WorkLoadPlan Guidance for Academic Team Members

1.0 Introduction

The University believes that every academic should have direct, transparent access to their own workload. This simple guide is intended for academic team members viewing their own workload (and those of immediate colleagues) on the WorkLoadPlan (WLP) online system.

2.0 Logging in

The WLP software can be found at https://wlp.sunderland.ac.uk/. You can Bookmark or Favourite this link in your web browser. It is best viewed in the Mozilla Firefox web browser.

To log in, enter your UserID and Password as per your ITS login when presented with the Single Sign On Service screen, this should take you to the WLP home page.

3.0 Getting Around

To move back from a page, please use either the link on the bottom left of each webpage, or the menu bar.

NEW To aid navigation, shortcut links to the WorkLoadPlan webpages most recently visited during your current session have been added below the Previous Page link.

To view a different academic year, in ‘Year’ on the menu choose the Year and click Go.

You will see a message to remind you about creating a new filter if you run reports in a different year. Click ok.

The selected year will be shown at the top right of the menu bar.

4.0 NEW Visuals

Visual presentations of the data have been introduced to WorkLoadPlan on the Home page.

You can determine which of the visuals you would like to see and in what order through the link on the WorkLoadPlan Navigation Bar.
You can (before clicking save):
- select/deselect from the available visuals by clicking the ticks to the left of the box
- change the order in which they will appear in the dashboard by using the arrow buttons to the right of the box (move them up the list to move them left along the homepage)
- place your favourite visual at the top of the list so that it always appears as the main visual on your WorkLoadPlan homepage

To view a specific visual please click on the relevant thumbnail, and either select an individual from the dropdown list for visuals B, C and D or a type of activity for visual L and click Load Visual. For visual L click Ignore filter.

Visual B is a pie chart of the activity make up of an individual's workload for the current year period, displayed in percentages. Please note:
- If a person is below their potential capacity of workload then the unassigned time will be shown as a percentage.
- If the person is above their capacity then the percentage proportions will reflect their total workload and unassigned will be shown as 0% (it cannot reflect the extent to which they are over assigned)

Visual C reflects an individual's workloads for all year periods for which data exists, displayed in hours. The items in the legend can be clicked upon to be excluded or included in the chart content.

Visual D shows an individual's total workload against the workloads of colleagues from within their own Team, displayed in hours. This includes any Hourly Academic Tutors within that team.

Visual L gives the total resource committed for your team, for a selected activity, displayed in hours.

The visuals can then be printed or downloaded in various formats by clicking on the small button at the top right hand corner of the visual which is labelled Chart Context Menu if you hover over it.

5.0 Your Workload ('Staff Plan')

To see your own workload click on then select your name from the list of colleagues in your team. (In a long list, you can hold down Ctrl + F to find a name.)

You can view but not amend your workload. The screen shows your Category 1, 2 and 3 workloaded annual hours, by module or activity. You also have access to view other staff plans within the same academic subject team, on a read only basis.

At the start of each academic year your workload begins as a copy of the previous year’s workload (taken during May). This does not mean that any decisions have yet been taken.
As part of the workloading process the copied workload is amended by your team leader following discussion and agreement with you.

Your workload is updated in discussion with you throughout the academic year, ensuring that the needs of students, staff and external clients can be met as circumstances change.

If you have any queries about your recorded workload these should be discussed and resolved by your team leader in the first instance.

6.0 Workloading Framework and Tariffs

The Framework for Academic Workloading contains principles, definitions and standard ‘tariffs’ for different activities. Clicking on **Link** in the top WLP menu provides a link to the framework as well as to more detailed guidance on using WLP.

7.0 Approving Workloads

This functionality enables your Team Leader to ‘approve’ the record. They must do this once the workload has been finalised (usually at the end of the academic year). This represents an acceptance that the workload is an accurate reflection of work undertaken. This feature has been introduced to comply with TRAC guidelines (a summary of your workload is used to replace the TRAC Time Allocation Survey).

Once this has been clicked then the date/time stamp (which shows when the record was last amended) will show as ‘approved’. Your staff plan also now records the name and userID of the last person who made a change to the record, or approved it where the record has been approved.

If a change has been made after the record has been approved then the staff plan will revert back to ‘unapproved’.

You can see if your workload has been approved from the staff screen. This is shown by the § icon that will appear next to the traffic light workload markers

8.0 Printing & Saving Plans

Printing from the system is now possible direct from your staff plan. To print your current staff plan simply click the print icon.

Records can also be saved in pdf format, simply click the pdf icon and browse to the area you would like the file saved.

9.0 System Support

Human Resources provide support for the WLP system. If you require any support regarding WLP please email vikki.hewison@sunderland.ac.uk or ring extension 2057.
WorkLoadPlan Guidance for Academic Team Members

Date of Issue: March 2015
Next review date: May 2018
Approved by (e.g. Committee, Director, etc): Human Resources
Date of last approval: May 2017
Author/Owner: Head of HR Management Systems
Department: Human Resources

This Policy can be obtained from the Human Resources website or by contacting Human Resources.

If you would like this document in larger print please contact Human Resources.