



GETTING STARTED WITH INSTRUCTOR OF RECORD

**Produced by
Client Relations and Communications**

Olinda Hubbs
Rodney Emery
Lisa Threlkeld
Jennifer St. Louis

crc@siu.edu
oit.siu.edu/crc

© Southern Illinois University

Table of Contents

Introduction to Instructor of Record	i-2
Login Information	1
Login Credentials	1
Definitions	1
Budget Purpose	1
Delegate	1
Fiscal Officer	1
Instructor Percentage	1
Parts of the Homepage	2
Add Course Assignments	2
Add Delegates	2
View Reports	2
User Details	2
Course Assignments	3-5
Assigning an Instructor to a Course	3
Accessing the Course Assignments Section	3
Choosing the Course View	3-4
Entering an Instructor	5
Instructor Modifications	6
Edit an Instructor	6
Delete an Instructor	6
Delegates	7-8
Add Delegates	7
Remove Delegates	8
Reports	9
Access Available Reports	9
Notifications	10
Beginning of Semester Email	10
Courses Missing Instructor Email	10
One-Time Notification	10

Training Module Links

Introduction: <https://web.microsoftstream.com/video/e130e5f1-fab4-43de-a1a1-7a97927801e8>

Course Assignments: <https://web.microsoftstream.com/video/0dd4b55a-f964-44fa-ab0b-e03b9a2d5ed8>

Delegates: <https://web.microsoftstream.com/video/8537d53c-620b-4b24-9bcd-db74775dceaa>

Reports: <https://web.microsoftstream.com/video/418a21de-d366-4e13-a386-21ec0e720732>

Introduction to Instructor of Record

Instructor of Record replaces the iQuest OAR Solicitation system. It allows department chairs or school directors and their delegates to login to Instructor of Record and enter the teaching assignments for the courses under their subjects for the semester. That data is collected and sent to SIS to update the student information system (Banner). The new system automatically updates SIS in real-time. You can delete an instructor from a course now and it will be deleted in SIS. When you enter instructors, you can search for them by Name, Dawgtag or Email.



Watch the video: <https://web.microsoftstream.com/video/e130e5f1-fab4-43de-a1a1-7a97927801e8>

INTRODUCTION TO INSTRUCTOR OF RECORD

Login Information

Fiscal officers, as authorized through the AIS system, automatically have access to the Instructor of Record (IOR) platform for the purpose of assigning instructors to course sections and identifying delegates.

Fiscal officers (and delegates) will login to the IOR application by visiting this link:
<https://ais-epsapex.siu.edu:8448/aisapex/f?p=116:1:14238626840535::::>

A link to the platform is also available on the SIS website (sis.siu.edu) under the Login Quicklinks, on the Institutional Research iQuest page and on SalukiNet.

Login Credentials

Username: Your@siu.edu email address

Password: Your Network ID password

Definitions

Budget Purpose

Budget Purpose is the pay account number that links the Fiscal Officer to the corresponding course subject(s)

Delegate

A delegate is an individual that assists the chair/director in completing the instructor assignments for the unit. Having a delegate assigned also provides a mechanism by which another individual is notified that the instructor assignment is incorrect or is incomplete. Although the delegate may enter instructor assignments on behalf of the unit, the chair/director as fiscal officer authorizes the process.

Fiscal Officer

Fiscal Officer has administrative oversight of the academic department or school.

Instructor Percentage

Instructor percentage defines distribution cost for the course. All instructor entries must total 100% per course regardless of total number of instructors (e.g., instructor #1=25%, instructor #2=25%, and instructor #3=50%, for a total of 100%) and each percentage of time must be greater than 0%. **Note:** There can only be one primary instructor for each course section regardless of distribution of teaching assignment.

INTRODUCTION TO INSTRUCTOR OF RECORD

Parts of the Homepages

Once you have logged in, there are four main options to choose from on the homepage.



1. Add Course Assignments

The Course Assignments tab will allow users to indicate which instructor is teaching each course. In order to be able to assign an instructor, users will have to be identified as the Fiscal Officer of the subject or department or you will need to be added as a delegate for that subject or department.

2. Add Delegates

The Add Delegates tab will allow Fiscal Officers to add additional users to enter instructors in the Instructor of Record application. Delegates can enter instructors into the application for the Fiscal Officer.

3. View Reports

The reports tab shows a series of reports that can be run to view the course information. Users should have access to their departments as identified under User Details.

4. User Details

The users calculated security settings are located in a collapsible box on the home page under User Details.

