How to Enter Faculty Load in Banner

To enter faculty workload, you need to log into goPFW account using the Mozilla Firefox browser, go to the Employee tab, and select the link that says Login to Banner 9 Admin. Once logged into Banner, the faculty load process consists of three steps.

The three steps are: Check or enter a workload for instructional assignments,

Enter any workload value for non-instructional assignments, and Check workload credit and FTE totals using Banner and Cognos reports.

The following sections describe the purpose of each form and the data that must be entered on each form. In order to complete a load report for each employee, the steps noted below MUST be completed sequentially.

Step 1: SIAASGN – Faculty Assignment Form

In Banner, go to the Welcome page and in the search bar type 'Faculty Assignment' OR type SIAASGN in the box and press Enter.

Step 1 consists of three parts: (1) entering a workload value for instructional assignments (if any); (2) entering a workload value for non-instructional assignments (if any); and (3) then checking the workload summary. Consequently, depending on an instructor's load, you will enter assignment information using a combination of forms to document the range of instructional and non-instructional activities. The main SIAASGN form is used to document instructional assignments. The Non-Instructional Assignment form allows you to document non-teaching activities (e.g., instructional support activities, research, administration, etc.). The Faculty Workload Summary form contains a summary of your workload values and term FTE.

Faculty Instructional Assignment Form

The main window used for assigning load is the Faculty Assignment [SIAASGN] form. To assign workload to teaching assignments, enter an instructor's PFW 900 number (Fig 1.) or you can click on the extended search dropdown (red arrow) and click on 'Faculty Search' (Fig 2.), select the term, and then press the 'GO' button on the left-hand side of your form.

×	@ ellucian	Faculty Assignment SIAASGN 9.3.8 (F	PROD)	Figure 1: Enter 900# in box of click the dropdown
	ID:	▲ ····		to search by name
		Option List X Person Search Faculty Search Cancel	Figure 2: C the person	lick Faculty Search to find by name
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X	0 ellucian	Faculty/Advisor Query SIAIQRY 9.3.7 (PROD)		ADD	PRETRIEVE	🔓 RELATED	🗱 TOOLS
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	Advisor:		Category:				
	Staff Type:		Contract Type:				
	Tenure Status:		Status:				
Get	Started: Complete	e the fields above and click Go. To search by name, p	press TAB from an ID field, enter your search criteria, and then press ENTER.				

Code	Description	Start Date	End Date	FinAid Y
202130	Summer 2021	05/10/2021	08/22/2021	
202120	Spring 2021	12/21/2020	05/09/2021	
202110	Fall 2020	08/24/2020	12/20/2020	
202030	Summer 2020	05/11/2020	08/23/2020	
202020	Spring 2020	12/23/2019	05/10/2020	
202010	Fall 2019	08/26/2019	12/22/2019	1920
201930	Summer 2019	05/06/2019	08/25/2019	1819
201920	Spring 2019	12/17/2018	05/05/2019	1819
201910	Fall 2018	08/20/2018	12/16/2018	1819
201830 <	Summer 2018	05/07/2018	08/19/2018	1718
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Figure 3: Select the term and be sure that the 'Faculty' box is checked.

Figure 4: Select the correct term and click ok

X @ ellucian Faculty	Advisor Query SIAIQRY 9.3.7 (PROD)					🗋 add 📲 retreve	🛱 RELATED 🔅 TOOLS 1
Term: 201920 Faculty: 🖌 A	dvisor: Category: Staff Type: Contract T	ype: Tenure Status: Status:					Start Over
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							Clear All Go
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Figure 5: Start by typing in the last name and click go

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Term: 201920 Faculty:	Advisor: Category: Staff Type: Contra	act Type: Tenure Status: Status:					Star	t Over
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Active filters: Last N	tive filters: Last Name : Smith 💿 First Name : %a 💿 Clear All					'Again 🙁		
ID	Last Name	First Name	Middle Name	Faculty	Advisor	College	Department	
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Figure 6: Select the correct person and press select on the bottom right of the screen

If the instructor is teaching a course section in the selected term, the course section information will automatically be loaded from the section records (see Figure 1 below).

