

**Academic Workforce Management Tool**

**User Manual**

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# Introduction

## Background

Triggered by the new service model there is a recognised need to allocate academic personnel, both Online Facilitators (OLFs) and Subject Co-ordinators (SC) to subjects offered in the global timetable. The business describes the key business objective as:

An ability to co-ordinate and provide a means of allocating personnel to the teaching of subjects. A way to plan and predict subject / class numbers against our resource pool.



The tool will record what subjects an OLF can theoretically teach and when the OLF is available to teach.

It will then cross reference the OLF information against the global timetable and shortlist potential matches by using the list of personnel and comparing it to their qualifications and availability.

Online Facilitators and Subject Co-ordinators will then be allocated to classes.

The tool will support the capture of feedback on OLF performance, and will support regulatory reporting.

The tool is used by less than 5 people.

## Relationship with other systems

A key challenge when allocating OLFs to classes is to predict how many students will be enrolled in the subject.

Ultimately it is the final number of students who enroll that determines the number of classes, however OLFs need to be contracted prior to the admin date for the subject and many student leave their enrolments to the last minute.

The tool will show the confirmed enrolments for each subject.

The tool has potential to read enrolments that have been proposed by the Student Timetable tool. Not all of these will become enrolments, but it could be a useful indicator. Note that currently the Student Timetable tool is writing this information to a database table, but this is not being used by AWFM.

# Hints and Tips

## Cut & paste

When entering large amounts of text, such as staff experience or qualifications you will probably want to cut & paste from another source document. If the other document is a spreadsheet you may find that cut & paste appears not to work.

After copying data from a spreadsheet field, you must press Esc to exit the field before attempting to paste into the tool. Otherwise Excel thinks you are still in the cell in the spreadsheet and paste will not be available in the tool.

## Screen resolution

The Academic Workforce management tool has been optimized for a screen resolution of 1920 x 1080. The tool will work fine on a screen resolution of 1600 x 900, but will have issues for any screen resolution lower than that.

This means that if you are working on a laptop, you might have to use an external screen if your laptop does not support the required screen resolution.

## Excel locks

The Academic Workforce management tool has been developed on Excel and so inherits some locking behavior from Excel. It is possible for the tool to become locked if the tool is being used by multiple people who also have other spreadsheets open. The only way to fix the issue is to get all users of the tool to exit the tool, and to exit all spreadsheets that they have open.  This releases all locks.

The vulnerability occurs because Microsoft only runs one copy of Excel code, irrespective of how many spreadsheets you have open.  What Excel considers to be the primary spreadsheet can change over time as spreadsheets are opened and closed.  This can cause locks to seem to move from one spreadsheet to another.

Although the Academic Workforce Management tool has this vulnerability it will not be pronounced for two reasons.  Firstly, it uses SQL databases instead of spreadsheets for its data, and secondly because it will only be used by a maximum of two or three people.

# Defining the Global Timetable and Personnel

## Courses, subjects and terms

The easiest way to define courses, subjects & terms is to first define the subjects. Next define the course and add the subjects to the course. Note that a subject could be part of multiple courses.

Note that from the perspective of this tool, a course is might be better described as a ‘study model’, rather than an academic course. So even though the MBA 4 week model is the same academic course as the MBA 7 week model, they will be entered as separate courses in the tool as they run with different timetables and subjects.

In a similar way, if a Graduate Diploma of Management was run as a separate academic course, sharing some of the same subjects as the MBA, it would only need to be added if it ran to its own timetable. If it shared subject instances with the MBA it would not be needed in this tool as the subject instances and their OLFs would be managed via the MBA timetable.

## Personnel

The new staff function allows you to enter basic details about staff and OLFs.

The ‘campus’ field is used to differentiate between internal staff and external people who are contracted in for a role. The’ work deed’ and ‘AIB induction’ fields are only relevant for external personnel.

### Term Availability

Term availability defines the degree of availability for a person for a term. A person can be set as available 1, 2 or 3, which denotes how many classes they can take for a term. The system will only allow staff to be selected if they are available for that term and have unused capacity.

### Subjects

The ‘subjects’ tab defines which subjects and roles a person is approved for. “Rank” can be used to indicate the order of preference for a person. “Average feedback’ is set by the system as the average of the feedback for this subject received for all of the classes they have taken for this subject. “Justification” is an articulation of why this person is suitable for this role for this subject, and is used by the TEQSA report.

The system will only allow staff to be selected if they have been approved for that subject / role combination.

### Qualifications

Each qualification for a person needs to be entered separately. Enter a digit (1, 2, 3) in the ‘qualification rank’ field to set the order in which qualifications will appear in the TEQSA report.

### Experience

Each experience for a person needs to be entered separately. Enter a digit (1, 2, 3) in the ‘experience rank’ field to set the order in which experience entries will appear in the TEQSA report.

### Documentation

The documentation tab can be used to store documents, photos and files associated with a person. When you view a file it is copied from of the database to the document folder. For security, it can be deleted from the folder when you are finished with it.

