

# ***TA Management System User Manual***

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For assistance please contact the Faculty of Graduate and Postdoctoral Affairs.

## Revisions:

Date	Version	Change
July 19, 2010	V.1.0	
December 17, 2010	V.2.0	Module 4 TA Workshop added
December 17, 2010	V.2.0	Module 5 TA LFD added
February 09, 2011	V.2.1	Enhancements to SZATAAL
February 09, 2011	V.2.1	Enhancements to SZATAAS
March 08, 2011	V.2.1	Enhancements to Assign of Duties
April 01, 2011	V.2.1	Enhancements to SZATAMT, SZVTADM, SZVTAFM, SZATAAL
July 15, 2011	V.2.1	New report for Depts & FGPA GSRO_TA_PROFILE_XLS
August 30, 2012	V.2.1	Allow UG TAs to decline assignment
September 06, 2012	V.2.1	Update Workshops to 'Training Sessions'

# Introduction

The TA Management System will collect and manage information on graduate and undergraduate Teaching Assistants (TAs). The TA Management System supports the tracking of TA allocations to academic units, subsequent assignments to course and non-course activities; collection of TA areas of interest; manage TA training requirements; supports the undergraduate TA hiring process; tracks historical trends and assists in the management of the overall TA budget.

The TA Management System is comprised of seven modules; the first three modules will be put into production August 6, 2010. These modules cover Graduate TA Allocation to Departmental Units; Undergraduate TA Recruitment; and Assignment of TAs to Courses and Non-TA Duties.

On December 15, 2010, modules 4 and 5 were placed into production. Module 4 provides EDC, FGPA, Academic Departments and Mentors with a tool to manage TA Training Workshops. Module 5 will allow both TAs and FGPA to electronically complete the Leave of Duties (LFD) process.

This training manual will be updated as other modules are put into production.

The following acronyms will be used throughout the manual:

- ADs - Associate Deans
- DAs - Departmental Administrators
- DS - Departmental Supervisor
- TAs - Teaching Assistants
- FGPA - Graduate Studies staff
- EDC – Educational Development Centre

***Form access:** Who can access what forms:*

Associate Deans (Faculty) will have:

- a. update access to the Allocation form - SZATAAL
- b. **view only** access to Assignment form - SZATAAS

Departmental Administrators (Departments) will have:

- a. update access to Assignment form - SZATAAS
- b. update access to Departmental Maintenance form - SZVTADM

Faculty of Graduate Postdoctoral Affairs staff will have:

- a. update access to FGSR Maintenance form - SZVTAFM

Mentor Coordinator (EDC) will have:

- a. update access to TA Mentoring Application form - SZATAMT

## **SZATAAL – TA Allocation Form**

This form is accessible only by ADs. It lists all TAs allocated to the user's faculty. The multi-tabbed form provides other key information such as up-to-date views of TA Profiles, Departmental TA requirements, Instructor TA Requirements and possible TAs that other faculties are willing to trade which will facilitate TA allocation decisions.

# SZATAAL - TA Allocation Form - Grad TA Allocation Tab

The SZATAAL form is blank upon initial opening. The Term must be chosen before using “Next Block” to populate the form with TAs who accepted TA Awards. Only active TA’s within the AD’s faculty, who have awards with a status of accepted, will show on this form.

The “Full Session” checkbox can be checked to show data for the term selected and the term that either precedes or follows the selected term to complete the full session.

When checked, the “Unallocated Students Only” checkbox only displays TA records within the AD’s faculty that have not been allocated.

When a student number is entered in “Student ID:” only data for the specific TA is returned.

The “Level (Outside Priority):” field only affects the “Outside Priority” tab. The default is will return all records; selecting ‘GR’ or “UG” reduce the number of returned records.

The form defaults to showing all departments. ADs choosing a specific department in the keyblock will view all TA records that have been allocated to the ‘Work Dept’. This includes TAs that have been traded into the faculty and then allocated to the ‘Work Dept’.

The “Faculty:” field is used by FGPA users to query specific faculties.

