Bath WAMS User Guide

Allocator/Departmental Administrator

May 2019

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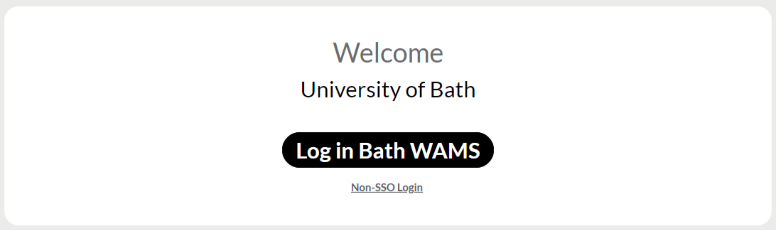
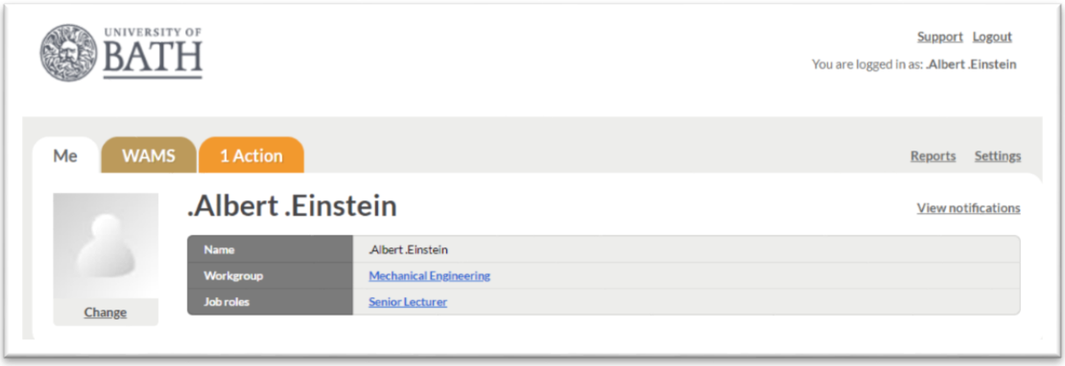
1 Log in to Bath WAMS

Bath WAMS is accessed via a University single sign-on: https://wamsbath.simitive.com/



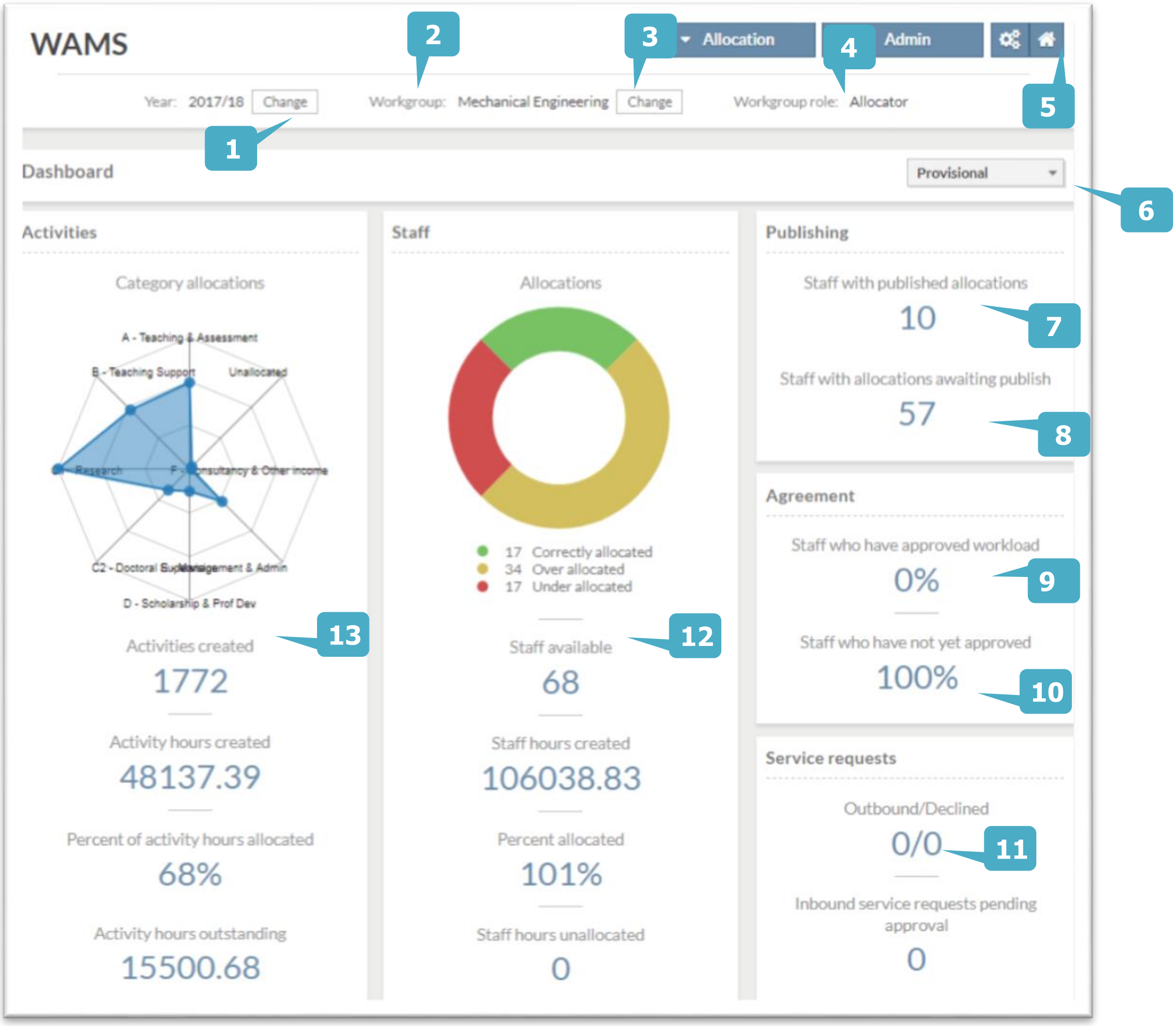
There is a link to the SSO via the Academic resources drop-down menu on the staff homepage: https://www.bath.ac.uk/services/bath-workload-allocation-management-system-wams/

The launch page for Allocators and Departmental Administrators has three tabs: Me (the Allocator's own allocations or blank for Departmental Administrators), WAMS (linking to the dashboard) and Actions.



2 Dashboard

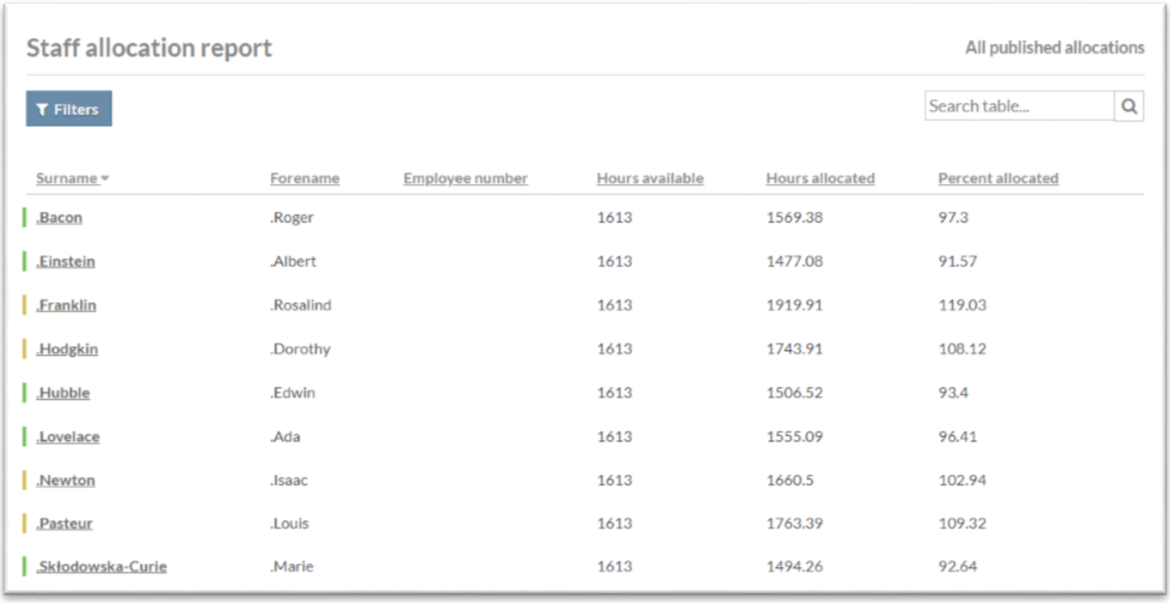
The dashboard is an overview of the status of the allocation process for the workgroup, accessed by clicking on the 'WAMS' tab.



1. The relevant year for this dashboard's data. Planning years are also accessed here.
2. Department (labelled as workgroup on WAMS).
3. Departmental Administrators and Deans have access to multiple departments and can change between them.
4. Users role (within the system)
5. The drop-down menus visible here will vary with User permission levels.
6. When a workload is ready to be shared with the academic User, it is 'Published'. Until this time, it is considered 'Provisional'. The dashboard toggles between these options.
7. % of staff who have had their workload published.
8. % of staff whose workload is not published or has changed since last publication.
9. % of staff who have agreed to their workload allocation. **This is important for monitoring response rates for provisional and final verification.**
10. % of staff who are yet to agree their most recent published workload.
11. Service requests for teaching
12. The progress of allocation to Staff in this workgroup. Click on a coloured portion of the doughnut chart to see which specific staff members are included.
13. A radar chart of allocation to activities in this workgroup.