# Analysis of a term

When you are ready to start looking at staffing for a new term, start with the “Estimate Staff Levels” function.

## Estimate staff levels

Select ‘New Prediction”, and then the course, term and subject, thus defining the subject instance. Only the subjects for that term will be available.

The system will access enrolment data and populate the number of actual enrolments. The date this is was obtained is shown so you will know if you wish to obtain more recent enrolment information.

Enter your estimate of the cohort for this subject instance. Depending on the source of your information, you may wish to apply a variance factor.

At this early stage you would normally leave the class size defaults as they are.

When you select “Confirm” the system will calculate the number of classes that are required, based on your estimate of proposed enrolments.

### Altering estimates

If you wish to alter your estimates, double click on the subject on the top half of the screen. This will allow you to re-estimate the enrolments, or to adjust class sizes to obtain a better ‘fit’.

This time when you select “Confirm” you will be shown the old view of the classes for the subject and the proposed new view. You can move staff from the old view to the new view, retaining their contract details.

When you “Save” the old version will be discarded and the new version will be saved. If you are unsure you can “Return” and the old version will be retained.

This function allows you to adjust staff and class sizes to obtain a best fit for the subject. Typically, you would do this relatively late in the enrolment period when you are sure of the numbers.

## Provisioning a subject

When you double click a subject in the lower half of the ‘estimate staff levels’ screen, you will be shown the ‘Subject Staff Provision’ screen. This screen shows you each of the classes estimated for this subject and the class sizes.

To provision a class (select a person for that class), double click on the class you wish to provision. The “Update Person Provision” screen will be displayed. Here you can select the person you wish to use for this class / role combination. Only available people with approval for this subject will be displayed. You can use either the staff drop-down, or the select staff button, which provides additional information on candidates in the ‘pool’.

When you select a person for this class, you should also update their ‘work instruction’ and ‘subject access’ fields.

The system will only consider a person to be ‘contracted’ if their work instruction is ‘Sent’ or ‘Received’.

When you save, you will be returned to the provisioning screen and you can see that the person has now been allocated to that class.

## System warnings

Once a prediction has been generated for a subject instance the system will check the status of provisioning for the subject and issues various warnings.

You will be warned if not all subject coordinators have been ‘contracted’ and if not all OLFs have been ‘contracted’.

A warning will be issued if there are not sufficient staff in the pool for a subject. A pool is the group of staff who are available for that term and are approved for that subject.

You will also be warned if provisioning is incomplete and the ‘Personnel Deadline’ is less than two weeks away.

If provisioning is complete the subject code will be shown in Green.

## Updating confirmed enrolments

As you get closer to the personnel deadline, you will want to keep track of how many student have actually enrolled. Use the “Update Confirmed Enrolments” button to obtain updated actual enrolment figures.

This may prompt you to adjust the number of classes by altering the estimates for the subject as described above.

## After the term is completed

After the term is completed and you have the student survey results, you can update each allocated person with the results of their class.

View the provisioning screen for the subject and select the first class by double clicking on it. This will display the ‘Update Person Provision’ screen.

Enter the date the assessments were received back from the OLF, the actual class size and the class feedback score. You can also enter any comments that may be appropriate.

This provides a record of how that person performed for that class and will be useful when performing provisioning in the future. These results may prompt you to adjust the ranking for this person’s subject / role approval.

# Reporting capabilities

## TEQSA Staff Report

The TEQSA staff report is intended to extract a report of all staff allocated to classes for a term. The resulting excel report contains the required information (if it has been entered into the system) and only then requires cosmetic formatting before being ready for submission.

## Staff history report

The staff provision history report is designed to show all classes that have been taken by a person. The objective is to provide supporting information when discussing a person’s performance.

## Subject staff provision report

The subject staff provision report is an export of the subject staff provision screen. This function is designed to show all of the classes for all subjects in a term, and who have been allocated to each class.

When a new term is being planned, it is expected that all subjects for the term would be set up with enrolment predictions. This would generate the proposed number of classes.

Before anybody is allocated for the new term the subject staff provision screen shows all of the classes that need to be allocated. This is the staffing requirement and the printed version of the screen can be used when meeting to plan staffing allocations.

## Staff term availability report

The staff term availability report was designed to show all staff who have availability for a term. The report also shows what subjects the person is approved for and their qualifications and experience.

This report was designed to work in conjunction with the subject staff provision report. One shows the requirement, the other shows the pool of available staff.

In a planning meeting the pool of available staff can be allocated to the predicted number of classes for the subjects in the term.

## Staff approved report

The staff approved report is similar in concept to the staff term availability report, except it shows all staff and the subjects for with they are approved. The report also shows term availability, qualifications and experience.

When planning staffing it is envisioned that this report would be used to identify staff who are approved for a subject, but not currently available. If staffing is tight, this would be used to identify staff who can be approached to see if they might be able to be available.

## Subject history report

The subject history is designed to show previous instances of a subject so you can see how many students were expected and how many OLFs were engaged. This may help you to predict the expected enrolments for an upcoming subject instance.

# Appendix A – AWFM Data Model