There are 7 tabs across the top of the form:

- Grad TA Allocation
- Grad TA Profile
- Department TA Requirements
- Instructor TA Requests
- Outside Priority
- Grad TA Pool
- Email Sent

## SZATAAL- TA Allocation Form - Grad TA Allocation tab

Oracle Fusion Middleware Forms Services: Open > SZATAAL

File Edit Options Block Item Record Query Tools Help

TA Allocation SZATAAL 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Faculty: Department: Level (Outside Priority):

Full Session Unallocated Students Only

### TA Allocation Form

Student ID	Name	Term	Home Dept	TA Hours	Work Dept 1	Work Dept 2	Work 1 Asgn	Work 2 Asgn	Comments	Trade Faculty	Oth Rel.	Asgn	Reg'd	LFD	Ment.	Canc'd
100	Lastname, Firstname	201430	SYST	130	SYST											
100	Lastname, Firstname	201430	ECON	130	ECON											
100	Lastname, Firstname	201430	PSCI	130	PSCI	130										
100	Lastname, Firstname	201430	CIVE	130	CIVE	130										
100	Lastname, Firstname	201430	GEOL	130	GEOL											
100	Lastname, Firstname	201430	SYST	130	BIT	130										
100	Lastname, Firstname	201430	CIVE	130	CIVE	130										
100	Lastname, Firstname	201430	CIVE	130	CIVE	130										
100	Lastname, Firstname	201430	BIOL	130	BIOL											
100	Lastname, Firstname	201430	PSCI	65	PSCI	65										
100	Lastname, Firstname	201430	JOUR	130	JOUR											
100	Lastname, Firstname	201430	ECON	130	ECON	130										
100	Lastname, Firstname	201430	INAF	65	CRCJ	65										
100	Lastname, Firstname	201430	SOAN	130	SOAN	130										
100	Lastname, Firstname	201430	FREN	130	FREN	130										
100	Lastname, Firstname	201430	FREN	130	FREN											
100	Lastname, Firstname	201430	ECON	130	ECON	130										
100	Lastname, Firstname	201430	CHEM	130	CHEM											
100	Lastname, Firstname	201430	COMM	130	COMM	130										
100	Lastname, Firstname	201430	CIVE	130	CIVE	130										
100	Lastname, Firstname	201430	BIOL	130	BIOL	130										
100	Lastname, Firstname	201430	WOMN	130	WOMN	130										
100	Lastname, Firstname	201430	PSYC	130	PSYC	130										
100	Lastname, Firstname	201430	PADM	130	PADM											

Allocate Full Hours Release Allocations Send Allocation Notice Send Allocation Update Not... Allocation Report Allocation Statistics

The Grad TA Allocation Tab shows real time data to the AD on the following:

- All Grad TAs that have a Home Department within the user's faculty, have been allocated to a department(s) within the user's faculty, and have been saved in the TA Management system.
- All Grad TAs that have a Home Department within the user's faculty, have been allocated to a department(s) outside the user's faculty (i.e. transfers out) and have been saved in the TA Management system.
- All Grad TAs that have a Home Department outside the user's faculty, have been allocated to a department(s) within the user's faculty (i.e. transfers in) and have been saved in the TA Management system.
- All Grad TAs that have a Home Department outside the user's faculty, have been flagged as being transferred to the user's faculty but not yet allocated to departments within the user's faculty, and have been saved in the TA Management system.
- All Grad TAs that have accepted their TA award but have not yet been allocated and saved – **highlighted in yellow**.
- All Grad TA records where the TA award has been cancelled, whether allocated or not – **highlighted in red**.

The Grad TA Allocation tab allows the ADs to process all TA allocations including trading TAs to another faculty or placing them in the general Grad TA Pool for transfer.

Upon the initial opening of SZATAAL, all TA awards within the ADs' faculty that have a status of accepted will be imported from UGAFAs and displayed. Each time the form is accessed TAs who accepted awards and who did not show on the form previously will now show.

There are various columns containing data. The first 5 columns cannot be modified.

Upon initial opening of the Grad TA Allocation tab, the “Work Dept 1”, “Work 1 TA Hrs”, “Work Dept 2” and “Work Dept 2” fields will default to blank fields.

ADs can click the “Allocate Full Hours” button to allocate all unallocated TAs en masse. When pressed, the “Work Dept 1” column will populate with the pre-populated “Home Dept” data. “TA Hours” will populate the “Work Dept 1 Hours” column for all unallocated students. The AD then Saves. This will not apply to TA records where the trade indicator is checked.

ADs can enter “Work Dept 1” and “Work 1 TA Hrs” data for each unallocated TA record individually. ADs can change a “Work Dept” to another within their faculty or split the TA Hrs between “Work Dept 1” and “Work Dept 2”. ADs can enter or change the work TA hours in either of the “Work 1 TA Hrs” or “Work 2 TA Hrs” columns. Comments can be entered in free form text or you can double click on the “Comment” field to open up a larger text field. Changes must be saved.