3 Staff allocation report

The staff allocation report can be accessed from the dashboard by clicking on the doughnut chart.


Staff allocation report

All published allocations

Filters

Search table...

Surname	Forename	Employee number	Hours available	Hours allocated	Percent allocated
Bacon	Roger		1613	1569.38	97.3
Einstein	Albert		1613	1477.08	91.57
Franklin	Rosalind		1613	1919.91	119.03
Hodgkin	Dorothy		1613	1743.91	108.12
Hubble	Edwin		1613	1506.52	93.4
Lovelace	Ada		1613	1555.09	96.41
Newton	Isaac		1613	1660.5	102.94
Pasteur	Louis		1613	1763.39	109.32
Skłodowska-Curie	Marie		1613	1494.26	92.64

This gives the workload against the University's notional figure of 1613 hours per academic year (adjusted for FTE), the provisional hours allocated and percentage allocated, for each academic member of staff in the workload model.

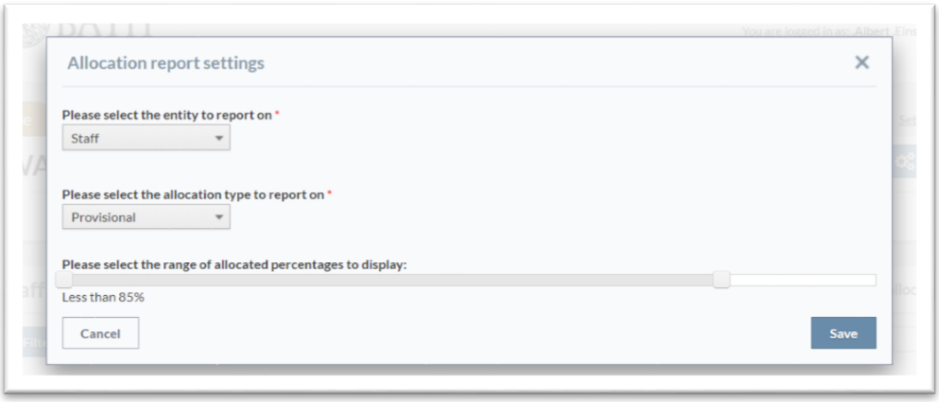
A coloured tab next to the staff surname categorises staff according to the percentage allocated column:

Red – 'under' allocated (less than 85% of notional 1FTE workload)

Green – 'correctly' allocated (between 85% - 100% of notional 1FTE workload)

Amber – 'over' allocated (greater than 100% of notional 1FTE workload)

The filter tab has a slider that allows the Allocator to select a range of allocated percentages to display in the report. The report can also be adjusted to show allocations for published allocations.



4 Making Allocations

Core information and workload allocations for Grants and Contracts, Doctoral Supervision and Consultancy and Other Income will be imported into Bath WAMS by the Central Administrators at the start of the academic year, and updated at agreed points in the year (as per timetable in the University Framework).

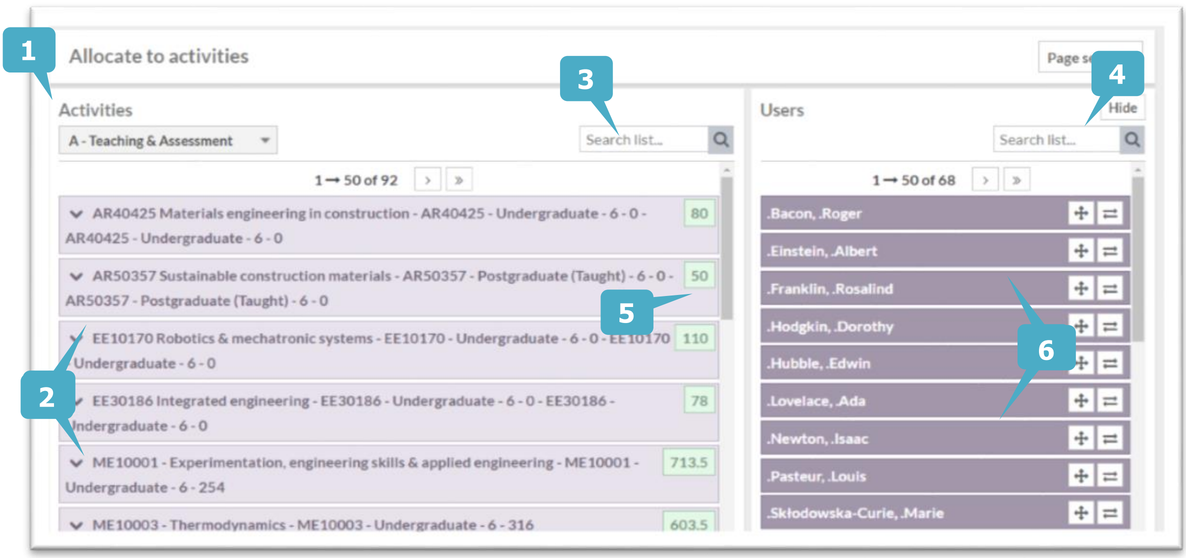
Allocations for Teaching and Assessment, Teaching Support, General Research, Scholarship and Professional Development and Management and Administration will be rolled over from the previous year. **This means that manual adjustment of allocations should be required only when there are changes to the rolled over activities.**

Manual workload allocations can be made to both Activities and Users.

4.1 Allocate to Activities

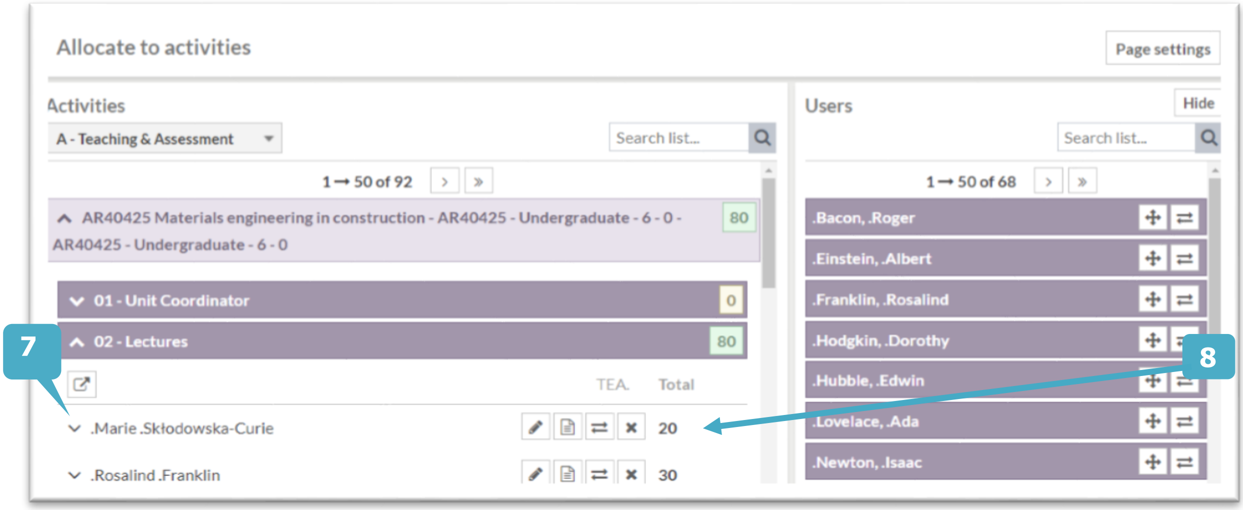
From the Allocation dropdown menu, select 'Allocate to activities', as shown below. You will be able to see a list of activities on the left-side column, and a list of Users on the right.

The Activities panel has a drop-down menu of the A-F workload categories. Teaching and Assessment is likely to be an activity where manual changes are needed during the course of an academic year. It lists all the units offered by the department, with the search function enabling location upon entry of unit code or title.



1. Select the required Activity category from the drop-down.
2. These are the Activities for the workgroup within the selected category.
3. Search box for the Activity panel.
4. Search box for the User panel.
5. Red, amber, green colour coding helps to identify under, over or correct allocations.
6. This shows the allocatable Users.

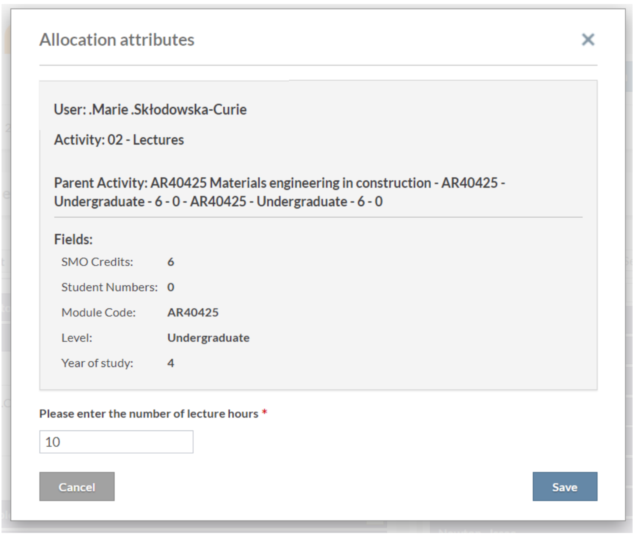
Click on the downward arrow for a unit. Another drop-down menu appears with the 14 sub-categories of the various forms of teaching, supervision and assessment undertaken across the entire University. This is based on the University Framework. Not all of the sub-categories will be used by all departments, with 1-6, 11 and 14 being the most common.



