WorkLoadPlan Guidance for Academic Team Leaders
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Principles

1.0 Introduction

WorkLoadPlan (WLP) is a software application designed to support the management, recording and reporting of academic workloads at the University in line with the Framework for Academic Workloading and associated ‘tariffs’.

This brief guide is set out to enable users of WLP (normally Team Leaders) to view, edit, update and report on workload data of staff within their area(s).

This guide will be updated as necessary and made available via a hyperlink on the WLP software page.

2.0 The right information in the right place

The information in WLP is currently used for a variety of purposes; in addition to providing a record of agreed workloads for staff and managers, the data is analysed by Team Leaders, senior Faculty Managers, the University Executive, HR and UCU. Up-to-date workloads are used for University planning and monitoring and in the external TRAC (Transparent Approach to Costing) Return to HEFCE.

Individual academic staff:
- Can view, but not amend, their own workload and the workloads of colleagues in their subject team, including their PL/Team Leader and Hourly Academic Tutors.
- Cannot see staff in other teams or faculties.

It is therefore very important that academic staff, team leaders and senior managers can rely on a single, transparent and accurate source of information about workloading. Please do not maintain any rival sources of information such as local spreadsheets or databases, as this may cause confusion about which source represents the ‘truth’.

Throughout the current academic year you are asked to amend your initial planned workloads as hours are added, reduced or changed. These changes should be reflected in the WLP system on a regular basis, and you will occasionally be asked to ensure that your staff’s workloads are completely up-to-date for key ‘snapshots’ of the data.
Getting Around the System

3.0 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.

4.0 Getting Around

To move back from a webpage, please use either 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.

5.0 How are WLP accounts created

User WLP accounts will be created by HR after the monthly Performance Management data has been prepared. This process identifies new academic staff and acts as a trigger to manually configure accounts, once a WLP account is created it is then linked to the University Single Sign-on system shown in 3.0 Logging in.

If a new user account is required outside of this process HR will create a staff members blank workload record upon request from the appropriate line manager, this is to support the line manager in their planning and to allow the new academic staff member the opportunity see how work will be allocated to them.

If a staff member is no longer responsible for workloading a team then HR will need to be informed of the change and who has been allocated to the line management role. In all other instances HR will grant access to users based on their job role details held in the HR database, e.g. Team Leader, Academic PL, SL, L. If a user requires more than read-only access, this can be requested via line managers to HR by emailing wlp@sunderland.ac.uk with justification for the change e.g. management information. HR will configure system access by following WLP system guidance.
Dashboards – Home Page

6.0 Visuals

NEW 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 unless you have access to multiple teams and don’t want to see all of them in the visual. In this case apply a filter as per the guidance in section 18.0. Note the only part of the filter applied is organisation filter, not Job Titles or Staff Groups. All visuals will be restricted to your own level of access.

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 at team level, 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.
Choosing the right Academic Year (or Historical Snapshot)

7.0 Active Academic Years

In May each year the current year’s workload records will be copied forward, to create the starting point for the following ‘future’ year, which you can amend without having to input from scratch. *This is for convenience only and does NOT imply that the starting workload has been agreed; a full workloading discussion must still take place with the individual.*

If any module codes have been copied which have been discontinued, please update them.

Towards the end of an academic year you may be both finalising this year’s workloads and starting to amend next year’s workloads. Since these look quite similar, it’s important to make sure you are in the right Academic Year. The selected year will be shown at the top right of the menu bar.

The *default* year when you log-in will still be the current year. To change 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.

In September the *default* year when you log-in will change to the new academic year.

8.0 Historical Snapshots

By default when you log-in you view LIVE data in the system. However, in addition to picking previous academic years, it is possible to switch to historical snapshot data within the current and last academic year (on a read only basis).

In ‘Year’ on the top menu bar choose a Snapshot, then click Go. The selected snapshot will be shown in the menu bar.

You can view and report on records in snapshot mode, but not amend data. In order to return to the live system click ‘Back to Live’ in the Menu bar.

At minimum, three ‘snapshots’ of the system will be taken at key dates within the academic year (on an approximately quarterly basis). These snapshots are used for internal management information and form the basis of Faculty discussions with the University Executive.

Prior to each of these snapshots being taken it is strongly advisable for you to update your team’s workloads to ensure that the system contains a complete and up-to-date record of your team’s activity. HR will remind you to do this at the appropriate time.

