

# Workload Reporting System (WRS) Guidance

The primary purpose of the WRS is to report the distribution of work activities across our academic community. This documentation is designed to guide you through using the WRS.

What is the WRS? .....	2
Workload Reporting System .....	2
Why do we need the WRS? .....	2
Benefits of the WRS.....	2
Glossary .....	3
Key Points about the System .....	4
Summary page.....	4
Time period .....	4
Saving and submitting your entries .....	4
Accessing your entries .....	4
Submitted Hours Alert .....	5
Data boxes .....	5
Auto log out.....	6
Help .....	6
Where the pre-populated data comes from.....	6
Tour of the system .....	7
Logging In .....	7
Landing Page.....	7
Initial Display .....	7
Teaching and Assessment.....	9
Research & Innovation .....	13
Management, Admin, & Citizenship.....	15
Submit and Mark as complete.....	17

## What is the WRS?

### Workload Reporting System

The WRS will be used to:

- Establish an equitable and transparent spread of workload across the Faculty.
- Ensure that an individual's balance of activities is appropriate.
- Better inform the Conversations and Priorities process.

### Why do we need the WRS?

The University Workload Planning Policy requires the Faculty to ensure its Unit Leads have robust mechanisms in place to collect and monitor data relating to academic workloads.

### Benefits of the WRS

- Workload planning will be a more transparent, equitable and collaborative process.
- More informed Conversations and Priorities (was PDR) will lead to improved support around career development.
- We will be better placed to identify and support staff wellbeing issues.
- It will allow Equality Diversity and Inclusion considerations to be part of workload planning.

You can find more information about the development of the WRS on the [project sharepoint page](#).

## Glossary

Each Activity has a Unit and this could be the number of contact hours, the number of scripts, the number of projects etc.

Tariff: After consultation with key stakeholders for all academic units, some activities have been allocated the number of hours it would generally take to complete the activity. This is the Tariff.

Calculated Hours: This is the Unit x the Tariff

Submitted Hours: The hours you have actually spent on delivering an activity. Where there is a Tariff, the system will suggest the Calculated Hours but you can edit these up or down. Where the system holds roll over data, this will appear in the Submitted Hours box. The hours you submit are limited to a maximum pre-defined by the system or up to 110% of Calculated Hours when there is a tariff.

Baseline: All academic staff have been given an allocation of 180 hours as a baseline for scholarship, research and administration that is core to all individuals. This is the allocation for full time staff. The baseline cannot be adjusted upwards. If you are part-time, please pro-rata the submitted hours. Staff who are in the 1st or 2nd year of their employment in the Faculty are given an allowance of an extra 150 hours or 100 hrs respectively as recognition of the time it takes to learn about a new role.

**Baseline activities include : paper reviewing, writing papers, completion of training, ethics applications, license applications and renewals, staff recruitment, peer grant reviewer, email and other general correspondence.**

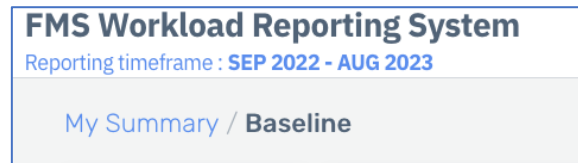
Time Frame: All data entered is for previous academic year which runs from 1st September to 31st August.

Job Share %: In the Management, Admin and Citizenship section of the WRS, you are given the opportunity to record if you share a particular role. For example, the role of Director of Education in a school has a tariff of 700 hours. If you are sharing the role with someone else 50:50, mark your Job Share % as 50% and your Calculated Hours will take this into account.

## Key Points about the System

### Summary page

The Workload Summary page is where you can access the four sections of the WRS to review and edit your data. You can always return to the Workload Summary page via the link in the top left of your screen or by clicking on the breadcrumb option 'My Summary'.



### Time period

The time period the WRS covers is displayed at all times in the second line of the site header.

### Saving and submitting your entries

You **MUST always** save your entries by clicking on the **Save Form button** in the top right corner of the form.

