

The table below shows some examples of multiple generic instances across the different categories of work:

A-Teaching and Learning:	B-Research and KE:
^ !C - Module Development and Review	^ C - Research - Internal
▼ Module Development/Review 01	▼ Internal Research 01
▼ Module Development/Review 02	▼ Internal Research 02
▼ Module Development/Review 03	▼ Internal Research 03
▼ Module Development/Review 04	▼ Internal Research 04
▼ Module Development/Review 05	▼ Internal Research 05
▼ Module Development/Review 06	▼ Internal Research 06

The idea is that the numbered child activities above do **not** represent a singular activity (in the same way as the named research project in the previous example) but is simply a placeholder to capture an individual's contribution to an activity that isn't named within the system.

Since the name of the activity doesn't provide the context for what the allocation is for, Line Managers will be asked to provide a brief name/description when defining the number of hours being allocated to individual staff. This can be reported/exported from AWP.

There are multiple placeholder activities because it's possible a single Academic may be contributing to more than one unlisted activity and since you cannot allocate someone to the same activity twice more opportunities are required.

The key difference for Line Managers is that because the placeholder/generic activity doesn't represent a singular activity, it isn't possible to monitor contributions from multiple academics as easily with the named approach. The focus here is more on ensuring that individual staff get their hours represented.

This is possible but will require you to produce a report and then filter to find the text which was entered in the name/description (see the steps outlined in 5.4).

The same data will be subject to review by the University to improve the listing of named/singular activities within the system in following planning cycles. You are encouraged to use the exact same text when allocating staff to the same real-life activity when allocating multiple staff to an unlisted activity.

Please reach out to the AWP Support Team if you require help with this approach.

5.3 Allocation example: Internal research

In this example a Line Manager is aware through discussion that two staff they supervise (User 1 and User 2) are each spending 50 hours on an internal research project titled 'Investigation into ABC' – a total of 100 hours.

Since this singular activity can't be imported yet, the multiple generic instances for internal research should be used. This means approaching things on an individual basis but whilst using the Allocate to Activities screens (see section 4.2).

Thinking of User 1, the Line Manager drags-and-drops them to the generic 'Internal Research 01' placeholder activity. The Line Manager then answers the relevant questions in the allocation pop-up window including the number of hours, the title/name of the activity (i.e. 'Investigation into ABC') and the funding type:

How many hours will this individual be responsible for? *

What is the title/ name? *

Please select funding type *

QR Internally Fund... ▾

Please use this area for any notes

This creates the appropriate allocation for User 1 as shown below under the child activity named Internal Research 01:

	RKE	Total
Test User01	50	50
Test User02	30	30
Test User03	30	30
Total:	110	110
Remaining:		-110

The Line Manager then repeats the process for User 2 but this time sees the following error message in a pop-up window on-screen: **“This allocation has already been created”**.

This is happening because the Line Manager (or another) has already used the 'Internal Research 01' placeholder activity to capture time against something else – and you can't allocate a staff member to an activity multiple times.

Since it's not essential to have all allocations for the real-life project under one placeholder (since its person focused) the Line Manager drags-and-drops User 2 to the generic activity named 'Internal Research 02' instead and completes the allocation for this user, inputting the same title text as before.

The Line Manager has now successfully allocated the needed time for both User 1 and User 2 onto the project, although this is across multiple placeholder activities as indicated below.

C - Research - Internal		-500 / 0
Internal Research 01		-110 / 0
	RKE.	Total
Test User01	50	
Test User02	30	
Test User03	30	
Total:		110 110
Remaining:		-110
Internal Research 02		-140 / 0
	RKE.	Total
Test User01	30	
Test User02	50	

The Line Manager can click on the pencil button next to the allocation to re-open the allocation pop-up window and see the title given to the allocation (the name of the real-life activity) and make edits as desired.

5.4 Reporting on singular activities captured as generic instances

As mentioned, a key difference using this approach is the inability to see all contributions to a real-life activity in the simple way you can with singular activities.

However, it would be possible for you as a Line Manager to see this within a downloadable CSV/spreadsheet report via the following steps:

1. Go to the AWP tab and click on the Settings/Cogs icon
2. Under Reports, select User Allocations
3. Select the relevant Year, School, data type (published or provisional) etc.
4. To the right of Additional data heading, click on the 'Show' text link
5. In the newly expanded section, go to the Allocation attributes section and select the item named "What is the title/name?" and click the dark arrow with a plus so it appears in the Selected Options window
6. Then click on the Create Report button
7. Open the CSV/spreadsheet file that has been downloaded
8. Depending on the multiple generic instances section being used, you can filter by the name of the generic activities using Column H (e.g. click all those with Internal Research in the title)
9. Next, filter the column in the report named "Attribute: What is the title/name?". If you added only one field it should be the very last column on the right. This should display a list of titles (i.e. answers Line Managers have given) or alternatively sort this column A-Z

Please note that step #9 will display the exact text-strings Line Managers have entered during the allocation process so if these were not exact, a degree of analysis may be required to group entries that do relate to the real-life activity you're searching for.