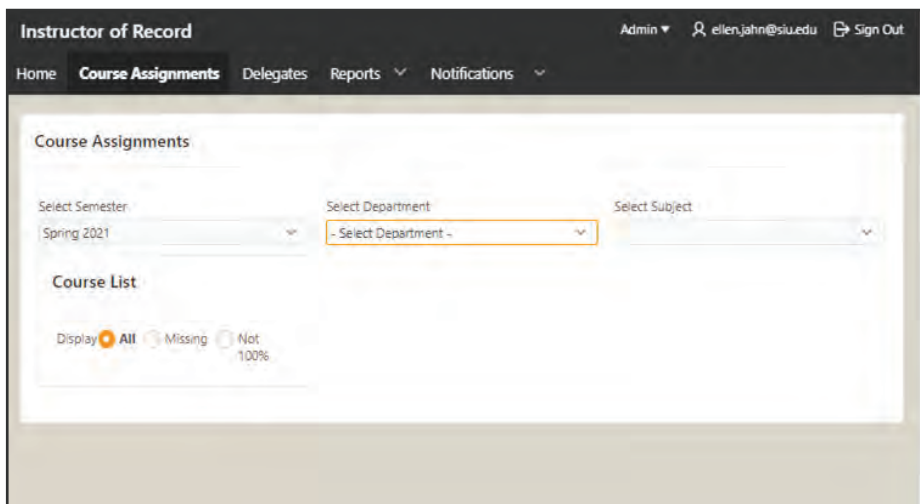
COURSE ASSIGNMENTS

Watch the video: <https://web.microsoftstream.com/video/0dd4b55a-f964-44fa-ab0b-e03b9a2d5ed8>

Assigning an Instructor to a Course

Accessing the Course Assignments Section

1. Select the **Course Assignments** option on the Homepage.
2. Select the **Semester**, **Department** and **Subject** for which to enter **Instructor Data**.



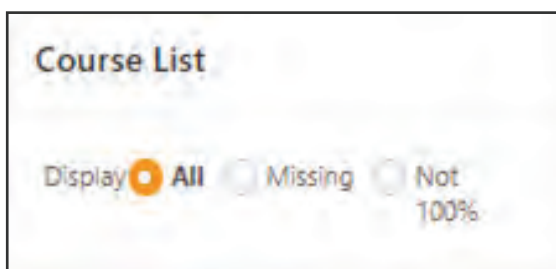
Note: The options available in the Department and Subject drop downs are dependent on user security as displayed on the Home Screen in the User Details pane. Department Chairs and their delegates as identified in the delegates tab of this application can both enter the instructor, primary flag and percentage of time.

3. After selecting the **Department** and **Subject**, the classes for the semester will be located on the left.

Choosing the Course View

There are multiple views available in the Course List pane by selecting a radio button.

- **Display All** will display all courses for the semester.
- **Display Missing** will display courses missing Instructor Records
- **Display Not 100%** will display records that do not have 100% of time entered for the course.



COURSE ASSIGNMENTS

Assigning an Instructor to a Course (Cont.)

Choosing the Course View (Cont.)

4. Choose a course to enter **Instructor(s) of Record**.

Instructor of Record Admin | ellen.jahn@sju.edu | Sign Out

Home **Course Assignments** Delegates Reports Notifications

Select Semester: Spring 2021 | Select Department: ACTY ACCOUNTING | Select Subject: ACCT ACCOUNTANCY

Course List

Display: All Missing Not 100%

Course	Section	Primary Instructor
ACCT 360	001	?
ACCT 360	940	?
ACCT 961	201	?
ACCT 575	001	?

1 - 4

SIS Course Information

CRN: 20565
Course: ACCT 360
Meeting Time: 1100 - 1215
Primary Instructor: ?
% Time: ?

Interdisciplinary: ?
Section: 001
Meeting Days: MW
SIS ID: ?

Edit Instructor(s) of Record [Add Instructor](#)

Search: [] Go Actions

COURSE ASSIGNMENTS

Assigning an Instructor to a Course (Cont.)

Entering an Instructor

5. After selecting a course, click the **Add Instructor** button to enter the **Add/Edit Instructors** form.



6. Click the **up arrow** next to username to search for an instructor by **Name**, **Network ID (SIU85XXXXXXX)** or **Email**.