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* FACULTY ASSIGNMENT						🖬 Insert 📮 Delete 📲 Copy 🎙 Fiter
CRN	22756		Verride Conflicts	Generated Credits	54.000	
Session	01	Workload	3.000	FTE	0.25	
Subject	СОМ	Override Workload		Contract Type		
Course	35200	Calculated Workload	3.000		Compensation Applied	
Section	01	Assignment Type		Position Number		
Session Credit	3.000	Percent*	100	Position Number		
		Responsibility		Suffix		
Institutional Credit	3.000	Weekly Contact	3	Additional Instructors		
Percentage of *	100	Total Contact	51			
Session						
	Primary Instructor		Compensation Extracted			
	1 ✓ Per Page					Record 1 of 4

Figure 7: Instructor and different course over view.

Notice: There are four courses this person teaches

In the Faculty Instructional Assignment form, you check whether the default workload value assigned in the Workload field are correct by clicking the down arrows at the bottom left of your screen till you get to the 'Workload Summary Page'.

A		ire 8: Down arrows	(Bottom left of the	Screen)		
ID:						Start Over
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Workload Rule						
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				Workload		
Generated Hours	123.000			Non-Instructional	0.000	
				Workload		
Weekly Contact	12.000			Total Workload	9.000	
Term Contact	204.000			Term FTE	0.75	
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FACULTY WORKLOAD AN	ID ANALYSIS					🖬 Insert 📮 Delete 🥤 Copy 🔍 Filter
Workload Rule						
		Low		High		Under/Over
Credit Hours						
Generated Hours						

Figure 9: The Faculty Workload Summary with instructional FTE listed, non-instructional FTE, and term FTE listed.

If the default workload assigned to a section is <u>NOT</u> correct, then you need to assign a workload value to each section using the Override Workload field (see figure 10).

FACULTY ASSIGNMENT							
CRN	21089		Override Conflicts				
Session	01	Workload	2.000				
Subject	СНМ	Override Workload					
Course	25600	Calculated Workload	2.000				
Section	01	Assignment Type					
Session Credit	3.000	Percent *	100				
		Responsibility					
Institutional Credit	3.000	Weekly Contact	3				
Percentage of *	100	Total Contact	51				
Session							
	Primary Instructor		Compensation Extracted				
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Figure 10: you can override a workload by clicking the 'Override conflicts' box in different CRN sections

The rest of the fields will be pre-populated with information you have entered on section records. The FTE value will also be automatically calculated taking account of the <u>Calculated Workload</u> and <u>Percent</u> <u>Responsibility</u>. For instance, if the instructor's load is 3 credit hours at 100% responsibility, the FTE will be 0.25. However, if the load is 3 credits at 50% responsibility, the FTE will equal 0.125. Do not forget to save the form before exiting the window. (Bottom Right of the Screen)

The Assignment Type on the Instructional page (Courses page) is selected only if there is a paid overload

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Session	01	Workl	ad 4.000		FTE	0.33	3			
Subject	BIOL	Override Workl	bad		Contract Type		•••			
Course	11700 •••	Calculated Workl	4.000			Compensation App	blied			
Section		Assignment T	/pe		Position Number					
Session Credit	3.000	Perc	ent * 100		Position Number					
		Assignment Type	Code Validation (STVASTY)	*	Suffix					
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				Cancel OK						
1										

Figure 10: Red Lines, show the analysts which course the faculty is getting paid Overload pay for.

Faculty Non-Instructional Assignment Form

All non-teaching assignment should be reflected on the 'Faculty Non-instructional Assignment' form in figure 11. Accessed using the down arrows (Page two of the form).

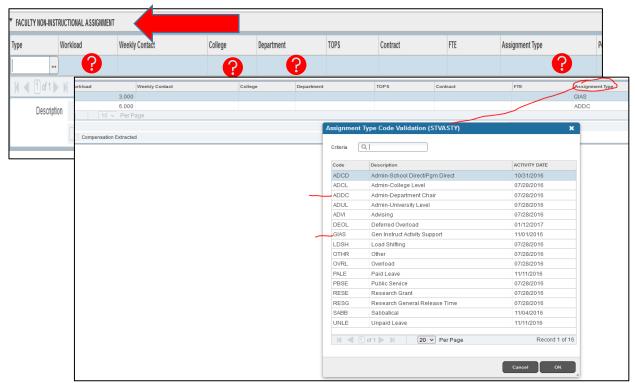


Figure 11: Faculty Non-instructional Assignment form

Non-Teaching Activities entered into workload reports should be for work where there is a formal agreement that a faculty member's FTE has been devoted to a certain task/administrative role.