By using filtering in the column displaying the titles (including filtering by searching for specific text) you would be able to target only those you are interested in such as those highlighted in the image below:

A	B	E	H	O	R	U
Surnam	Forenan	School	Activity	RKE ho	Total al	Attribute: What is the title/ name?
User01	Test	Demo School	Internal Research 02	30	30	text
User03	Test	Demo School	Internal Research 01	30	30	text
User03	Test	Demo School	Internal Research 02	30	30	text
User04	Test	Demo School	Internal Research 02	30	30	text
User04	Test	Demo School	Internal Research 04	150	150	text
Admin4	System	Demo School	Internal Research 03	100	100	text
User01	Test	Demo School	Internal Research 01	50	50	Investigation into ABC
User02	Test	Demo School	Internal Research 02	50	50	Investigation into ABC
User02	Test	Demo School	Internal Research 01	30	30	Another unrelated activity.

Since the above detail is not immediately visible in the system, this report can help Line Managers to target specific changes if needed. For example, if there was a need to increase User 2's allocation on the internal project to 100 hours but it was difficult to find which generic activity was being used, this report clearly indicates where you would need to go to edit the allocation (i.e. Column H, and child activity named 'Internal Research 02').

6 Service Requests

6.1 Overview

Whilst ensuring there is sufficient staff hours to deliver an activity owned by your School, you may need to call upon the services of an Academic staff member outside of your School. Typically, you would not have direct access to that School's allocations screens so would be unable to action this yourself.

The AWP tool allows you to request time from an Academic elsewhere via functionality called Service Requests. It works similarly to standard allocation but creates a request for the hours which needs to be approved by the other School before the allocation is confirmed and the hours can be published.

6.2 Creation via allocate to activities screen

You will need to go to the Allocate to Activities screen, so the focus is on activities on the left-side panel. This permits the display of the Service Request button which sits immediately underneath the name of the child activity (the dark bar) but above the list of allocated staff:

	FST.	TRA.	Total
System Admin2			20
System Admin3			10
Total:	15	15	30
Remaining:			10

Upon clicking the above button, a pop-up window will appear for you to select the School in which the Academic you need belongs. You will then see a new dropdown menu for you to select the Academic by name, and then click on 'Create'.

Create service request

Select a school
Training_Eng

Select a recipient user
6, Allocator

Cancel Create

The pop-up window that follows is the same allocation window that would display if you were allocating to an Academic from your own School – complete this as required. Upon doing so you will notice that the allocation to the individual is displaying with a red version of the Service Request icon:

Module 001 - UG - 15		125 / 284		
Lectures		0 / 40		
	FST.	TRA.	Total	
System Admin2	20			
System Admin3	10			
Academic06 Test	10			
Total:		20	20	40
Remaining:				0

The red icon represents that the Service Request has been sent to the other School but has not yet been agreed to. It is likely that in making this allocation you may have already been in contact with the Line Manager of the Academic you are seeking, but if not you can get in touch to let them know you're seeking their response to a Service Request.

The example continues in the next sections which will show you how the process works, both as the creator of a Service Request but also as a responder.

6.3 Service request outbox

As a Line Manager from the School that created the Service Request in section 6.2, you would be able to see the status of all outgoing requests originating from your School and their status (Pending, Approved, or Declined).

To access the outbox click on the Allocation menu and select 'Service request outbox'. You can also use the Dashboard panel relating to Service Requests (see section 3.3.6).



In the image below, you can see the example service request for 10 hours from the 'Demo School' to the 'Training_Eng' school and that it is pending a decision:

Service request outbox

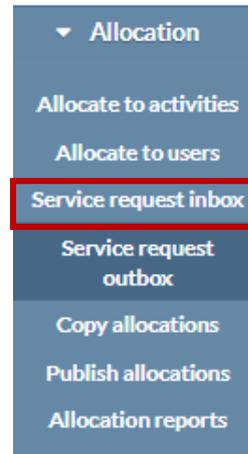
<input type="checkbox"/> <u>Allocated user</u>	<u>Source activity</u>	<u>Source parent activity</u>	<u>Target school</u>	Status	Amount allocated
<input type="checkbox"/> Test, Academic02	Lectures	Module 002 - UG - 30	Training_Sci	Pending	40
<input type="checkbox"/> Test, Academic06	Lectures	Module 001 - UG - 15	Training_Eng	Pending	10
<input type="checkbox"/> Test, Academic02	Lectures	Module 003 - UG - 45	Training_Sci	Pending	40
<input type="checkbox"/> Test, Academic01	Field Trip	Module 005 - PG - 15	Training_Sci	Declined	84
<input type="checkbox"/> Test, Academic01	Module Development/Review 02	!C - Module Development and Review	Training_Sci	Approved	9

Please note: as items are approved/declined or otherwise dealt with, a Line Manager from your School can tidy up this list by selecting the line items using the tick box and then clicking on the 'Remove selected' button that appears.

6.4 Service request inbox

As a Line Manager from the School that created the Service Request in section 6.2, you would be able to see the status of all incoming requests originating from outside of your School and their status (Pending, Approved, or Declined).

To access the inbox click on the Allocation menu and select 'Service request inbox'. You can also use the Dashboard panel relating to Service Requests (see section 3.3.6).



As a Line Manager from the School that received the request, the inbox shows the originating or source School and the amount of hours being requested. If the Line Manager is aware that this request was incoming or is standard they may be able to make a quick decision. Alternatively, they may need to reach out to the School making the request to learn more.