Prior to the end of the academic year it is imperative that individual academics agree that the record is an accurate reflection of the work they actually did during the year, and not just the originally planned activity. All workloads must be brought fully up-to-date to reflect actual activity, including any amendments for staff who left or had significant absence during the year.
Working with Academic Workloads

9.0 Accessing individual staff workload plans

Individual staff workloads can be viewed/edited via the **Staff** link on the top menu.

You should see a list of all those staff for whom you hold workloading responsibility (or whose workloads you are permitted to access).

<table>
<thead>
<tr>
<th>Tolerance Key:</th>
<th>0-0%</th>
<th>0.01-55%</th>
<th>55.01-70%</th>
<th>70.01-85%</th>
<th>85.01-100%</th>
<th>100.01-105%</th>
<th>105.01-99999%</th>
</tr>
</thead>
</table>

The colour coding ‘traffic lights’ to the left of the staff list indicate the percentage of their maximum annual workload (1,566 hours pro-rata) currently allocated and the percentage of their Category 1 hours (550 hours pro-rata) currently allocated.

Next select the member of staff whose workload (‘Staff Plan’) you wish to view/edit (in a long list, you can hold down Ctrl + F to find a name.)

10.0 View, Input, Edit and Delete workload data

Initially you will be in the View of the person’s workload; the header confirms the detail of the individual.

Within the Staff Plan we have incorporated the contracted FTE, and the FTE taking into account starting or leaving dates in the current Academic Year. This should help prevent inadvertent over-workloading of staff who are not here for the whole year. If appropriate ‘In year start’ and ‘end date’ will be populated for you by HR.

To Input data or Edit the workload plan for the individual click on the **edit** button.

As data is added to the workload plan, items will appear with * in the ‘St’ column on the left of screen. This item indicates that they have been temporarily stored but not saved to the database. Exiting the screen without saving will result in these items not being saved to the database. See example below of a row of data that is stored but awaiting being saved to the database:

| * ART195 | FINE ART SKILLS | Semester 3 Sunderland | 24 tutorials + 12 lectures | 36 Hours |

To Delete items, remove the tick for the item in the column on the extreme left of screen. The next time you ‘Save’ the workload plan, these items will be removed. If you exit without saving then the un-ticked item(s) will remain in the workload plan.

11.0 Cloning data

Workloaders now have the ability to clone or move workloads between team members; this can be a copy of a full record or a specific module or activity. At the same time you are also given the option to
either keep the original record or delete the entry from the original task holder. One you have clicked ‘edit’ you will be presented with the clone button.

The next step is to select what you want to clone or move. This is done by ticking the module or activity you want to use, also using the dropdown list to identify who you want to receive the record.

If you want to remove the workload entry from the original plan please tick ‘remove original’. Please note that this will remove the record from the staff plan you are cloning from.

Simply click ‘ok’ at this point to make the change happen in the system. Please note if you need to change the number of hours you will have to visit the new record and adjust the numeric value of the module or activity cloned.

### 12.0 Saving changes and entered data

Only on clicking on the button Save will the entered or amended data be saved to the database. If you do leave the edit screen without saving, the data entered at that visit will not be retained.

There are save buttons after the Category 1, 2 and 3 sections.

Individual staff plans (i.e. the individual staff workload) now record the name and userid of the last person who made a change to the record, and the date and time that this took place.
13.0 Approving Workloads

The staff plan now also has an ‘approve’ button which MUST be clicked 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. Once this has been clicked then the date/time stamp will show as ‘approved’. This will revert back to ‘unapproved’ however if any further changes are made to the record.

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

14.0 NEW Staff Plan Notes

Every Staff Plan is now capable of holding a history of related notes which will roll forward from one year to the next. This feature allows for more detail to be added to staff plans.

Notes are accessed using the ‘Notes’ icon which is visible on the right-hand side, just below the header section.

Team Leaders can add and edit notes (although you can only edit notes you created and not any created by other users).

Staff can not currently view the notes on their staff plans and they are not reportable but this may change going forward so please be wary about what you write, with regards to data protection legislation for example.

Clicking on the Notes icon will bring up a notes window, example below. Clicking the Notes icon again will collapse the notes window. The icon shows the number of notes in the Staff Plan.

Click on a note to expand the header and see the content, click again to go back to the note header only.

To edit notes use the icons to the right.

There is also a toggle facility for making some notes less prominent, this might be useful when there are lots of notes and you identify two or three which you’d like to focus on.
Notes can be added by clicking on the icon at the top right hand corner of the notes facility.

This will bring up the following screen, where a Note Subject and Note Detail can be added. Once saved a data and time stamp; user who created the note and Subject title will be shown in the notes summary.