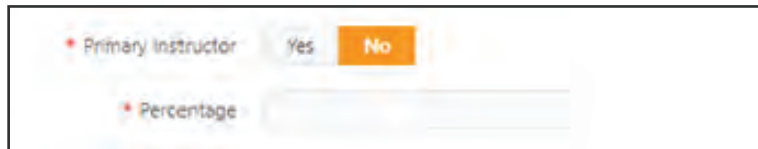
7. Select the **appropriate instructor**.

8. After selecting the username, the Instructor Name and SIS ID will display.

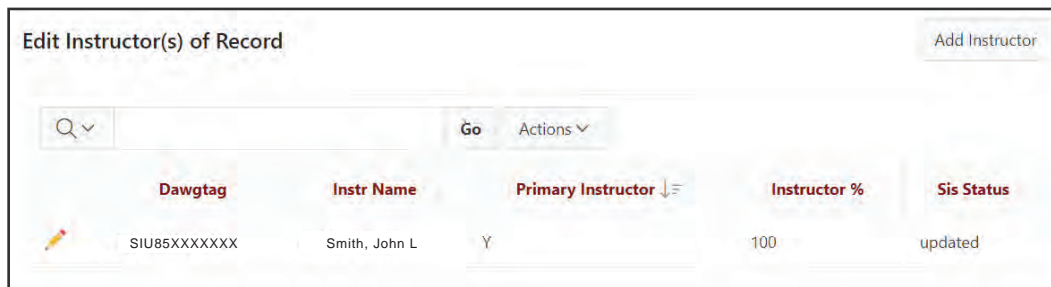
9. Enter Yes or No for **Primary Instructor**.

10. Enter the **percentage of time** the instructor is teaching the course. **Note:** There can only be one primary instructor for each course section regardless of distribution of teaching assignment.

11. Click **Add Instructor**.




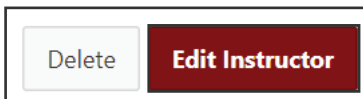
Note: The instructor of record will be sent immediately to SIS. Primary Instructors are displayed in the SIS Course Information pane as Primary Instructor.




INSTRUCTOR MODIFICATIONS

Edit an Instructor

1. From the **Homepage**, select the **Course Assignment** section.
2. Select the **Semester**, **Department** and **Subject** for which to modify **Instructor Data**.
3. Select the **appropriate course**.
4. Select the **pencil icon**  next to the Instructor's name.
5. Make any necessary modifications to the **Instructor information**.
6. Select the **Edit Instructor** button to save your modifications.

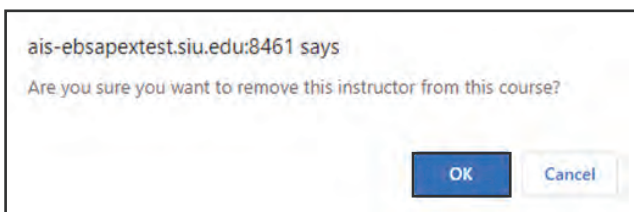


Delete an Instructor

1. From the Homepage, select the **Course Assignment** section.
2. Select the **Semester**, **Department** and **Subject** for which to modify **Instructor Data**.
3. Select the **appropriate course**.
4. Select the **pencil icon**  next to the Instructor's name.
5. Click the **Delete** button in the bottom right corner of your screen.



5. Click **OK** to confirm that you would like to remove the instructor from the course.



The instructor will be immediately deleted from the Instructor of Record app and deleted from this course in SIS.

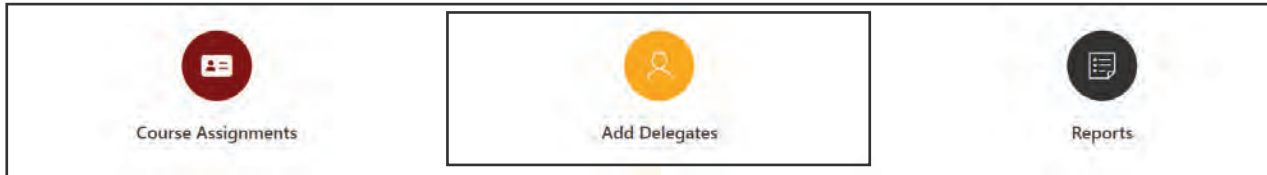
DELEGATES

Watch the video: <https://web.microsoftstream.com/video/8537d53c-620b-4b24-9bcd-db74775dceaa>

Add Delegates

Delegates can be defined by the Fiscal Officer to enter instructors on behalf of a department or course subject. As many delegates as are necessary can be entered.