7. Expand the Activities list by clicking on the downward arrow.

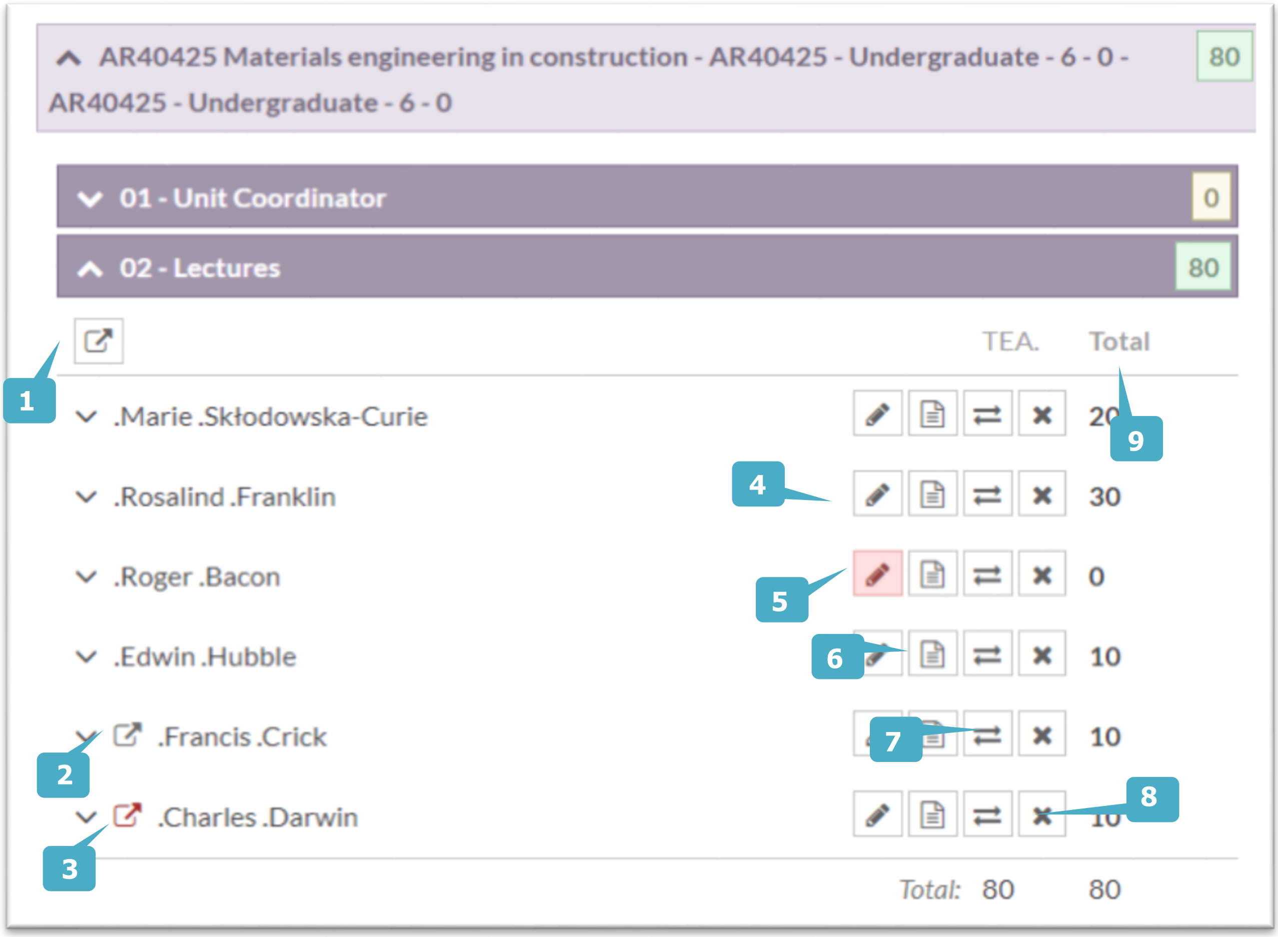
8. To allocate a User to an Activity, expand the activity, and drag the indicated icon against the relevant User to the white space under the Activity. **It is not possible to allocate the same person to the same activity more than once.**

Select the lecture sub-category and find the relevant member of staff via the search function on the Users panel. Click on the cross at the end of the User bar and drag and drop into the sub-category activity. A pop-up box will appear.



Enter the number of lecture contact hours and save. WAMS calculates the total allocation using the tariff for lecture preparation agreed by the Faculty/department or School.

4.2 Additional information

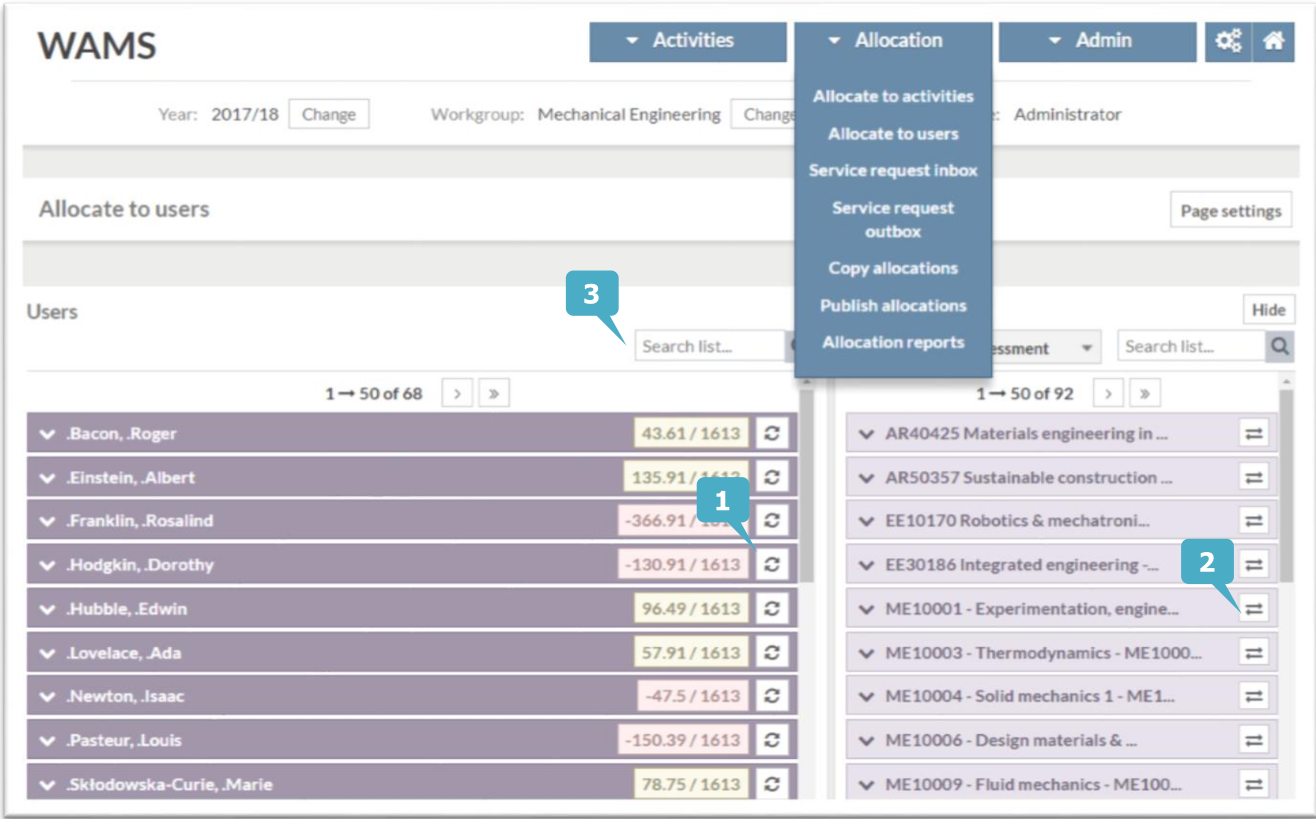


1. Service Request button – to request a staff member from another department to contribute to this activity.
2. This black icon before a staff members name indicates their contribution to the activity is via a Service Request that has been approved.
3. This red icon before a staff members name indicates their contribution to the activity is via a Service Request that is still pending approval.
4. This icon means that allocation details can be edited. Click on the pencil icon to edit.
5. If the pencil icon is red this indicates that mandatory information is missing from this allocation. **Note:** it will not be possible to publish work to a User if any mandatory fields need completing.
6. Notes icon – specific to this allocation. Notes can be edited via this icon and shared with the Academic when their workload allocation is published, or be set to private (but still visible to Allocators and Administrators).
7. This directional arrows icon is a toggle switch that changes the screen between 'Allocate to Activities' (as shown above) or 'Allocate to Users' (see Section 3).
8. The "X" icon can be clicked to remove the allocation. Note: once removed this cannot be undone (the allocation would need to be added again manually).
9. Allocated hours are displayed by work activity type (e.g. TEA). When an allocation is made, the values for each work activity type are summed along with the total number of hours.

4.3 Allocate to Users

From the Allocation drop-down menu, select 'Allocate to users', as shown below. 'Allocate to users' can also be accessed from the 'Allocate to activities' page, by clicking on the two arrows next to the cross on the User bar.

'Allocate to users' functions in a very similar way to 'Allocate to activities'. In this view, there is a list of Users on the left-side column and activity types on the right.