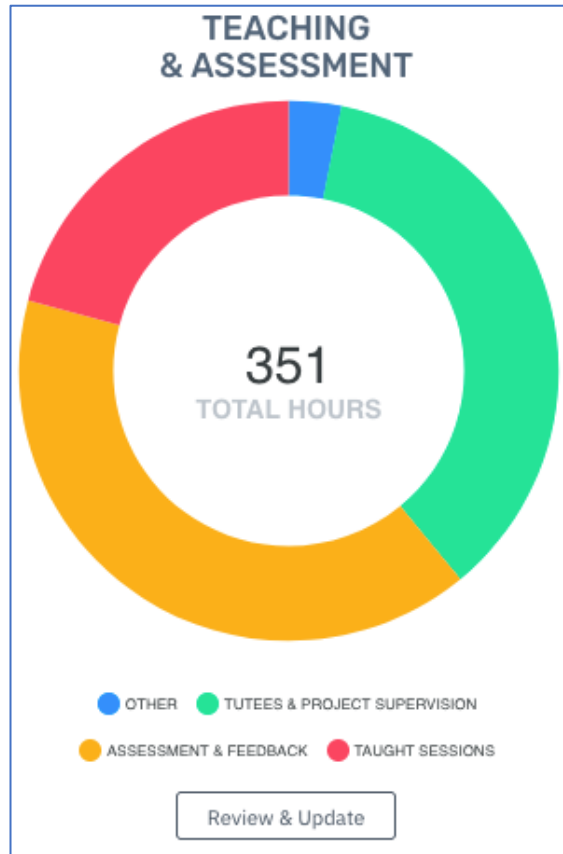
If an entry is incomplete when you press Save Form, an alert will ask you to complete and highlight where there is missing data.

Once you have completed saved all of your entries, you must click the Submit and Mark as complete button on the Summary page.

This is the only way to submit your work.

### Accessing your entries

To access and edit a section, select the **Review & Update button** located at the bottom of the section card.



The Contents List on the left-hand side of the screen for each section can help you navigate to activities within that section.

## Submitted Hours Alert

**Submitted Hours Alert:** If you manually enter more hours than the max allowed or more than 110% of the Calculated Hours box, then a yellow alert will appear in the top left-hand corner of the Submitted Hours box.

Clinical Activities (Newcastle) ⓘ			
NO OF PAS ⓘ	THE TARIFF ⓘ	CALCULATED HOURS ⓘ	SUBMITTED HOURS ⓘ
2	x175	350.00	385

## Data boxes

Data boxes are colour-coded as follows:

- White boxes you can enter data into.
- Orange boxes cannot be edited as they contain the assigned tariff for the activity
- Grey boxes cannot be edited as contain hours calculated based on Unit x Tariff.

## Auto log out

You will be logged out of the system after 2 hours inactivity and you will need to log in again to continue. If you are logged out before you save your data you will have to re-enter it. Remember to save as you are working through.

## Help

Need Help? Click on the Help icon in the upper right corner of the screen. Fill out the form and we will get back to you as soon as possible.



## Where the pre-populated data comes from

The pre-populated data can come from a variety of University systems.

### *Roll over data*

Where possible, the data you submitted in the previous WRS reporting period will be rolled over and visible in the Submitted Hours box.

If the rolled over data is no longer relevant (i.e. you have changed roles and responsibilities since the last period), use the delete button to remove it from your entry.

If the rolled over is no longer accurate you can edit the Submitted Hours box.

Rolled over data has been adjusted according to the new limits on Submitted Hours. See definition of Submitted Hours in Glossary above.

### *Baseline & Clinical Activity*

Baseline & Clinical Activity: SAP

### Teaching & Assessment

Module reporting: SAP

Tutees & Project Supervision: SAP and FMS Projects Database

### Research and Innovation

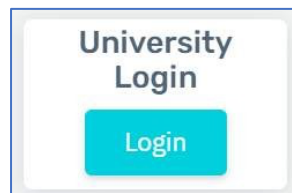
Awards and Applications: NuProjects

PhD/MD student supervision and progression: PGR CoP

## Tour of the system

### Logging In

Begin by logging into the WRS using your university credentials.