If you need a note deleting please email wlp@sunderland.ac.uk

15.0 Category 1 activity (Formal Scheduled Teaching / Higher Degree Supervision)

In this section there is a pull-down list of modules relating to the Team that the member of staff belongs to, plus at the bottom of the list the activities ‘Higher Degree Supervision (Director of Studies)’, ‘Higher Degree Supervision (2nd or Co-Supervisor)’, ‘Non Modular Teaching’ and ‘New Module’. If the module is not shown in the list then the ‘Module search’ facility can be used by adding in the module code and clicking the chevrons to the right.

NEW Up until now, in order to search for a module, the user needed to know the full module code. Now only part of the code, or description, needs to be entered and a list of modules meeting the entered criteria will be presented.

NEW You can now amend the Module list dropdown presentation order and select whether the modules are displayed in Code order or Description order. Within the Profile option on the navigation bar, select one of the two options and click save.

‘New Module’ should ONLY be selected as a temporary measure when the Module Code does not exist on either the Category 1 drop-down list or the ‘Module search’. It must be updated to a valid module code as soon as one becomes available. This can be done by deleting the ‘New Module’ entry and adding a new entry with the valid module code.
For each line of module activity ignore the MAV field which is not used. Enter:

- **Comment**
  Any text e.g. a reminder of how the input hours have been calculated in line with tariffs and student numbers, e.g. (12 lectures x 1 hour) + (24 tutorials x 1 hour)

- **Input**
  This is where the number of hours is to be entered, so in the above example this would be entered as 36 hours.

Associated Category 2 time will automatically be added.

If adding Supervision of Higher Degree students, select the supervisory role undertaken, (Director of Studies) or (2nd or Co-Supervisor)

Enter a separate line for each student supervised rather than grouping them together. This allows the Faculty to more easily monitor the total hours across the supervision team which are allocated to each student.

The Comments field should be used to record

- The NAME of the student for that workload row, and
- whether the student is FULL-TIME or PART-TIME e.g. “Jane Smith (Part-time)”.

Associated Category 2 time will automatically be added.

**16.0 Category 2 (Teaching Delivery Related Activity)**

Whenever the ‘Save’ button is selected the Category 2 hours total is refreshed. By default there is a one-to-one relationship with hours entered in Category 1. For example if there are 520 hours entered in category 1, then on Saving the workload plan, Category 2 will be populated with 520 hours, itemised according to the same activity as in Category 1. The number of hours can be amended if required.

If the individual should have no Category 2 related to a particular Category 1 entry the number of hours next to that line in Category 2 can be amended to 0.

If the individual has Category 2 hours related to a module but no Category 1, an entry should be added in Category 1 for that module but with 0 hours attached to it. The number of hours can then be amended in Category 2. This applies to non-modular teaching as well.

Please note however that if you have an entry for a module in Category 1 and have changed the value in Category 2 for the related entry, and then you subsequently go back into Category 1 and change the Cat 1 value, on hitting SAVE the Category 2 value will also be changed to the latest value entered in Cat 1.

Remember to “SAVE” for adjustments to be retained.

**17.0 Category 3 (Other Academic Activities)**

The list of activities in Category 3 is common to all Teams and Departments within the University. For definitions please [Framework for Academic Workloading](#).
The method for adding, editing and deleting items is as for Category 1.

When selecting some Category 3 activities, an additional/optional list may be available:
- when Module Leadership is selected, a list of modules within that Team is offered
- when Externally Funded Research is selected, a list of projects is offered

Where the module code does not exist in the list or where the source of funding is yet to be confirmed a module or project code does not have to be selected. This should ONLY be done as a temporary measure however and the staff plan must be updated to a valid module or project code as soon as it becomes available on the system or becomes known. This can be done by deleting the entry and adding a new entry with the valid code. By the end of the academic year all Module Leadership and Externally Funded Research entries should have a code attached to them. This additional detail allows TRAC information to be sourced from the WLP software without the need for you to complete Time Allocation Surveys.

Research and Scholarly Activity (RSA)

Each individual (excluding Salaried Academic Tutors and Senior Managers) should be workloaded for 160 hours of RSA (pro-rata for part time staff, those who started or ended during the academic year or those who would not be workloaded to their full FTE allocation (see below)).

The overall split of time between Research activity and Scholarly Activity should be agreed with the individual academic based on the nature of the RSA undertaken.

This data will facilitate the TRAC Return and it is important that RSA Research is appropriately labelled as it may be beneficial for the University’s external reporting and for reclaiming research overheads.