1. From the Homepage, select the **Delegates** section.



2. Click the **Create button** **Create** in the top right corner of the screen.
3. Select the appropriate **Department**, **Subject**, and **Username** for the delegate you would like to add.

A screenshot of the 'Edit Delegate' form. It features several input fields: 'Department' (a dropdown menu), 'Subject' (a dropdown menu showing 'ALL *ALL SUBJECTS*'), and 'User Name' (a text field with a search icon). There is also a 'Disabled' field with radio buttons for 'Yes' and 'No', where 'No' is selected. Below these fields is a section for 'Audit Information'. At the bottom left is a 'Cancel' button and at the bottom right is a red 'Create' button.

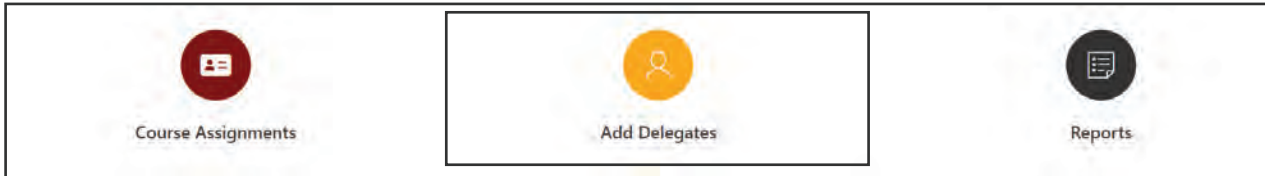
Note: The options available in the Department and Subject drop downs are dependent on user security as displayed on the Home Screen in the User Details pane. Department Chairs and their delegates as identified in the delegates tab of this application can enter additional delegates.

5. Click **Create** to save the Delegate.

DELEGATES

Remove Delegates

1. From the Homepage, select the **Delegates** section.

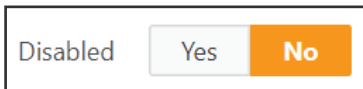


2. A list of current delegates will appear.

3. Click the **Edit pencil icon**  to the left of the delegate you would like to remove.

4. The **Edit Delegate** form will open.

5. Under the **Disabled** heading, click **Yes** to remove the delegate.



6. Click **Apply Changes** to save.

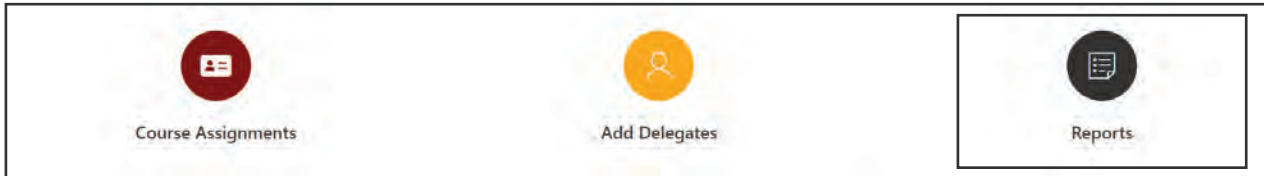


REPORTS

Watch the video: <https://web.microsoftstream.com/video/418a21de-d366-4e13-a386-21ec0e720732>

Access Available Reports

1. From the Homepage, select the **Reports** section.



2. Click on one of the six options that appear to run a corresponding report.

Courses by Department in SIS	All courses listed for a semester/department in SIS.
Instructor Records	Instructor Records entered into Instructor of Record application.
No Instructors Entered	Courses without instructor data entered in the Instructor of Record application for a semester and department.
Instructor % does not equal 100%	Courses where the instructor time percentage does not equal 100% in Instructor of Record application.
Some Instructors Entered	A list of All Departments for a semester, if courses are available and if instructor data has been entered.
Courses for an Instructor	All courses for an instructor by semester as entered into the Instructor of Record application.

NOTIFICATIONS

Beginning of Semester Email

Department Chairs, school directors, and their delegates should receive emails at the beginning of the semester indicating that the semester is unlocked for Instructor of Record to be Entered.

Courses Missing Instructors Email

Department Chairs, school directors, and their delegates are emailed additional notifications as the semester continues indicating that courses are missing instructors. This notification will continue throughout the semester until all teaching assignments are made.

Note: Course assignments should be in place by week three of the semester.

One-Time Notification

Department Chairs, school directors, and their delegates are emailed a one-time communications. These notifications are sent as information is updated and may vary based on any changes that were made.



SIU Southern Illinois University
CARBONDALE