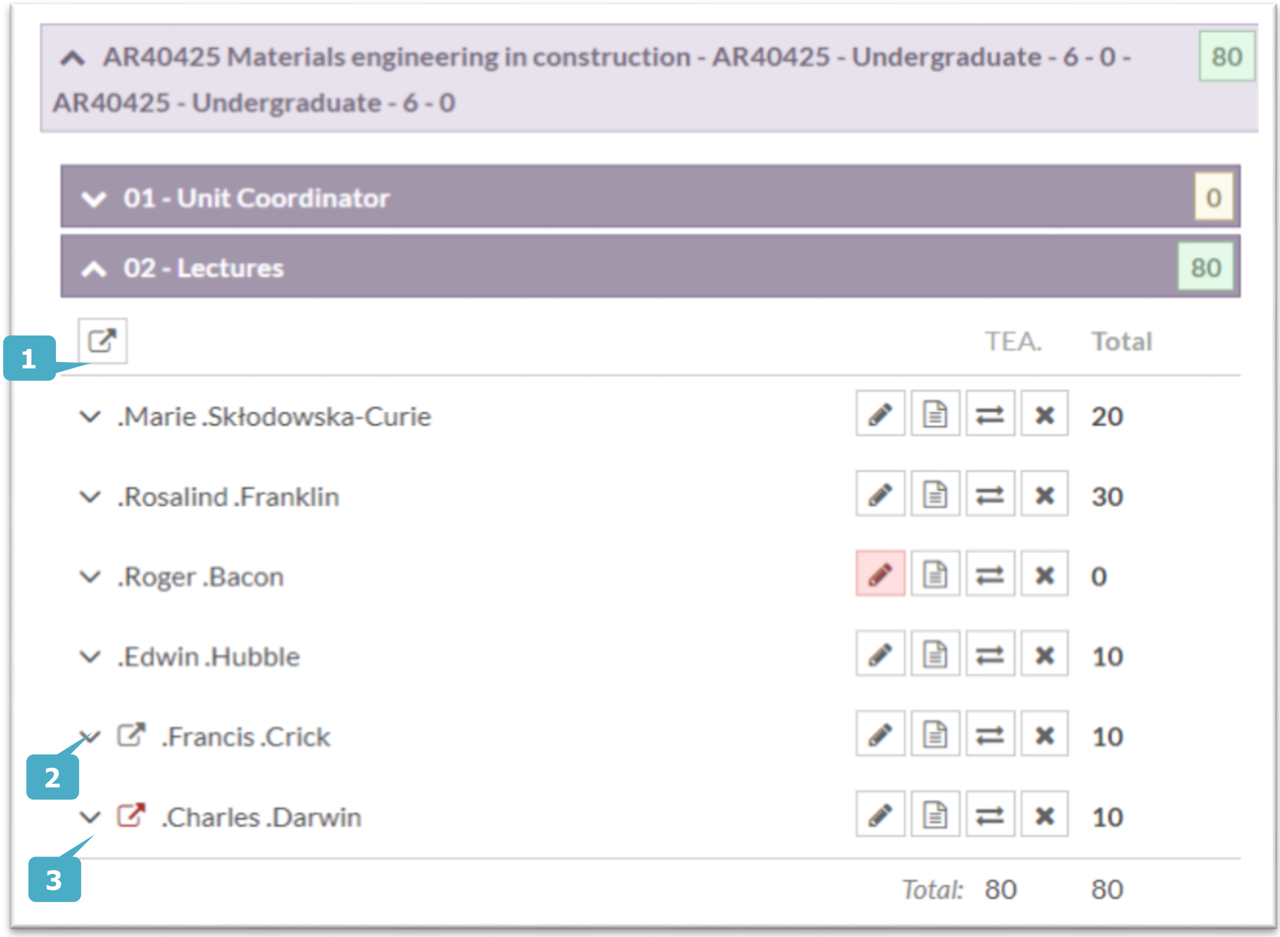


1. One important difference in this view is the Recalculation button/icon. Clicking on this button will ensure that the latest calculations are being used for the individual User. **Note:** A prompt message appears when using this button, reminding the User that the values in the individual's calculation may be altered.
2. This toggle switch enables you to change the screen display to 'Allocate to activities' view, with the target activity opened on the left-hand column.
3. The User list includes a 'VHTF and Visiting Lecturer' User and three posts for vacant positions (i.e. 'Mechanical Engineering, Post 1', 'Mechanical Engineering, Post 2^, Mechanical Engineering, Post 3') for each department.

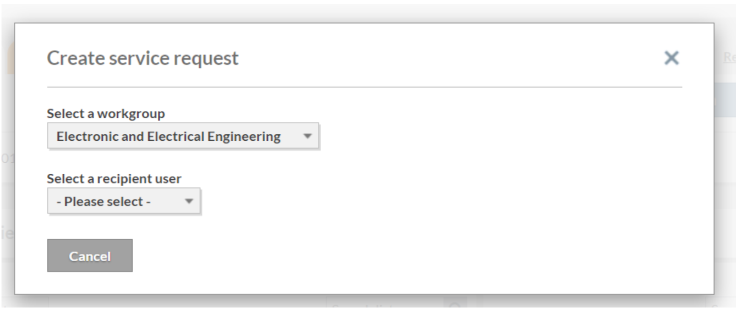
5 Service requests

The Allocations screens will only display Activities and Users from the relevant department selected by the Allocator. In order to allocate to a member of staff from another department, a Service request is required.

The Service request function is accessed from the Allocate to Activities page (see Section 4.1).



1. Service Request icon – request a User from another department to contribute to this activity. You will be able to select the required User's department and then their name from the drop-downs displayed. Upon creation of the service request, the allocation will show against the activity and a coloured service request icon (red or black) will appear on the left of the individual's name.



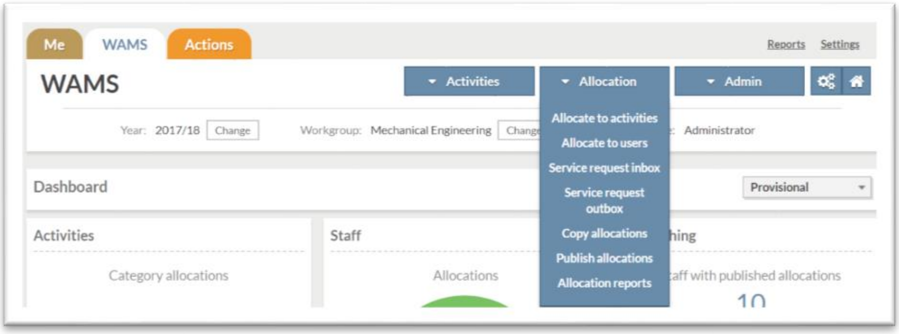
2. This red icon before a User name indicates their contribution to the activity is via a Service Request that is still pending approval.
3. This black icon before a User name indicates their contribution to the activity is via a Service Request that has been approved.

5.1 Managing service requests

5.1.1 Accessing the Service Request Inbox and Outbox

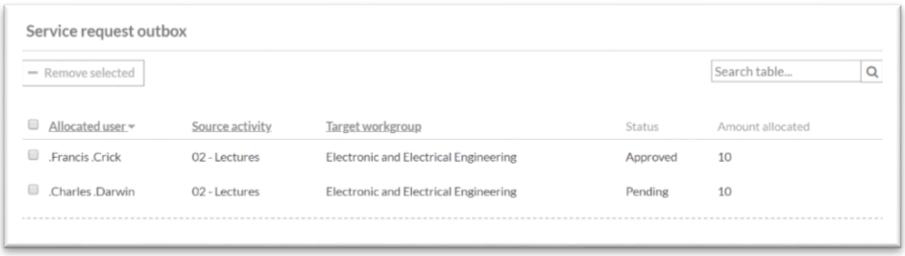
If a service request requires approval, once the allocation has been made, an entry appears in the service request **outbox** of the originating department. An entry will also appear in the service request **inbox** of the requested User's own department.

The Service Request inbox and outbox is located in the Allocation drop-down menu.



5.1.2 Service Request Outbox

All Service Requests, Pending and Approved are displayed. If a Service Request is rejected, it will disappear from the outbox and from the allocated Activity. **It is assumed that WAMS will not be the primary or only form of communication about a request.**



Service request outbox

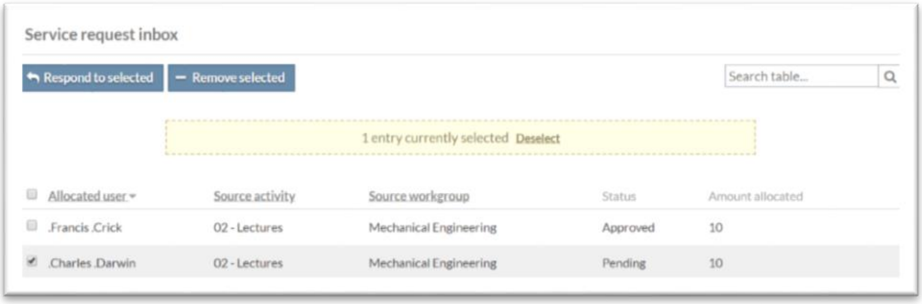
Remove selected

Search table...

Allocated user	Source activity	Target workgroup	Status	Amount allocated
Francis Crick	02 - Lectures	Electronic and Electrical Engineering	Approved	10
Charles Darwin	02 - Lectures	Electronic and Electrical Engineering	Pending	10

5.1.3 Service Request Inbox

The Service request inbox allows an Allocator to approve reject or remove requests. Responding to the request gives access to a drop-down box with the options of approve or reject.