The FTE value will be automatically calculated on the Cognos report based on the workload value entered.

If there are no course section assigned to an instructor or GA in a given term, a warning message saying "Active faculty workload rules not defined for this term". Disregard it and proceed to the non-instructional form where you will still able to enter load for non-instructional assignments.

We will need these four items from you:

- 1. Workload
- 2. College
- 3. Department
- 4. Assignment Type

Keep in mind that you will not be able to access the Faculty Workload Summary form if there are no teaching activities assigned in a given term.

Do not forget to save the form before exiting the window. (Bottom Right of the Screen)

Faculty Workload Summary

Once both the instructional **AND** non-instructional forms have been completed, go to the Faculty Workload Summary. If everything looks correct then print off your Cognos report and review for accuracy.

<u>For fall and spring semesters, the assigned workload for a full-time instructor should typically</u> <u>be 1.00 Full-Time Equivalent (FTE), which is equivalent to a workload of 12 credit hours.</u> Furthermore, each activity performed by a full-time instructor (whether teaching or nonteaching) receives a fraction of 1.00 FTE per semester. There are cases where it expected for a full-time instructor to have an FTE of less than or greater than 1. When a faculty member is paid an overload for a course, then you would expect his or her semester FTE to be greater than 1. When an instructor is load shifting, his or her semester FTE will be either greater than 1 in the semester they are carrying a heavier teaching load or less than 1 in the semester with reduced teaching load. When these two cases do not apply, and the term FTE value appears to be lower or higher than expected, it is an indication that there may be data entry errors that need to be corrected either on instructional or non-instructional assignment forms.

ID: 900211920 Smith, I	Barbara H. Term: 201920			Start Over
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		Workload		
Generated Hours	123.000	Non-Instructional	0.000	
		Workload		
Weekly Contact	12.000	Total Workload	9.000	
Term Contact	204.000	Term FTE	0.75	
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* FACULTY WORKLOAD AN	ND ANALYSIS			😫 Insert 🗖 Delete 🌆 Copy 🌱 Fil
Workload Rule				
	Low	High		Under/Over
Credit Hours				
Generated Hours				
Weekly Contact				
Total Contact				
Instructional				
Workload				
Non-Instructional				
Workload				
Total Workload				
Term FTE				
K ◀ 1 of 1 ►)	1 v Per Page			Record 1 of

Examples of Assignment Categories

Teaching Activities are always entered on the SIAASGN Instructional Assignment form.

1. **Teaching** – all credit and non-credit hour generating classes taught by the instructor. It is usually a face-to-face instruction of Purdue Fort Wayne students. This also includes online courses.

Non-Teaching Activities are always entered on the SIAASGN Non-Instructional Assignment form.

1. General Instructional Activity Support (GIAS) – an activity that is directly associated with the instruction of Purdue Fort Wayne students. Some of the examples are:

Supervising student teachers Course/program development Lab supervisor Workshops Coaching, ensembles, band, etc.

- 2. Research scholarly activities or creative endeavors undertaken in support of the university mission.
 - a. Research General Release Time (RESG) Scholarly activities funded internally by the University. Some of the examples are:

Departmental research assignment Endowed Chair assigned time for research Funded research – General Fund grants or cost-sharing Faculty recitals, trios, quartets, quintets

 External Fund (RESE) – Research Grant- Scholarly activities funded by external agencies or foundations.
 Some of the examples:

NSF Grants Lumina Foundation Grant Lilly Endowment Grants

 Department Level Administration (ADCD, ADDC) – duties carried out in support of the department administration, management of department programs, and other major departmental committees. Some of the examples are: Department chair Assistant or associate chair Program Director School Director Graduate Program Coordinator

Undergraduate Program Coordinator

Lead Advisor

4. College Level Administration (ADCL) – duties carried out in support of college administration, program coordination, and other college non-teaching activities. Some of the examples are:

Assistant or Associate Dean Interdisciplinary Program Director

5. University Level Administration (ADUL) – duties performed in support of university-wide initiatives. Some of examples:

OAA Fellow

- 6. Sabbatical (SABB) only includes paid leave on sabbatical.
- 7. Other (OTHR) various activities that cannot be included in any of the other categories.
- 8. Paid Leave (PALE) only includes paid leave
- 9. Unpaid Leave (UNLE) only includes unpaid leave

Table 1. Instructional Assignment Types ONLY

Banner Code	Assignment Type	Description
OVRL	Overload	Place on section (course)
		receiving overload

