Desk Manual for Entering AOR into IRattler

Use the following steps to enter data for Assignment of Responsibilities.

<table>
<thead>
<tr>
<th>Steps</th>
<th>Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Log on to IRattler. Click on &quot;Campus Solutions&quot; &gt; &quot;FAMU Faculty Assignment&quot;</td>
<td><img src="image" alt="Menu Screen" /></td>
</tr>
<tr>
<td>2. Click on &quot;Use&quot; &gt; &quot;Assignment of Responsibility&quot;. A search form should be displayed.</td>
<td><img src="image" alt="FAMU Faculty Assignment Screen" /></td>
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<tr>
<td>3. On the search form, you can search by the fields that are available on the form. The most commonly used search fields are &quot;Term&quot;, &quot;EmplID&quot;, and &quot;Department&quot;. If you are entering AOR for an academic department, enter a term for example: 2135 for Summer 2013, 2138 for Fall 2013, and 2143 for Spring 2014) in the &quot;Term&quot; field and first few digits of Dept ID for &quot;Department&quot; (15 for Pharmacy for example). Click on &quot;Search&quot; to show a list of faculty in your department that require AOR's.</td>
<td><img src="image" alt="Find an Existing Value Screen" /></td>
</tr>
</tbody>
</table>

*Ask EIT for setup menu 'period administration'
4. You can also search by Term and EmplID if you are working on an AOR for a specific faculty member.

![Search Criteria](image)

5. In Search Results list, click on any column heading to sort in ascending order on that column and click again for descending order. The most commonly used sort is "Last Name" column. Click on a faculty name in which you would like to work on.

6. If this faculty member has not been entered previously, it will show limited basic information about that individual. Click on "Save" to start creating an AOR for this individual. Once "Save" is clicked, this will bring you to the actual AOR page.
7. In the actual AOR page, the top of the screen (in big red box) is pre-populated from HR and changes cannot be made within these fields. The field “HR Position Effort (FTE)” is the contracted for by the faculty on the HR side, and “AOR Position Effort” shows information that has been entered on the AOR page. The field “Effort Discrepancy” shows the difference between the last 2 lines. If the difference is 0, the color will change from red to black. What you need to do is enter all the activities to match the AOR Position Effort with HR Position Effort so that the difference show 0. Also the status of the AOR should show “Draft” status.

8. To enter a course for faculty, click on the arrow sign besides “Credit Generating Activities”.

9. Some courses are automatically populated for the faculty member on course scheduling side based on Emplid, Term, and Empl Rcd number. There will be cases where some courses will not be populated initially because when instructors are assigned to a course on course Scheduling side, only the EmplID is entered and maintained, not the Empl Rcd. To view all courses in which the faculty taught for
that term, click on "Refresh Classes". This
will populate all non-zero enrollment
courses in which the faculty taught for
that term.

10. If a course is not populated after clicking
on "Refresh Classes", the course has not
been assigned to the faculty on the course
scheduling side. Click on Campus
Solutions > Curriculum Management >
Schedule of Classes > Maintain Schedule
of Classes to attach an instructor to a
course before you come back to the AOR
system to click on "Refresh Classes".
(Access to Maintain Schedule of Classes is
needed in order to do so.) If access is not
available, check with your department for
individuals with access, or contact the
Registrar’s Office for assistance.

11. For courses that are populated under
"Credit Generating Activities", if any
information is missing for the course, such
as Credit Hours or Contact Hours, or if
the % Effort for that course needs
adjustment, click on "Edit" to display "Edit
Activity" screen.

12. Changes in the "Edit Activity" screen can
be made as needed. Click Ok to return to
the AOR page. Adjust or enter the % Effort
based on what was on the paper AOR.
You may also enter the Contact Hours or
Credit Hours if they are missing.
13. To add non-credit generating activities such as advising, research, service, click on “Add Activity”.

14. Select the appropriate activity from the drop down list. Please remember E&G research is listed as “Non-Sponsored Research” and C&G research “Sponsored Research”. Click Ok to view additional fields.

15. The additional fields are different for each activity you choose in the drop down. If all the information for each field is known, fill it in. Otherwise, you can just fill in % Effort field. Click Ok to return to the AOR page.
16. You will notice all Non-Credit Generating Activities entered will now be listed under “Non-Credit Generating Activities” section if you click on the arrow.

17. Repeat as needed to enter all other activities. When completed, you will notice the “Effort Discrepancy” field is showing 0 in black.

18. Expand “Approval Information” arrow and put in the approval ID and click on “Submit for Approval”.

19. If the faculty happens to have several positions for that term, you will need to go to each record by clicking on the page arrow, repeat steps 1-17 for each AOR and match the FTEs before it can be submitted for approval.

20. In some cases, if a faculty/staff has several positions, and the total FTE of all positions is greater than 1.2, it will prompt you to enter a comment before it can be submitted for approval. Click on “Faculty/AOR Comments” to enter comments.
21. If an AOR is successfully submitted, the AOR status should now change from “Draft” to “Pending Approval”.