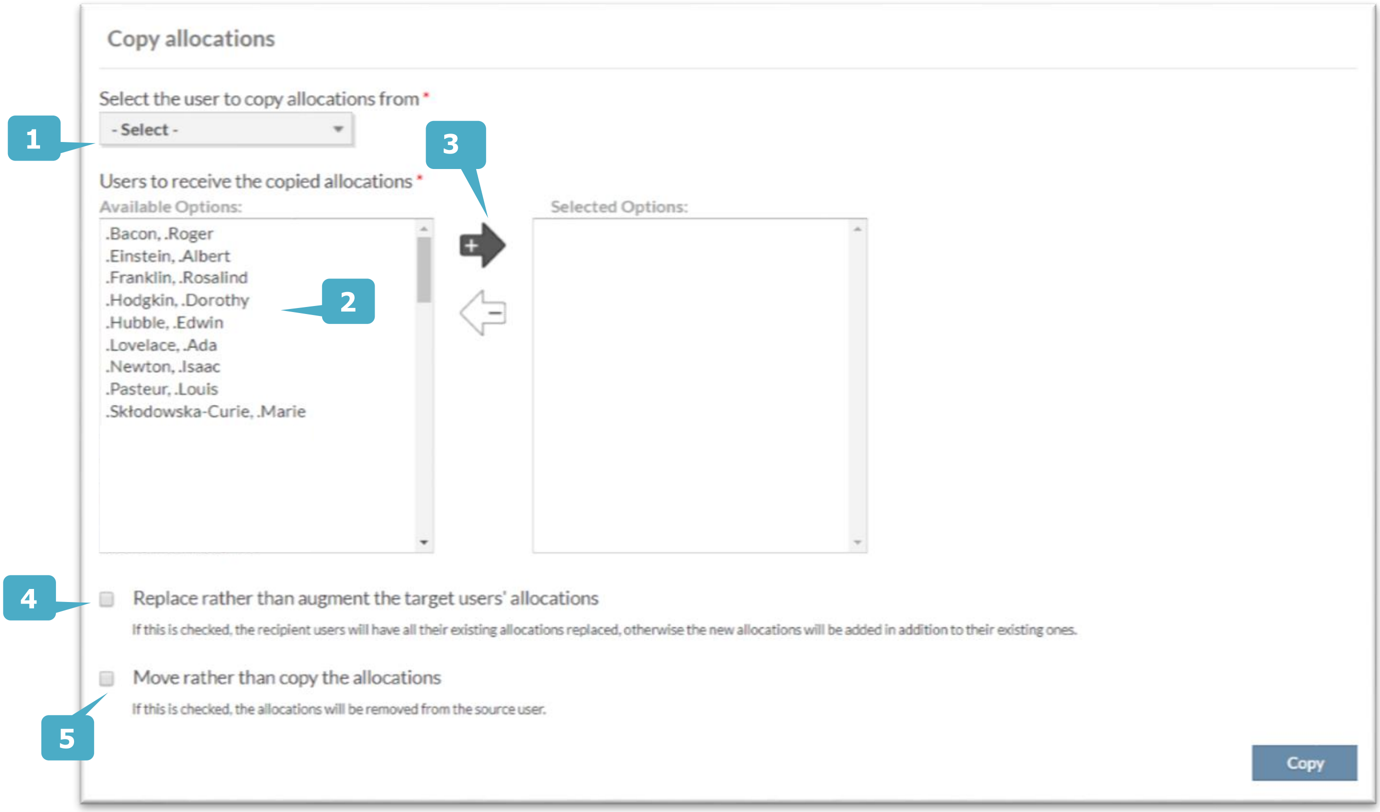
Workloads cannot be published in WAMS until requests are approved or rejected in the Service Request Inbox.

6 Copy Allocations

Allocations may be copied or moved from one User to another on the 'Copy Allocations' page, accessed via the Allocation drop down menu.

This function can be helpful if a vacant job position is given allocations which are then moved to the new staff member once their employment starts.

Three Users have been created in each department for this purpose (i.e. 'Mechanical Engineering, Post 1', 'Mechanical Engineering, Post 2', 'Mechanical Engineering, Post 3').



1. Select the User from which allocations are to be copied.
2. The list of the Users that can be selected to receive the allocation.
3. The + and – arrows allow Users to be moved from the Available Options area to the Selected Options area.
4. The copied allocations may be used to replace the User's existing workload, or to be in addition to the User's existing workload.
5. In some instances moving the allocation rather than copying them may be more useful. This removes the need to then delete them from the source User.

7 Publish Allocations

An Allocator or Departmental Administrator with publishing permissions, can access the 'Publish Allocations' page.

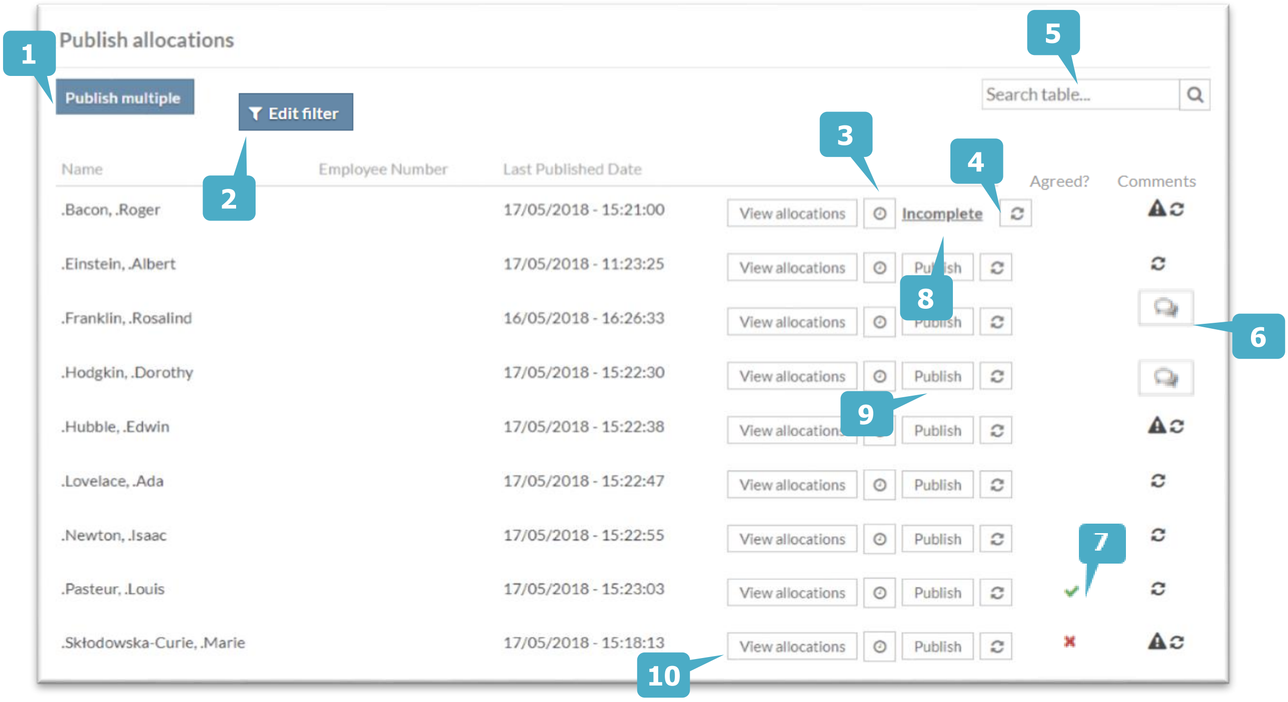
Until 'Published', all allocations are 'Provisional', and as such are viewable only by those with permission to view provisional allocation (Allocators/Departmental Administrators/Central Administrators).

'Publishing' allocations makes the latest Provisional allocations available to the User. They will receive an email to tell them that their planned workload allocations have changed, inviting them to log on to WAMS and confirm their workload within one working week.

Workloads will need to be published on WAMS at a minimum of two points in the academic year in order to be compliant with TRAC guidance: confirmation of provisional workloads before the end of semester 1 and positive verification of actual workloads at the end of academic year. There is no upper restriction on the number of times that a workload can be published to a User.

To publish allocations, select the 'Publish Allocations' options from the Allocations dropdown.

7.1 The Publish allocations page



1. To publish more than one set of allocations or to all User. Dummy posts (i.e. Mechanical Engineering, Post 1) can be excluded. 'Publish All' option will publish an entire department.
2. Filter - by a User's response, or by comment status.
3. Clock icon – view previously published allocations.
6. Speech bubble icon – indicates that there are comments to view. You can click here to reply to comments.
7. Green tick/Red cross – indicates that the User has agreed or rejected their published allocation.
8. Incomplete status – if workload has changed since publication this cell will show incomplete

4. Circular arrows icon – recalculate the User's allocations to ensure they reflect the most current calculations.
5. Search table – search by employee name or ID number.