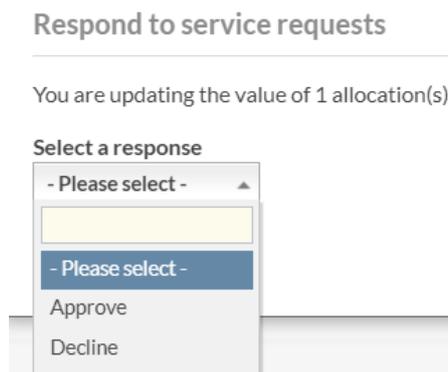
This is where a Line Manager can approve or decline a Service Request by using the tick box to select the line item(s) and then clicking on the 'Respond to selected' button:

Service request inbox

1 entry currently selected [Deselect](#)

<input checked="" type="checkbox"/> <u>Allocated user</u>	<u>Source activity</u>	<u>Source parent activity</u>	<u>Source school</u>	Status	Amount allocated
<input checked="" type="checkbox"/> Test, Academic06	Lectures	Module 001 - UG - 15	Demo School	Pending	10

A pop-up window will appear allowing the Line Manager to select a response:



In this case the Line Manager approves the request. This will change the status of the request from the perspective of the originating School's outbox as well as the target School's inbox (to say it's been approved). This locks in the allocation that was made originally which means that either party could remove the line item from the inbox or outbox with no ill effect.

6.5 Confirmation of allocation

With the Service Request approved, the red icon in the activities panel has now turned automatic black, denoting that the allocation to the user outside of the School is confirmed and can be treated in the same way as any other allocation:

Lectures		0 / 40	
	FST.	TRA.	Total
System Admin2			20
System Admin3			10
Academic06 Test			10
Total:			20 20 40
Remaining:			0

7 Copy Allocations

7.1 Overview

AWP allows Line Managers to copy allocations from one staff/user to another (or many others). Admittedly, this functionality is 'all or nothing' in the sense you cannot select individual allocations from the original user – it would be **all** their allocations that get copied.

The main use for this would therefore be in circumstances where you're happy for all allocations to be copied across.

For instance, if your School chooses to make use of 'dummy users' that represent vacant posts (see section **Error! Reference source not found.**10.4.2 for more detail) then you could workload the dummy user with all the allocations you expect the new starter to have when they join the University. When the new starter's name does appear in AWP, you can then use the copy allocations functionality to copy across the allocations from the dummy user to the real Academic, rather than replicating them manually from scratch.

7.2 How to copy allocations

To access the copy allocations functionality, use the Allocations menu at the top of the screen. On the page that follows, you will first need to select the originating user to copy allocations from (see #1 below).

The screenshot shows a web interface for copying allocations. At the top, there is a dropdown menu labeled "Select the user to copy allocations from *" with "User01, Test" selected, marked with a red circle #1. Below this is a section titled "Users to receive the copied allocations *" which contains two list boxes. The left list box, "Available Options:", contains a list of users: Admin1, System; Admin2, System; Admin3, System; Admin4, System; User01, Test; User02, Test; and User03, Test. A red circle #2 is next to the list. A dark arrow with a plus sign points from this list to the right list box, "Selected Options:", which contains "User04, Test" and is marked with a red circle #3. A light arrow with a minus sign points from the right list box back to the left. Below the list boxes are two checkboxes. The first checkbox, labeled "Replace rather than augment the target users' allocations" with a red circle #4, is unchecked. Below it is a small text note: "If this is checked, the recipient users will have all their existing allocations replaced, otherwise the new allocations will be added in addition to their existing ones." The second checkbox, labeled "Move rather than copy the allocations" with a red circle #5, is also unchecked. Below it is another small text note: "If this is checked, the allocations will be removed from the source user."

You will then need to select from the available options (#2) the staff you want to receive the copied allocations by selecting one or multiple names and clicking on the darker arrow with a plus symbol. This will make the chosen names appear in the list in #3.

If you were to run the copy allocations without selecting the options in #4 or #5, the result would be that the allocations for User01 would be **added** to the existing allocations of User04. User01 would also retain the existing allocations.

If the tick box in #4 is selected, the target user(s) existing allocations are **deleted** and **replaced** by the copied allocations. So this would be User04 having the same allocations as User01, regardless of the current allocations.

If the tick box in #5 is selected, it changes what happens to the allocations of the user that are being copied such that they get removed, so only the target user(s) have them. So this would be User04 having the set of allocations previously held by User01, but those same allocations being removed from User01.

8 Publication

8.1 Overview

As a Line Manager, you will allocate in the 'provisional' data environment making changes that are not yet visible to Academic staff (unless they are also Line Managers within your School).

To make the allocations visible to Academics they need to be published by Line Managers. This also initiates a 'workflow' that asks the Academic to agree or query their workload – responses to this are monitored in the same part of AWP to help you manage changes and (re)publication of new or edited workload.

8.2 Publish allocations screen

8.2.1 On-screen overview

You can access the 'Publish allocations' screen via the Allocation menu at the top of the page. The screen will initially display a list of all staff within the School as follows:

The screenshot shows the 'Publish allocations' interface. At the top, there is a search box (1) and a filter button (2). Below is a table with columns for Name, Employee Number, Last Published Date (3), and Action buttons (4, 5, 7). The 'Agreed?' column (8) shows a green checkmark for the first user and a red 'x' for the second. The 'Comments' column (8) shows comment icons for each user.