22. Return to the search screen by clicking on Use > Assignment of Responsibility. Use the Term and Department to bring up the department list again and move on to the next person until each individual on your list has a “Pending Approval” status. To avoid typing term and Department repeatedly, you can click on “Save Search Criteria” to save your search criteria.
23. Type a name for your search and click on “Save”

Assignment of Responsibility

Save Search As

Name the search and then click Save.

Name of Search: Summer 2013

The saved search will contain these values:

- Term: begins with 2135
- Empl ID: begins with
- Version: =
- Last Name: begins with
- First Name: begins with
- Status: =
- Appointment Type: =
- Pay Group: begins with
- Position: begins with
- Department: begins with 15
- Job Code: begins with
- HR FTE: =
- AOR Effort: =

24. Then click on “Return to Advance Search”.

Assignment of Responsibility

Save Search As

Search saved as Summer 2013.

Return to Advanced Search
25. You should now see the saved search in the “Use Save Search” drop down. You can do a saved search for each term for your department so that you don’t have to enter the term and department again and again.

26. Once all faculty/staff have been entered for the department within a term, check to ensure all courses are attached with instructors. You will need Query Viewer to do that. Click on “Campus Solutions” > “Reporting Tools” > “Query” > to view.

27. Click on “Query Viewer”.

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Menu
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advisement
- Contributor Relations
- SA Integration Pack
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
  - Query
  - BI Publisher
  - Report Manager

Main Menu

Reporting Tools
Run, create, and manage queries and nVision reports.

Report Manager
Review report list.

Query
Extract information using visual representations of your PS database
- Query Manager
- Query Viewer
- Schedule Query
28. Enter "FAM_AOR_UNACCOUNTED_COURSES" in the search box. Two queries should appear.

29. Click on "Excel" on the line of "FAM_AOR_UNACCOUNTED_COURSES". If a popup blocker appears, the block will need to be removed to show the query result page.

30. A window will appear asking for a term. Enter the term and click on "View Results".

31. An Excel file is generated and in the file it shows all courses that have not made into the AOR system yet. The file is sorted by DeptID already. Scroll down to your department and view courses that are still left uncounted for. Find out which faculty/staff taught the course and enter it on the AOR page of the individual.

32. Repeat query process as needed until the DeptID is not showing in the Excel file anymore.

33. Congratulations! You have now completed one term. Move on to the next term until all 3 terms are completed.
## Courtesy Appointments

The steps below describe how to enter AOR for courtesy appointments. Courtesy Appointments are usually assigned to Navy ROTC, Army ROTC, and Engineering FSU Faculty who teaches courses which have FAMU student enrolled.

<table>
<thead>
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<th>Steps</th>
<th>Screen</th>
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<tbody>
<tr>
<td>1. Click on &quot;Add a New Value&quot; tab. Enter the Term and ID and click &quot;Add&quot;.</td>
<td><img src="image" alt="Assignment of Responsibility" /></td>
</tr>
<tr>
<td>2. A message will appear stating &quot;a new AOR will be created&quot;. Click &quot;OK&quot; to close the message box. Limited initial information will be displayed such as Term, ID, and Appointment Type. Click on &quot;Save&quot; to create an AOR for this faculty/staff. Once &quot;Save&quot; is clicked, blank payroll information is displayed with 0 HR Position Effort.</td>
<td><img src="image" alt="Positions" /></td>
</tr>
<tr>
<td>3. Click on the triangle next to &quot;Credit Generating Activities&quot;. If the course is not showing on the list, click on &quot;Refresh Classes&quot; to bring up the course. Adjust the FTE by clicking on the &quot;Edit&quot; button.</td>
<td><img src="image" alt="Credit Generating Activities" /></td>
</tr>
<tr>
<td>4. The HR position effort will stay at 0, and there will be some effort discrepancy showing in red after efforts are entered for the course. You can still enter the approver ID and submit the AOR for courtesy appointments even though the FTE's are not matching.</td>
<td></td>
</tr>
</tbody>
</table>
FAQ

1. What does AOR stands for?
   Assignment of Responsibility.

2. Why are AOR's used at Florida A&M University?
   Each SUS (State University System) institution is required by the State of Florida to report
   information regarding instruction and research activities. This information will provide data for
   the review and management of personnel assignments, the development of SUS request,
   budgets related to faculty activities, the reporting and auditing requirements of the
   Twelve Hour Law (1012.945 F.S.), and the Annual Expenditure Analysis.