Work assignments are evaluated independently:

- 1) Updates can be made to work dept 1 provided there are no assignments for work dept 1
- 2) Updates can be made to work dept 2 provided there are no assignments for work dept 2

**Exception:** increasing hours for work department with assignments is allowed. An AD allocates ½ the TA hours to Dept A, Dept A completes assignments. The AD can allocate the remaining TA hours to Dept B.

(Note: decreasing hours for work department with assignments is NOT allowed).

“WD 1 Asgn” is checked when TAs have received a (Non-)Course assignment for ‘Work Dept 1’  
“WD 2 Asgn” is checked when TAs have received a (Non-)Course assignment for ‘Work Dept 2’

The user will note that certain titles on the columns are blue ([Work Dept 1](#), [Work Dept 2](#), and [Comments](#)) indicating the field can be double clicked to get a pick list of the Departments to choose from and the Comments field can be double clicked to get a larger text field.

A checkbox labelled “Rel.” allows ADs to create and save allocations in a pending state. Once ticked and saved, the allocation record will become visible to the DA in the assignment form SZATAAS. A button labelled “Release Allocations” has also been added at the bottom of the page. When pressed, all allocated TA records will be released that are currently being viewed, i.e. releasing one department at a time if a department is selected in the keyblock. Canceled or traded TA records are not affected.

**Note:** once a DA has created course assignments in SZATAAS, an AD may not modify the ‘Released’ indicator.

Once allocations are completed the AD can click on the “Allocation Notice” button at the bottom of the page to notify departments of what allocations have been processed and departments can now begin assigning duties. If re-allocations are made, ADs click on the “Send Allocation Update Notice” button at the bottom of the page, to notify affected departments to review the re-allocated TAs.

Email allocation notices will only be sent if the “Released’ flag has been set. Furthermore, email allocation notices will only be sent to specific departments when “Department:” is selected in the keyblock.

If a TA is “transferable” the AD can either check the “Trade” checkbox and choose the faculty to which that TA is being transferred, OR check the Trade checkbox and leave the Trade Faculty field blank.

## TRADING TAs

When the “Trade” checkbox is checked and the “Trade Faculty” is chosen, the TA appears on both the allocation tab for the faculty chosen and the original faculty. The TA will not show up on the Grad TA Pool tab.

When the “Trade” checkbox is checked and the “Trade Faculty” is left blank the AD is making a general trade. The TA will appear under the Grad TA Pool tab as well as on the allocation tab for the home faculty. When an Associate Dean is trying to identify TAs available for Transfer, they will review the Grad TA Pool tab.

To complete a transfer, the Associate Dean identifies which TA(s) in the Grad TA Pool are wanted, speaks to the TAs Home Faculty, the Home Faculty goes into SZATAAL Grad Allocation Tab form and chooses the Trade Faculty to which the TA will be partially or completely transferred to.

- For partial Trades the home Faculty reduces “Work 1 TA Hours” by the number of hours being traded and enters a comment indicating the number of hours traded.
- For full Trades the Home Faculty enters 0 in the “Work 1 TA Hours” field and enters a comment “Full Trade”. The receiving Faculty allocates the TA by choosing the ‘Work Dept’ and enters the number of traded hours into the work TA hours field(s).

### Undo Trades:

- A trade to the TA Pool can be undone by unchecking the Trade checkbox beside the traded TA on the Allocation form – causing the TA to be removed from the TA Pool tab.
- A trade to a specific faculty can be undone but a message will appear advising the user to contact the receiving faculty in case assignments have already been made.

The last 6 columns show the status of the TA

- “Rel.” is an editable checkbox which allows ADs to make saved allocations visible to DAs in SZATAAS.
- “Oth Asgn” is checked when TAs have received a (Non-)Course assignment to a Dept. other than “Work Dept 1” or “Work Dept 2”
- “Reg’d” will be checked when that TA has registered for the term indicated in the “Term:” at the top of the page. A TA may receive an assignment without being registered.
- “LFD” will be checked when the TA has received a Leave From Duties approval.
- “Ment.” is checked when the TA receives a Mentorship from EDC.
- “Award Canc’d” is checked when the TA Award has been cancelled by FGPA.

### Form Reports

“Allocation Report” button will launch an email delivered report, in Excel format. Displays all data which is visible on the allocation tab. All criteria set in the keyblock will affect the data presented in the report.