Name	Employee Number	Last Published Date	View allocations	Publish	Recalculate	Agreed?	Comments
User01, Test	testuser1	18/07/2022 - 18:32:56	View allocations	Publish	Recalculate	✓	Comment
User02, Test	testuser2	18/07/2022 - 18:32:45	View allocations	Publish	Recalculate	✗	Comment
User03, Test	testuser3	23/06/2022 - 09:44:20	View allocations	Incomplete	Recalculate	⚠	Comment
User04, Test	testuser4	23/06/2022 - 09:44:25	View allocations	Publish	Recalculate	⚠	Comment

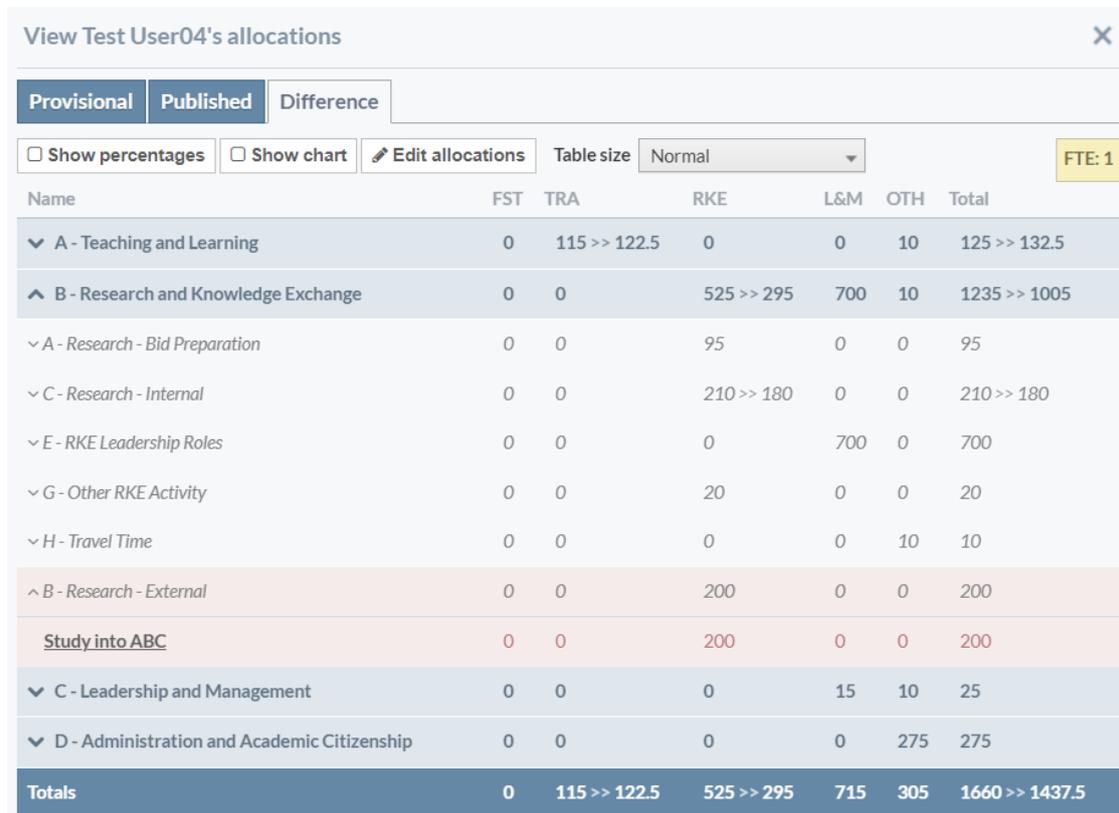
1. Search box – narrow down individual Academics within the larger list by name or ID
2. Filter – narrow down according to criteria
3. Last Published – date and time stamp of the last time workload published to the user
4. View Allocations and History – see 0
5. Recalculation – allows for recalculating allocations if variables in calcs have changed, such as the number of students having been updated
6. Publish multiple – allows you to select several staff to publish to at once
7. Publish button – allows you to publish to the individual Academic listed
8. Agreement tracker – indicates whether user has agreed or queried their workload and allows access to comments – see 8.2.3

8.2.2 View allocations (before publishing)

In the Publish allocations screen you can click on two buttons to provide you with additional context of the history or current or proposed changes you're about to make – before publishing out to the Academic:



The view allocations button will trigger a pop-up window as per the image below:



Name	FST	TRA	RKE	L&M	OTH	Total
▼ A - Teaching and Learning	0	115 >> 122.5	0	0	10	125 >> 132.5
▲ B - Research and Knowledge Exchange	0	0	525 >> 295	700	10	1235 >> 1005
▼ A - Research - Bid Preparation	0	0	95	0	0	95
▼ C - Research - Internal	0	0	210 >> 180	0	0	210 >> 180
▼ E - RKE Leadership Roles	0	0	0	700	0	700
▼ G - Other RKE Activity	0	0	20	0	0	20
▼ H - Travel Time	0	0	0	0	10	10
▲ B - Research - External	0	0	200	0	0	200
Study into ABC	0	0	200	0	0	200
▼ C - Leadership and Management	0	0	0	15	10	25
▼ D - Administration and Academic Citizenship	0	0	0	0	275	275
Totals	0	115 >> 122.5	525 >> 295	715	305	1660 >> 1437.5

The three tabs at the top-left of the window allow you to see the provisional allocations (i.e. the current state of what you've changed) as well as the published allocations (i.e. the latest version of the work plan that the Academic has access to).

Usefully, the 'Difference' tab (which is displayed in the image above) will show the difference between the other two tabs, indicating clearly where new items have been added (highlighted green) or are removed (in red) and indicating the change in values.

You can also see the allocations in terms of percentages and as charts – effectively replicating the view that the Academic can see once the publish has taken place.