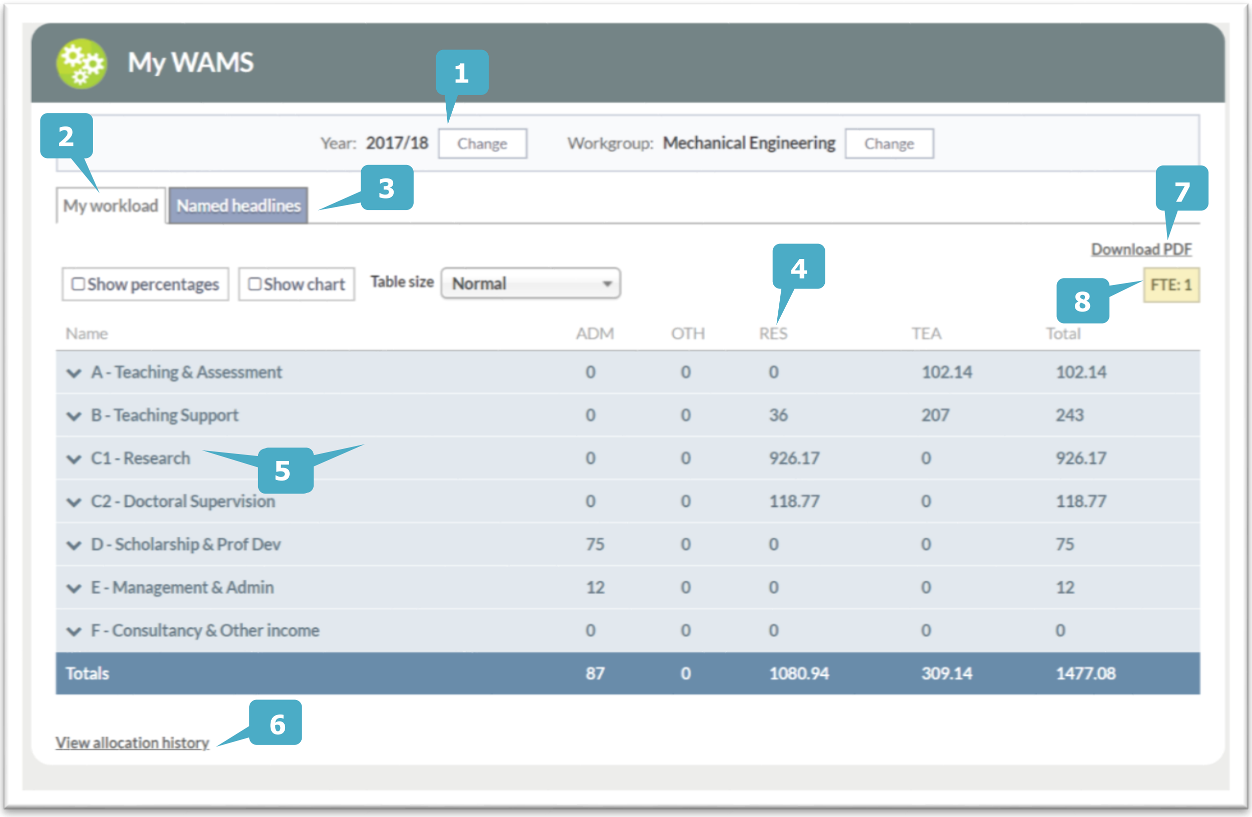
as per this example or mandatory fields are missing.

9. Publish button – this will display when 'publishable'. Clicking this will publish to the User.
10. View allocations – provides see an overview of the User's allocations.

8 My WAMS

8.1 Overview

The 'My WAMS' page is available to all Users who have a workload allocated in WAMS, including Allocators, and is accessed by clicking on the 'Me' tab.

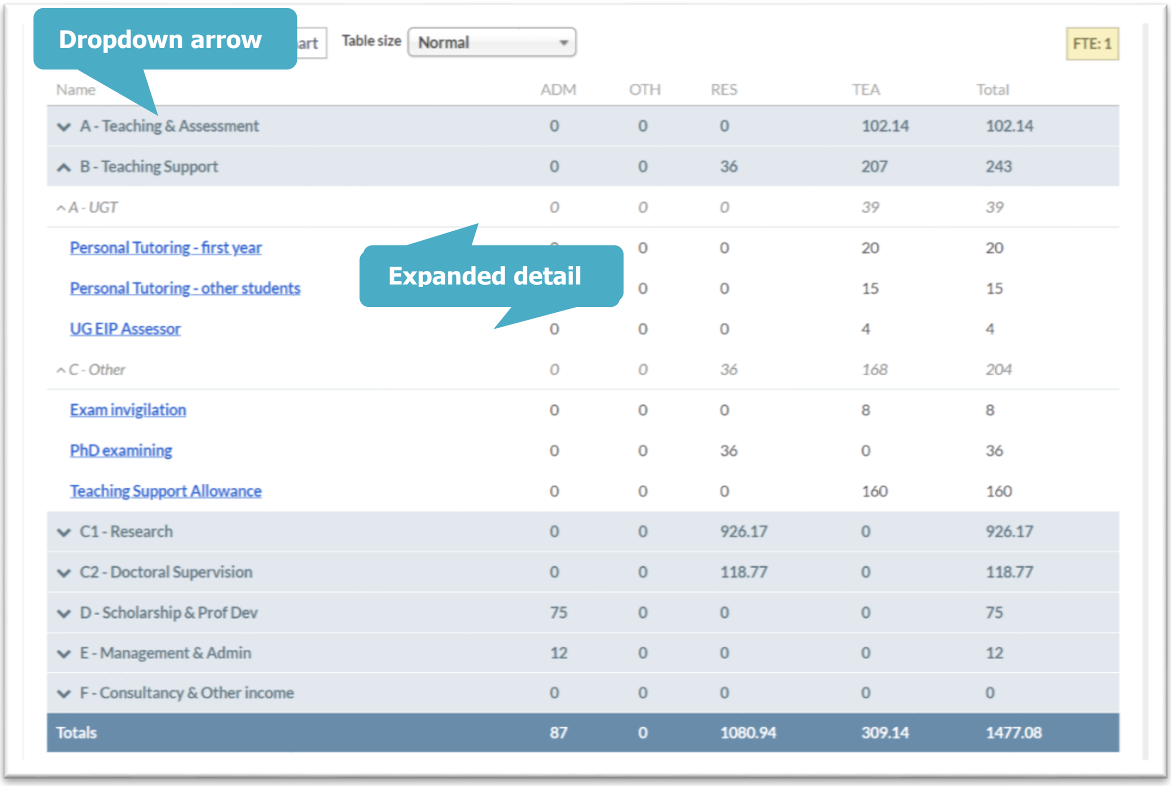


1. The academic year that this workload applies to. To select an alternative year, click on “Change”.
2. To access workload details.
3. To access a workload overview for the department.
4. Hours are grouped according to work activity types: TEA (Teaching), RES (Research) OTH (Other) and ADM (Admin).
5. The grid shows the hours allocated within this year/department - the activities are organised into categories which are then totalled. To see the detail, click on the downward point arrow icon (this section is explained in further detail below in section 2.2).
6. Click here to view previous published allocations in the academic year chosen.
7. To access a PDF file of workload.
8. FTE of the User.

Note that the ‘My Workload’ tab only becomes populated with allocated hours once workloads have been published in WAMS.

8.2 Expanding the data

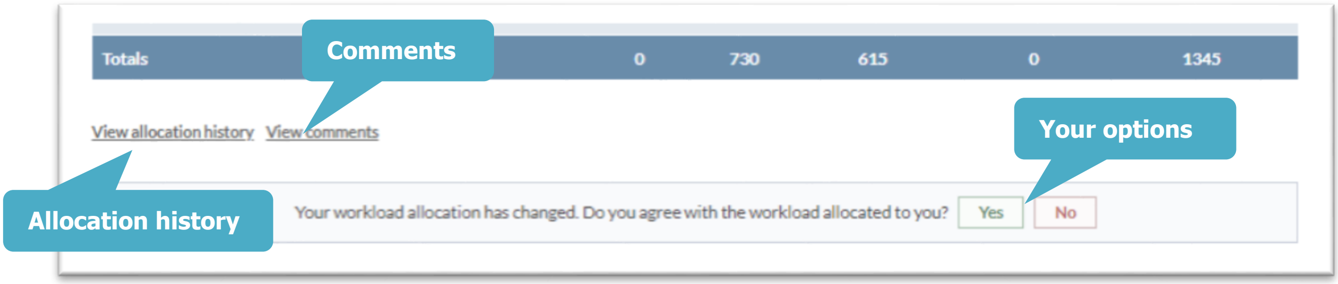
The workload detail grid may be expanded to give more detailed information. Expand the data by selecting the downward pointing arrow icon next to the workload category. The individual workload items are displayed with the hours allocated to them.



Name	ADM	OTH	RES	TEA	Total
A - Teaching & Assessment	0	0	0	102.14	102.14
B - Teaching Support	0	0	36	207	243
A - UGT	0	0	0	39	39
Personal Tutoring - first year		0	0	20	20
Personal Tutoring - other students		0	0	15	15
UG EIP Assessor	0	0	0	4	4
C - Other	0	0	36	168	204
Exam invigilation	0	0	0	8	8
PhD examining	0	0	36	0	36
Teaching Support Allowance	0	0	0	160	160
C1 - Research	0	0	926.17	0	926.17
C2 - Doctoral Supervision	0	0	118.77	0	118.77
D - Scholarship & Prof Dev	75	0	0	0	75
E - Management & Admin	12	0	0	0	12
F - Consultancy & Other income	0	0	0	0	0
Totals	87	0	1080.94	309.14	1477.08

8.3 Accepting or declining a published workload allocation

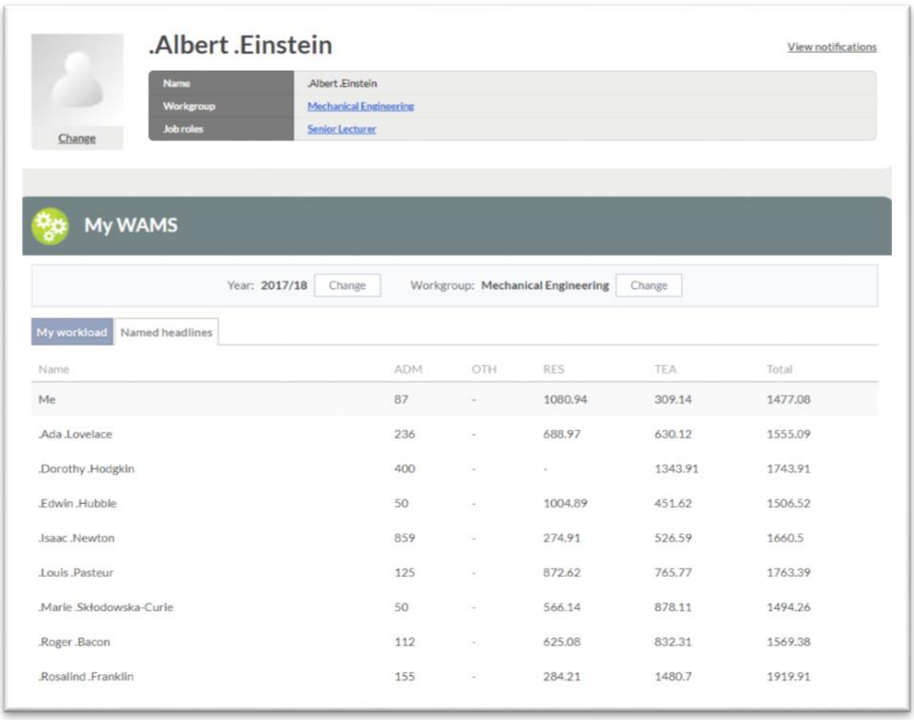
After workloads have been published in WAMS, Users will receive a notification at the bottom of the 'My WAMS section' of their Me page indicating the requirement for workload agreement (in addition to an email notification).