“Allocation Statistics” will launch a pop-up window containing the following TA award statistics

**Available** = Internal Use + Imported + To Be Allocated

**Internal Use** = TAs that belong to my faculty and allocated within my faculty

**Exported** = TAs that belong to my faculty and allocated outside my faculty

**Imported** = TAs that do not belong to my faculty but are allocated within my faculty

**To Be Allocated** = TAs belonging to my faculty and not yet allocated + TAs traded into my faculty and not yet allocated

**Total Allocation** = Internal Use + Imported

## SZATAAL – TA Allocation Form - Grad TA Profile tab

Oracle Fusion Middleware Forms Services: Open > SZATAAL

File Edit Options Block Item Record Query Tools Help

TA Allocation SZATAAL 7.0 (PPRO)

Term: 201430 Fall 2014 (September-December) Student ID: Faculty: Department: Level (Outside Priority):

Full Session  Unallocated Students Only

### TA Allocation Form

Grad TA Allocation **Grad TA Profile** Department TA Requirements Instructor TA Requests Outside Priority Grad TA Pool Email Sent

Student: Carleton, Student

Current Program: PHD-5C

Previous Degree(s): BMAT (6B - Mathematics-B/MSc) MSc (5C - Pure Mathematics)

Email: @connect.carleton.ca

Program Supervisor: Thesis Supervisor: Thesis/Project Title: Mother Tongue: English Last Updated: 11-AUG-2014

Grad Courses and Grades

Course ID	Section ID	Course Name	Grade
200830	34798	MATH 5104	W/DN
200830	34788	MATH 5306	A
200830	34801	MATH 5818	A+
200910	14780	MATH 5607	A+

Undergrad Courses and Grades

Course ID	Section ID	Course Name	Grade
199930	42101	BUSI 1001	B
199930	95105	COMP 1005	A-
199930	95185	COMP 1805	A
199930	43100	ECON 1000	CTN

Skills

- Analytical Skills
- Presentation Skills
- English Language proficiency
- Management

Interests

- Teaching/Instructing
- Tutoring
- Research

Course Preferences

- STAT 2655 A1 (Fall 2014)
- STAT 2559 A1 (Winter 2015)
- STAT 2559 A2 (Winter 2015)
- MATH 1007 E1 (Fall 2014)

Course Non-Preferences

- N/A
- N/A
- N/A
- N/A

Other Degrees

Other Degrees	Majors	Minors	Institute
Bachelor Degree	Architectural Engli		Ain Shams University
Masters of Science	Architectural Engli		Arab Academy for Science and Technolo

Course Preferences/Non-Preferences Comments

For Winter 2013 I would prefer a 1st year Algebra or Calculus class.

Other Courses and Grades

Other TA Experience

Work Experience

Conflicts/Issues/Notes

Send Update Profile Notice

**Grad TAs will submit profiles, through Carleton Central. That information is displayed in the form under the Grad TA Profile tab.**

To view a TA profile, select a student ID from either the Grad TA Allocation or Grad TA Pool tab. Then click on the Grad TA Profile tab. Alternatively, a user enters a student ID in "Student ID:" at the top of the form and clicks on Next Block. The Grad TA Allocation tab will become active and display that TA's allocation details; the user then clicks on the Grad TA Profile tab to view the TA's profile.

The form shown under the Grad TA Profile tab is view only. Users may click on the "Send Update Profile Notice" button to send an email to request the TA to update their profile.

# SZATAAL - TA Allocation Form - Department TA Requirements tab

The screenshot shows the Oracle Fusion Middleware Forms Services interface for the SZATAAL TA Allocation Form. The top navigation bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The main header area contains the following fields:

- Term: 201430 (dropdown), Fall 2014 (September-December) (dropdown)
- Student ID: (text input)
- Faculty: (text input)
- Full Session  Unallocated Students Only
- Level (Outside Priority): (dropdown)
- Department: (text input)

The main content area is titled "TA Allocation Form" and has several tabs: "Grad TA Allocation", "Grad TA Profile", "Department TA Requirements" (selected), "Instructor TA Requests", "Outside Priority", "Grad TA Pool", and "Email Sent".

The "Department TA Requirements" tab contains two main sections:

- Top Section:** A table with columns "Term", "Dept", and "Total TAs". The "Term" and "Dept" columns are highlighted in yellow. There are 5 rows in total.
- Bottom Section:** A table with columns "Special Requirements/Needs", "# TAs Per", and "# Hrs Per". There are 8 rows in total.

At the bottom of the form, there is a "Total:" label followed by a text input field, and a button labeled "Send TA Requirement Reminder".