For example, the image above shows several changes with the overall result that total allocated hours would go down from 1660 to 1437.5 if the publish were to go ahead. If this looks right then you could publish away from the previous screen. If not, then you can revisit the allocations (you can also use the Edit allocations button on this screen to be taken directly to the allocate to user screen).

The smaller button next to the View Allocations button on the Publish Allocations page allows you to access all previously published workload to the same level of detail as the

Academic has access. A list of date and time stamped publications will be available for selection within a pop-up window.

8.2.3 Academic perspective

Once you have published workload the Academic will be able to see the following table on their MePage. In this example it's showing the A – Teaching and Learning category expanded and individual allocations on Module 005:

The screenshot shows the 'My AWP' interface with the following elements:

- Header: My AWP
- Configuration: Year: Configuration (Change), School: Demo School (Change)
- Navigation: My workload, Named headlines, Normalised Named headlines, Graphs
- Options: Show percentages, Show chart, Table size: Normal, Download PDF, FTE: 1
- Table of workload allocations:

Name	FST	TRA	RKE	L&M	OTH	Total
^ A - Teaching and Learning	20	655.75	0	0	10	685.75
!A - Personal Tutoring	0	130	0	0	0	130
!B - Placement Support	0	412.5	0	0	0	412.5
!C - Module Development and Review	0	72	0	0	0	72
!F - Other Teaching and Learning	0	10	0	0	0	10
!G - Travel Time	0	0	0	0	10	10
^ Module 005 - PG - 15	20	31.25	0	0	0	51.25
Assessment and Feedback	0	7.5	0	0	0	7.5
Labs	20	20	0	0	0	40
d444	0	3.75	0	0	0	3.75
v B - Research and Knowledge Exchange	0	0	295	0	10	305
v C - Leadership and Management	0	0	0	152.5	10	162.5
v D - Administration and Academic Citizenship	0	0	0	0	275	275
Totals	20	655.75	295	152.5	305	1428.25

View allocation history View comments

Your workload allocation has changed. Do you agree with the workload allocated to you?

This example is a reminder to Line Managers (some of whom may receive workload plans themselves, some not) of what the Academic can see. They will be able to drill down from the Category to Parent to Child levels to see how their work plan has been allocated including the questions you answered during the allocation process. For example:

Assessment and Feedback allocation information ✕

Structure | Attributes | **Additional information**

How many students will this individual be responsible for?

15

Please use this area for any notes

The yellow-gold bar at the bottom of the screen represents the agreement workflow whereby the Academic is asked whether they agree with the plan. If they do, they get the option to leave a comment or directly submit and approve. If they don't agree, they must leave a comment and submit and query. This is what sits behind the green ticks and red crosses on the Publish Allocations page.

Guidance documentation will ask Academic staff to provide constructive feedback in the comments where possible, but they may wish to express themselves via other channels such as 1to1s or email – the intent is not for AWP to replace these.

8.2.4 Agreement tracker

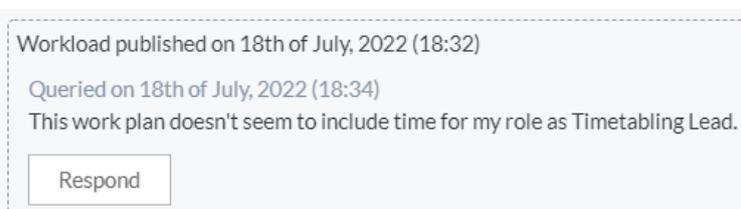
As explored in section 3.3.5, you can see the percentage of staff within the School that have agreed to their workload plans via the Agreement panel on the AWP Dashboard. As a Line Manager however, you will likely want to track the responses of your direct reports which you can do via the Publish Allocations screen.

The image below has been truncated for illustrative purposes, and shows some of the key information which can be helpful to Line Managers:

Name	Last Published Date	View allocations	🕒	Publish	Agreed?	Comments
User01, Test	18/07/2022 - 18:32:56	View allocations	🕒	Publish	✓	🗨️
User02, Test	18/07/2022 - 18:32:45	View allocations	🕒	Publish	✗	🗨️

There is the 'Agreed?' column which indicates agreed workload with a green tick and querying of workload with a red cross. The lack of either of these symbols indicates that the Academic has not responded either way (which itself may require further input outside of AWP).

Where a comment has been left you can use the icons in the Comments column to access them and the history of all other comments. For example, User 02 has queried their workload (hence the red cross) and has left constructive feedback:



If accurate, then this kind of feedback can allow a Line Manager to quickly add in the missing allocation and (re)publish again. The Line Manager could also use the 'Respond' button to let User 02 know that this has been added and everything else is otherwise as before. Hopefully, this would then lead to agreement of workload.

However, if the comment raises a more involved issue or requires further discussion then this may well take place outside of AWP (e.g. 1to1s with direct reports, emails, etc). Once there is a way forward, the Line Manager can revise allocations and republish or the Academic can 'undo' their previous response and reply differently.

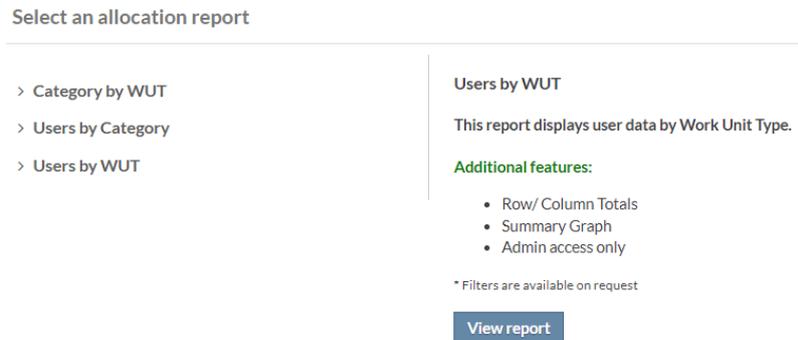
9 Reporting

There are several Allocation reports that allow you to see information on-screen (or download to CSV/spreadsheet files) to assist you in your decision-making as a Line Manager when allocating workload. There are also additional reports available via the AWP Settings area that can be set-up to export data that you may find useful for internal reporting or modelling.