Banner Code	Assignment Type	Description
ADCD	Admin – School Direct/Pgm	All non-chair departmental
	Direct	administration activities
ADCL	Admin – College Level	College administration
ADDC	Admin – Department Chair	Chairperson, assistant chair
ADUL	Admin – University Level	University administration
ADVI	Advising	Advising
DEOL	Deferred Overload	Deferred Overload
GIAS	General Instructional Activity	Program development;
	Support	supervising students, etc.
LDSH	Load Shifting	Place code on non-instructional
		form for both semesters load
		averaging
OTHR	Other	Explain on report
RESE	Research Grant	All grant activities administered
		through SPO should be
		recorded as RESE.
RESG	Research General Release Time	Research activities funded by
		the university
SABB	Sabbatical	Paid sabbatical
PALE	Paid Leave	Paid Leave
UNLE	Unpaid Leave	Unpaid Leave

General University Guidelines Regarding Faculty Load

- 1. Term FTE for a **full-time instructor** usually equals 1.00 in fall and spring terms, which is equivalent to an assigned 12 credit hour workload, except when an instructor carries a paid overload or is load-averaging over the academic year. Thus, instructor workloads are calculated on an "equivalent to" 12 credit hour basis.
- 2. FTE formula = (Calculated Workload X Percent Responsibility) / 12 credit hours
- **3.** The faculty assignment form **must be completed** for every <u>active instructor</u> in the department.

Instructors who are on grant activities for an entire semester receive 1.00 FTE (or a 12 credit hour workload). Instructors who are on sabbatical receive 1.00 FTE except for when it is without pay. In this case, you would still load them in Banner but with 0.00 FTE assigned. <u>Instructors who are on any medical leave without pay receive 0.00 FTE</u>. You do not need to enter that in Banner.

If an instructor is unable to teach his/her load for the entire semester, the workload should be prorated for the number of weeks worked. For example, a person teaching four 3 credit hour lecture classes who goes on sick leave after four out of sixteen weeks of classes, should be assigned 4/16 of 3 credit hour (i.e. a workload of 0.75) for each course.

If you need help with the prorated FTE calculation, contact Irah Modry-Caron.

- 4. Faculty workload and student credit hours for classes taught by a faculty member from another department are credited to faculty's home department workload.
- 5. Load shifting: for a variety of reasons, departments may need for full-time faculty to adjust their teaching and research load between semesters of the same academic year. Sometime this causes a full-time faculty member to carry an unpaid overload one semester (i.e., over 1.00 FTE) and less than full load (less than 1.00 FTE) in the other, thus averaging load over two semesters.

In conclusion, the information gathered from the Faculty Workload data provides the basis for both internal and external productivity reports and analyses. Therefore, consistent and accurate reporting of all faculty activities is essential.

Thank you for your effort and diligence in this important university process.

How to Run Faculty Workload Reports in Cognos

This will allow you to check the faculty workload data for your department

- 1. Go to https://cognos.ipfw.edu/bi/ and log in
 - a. If you don't have access, please email Melissa Litmer (<u>litmerm@pfw.edu</u>)
- 2. In Cognos, go to the Team Content folder
- 3. Within PFW Shared Reports folder go to the Faculty Load folder
- 4. To open the Faculty Workload Report, double-click on the report labeled Faculty Workload (Prod)

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- 5. To run the Faculty Load Report, you should:
 - a. Select the Term.
 - b. If you want to pull <u>all departments within a College</u>, then scroll to and select the name of the College you want to see.
 - c. If you want to see a <u>specific department workload report</u>, then scroll to and select the name of the Department you want to see.
 - d. You have a choice in pulling a report for specific types of faculty (e.g., tenured, tenure-track, etc.). If you want to pull all instructors, then do not select any faculty categories.
 - e. Click the Finish button to generate the HTML report.