3. What entails the AOR data entry workshop?
   Each academic department will need to complete the AOR's in the data entry system (within
   iRatler) to account for the amount of payment and FTE each faculty is contracted for. Before
   AORs are entered, paper AOR's should be prepared, verified, and signed by appropriate
   authorities. The AOR data will then be entered into the AOR system based on the paper AOR's.
   The AOR system pre-populates position and payroll data from Human Resources module, as well
   as course assignment information from Curriculum Management within Campus Solutions
   module. You cannot change anything on job/position/payroll in AOR system, nor change course
   assignments in the AOR system. If there are any errors from either source, changes have to be
   made at the source system, Human Resource and Curriculum Management respectively. The
   information entered into the AOR system is the % effort a faculty has within credit generating
   activities (courses) and non-credit generating activities. Once this information is entered, the
   AOR can be submitted for approval. All faculty within the department, as well as all courses
   that are offered in your department for the term will have to be entered into the AOR system.

4. Where do I go to enter information into the AOR data entry system?
   When the AOR system is opened for a term, department representatives will be notified via
   email or phone. Access will be granted to assigned department representatives in order for
   completion of AOR's within specified time frame. The option to meet at a centralized location to
   perform the data entry will be available if problems occur doing the entry at your desk. The
   navigation to the AOR system is Campus Solutions > FAM Faculty Assignment > Use >
   Assignment of Responsibility.

5. What if there is a discrepancy in position/payroll/job between the paper AOR and AOR system?
   The AOR system pre-populates position and payroll data from Human Resources module. Changes
   cannot be made to anything within job/position/payroll information in the AOR system. If there
   are any problems with the source data, changes need to be made in the Human Resources
   module. Proper protocol such as the department chair, Dean's office, Academic Affairs, and
   Human Resources is essential to file paper work and make any adjustments in Human Resources
   module. The verification process should happen before AOR data entry to ensure a smoother
   data entry session.

6. What if a course is not showing even after clicking on “Refresh Classes”
   The AOR system pulls course assignment information from Curriculum Management in Campus
   Solutions module. Changes cannot be made to course assignment in the AOR system. If you
need to attach a course to an instructor, click on Maintain Schedule of Classes under Curriculum Management. If proper access isn’t available, check within the department to see what individual has access, or contact the Registrar’s office for assistance. In some cases, instructors will not show up in the list of instructors authorized to teach in your department. Contact the Registrar’s office to make the instructor appear on the list to assign courses.

7. How do I know if I am done with specific faculty for a term? An AOR is completed for a faculty when all FTE’s matched for each position for that faculty within that term. It is then submitted for approval, and the status of the AOR will show “Pending for Approval”.

8. How do I know if I have completed entering data for my department within a specific term? 
   1) Each faculty on the department list has “Pending for Approval” status.
   2) No course is showing for the department in “FAM_AOR_UNACCOUNTED_COURSES” query result.

9. What if there are courses left for my department in the “FAM_AOR_UNACCOUNTED_COURSES” query result? Search what faculty taught this course in Maintain Schedule of Classes under Curriculum Management. If the instructor is missing even in Maintain Schedule of Classes, fill in the instructor in Maintain Schedule of Classes and then go to AOR system, click on “Refresh Classes” to bring up this course in the AOR system.

10. What are some cases which an AOR cannot be submitted for approval? 
    1) The FTE does not match for one or more of the AORs. To solve is issue, match all FTE’s for all records for the faculty/staff 
    2) The total FTE for all AOR’s for the faculty/staff within the term is more than 1.2. To solve this issue, add a comment explaining the FTE is over 1.2.

11. How can changes be made (if needed) once an AOR has been submitted for approval? Changes cannot be made to an AOR in “Pending for Approval” status. The Approver will have to push back the AOR for you to make changes. If the AOR has already been approved, another version of the AOR can be created by clicking on “Add a New Value”. Then enter the term and EmplID and follow the same steps stated previously to create another version.
Assignment of Responsibility

Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value  Add a New Value

Search Criteria

Use Saved Search: ▼

Term: ▼ ▼
Empl ID: ▼ ▼
Version: ▼ ▼
LastName: ▼ ▼
FirstName: ▼ ▼

12. What if I cannot find the faculty in the search list
1) The faculty may be paid under a different DeptID. In this case, search the person by EmplID and Term instead of DeptID and Term.
2) The faculty may not be on FAMU payroll. We have courtesy appointments in ROTC (Army and Navy) and Engineering School in which FSU faculty teaches courses that have FAMU students enrolled. Click on “Add a New Value” to add a courtesy appointment for the faculty/staff and click on “Refresh Classes” to bring in all courses this individual taught. FTEs for courtesy appointment do not have to match before you can submit since there is nothing to match.
*Please see detail instruction in the “Courtesy Appointments” section.

13. Who do I contact if I have any questions or problems with AOR data entry?
You may contact Dr. Sunny Li, Assistant Director within the Office of Institutional Research (412-5358, Shaoqing.li@famu.edu) for any questions or problems you have on AOR data entry.

List of Abbreviated Terms:

Emplid- Employee Identification Number
Empl Rcd- Employee Record
DeptId- Department Identification Number