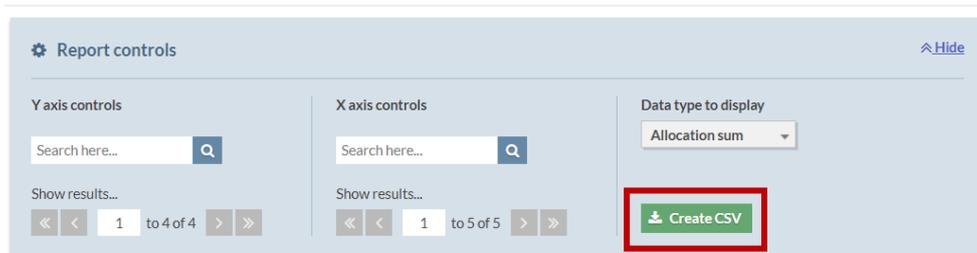
Please note that as a Line Manager you will have access to the workload data for all users within your School, not only your direct reports.

9.1 Allocation reports (on-screen)

Several on-screen reports are available from the Allocation menu at the top of the screen given your role as a Line Manager. On the report selection screen you can select an item from the list on the left and then click the View Report button on the right:



Please note that for each on-screen report you can click on 'Show' on the Report Controls bar to uncover a further 'Create CSV' button to download a spreadsheet with this data:



9.1.1 Category by Work Unit Type (WUT)

This report provides a School-level overview of the total hours allocated under each WUT within each Category. This can be useful to show the different types of effort being expended (the WUTs) such as the proportion of hours within A – Teaching and Learning allocated to FST (direct contact time) versus TRA (teaching related activity). You can hover over the graphic/chart elements to see percentages. Please note the example below is based on testing data only and has been truncated for display purposes:

<input type="checkbox"/>	Name	FST	TRA	RKE	L&M	OTH	Total	
<input type="checkbox"/>	A - Teaching and Learning	283	2329.5	0	775	80	3467.50	
<input type="checkbox"/>	B - Research and Knowledge Exchange	0	0	1720	700	80	2500.00	
<input type="checkbox"/>	C - Leadership and Management	0	0	0	360	80	440.00	
<input type="checkbox"/>	D - Administration and Academic Citizenship	0	0	0	0	2377.5	2377.50	
Total		283	2329.5	1720	1835	2617.5	8785	

9.1.2 Users by Category

This report focuses on the distribution of users' allocated hours by the four categories of work used in the AWP workload framework. This can be useful in understanding where there may be significant differences between staff in the School in the balance of different kinds of activities. For example, you may want to consider the distribution of hours under B – Research and Knowledge Exchange across staff in similar roles.

You can hover over the graphic/chart elements to see percentages of the staff members total available hours. Please note the example below is based on testing data only and has been truncated for display purposes:

Surname	Forename	A - Teaching and Learning	B - Research and Knowledge Exchange	C - Leadership and Management	D - Administration and Academic Citizenship	Total	
Admin1	System	500	125	97.5	275	997.50	
Admin2	System	264	125	25	375	789.00	
Admin3	System	498	125	55	275	953.00	
Admin4	System	247	225	25	275	772.00	
User01	Test	685.75	305	162.5	275	1428.25	
User02	Test	125	355	25	252.5	757.50	
User03	Test	822.25	235	25	375	1457.25	
User04	Test	132.5	1005	25	275	1437.50	
		3274.5	2500	440	2377.5	8592	

9.1.3 Users by Work Unit Type (WUT)

This report focuses on the distribution of users' allocated hours by the five work unit types (WUTs) used in the AWP workload framework. This can be useful in understanding where there may be significant differences between staff in the School in the balance of different types of effort. For example, you can consider the proportion of FST hours the individual has in relation to their peers.

You can hover over the graphic/chart elements to see percentages of the staff members total available hours. Please note the example below is based on testing data only and has been truncated for display purposes:

Surname	Forename	FST	TRA	RKE	L&M	OTH	Total	
Admin1	System	20	170	115	387.5	305	997.50	
Admin2	System	32	147	115	90	405	789.00	
Admin3	System	15	473	115	45	305	953.00	
Admin4	System	26	161	215	65	305	772.00	
User01	Test	20	655.75	295	152.5	305	1428.25	
User02	Test	0	115	345	15	282.5	757.50	
User03	Test	36	426.25	225	365	405	1457.25	
User04	Test	0	122.5	295	715	305	1437.50	
		149	2270.5	1720	1835	2617.5	8592	

9.2 Other AWP reports

The other reports available to you will be accessible via the AWP Settings button which is to the right of the Allocation menu, with multiple cogs icon. The following screen lists the available reports as follows:

9.2.1 Download workload PDFs

Academic staff will have the option of downloading their published workload plan via their MePage. This auto-expands all elements within the workload table (see example image in 8.2.3) and includes the allocations in hours and as a percentage of total available hours.