### Landing Page

When you open WRS, you will be presented with the Workload Summary landing page. This page shows an interactive summary of your workload details. It is divided into four sections:

- Baseline & Clinical Activity
- Teaching & Assessment
- Research & Innovation
- Management, Admin, & Citizenship

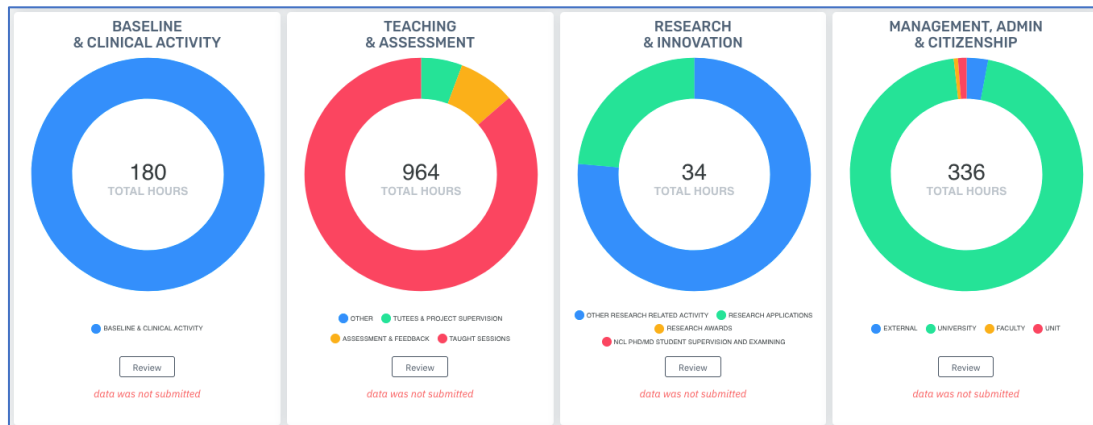
### Initial Display

Initially, your landing page will look like one of the following:

#### Unpopulated



## Populated



Your landing page will update as you work through the system and save your entries.



## Teaching and Assessment

### Baseline & Clinical Activity

In this section, you will see the standard Scholarship/Research baseline. This baseline is to carry out scholarship, research and administrative activity that is core to all individual roles. The baseline cannot be increased but you are asked to pro-rata the submitted hours if you are part-time. The baseline will automatically include standard extra hours for anyone who is in the 1<sup>st</sup> or 2<sup>nd</sup> year of their contract during the reporting period.

In this section you can also indicate the following:

- You have taken a sabbatical
- You deliver clinical activities where the standard PA is four hours for UK-based staff. For NUMed please record hours per month.

### Teaching and Assessment

Teaching and Assessment includes these sub-sections:

- Module Based Teaching
- Non-Modular/Programme Based Teaching
- Other reporting
- Archived

#### *Module Based Teaching*

This section is pre-populated with the modules the University holds for you on Business Warehouse.

You will see the module name, number of credits, number of students number of hours.

If you are no longer associated with this module, delete it using the Trash Can button. Otherwise, edit and enter data for each of your modules via the Edit button.

#### [Add Teaching and Assessment Data](#)

Teaching and Assessment data is divided into the following sub-sections for each module:

#### **Taught Sessions**

- Synchronous/Timetabled
- Non Synchronous and Recorded content

- Module Leader

## Assessment and Feedback

- In-course assessment
- Exams

For each module click on the edit button and check or enter data in all of the relevant fields. Each activity will require a different unit indicated by the red arrow in the graphic below (e.g. number of contact hours, number of scripts, number of MCQs etc.). The WRS will then show the Calculated Hours based on the assigned tariff. You then have the opportunity to enter your actual hours which can be more or less than the Calculated Hours.

