Metadata for Instructor Data in Class Enrollment

- **Rules for selecting position from Workday**
  - Every instructor can only have 1 position for a given class.
  - Session begin and end date for class is used as Time range to match positions to classes for an instructor.
  - If someone has 2 positions during that time range, the logic will always select the last position that the person had for the Time Range (Currently pulling the first and this will be fixed).
  - For multiple appointments:
    - For Adjuncts: 1) Pull in the position attributes associated with the activity task. 2) If the instructor has 2 activity tasks, but those tasks are associated with two classes, you want both rows. 3) If there is no activity task, pull the Primary Position row. (All job info should be associated with that row).
    - For All Full Time Faculty, Tenure Track and Non Tenure Track: There is no activity task. Take their Primary Position and all detail about that primary position.

- **Activity Linkage**
  - Activity task is only for Union faculty.

- **Reporting Dept should come from Academic Uni of the Academic Appt**

- **Known Legacy Data Issues**
  - Some Instructors don’t have a primary position.
  - Legacy data is not seamlessly integrated so there might be fields that are not populated as expected for legacy data.
  - Retired People, Shanghai, SOM and NYUAD excluded from Historical Data (assumption is that they are in the regular data set).
  - Rank might be missing for historic data.
  - Some adjuncts have a primary position of retired - Primary position was removed - we are randomly selecting position here.

- **Effort allocation for Team Taught Courses (more than one instructor):**
  - Cross listed classes - All Allocations are based on sponsored class.
  - When a class section has more than one Primary Instructor in an Enrollment Section or Section Leader in a Non Enrollment Section workload is allocated evenly among them. For example, if there are two Primary Instructors in a lecture with 10 students generating 40 points each instructor is assigned .5 classes, 5 enrolled students, and 20 points taught. Conflicting and incomplete data are handled as follows:
    - If a class section has both one or more Primary Instructors and one or more Section Leaders all the activity is assigned to the Primary Instructor(s).
    - If a class section has neither a Primary Instructor nor a Section Leader, often because no instructor is recorded the class activity is assigned to the Instructor Type Other/NA with Instructor Reporting Department = Course Org Reporting Department. These missing-data classes are included in both data views — “Department Classes” and “Classes Taught by Department Faculty” with instructor name shown as - and instructor type Other/NA. (Note: This has not been implemented yet).

- **Primary Instructor Flag**
  - Since a class may have more than one, we are randomly selected one for this primary instructor flag if we don’t want to show multiple instructors on a report.
  - An issue with Instructor Position in Class Meeting Pattern was found. E.g. instructor 10375147, Mary Acri is an adjunct for the courses in Spring 2016. However, she comes in with her primary position ‘ Senior, Research Scientist’. The following steps were implemented on 11/22/2016 to fix the issue:
    1. The Position SID to instructor bridge table is what the report uses to show the position info.
    2. Currently the position SID on this table points to the primary position.
    3. The logic in the ETL that populates this column will be changed to:
       a. Look the Position Associated with the Activity Based Pay using the Activity Code on the Class that the Instructor is teaching.
       b. If the Activity Based Pay record is not found, then use the Primary position of the Instructor at that point in time.
    4. We are not explicitly checking whether the instructor is an adjunct. Only Adjuncts get Activity Based Pay.
    5. We are not checking whether the instructor is in a union.

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**Instructor Allocated points** = enrolled headcount * taken units * NYU_WEIGHT

The NYU_WEIGHT divides the percentage among the instructors for a Class based on their role. Here is the logic used to derive the NYU_WEIGHT field:

1. NYU_WEIGHT is assigned only to Primary Instructor or Section Leaders.
2. In cases where there are Primary Instructors and Section Leaders for a class the percentage is divided only among the Primary Instructors.
3. NYU_WEIGHT divides the percentage equally among the primary instructor or section leaders.

For example:

1. If a class has 4 primary instructor, then the NYU_WEIGHT for each of them is 0.25.
2. If the class has no primary instructors, but 2 section leaders then NYU_WEIGHT for each of them is 0.5.
3. If the Class has 2 Primary Instructors and 1 section leader, then NYU_WEIGHT for Primary Instructors is 0.5 each and that for Section Leader is 0.

And in addition to the NYU_WEIGHT logic, sponsor vs non-sponsor class also seems to play into the allocation of points.

**Important Use Note:** When using any of the metrics in the allocated effort folder, you may only combine with attributes from the Class and Course Folders. If student attributes such as plan are added, the effort will be null.