Significant Absence and Leavers

There are circumstances in which individuals would not be workloaded to their full FTE allocation. Some absence due to sickness, maternity etc., (including absence of less than 4 weeks) is significant enough for an individual’s workload to be redistributed to other employees.

In order for WLP to hold an accurate picture of workloads (for management, monitoring and TRAC purposes) it is important to amend the workload of the individual in question (and those who have taken on the extra workload). This should be done regularly and may particularly need to be reviewed and updated at the end of the academic year.

In the absent employee’s workload:
- Any workloaded hours which they will no longer be fulfilling should be deleted, or zeroed. (i.e. if there are no hours left on a particular module but you wish to retain a record of which modules would have been taught, enter 0 hours next to that module).
- The total hours that were removed (from all workload categories) should then be added to that individual’s Category 3 as a single entry under ‘Non Workloaded Time’ as ‘Authorised Leave or Absence’. This will ‘pad’ the overall workload back up so that the individual does not falsely appear to be under-workloaded in reports / traffic lights.
Please Note that individual staff members can view their own workloads and those of colleagues. Although it is important and acceptable to record blocks of non-workloaded time as ‘Authorised Leave or Absence, it is important that any ‘Comments’ do not disclose personal information, particularly about sensitive matters such as the nature of long-term or chronic illness.

How to apply additional leave the employee has purchased:
- If an academic staff member buys annual leave they should add the equivalent hours as “Authorised Leave or Activity” in the category 3 section of the workload.

<table>
<thead>
<tr>
<th>Other Activity (Non Workloaded Time)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorised Leave or Activity (e.g. TU)</td>
</tr>
</tbody>
</table>

This is because the 1566 annual workload excludes the basic annual leave entitlement, so any purchased annual leave should reduce the workload further.

If staff leave the University during the academic year:
- Their FTE will be pro-rated automatically, but it is still necessary to amend the individual workloads to remove any activity they did not perform, otherwise they may appear to be over-workloaded for the period they were employed. Click ‘Edit’ and tick the “acknowledge contract expiring” box next to their end date to flag that you have adjusted a staff member’s workload based on their expected contract expiry date. The check box is aimed to help you manage your staff workloads, particularly leavers, by acting as a visual indicator that you control. This acknowledgement also feeds in to various reporting outputs to which you have access.

Non Academic Roles undertaking teaching

If a non-Academic employee (for example Heads of School) performs teaching or other workloaded activity which is recorded on WLP, these employees may appear to have a very low percentage workload because the majority of their time is not workloaded. The activity of ‘Non Academic Role’ under ‘Non Workloaded Time’ in Category 3 allows the non Academic elements of their role to be factored in.

Enter sufficient hours here to ‘pad’ the workload back up to a full workload of 1,566 hours i.e. a full-time Head of School doing 100 teaching hours and 100 Cat 2 hours needs 1,366 hours (1,566 – 200) adding here.

Outputting as a hard copy (print) or file (pdf)

Individual staff plans can be printed or converted to PDFs by using the respective icon next to the Edit button.
Reporting

18.0 Reporting and Exporting

The reporting suite is a comprehensive set of useful reports that will help you as a Workloader or Manager to get even more out of your system. Please take time to familiarise yourself with the various outputs that are offered. Detailed extract reports are available and there are a number of on-screen reports which can be run. It is intended that, in further releases, there will be additional reports.

Where the report has multiple versions, some with export in the title and others without, the export labelled reports will be produced as tsv or ‘tab separated’ files that can be opened with MS Excel and the others are produced on screen. Where only one version is offered without export in the title there will be a field entitled export which will export the data to excel if ticked. The data will be displayed on screen if this field is left unticked.

To access the views/reports: from the WLP ‘Home’ page, select the ‘Reports’ option from your menu bar.

Before running any reports you need to clear existing filters and create a new filter. Both of these options can be found under ‘Use data filter’. This allows the user the opportunity to create conditions that are to be used prior to data extract or on screen reporting.

Using the shuttle boxes select the Faculty/Department/Team you want to appear in your report. If you have access to multiple teams you can select more than one option. Select Go

The next step is to select the staff group/grade/job title you want to include. The default setting is to include all staff, however if you only want to see a specific group or set of staff make the appropriate selection.

Finally, if you are running the Export Staff Hours (using filter) report you need to select the Activities you want to include. If you want all Activities to be shown then simply click continue on each of the pages and save on the last page. If you are running any of the other reports you can just select ‘Skip Activity Filter’.
There are 7 report sections:

- **TRAC**
- **Module**
- **Team**
- **Staff**
- **Level**
- **System Exports (Bulk Data Extraction)**
- **Activities**

**TRAC report**

The TRAC section offers reports showing the hours by staff grade across the different TRAC activity codes for selected Faculties/Departments/Teams. The report can be extracted into Excel and can be run as a summary or to an individual level.