The screenshot displays a form with four sections for data entry:

- Marking and feedback of in-course standard essays or reports:** NO OF SCRIPTS MARKED AS FIRST MARKER (input: 0), THE TARIFF (x0.5), CALCULATED HOURS (0.00), SUBMITTED HOURS (input: 0).
- Moderation of in-course standard essays or reports:** NO OF SCRIPTS MODERATED (input: 0), THE TARIFF (x0.25), CALCULATED HOURS (0.00), SUBMITTED HOURS (input: 0).
- Marking and feedback alternative forms of assessments (Posters/oral presentations/OSCE/MOSLER/other):** CONTACT HOURS (input: 0), SUBMITTED HOURS (input: 0).
- Moderation of MCQ papers:** NUMBER HOURS (input: 0), SUBMITTED HOURS (input: 0).

Once you have entered all of the data for your module, you need to save it. Select the Save Form button in the upper right corner of the page (you may need to scroll up).

## Add a Module

If a module is missing, you can add it to your record by selecting the drop-down arrow to the left of the Add new module button. Start typing the name of the module or case you are looking for and select the correct title. With the module selected, press the Add new module button. When you add a new module, the WRS will take you straight to the edit screen to add Teaching and Assessment data.

The screenshot shows the 'Add new module' button with a red arrow pointing to a small drop-down arrow on its left. Below the button, a search box contains the text 'case' and a list of module titles is displayed:

- Case 1 [MED1105]
- Case 1 [MED1205]
- Case 1 [MED6105]
- Case 10 [MED1114]
- Case 10 [MED1214]
- Case 11 [MED1115]

At the bottom of the screen, there are labels for 'NO SESSIONS', 'THE TARIFF', 'INDICATIVE HOURS', and 'SUBMITTED HOURS'.

### *Non-Modular/Programme Based Teaching*

This section is not pre-populated. Using the same guidelines as above for Module reporting, add in any non-modular programmes you contribute to and then enter the details in the following sub-sections:

#### **Taught Sessions**

- Synchronous/Timetabled
- Non Synchronous and Recorded content
- Module Leader

#### **Assessment and Feedback**

- In-course assessment
- Exams

Once you have entered all of the data for your programme, you need to save it. Select the Save Form button in the upper right corner of the page (you may need to scroll up).

### *Other Reporting*

This sub-section covers activities relating to

- Tutees and UG/PG projects
- Other.

By clicking on the EDIT button against each activity, you can see the data that is held for you. For each line check or enter data in all of the relevant fields.

Under Other, you will be able to add free text on any other reporting activities you do that haven't been included, along with the number of Submitted Hours.

### *Archived*

If you delete a module it will be moved to this Sub-Section. If you deleted it in error you can move it back to your list of modules without having to re-enter your data.

## Saving Teaching & Assessment

Once you have completed all sub-sections, you must save the form. You can do this by pressing the Save Form button in the upper right corner of the screen. You will then be redirected to the WRS Summary page.

## Research & Innovation

Research & Innovation includes these sub-sections:

- PhD/MD student supervision and examining
- Research awards
- Research applications
- Other research related activity

### PhD/MD student supervision and examining

Data on the number of students supervised and progression panels involved in during the reporting period is populated from Business Warehouse. You will need to enter how many examinations you have contributed to. The WRS will calculate the number of hours and if your actual hours were more or less, enter this in the Submitted Hours box.

### Research Awards (active)

Awards that are showing as active during the reporting period are pre-populated from NuProjects. Enter the number of hours worked on this award during the reporting period in the Submitted Hours box. This should include supervision, meetings, research activity and hours spent writing application if this was done during reporting timeframe.

If there are awards missing, please add the details and enter how many hours you have worked in the Submitted Hours box.

### Research Applications (submitted/unfunded)

Applications that are showing as created during the reporting period are pre-populated from NuProjects. It will only include applications that were submitted and not successful or pending outcome. Calculated Hours are based on the length of proposed research project and your status as either PI/COI. If your actual time spent on writing the application was more or less, enter in the Submitted Hours box. If you submitted an application that was successful during this period, include the hours worked on the application in the award entry in the Research Awards Section.

If there are applications missing, please add details and enter how many hours you have worked in the Submitted Hours box.

## Other research related activity

Here you can enter any other Research related activity that you may have undertaken. The activities include:

- Spinouts
- Staff supervision
- Engagement and impact generation
- Research Administration

## Saving Research & Innovation

Once you have completed all sub-sections, you must save the form. You can do this by pressing the Save Form button in the upper right corner of the screen. You will then be redirected to the WRS Summary page.