Once the workload allocation has been viewed along with any associated comments (shown within View comments) the displayed workload can be accepted or declined. Comments can be added by the User in the box available upon submission (mandatory if declining a workload).

8.4 Named headlines tab

If your department has requested this tab to be switched on, it will display a high level view of the published workload allocations for the workgroup colleagues. Detailed allocations are not visible.

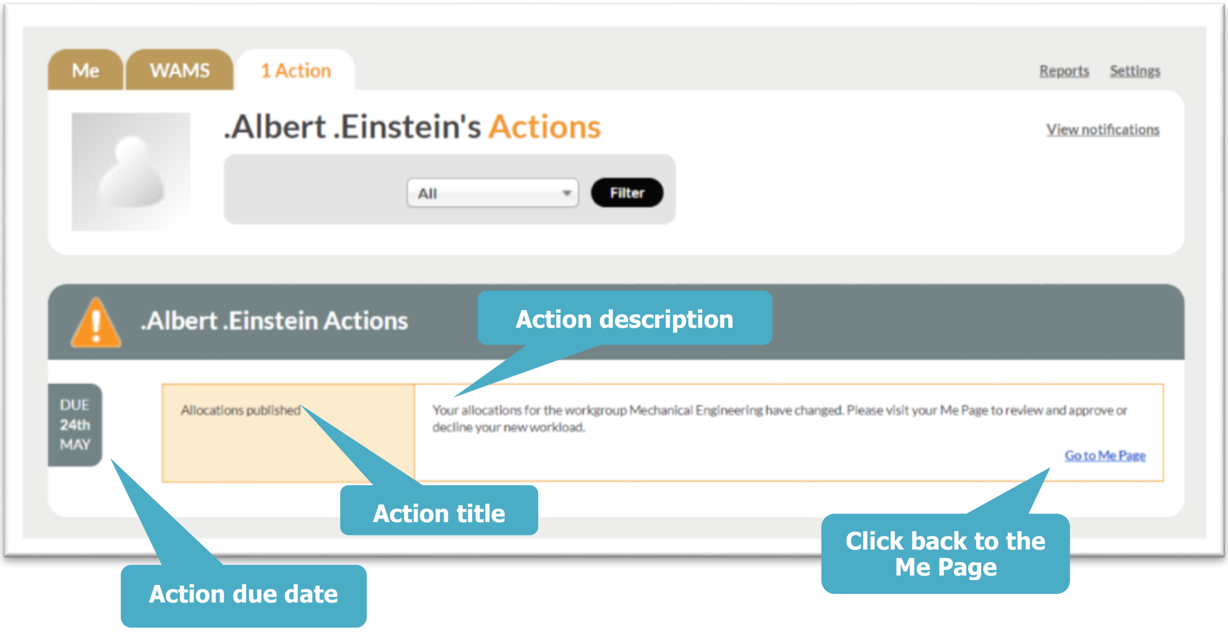


There is also an option to display detailed allocations for every member of staff in WAMS after they have been published. This view is called 'Other Workgroup Users'.

As a default, both views are switched off for all departments. A department should contact the Central Administration team (wams@bath.ac.uk) if they wish to add the 'Named Headlines' or 'Other Workgroup Users' views to their WAMS pages.

8.5 Actions

The Actions page displays any outstanding actions that need completing. If the actions are not completed, a weekly/ daily digest email is generated; this is only generated for as long as the actions are outstanding. Once completed, actions will no longer appear in the email, but any new actions will.

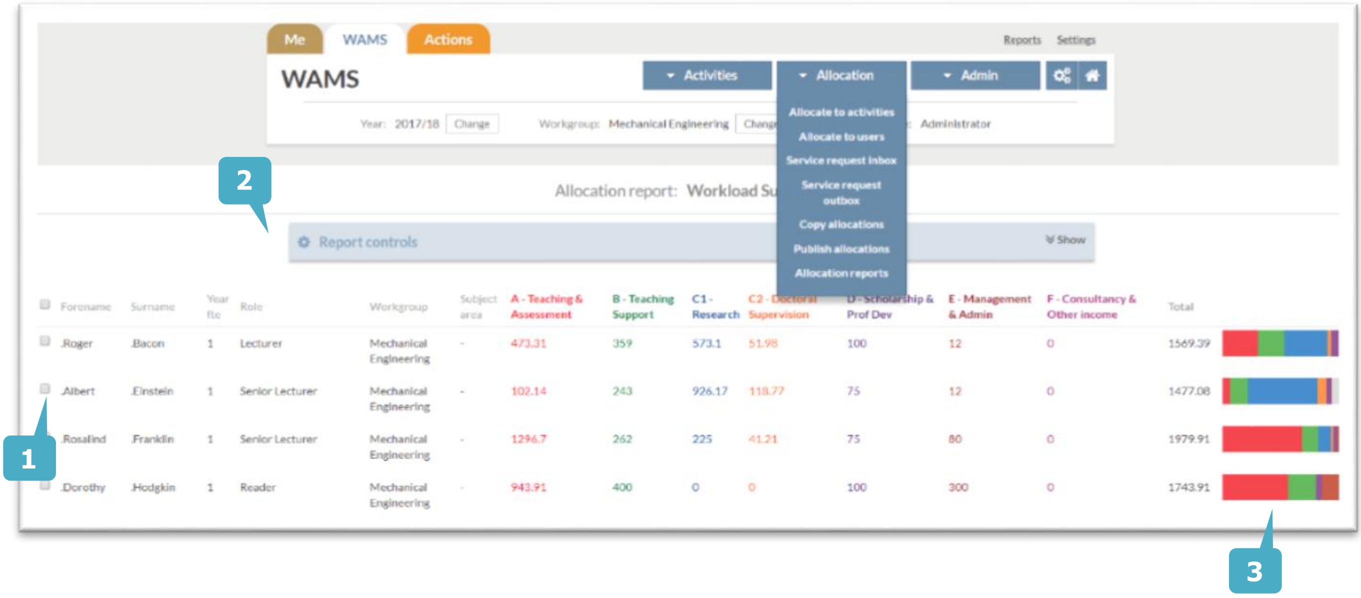


9 Reporting

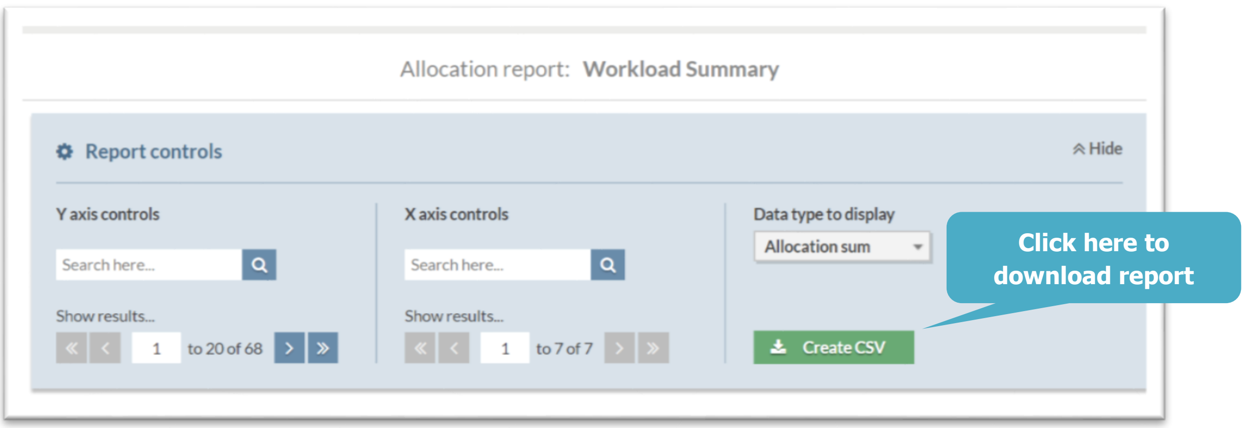
Reports are only available to Allocators, Departmental Administrators and Central Administrators.

9.1 Workload Summary

Click on the Allocation drop down menu to access the Workload Summary report. This page provides a summary of the unpublished allocations for all Users in the A-F workload categories included in the University Framework.