**Module reports**

There are two items under the Modules option:

- **Module Summary**

  Ran for a selected module, this report shows each staff member working on the module and the hours each of them have attached to that module by Category. It also shows any module related comments that have been entered in the workload plans for each staff member.

- **Hours by Module Summary**

  This report shows the Category 1 hours for each staff member, across all of the modules being delivered by the selected Team. The staff are grouped by grade.

**Team Reports**

The only report you would use in this section is the Team Hours Summary (we do not use sub teams and the hours by module summary is a repeat of the report in the module section).

For a selected Team, summary information for each member of staff is shown. The data is under the following headings. Multiple Teams can be selected and viewed on the same screen by holding down
“Ctrl” and clicking on the required fields. Click on the title to expand the report and show staff detail. This report can also be exported.

<table>
<thead>
<tr>
<th>%</th>
<th>Title</th>
<th>First name</th>
<th>Surname</th>
<th>Employee no.</th>
<th>Contracted FTE</th>
<th>Effective FTE</th>
<th>Formal Teaching (Cat 1)</th>
<th>Related Activity (Cat 2)</th>
<th>Category 3 hours</th>
<th>Total hours</th>
<th>Job Title</th>
<th>In-year start</th>
<th>In-year end</th>
<th>Leave details</th>
</tr>
</thead>
</table>

Staff reports

The Staff section offers a number of reports split into Summary reports or Grid summary reports. These sets of reports are then split into various organisation levels.

- **Summary reports** show you hours and percentage workload, taking into account the FTE of an individual staff member or as a total for the University and for all levels in between.

  - **Employee:**
  - **FTE:** 1.00
  - **Team:** Law
  - **Category 1**
    - Actual Formal Scheduled Teaching Hours
    - FST Maxima for FTE @ 550 hours
    - Percentage against maxima
    - Percentage against total workload maxima for FTE @ 1566 hours
    - Total: 536
  - **Category 2**
    - Teaching Delivery Related Activity Actual Hours
    - Percentage TDRA v Formal scheduled Teaching
    - Total: 100.00%
  - **Category 3**
    - Total actual Category 3 Hours
    - Percentage against maxima @ 1566
    - Total: 27.78%

  - **Module Leader**
  - **University/Faculty Funded Research**
    - Total: 39

- **Grid Summary reports** show you the same information as the Summary report but in a Grid format as shown below:

<table>
<thead>
<tr>
<th>Name</th>
<th>FTE</th>
<th>Actual hours</th>
<th>Max Hours</th>
<th>Actual as % of Max</th>
<th>% of total capacity</th>
<th>Category 1</th>
<th>Category 2</th>
<th>Category 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Actual Hours</td>
<td>% of Cat1 hours</td>
<td>% of total capacity</td>
<td>BUSDEVT</td>
<td>CENTI</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Level Reports

The Level section offers a number of reports split into Summary reports or Grid summary reports. These sets of reports are then split into various organisation levels from Team upwards.

- **Summary reports** show you total hours and percentage workload for that organisation level, taking into account the total FTE. It also shows average hours per individual by category.
Grid Summary reports show you the same information as the Summary report but in a Grid format as shown below:

<table>
<thead>
<tr>
<th>Name</th>
<th>Actual Hours</th>
<th>Capacity</th>
<th>Actual as % of capacity</th>
<th>No. of Staff</th>
<th>FTE</th>
<th>Avge Cat 1 hours</th>
<th>Avge Cat 2 hours</th>
<th>Avge Cat 3 hours</th>
<th>No. of Modules</th>
</tr>
</thead>
</table>

System Export (Bulk Data Extraction)

Authorised users can extract full workloads from the system based on your own level of access and requires a filter to be set before use. This option can be found in the reports tab under ‘System Exports – filtered’

This extract contains all information relating to Category 1, 2 and 3 including comments added to the system. This extract is available at team/department/faculty and staff group level with one line of data per workload entry per staff member.

Activities

All non module activities can be extracted from the system without the need to run a full report. This can be done by first applying a filter. From the reports tab select ‘Activities – filtered’. Multiple selections can be made by holding down ‘Ctrl’ and clicking on the required fields.

This report is very useful for identifying records that need to be cleansed. E.g. missing project codes for Externally Funded Research or missing module codes for New Module or Module Leadership (on campus).