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Example report for Fall 2018 Faculty Workload for Biology:

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UNIV		TY											Fall	2018	Fac	ulty Wo	rkload	- (PRC	DD) for Bi	ology					
Full Name	ID	PIDM	College	Department	Faculty Category	FTPT Status	CRN	Course	Course Title	Cross List Group	Type	Course Level	Primary Instructor Indicator	Course Type	Credit Hours	Enroliment	Workload Value	Default Workload Value	Percent Responsible	Instructional FTE	Activity Activity Code Type	Non- Instruction Activity Type	College	Department	
	Arts and Sciences	Biology	Continuing Lecturer	FT	11005	BIOL 10001 01	Intro Biol World Lab	KU	PFW Credit	UG		LAB	1	24			50	0		onal ivity					
						11006	BIOL 10001 02	Intro Biol World Lab	KU	PFW Credit	UG		LAB	1	21			50	0		onal ivity				
							11007	BIOL 10001 03	Intro Biol World Lab	KU	PFW Credit	UG		LAB	1	10			50	0		onal ivity			
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McLellan, Karen K	900023406	17988	Arts and Sciences	Biology	Continuing Lecturer	PT	13707	BIOL 33400 01M	Clinical Pathophysiol	2J	PFW Credit	UG	Y	LEC	4	2		4	100	0.333	Instruct Ac	onal ivity			
							12043	NUR 33400 01M	Clinical Pathophysiol	2J	PFW Credit	UG	Y	LEC	4	45		4	100	0.333	Instruct Ac	onal ivity			
							11651	BIOL 20400 01	Human Antmy & Physiol	B1	PFW Credit	UG	Y	LEC	4	63		4	100	0.333	Instruct Ac	onal ivity			
							15097	BIOL 20400 09	Human Antmy & Physiol	B1	PFW Credit	UG	Y	LEC	4	25		4	100	0.333	Instruct Ac	onal ivity			
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6. In order to generate a formatted Excel document, go to:

a. Click on the arrow next to the save and edit button and navigate to View in Excel Options.

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	Reset prompts and	run			11007	BIOL 10001 03	Intro Biol World Lab	KU	PFW Credit	UG		LAB	1	10			50	0		Instr
					11806	BIOL 10000 031	Intro To Biol World		PFW Credit	UG	Y	DIS	3	36		3	100	0.25		Inst
					12780	BIOL 10000 04I	Intro To Biol World		PFW Credit	UG	Y	DIS	3	79		3	100	0.25		Inst
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McLellar Karen I			Continuing Lecturer	PT	13707	BIOL 33400 01M	Clinical Pathophysiol	2J	PFW Credit	UG	Y	LEC	4	2		4	100	0.333		Inst
					12043	NUR 33400 01M	Clinical Pathophysiol	2J	PFW Credit	UG	Y	LEC	4	45		4	100	0.333		Inst
					11651	BIOL 20400 01	Human Antmy & Physiol	B1	PFW Credit	UG	Y	LEC	4	63		4	100	0.333		Ins
					15097	BIOL 20400 09	Human Antmy & Physiol	B1	PFW Credit	UG	Y	LEC	4	25		4	100	0.333		Ins
					11376	BIOL 20400 02	Human Antmy & Physiol	B9	PFW Credit	UG	Y	LAB	0	19			100	0		Inst
					15098	BIOL 20400 10	Human Antmy & Physiol	B9	PFW Credit	UG	Y	LAB	0	4			100	0		Inst
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b. Click on Run Excel data (three option on the list).

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								11007	BIOL 10001 03	Intro Biol World Lab	
								11806	BIOL 10000 031	Intro To Biol World	
								12780	BIOL 10000 041	Intro To Biol World	
Mo	cLellan, Karen K			Arts and Sciences	Biology	Continuing Lecturer	PT		BIOL 33400 01M	Clinical Pathophysiol	
								12043	NUR 33400 01M	Clinical Pathophysiol	
								11651	BIOL 20400 01	Human Antmy & Physiol	
								15097	BIOL 20400 09	Human Antmy & Physiol	
								11376 15098	BIOL 20400 02 BIOL 20400 10	Human Antmy & Physiol	
								11645	BIOL 20400 10 BIOL 20400 08	Human Antmy & Physiol Human Antmy & Physiol	
								15103	BIOL 20400 05	Human Antmy & Physiol	
								15105	DIOL 20400 15	Fidman Antiny & Physiol	
Bi	iswas, Aparna R			Arts and Sciences	Biology	Graduate Assistant	PT	11375	BIOL 20300 08	Human Antmy & Physiol	
					57			15447	BIOL 20300 33	Human Antmy & Physiol	
								11019	BIOL 20300 09	Human Antmy & Physiol	
								15448	BIOL 20300 34	Human Antmy & Physiol	
								11474	BIOL 20300 17	Human Antmy & Physiol	
								15457	BIOL 20300 42	Human Antmy & Physiol	