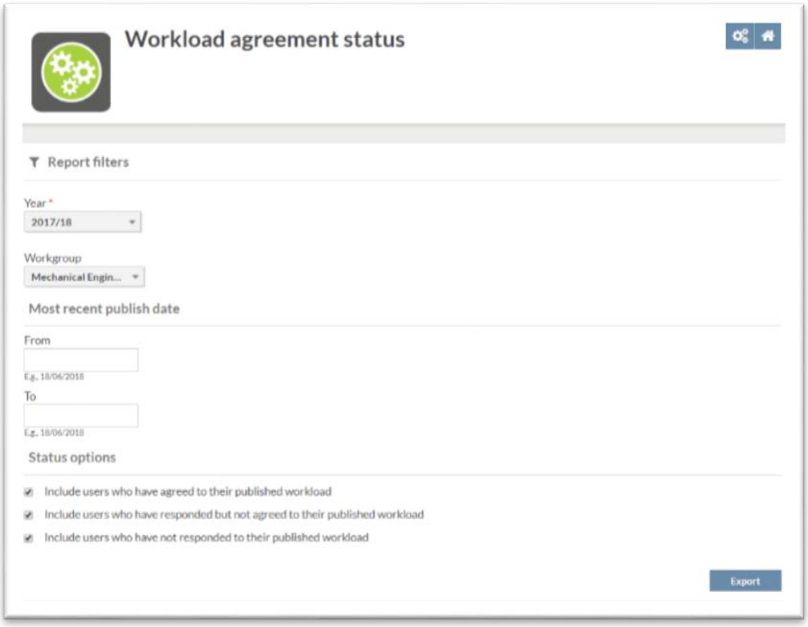
1. Multiple selected users can be compared by clicking on the check boxes adjacent to the Forename column.
2. Report controls – click on 'Show'. In the expanded view (see below), the Allocator can search in the Y and X axis, or download a CSV file of the workload summary. The CSV file can be used to create a bar chart and for other analyses.
3. Summary chart – hover the cursor over to see the % split of workload by A-F workload categories.

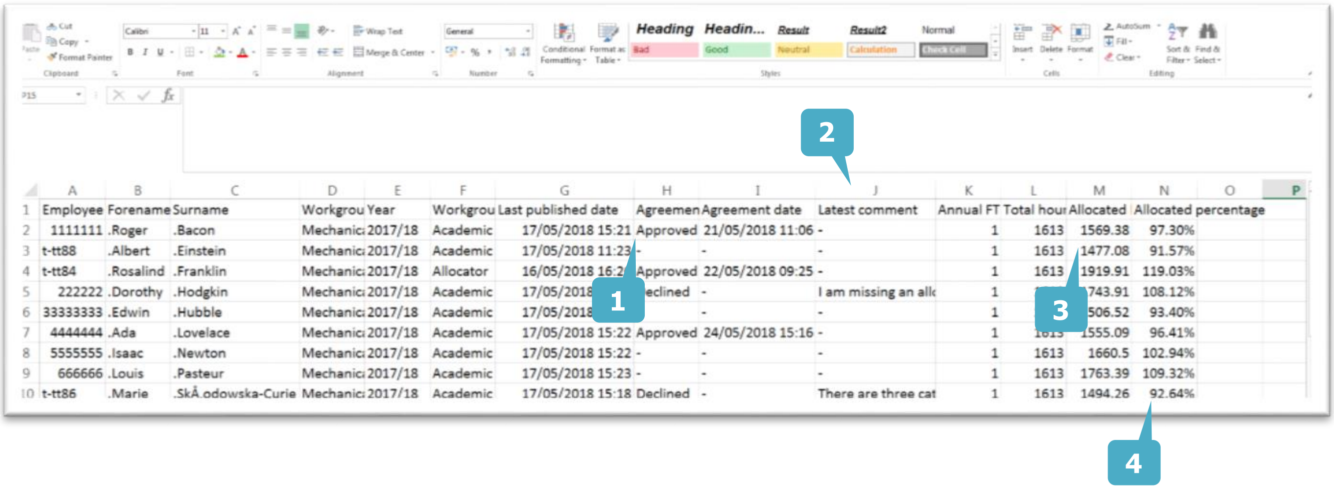


9.2 Workload Agreement Status

This report provides Allocators and Departmental Administrators with a CSV download of the workload agreement status of Users within their department, following publication of allocations in WAMS.

To access the 'Workload agreement status' report, click on the Global settings button. Select the year, department, and the timeframe required.





	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Employee	Forename	Surname	Workgrou	Year	Workgrou	Last published date	Agreemen	Agreement date	Latest comment	Annual FT	Total hour	Allocated	Allocated percentage
2	1111111	.Roger	.Bacon	Mechanic:	2017/18	Academic	17/05/2018 15:21	Approved	21/05/2018 11:06	-	1	1613	1569.38	97.30%
3	t-tt88	.Albert	.Einstein	Mechanic:	2017/18	Academic	17/05/2018 11:23	-	-	-	1	1613	1477.08	91.57%
4	t-tt84	.Rosalind	.Franklin	Mechanic:	2017/18	Allocator	16/05/2018 16:2	Approved	22/05/2018 09:25	-	1	1613	1919.91	119.03%
5	222222	.Dorothy	.Hodgkin	Mechanic:	2017/18	Academic	17/05/2018	eclined	-	I am missing an all	1	[illegible]	743.91	108.12%
6	33333333	.Edwin	.Hubble	Mechanic:	2017/18	Academic	17/05/2018	[illegible]	-	-	1	[illegible]	506.52	93.40%
7	4444444	.Ada	.Lovelace	Mechanic:	2017/18	Academic	17/05/2018 15:22	Approved	24/05/2018 15:16	-	1	[illegible]	1555.09	96.41%
8	5555555	.Isaac	.Newton	Mechanic:	2017/18	Academic	17/05/2018 15:22	-	-	-	1	1613	1660.5	102.94%
9	666666	.Louis	.Pasteur	Mechanic:	2017/18	Academic	17/05/2018 15:23	-	-	-	1	1613	1763.39	109.32%
10	t-tt86	.Marie	.SkÅ.odowska-Curie	Mechanic:	2017/18	Academic	17/05/2018 15:18	Declined	-	There are three cat	1	1613	1494.26	92.64%

1. Agreement status – 'Approved', 'Declined' or '-'(no response).
2. Latest comment – Users will need leave a comment if they decline their workload (in order for the response to be recorded).
3. Allocated hours – the total number of workload hours published to the User
4. Allocated percentage – the percentage of workload allocated (notional 1FTE = 1613 hours).

9.3 Other reports in WAMS

The following reports are available in on the Global Settings page .

9.3.1 User allocations

A configurable report that allows the Allocator or Departmental administrator to select any or all of the custom fields, allocation attributes or specific supplements in WAMS to include against allocations.

9.3.2 Allocation percentage report

An alternative way to access the staff allocation report (see section 3).

9.3.3 WAMS Users

A report of all WAMS Users within a department (workgroup). The Allocator/Departmental Administrator can filter for Year, Workgroup role, Job role and Active/Inactive User status.

9.3.4 Data Export

A report that allows all data from WAMS to be exported.

9.3.5 TRAC category report

A report that is used by the TRAC Accountant after end of year verification, to complete the TRAC return.

9.4 Changing FTE in WAMS

Staff FTE and notional hours are imported into WAMS by central administrators each month using a report from iTrent. FTE is adjusted by start date and end date within the year.

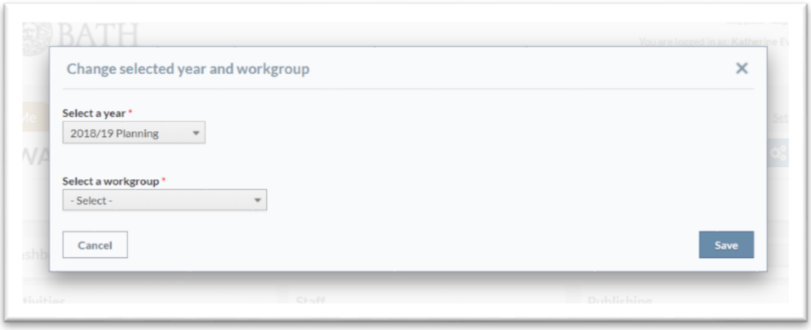
FTE can also be overwritten by an Allocator in WAMS. For example: Academic has changed from 1 FTE to 0.6 FTE part-way through the academic year.

To adjust the FTE, click on the 'Admin' drop down and then click on 'Workgroup staff'. There will be an option to click 'Edit' against the records for each member of staff. After clicking on 'Edit' for the relevant academic, select 'Override the user's default FTE value', adjust the FTE and add a comment. The academic will be able to view the comment when the workload model is published.

10 Planning Year

A department can contact the Central Administration team (wams@bath.ac.uk) if they wish to set up a planning year in WAMS.

- Click the 'Year' setting on the dashboard to select the planning year.



- Core data (Grants and Contracts, Doctoral Supervision and Consultancy and Other Income) imported into the planning year (i.e. 2018/19 Planning), will be the same as in the current year (i.e. 2017/18).

- WAMS has an in-built 'date-dependent' functionality, which means that Grants and Contracts, Consultancy and Doctoral Supervisions that expire at the end of 2017/18 academic year, will automatically have an allocation of '0' hours in the 2018/19 planning year.

- Allocations for Teaching and Assessment, Teaching Support, General Research, Scholarship and Professional Development and Management and Administration will be rolled over from the previous year.

- Allocators can make adjustments to teaching allocations for the planning year, using the 'Allocate to Activities' and 'Allocate to Users' pages.

- Workload can be assigned to new staff who are scheduled to start the following academic year (using i.e. 'Mechanical Engineering, Post 1', 'Mechanical Engineering, Post 2', 'Mechanical Engineering, Post 3'). The workload can be moved to staff once they become visible in HR records (see section 6).

- Contact the Central Administration team for support with:

  - Adjusting FTE for individual Users in the planning year
  - Adding new units into the planning year (if set-up on the online Unit Catalogue)