This report (or rather download functionality) allows a Line Manager to download the same PDFs for staff within the School.

Please note: the functionality is limited in that you can only download the PDFs for all staff rather than for specific individuals. The download will include a zip file within individual PDFs however.

9.2.2 User allocations report

This report provides a listing of every allocation (according to the criteria selected) of an activity to user individually within a spreadsheet/CSV file. The image below has been truncated for display purposes, and shows the individual allocations for User 01 as well as a total at the bottom:

Surname	Fore	School	FTE	Activity	FST ho	TRA ho	RKE ho	L&M hc	OTH ho	Total	Total av	Percent
User01	Test	Demo School	1	Travel Time	-	-	-	-	10	10		
User01	Test	Demo School	1	Other Teaching and Learning	-	10	-	-	-	10		
User01	Test	Demo School	1	Personal Tutoring	-	130	-	-	-	130		
User01	Test	Demo School	1	Bid Preparation 01	-	-	50	-	-	50		
User01	Test	Demo School	1	Bid Preparation 02	-	-	45	-	-	45		
User01	Test	Demo School	1	Internal Research 01	-	-	50	-	-	50		
User01	Test	Demo School	1	Internal Research 02	-	-	30	-	-	30		
User01	Test	Demo School	1	Other Research and Knowledge	-	-	20	-	-	20		
User01	Test	Demo School	1	Travel Time	-	-	-	-	10	10		
User01	Test	Demo School	1	Other Leadership and Management	-	-	-	15	-	15		
User01	Test	Demo School	1	Travel Time	-	-	-	-	10	10		
User01	Test	Demo School	1	RSA Allowance	-	-	-	-	175	175		
User01	Test	Demo School	1	Administration (contracted TRA)	-	-	-	-	70	70		
User01	Test	Demo School	1	Interviewing Student Applicant	-	-	-	-	5	5		
User01	Test	Demo School	1	Other Admin and Academic Citi	-	-	-	-	15	15		
User01	Test	Demo School	1	Travel Time	-	-	-	-	10	10		
User01	Test	Demo School	1	Assessment and Feedback	-	7.5	-	-	-	7.5		
User01	Test	Demo School	1	Labs	20	20	-	-	-	40		
User01	Test	Demo School	1	Placement 02	-	60	-	-	-	60		
User01	Test	Demo School	1	Placement 01	-	352.5	-	-	-	352.5		
User01	Test	Demo School	1	Module Development/Review	-	72	-	-	-	72		
User01	Test	Demo School	1	Link Tutor 01	-	-	-	67.5	-	67.5		
User01	Test	Demo School	1	Timetabling Lead	-	-	-	70	-	70		
User01	Test	Demo School	1	d444	-	3.75	-	-	-	3.75		
User01	Test	Demo School	1	Case Study of Greenwich Mariti	-	-	100	-	-	100		
User01	Test	Demo School	1	> TOTALS	20	655.75	295	152.5	305	1428.25	1505	94.90%

When selecting criteria for the report it is also possible to omit the total line per user, or run a report of only the totals (under the 'Information to display' dropdown). Under 'Additional data' section (need to click 'Show' to reveal the options) it is also possible to select other activity or allocation related data in order to perform more detailed analyses.

9.2.3 Workload agreement status

This report provides a data export of information relating to whether staff have agreed, queried, or not yet responded to their published workload. It covers the same material as described in section 8 (Publishing). The report shows the date last published, the agreement status and the date of their response (if applicable) as well as the latest comment and overview of their allocation totals:

Employee number	Surname	Forename	School	School role	Last published date	Agreement status	Response date	Latest comment	Annual FTE	Total hours	Allocated hours	Allocated percentage
1234	Admin1	System	Demo School	Academic	23/06/2022 - 09:43:57	-	-	-	1	1505	1322.5	87.87%
2345	Admin2	System	Demo School	Academic	23/06/2022 - 09:44:01	-	-	-	1	1505	1169	77.67%
3456	Admin3	System	Demo School	Academic	23/06/2022 - 09:44:05	-	-	-	1	1505	1308	86.91%
4567	Admin4	System	Demo School	Academic	23/06/2022 - 09:44:09	-	-	-	1	1505	1332	88.50%
testuser1	User01	Test	Demo School	Academic	18/07/2022 - 18:32:56	Approved	18/07/2022 18:33		1	1505	1428.25	94.90%
testuser2	User02	Test	Demo School	Academic	18/07/2022 - 18:32:45	Declined	18/07/2022 18:34	This work pla	0.5	752.5	757.5	100.66%
testuser3	User03	Test	Demo School	Academic	23/06/2022 - 09:44:20	-	-	-	1	1505	1278	84.92%
testuser4	User04	Test	Demo School	Academic	23/06/2022 - 09:44:25	-	-	-	1	1505	1660	110.30%

This report can be useful for individual Line Managers to direct their efforts in reaching out to staff, as well as School management in monitoring engagement with the workload allocation process.