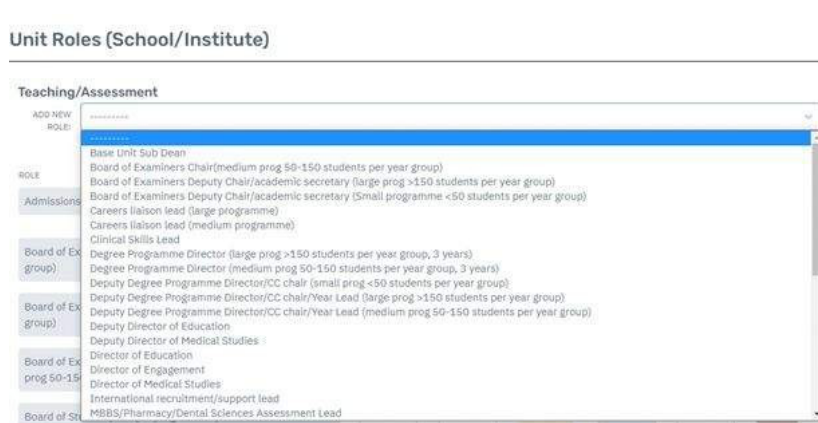
## Management, Admin, & Citizenship

This section will ask you about roles you undertake at the following levels:

- Unit
- Faculty
- University
- External/Other

Under each of these levels, you will be asked to select the roles you undertake to contribute towards Learning & Teaching, Research & Innovation and general Citizenship.

Use the drop-down list to find and select roles you undertake. Choose one role at a time and it will appear in your personal selection list.



As well as the Tariff, Calculated Hours and Submitted Hours boxes to complete there are two new ones; Job Share % and How Many Times. If you share a particular role with another member of staff, enter the % of the role you deliver. For example, the role of Director of Education in a school has a tariff of 700 hours. If you are sharing the role with someone else 50:50, mark your Job Share % as 50% and your Calculated Hours will take this into account.

How Many Times box is used to record multiples of a role. The default is 1. If you do the role twice, for example chair on two different programmes, then the value can be increased. The only exception to this is for the MBBS Case Lead role which asks for the total number of days for that activity rather than how many times that specific role has been undertaken.

To delete a role, select the trash can button to the right of the role.

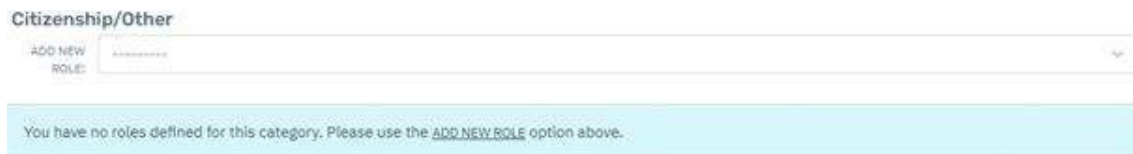
## Other:

If you want to add a role that hasn't been included in the drop-down list, you can select other and you will be asked to complete the following boxes:

- Job Share %
- How Many Times
- Actual Hours per number of times

### *When you have no roles in a category*

Sometimes you will have no roles in a category, or you won't have entered them yet. This is denoted by a blue-shaded box telling you that there are no defined roles and to use the Add New Role drop-down box to add any that are needed.



## Saving Management, Admin and Citizenship

Once you have completed the whole section, you must save the form. You can do this by pressing the Save Form button in the upper right corner of the screen. You will then be redirected to the WRS Summary page.



## Submit and Mark as Complete

Once you have completed and saved all sections, click the 'Submit & Mark as Complete' button which is located at the bottom of the WRS summary page.

A rectangular button with a thin orange border and rounded corners. The text "Submit & Mark as complete" is centered within the button in a dark grey font.

Submit & Mark as complete

Until you have submitted and marked as complete your entry, the system will mark your records for the reporting period as open and you will continue to receive reminders to complete until the reporting deadline.