9.2.4 Allocation percentage report

This report is on-screen and shows the Line Manager a list of staff within the School colour coded according to whether the individual is correctly allocated (between 85-100%, green), over allocated (above 100%, red) or under allocated (below 85%, yellow). The figures displayed show the hours available for the individual (based on FTE), the hours allocated, and the percentage:

<u>Surname</u> ▾	<u>Forename</u>	<u>Employee number</u>	<u>Hours available</u>	<u>Hours allocated</u>	<u>Percent allocated</u>
 Admin1	System	1234	1505	1322.5	87.87
 Admin2	System	2345	1505	1169	77.67
 Admin3	System	3456	1505	1308	86.91
 Admin4	System	4567	1505	1332	88.5
 User01	Test	testuser1	1505	1428.25	94.9
 User02	Test	testuser2	752.5	757.5	100.66
 User03	Test	testuser3	1505	1278	84.92
 User04	Test	testuser4	1505	1660	110.3

You can use the Filter button to adjust the report focus by showing staff with an allocation percentage below/above/between a particular range, such as all of those over allocated.

Please note: you can get to this report view more directly by clicking on the relevant segment of the Staff donut chart on the AWP Dashboard (see 3.3.3).

10 Other configuration details

The following sections include further information to help Line Managers in using the AWP tool that relate more to decisions made by the University during the configuration of the tool. These sections may expand over time in response to feedback from Line Managers.

10.1 Modules with multiple runs

Modules will appear once in the list of activities with category A – Teaching and Learning regardless of whether they are delivered within separate runs, such as having a September and January cohort. The anticipated hours of delivery as well as the estimated preparation time will be combined for all runs within a singular parent module, and relevant child activities. The intention would be to plan for the multiple runs together.

Please note: feedback during the transition year on how this works would be valuable to the AWP Support Team.

10.2 Shared activities on multiple modules

It is understood that on occasion activities will be delivered in such a way that students from multiple modules will take part. Whilst the activity may relate to X number of modules it can only be delivered once, and so it shouldn't be allocated within each of the participating modules.

Following the approach of Timetabling, the activity/activities that are shared will be linked to **only one** of the participating modules which can then be allocated accordingly. This avoids the arbitrary split of the shared activity hours equally across X modules, requiring multiple allocations.

For example, in modules PHYE1091 and PHYE1097 there are 40 hours of “Practicals” that are jointly delivered. The 40 hours will become part of the resource bucket (see 4.2.3) for PHYE1091 only – not PHYE1097. The Line Manager would be able to find the Practicals activity (or the larger number of hours if module-specific practicals were also taking place) within PHYE1091.

Line Managers will be provided with additional documentation to clarify which modules are being used to contain the jointly delivered hours.

10.3 Allocation overrides

A number of activities have been identified within the AWP Guidance Doc (and AWP Framework Quick Reference Guide) as possessing an ‘override’ mechanism for Line Managers to use.

An override will allow the Line Manager to bypass the ‘allocation calculation’ and allow you to input a different overall allocation for the activity. There is also a requirement to provide a rationale for how you arrived at the new value within a text box. This allows for a degree of flexibility during the transition year, the content of which can be reviewed to better inform a more structured approach in the next planning cycle.

For example, Programme Leadership has an allocation calculation that applies a fixed element of 200 hours and then adds 0.5 hours per student. If there were 200 students, then this would be 300 hours – $200 + (200 * 0.5) = 200 + 100 = 300$.

If there was a significant rationale for increasing the allocation beyond the 300 hours, then the Line Manager would be able to edit the allocation within the pop-up screen and make use of an override switch. For example:

Do you wish to override the tariff? *

YES

If you have chosen to override, how many hours should be allocated?

400

If you have chosen to override, please provide a rationale? [REQUIRED]

Given the circumstances of XYZ, in addition to the fixed 200 hrs a per student rate of 1 hr per student is being used.

Upon saving the allocation details, the allocated hours would then change from 300 to 400 hours. The structure of the override questions above (yes/no switch, override value, and rationale text box) will be consistent for all activities where this is available.

10.4 Atypical staff, vacancies, and ‘dummy’ users

10.4.1 Atypical staff

At a minimum, staff records will exist in AWP for those staff on academic contracts who are expected to be in receipt of a workload plan and to engage in the back-and-forth with Line Managers (or nominees) and to eventually ‘agree’ to their workload.

However, those staff may not be the only ones who contribute to the delivery of the activities that are included within the academic workload framework. Additional hours may be contributed by staff employed on a part-time hourly basis which may or may not also include visiting staff or postgraduate research students who teach.

It is possible to add in ‘users’ into your School to represent either individuals or generic ‘pots’ of contribution to allow you and fellow Line Managers to effectively workload activities without those individuals/groups being part of the general AWP framework.

For example, within the list of users/staff seen in the Allocate to Activities (or Allocate to Users) screen the University could add in a ‘dummy user’ named “HPLs” which is then marked within the system as ‘Atypical’ so they don’t appear as a person within on-screen reports in the same way as named staff. When allocating to ensure activities have enough staff hours to be delivered, where HPLs are being used the allocated user would be this generic one.

The AWP Support team will be reaching out to Schools to discuss the most effective way to manage allocations from such contributors during the transition year. Discussions can then take place based on feedback about the approach in the next planning cycle.

10.4.2 Staff Vacancies

Similar to the above, the ‘dummy user’ approach can be used to help Line Managers workload staff who have not even been appointed yet. Having a dummy user added to the School representing the new post (e.g. Vacancy 01, or Vacancy Ref:12345 as per the job advert) can be used in exactly the same way as any named staff, so planning of future activity can be done with the eventual person being there in the year ahead.

When the time comes that the post has been appointed to – and the AWP system has been updated with HR data enabling visibility of the actual named person – the allocations from the vacancy user can be copied across entirely to the named person. This would save duplication of effort in replicating the allocations for the new person upon their arrival.

If this would be of benefit you can reach out to the AWP Support Team with your requests.