The Department TA Requirements tab is view only; however users may click on the “Send TA Requirements Reminder” button to request the departments within the faculty to update their requirements.

Notes and/or comments from departments concerning special and/or unusual requests will be displayed in the “Special Requirements/Needs” section. The user will highlight the “Dept” in the top section to view any special and/or unusual requests.

Department TA Requirements are by term. The user will highlight a term in the top section to view any special and/or unusual requests for that term.

## SZATAAL – TA Allocation Form - Instructor TA Requests tab

Oracle Fusion Middleware Forms Services: Open > SZATAAL

File Edit Options Block Item Record Query Tools Help

TA Allocation SZATAAL 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Faculty: Department: Level (Outside Priority):

Full Session  Unallocated Students Only

### TA Allocation Form

Grad TA Allocation | Grad TA Profile | Department TA Requirements | **Instructor TA Requests** | Outside Priority | Grad TA Pool | Email Sent

Course	Primary Instructor	Last Updated By	Term	Max Enrollment	Enrollment	TAs Requested	TA Hours Requested	Special Requests
ACCT 5001 A	Lastname, Firstname		201430	30	1			
ACCT 5001 D			201430	30	1			
ACCT 5002 A	Lastname, Firstname		201430	30	1			
ACCT 5002 D	Lastname, Firstname		201430	30	0			
ACCT 5012 A	Lastname, Firstname		201430	25	0			
AERO 3240 A	Lastname, Firstname		201430	40	1			
AERO 3240 A1	Lastname, Firstname		201430	40	0			
AERO 3700 A	Lastname, Firstname		201430	90	1			
AERO 3700 A1	Lastname, Firstname		201430	90	0			
AERO 4003 A	Lastname, Firstname		201430	100	1			
AERO 4003 A1	Lastname, Firstname		201430	50	0			
AERO 4003 A2	Lastname, Firstname		201430	50	0			

Totals: 15 290

Skills Required

Duties Expected

Hours

Total:

Instructors submit their TA requirements through Carleton Central. Their requirements are viewed on SZATAAL under the Instructor TA Requests tab.

Users will note that the column title “Special Requests” is blue indicating the field can be double clicked to open up a larger text field.

The form shown under the Instructor TA Requests tab is not updateable. Users double click on the ‘Special Requests’ field to open up a larger text field to read large amounts of text.

The “Skills Required” field and “Duties Expected” field are populated from the instructors input in Carleton Central. When a course is highlighted in the top section, the “Total:” hours displayed under “Duties Expected” will not exceed the “TA Hours Requested” in the highlighted course above.

## SZATAAL - TA Assignment Form - Outside Priority tab

Oracle Fusion Middleware Forms Services: Open > SZATAAL

File Edit Options Block Item Record Query Tools Help

TA Allocation SZATAAL 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Faculty: Department: Level (Outside Priority):

Full Session  Unallocated Students Only

### TA Allocation Form

Grad TA Allocation | Grad TA Profile | Department TA Requirements | Instructor TA Requests | **Outside Priority** | Grad TA Pool | Email Sent

Student ID	Student Name	Level	Term	Dept	Course(s)/Area of Interest	Date Submitted	Interview Date	Interview Time	Interview Location	Status	Status Date
100	Lastname, Firstname	UG	201430	BUSI	introduction to business or, Elementary	26-JAN-2014				Application Received	26-JAN-2014
100	Lastname, Firstname	UG	201430	COMM	Journalism and Communications	29-APR-2014				Cancelled	29-APR-2014
100	Lastname, Firstname	GR	201430	CIVE	Interested in a TA position	05-AUG-2014				Waitlisted	21-SEP-2014
100	Lastname, Firstname	UG	201430	BIOL	Lab stuff	07-AUG-2014				Approved	07-AUG-2014
100	Lastname, Firstname	UG	201430	CHEM	CHEM 1001	07-AUG-2014				Declined	21-SEP-2014

Work Experience | TA Experience/Skills | Conflicts/Issues/Notes | Message to Student | Department Comments

Areas of Interest

Undergrad Courses and Grades

Year	Course	Grade
200930	30026 CHEM 1000	CTN
201010	10390 BIOL 1004	B
201010	10934 PHYS 1008	A+
201210	12388 BIOC 3006	A+

Program: BENG-821 GPA: Prevs Degr: BSCH (6K - Biochem & Biotech) Email: @cmail.carleton.ca

#### Course Assignments

Term	Subj	Course	Section	Instructor	Hours	Released	X-List	Accept
201430	ECOR	3800	B	Firstname Lastname	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Duty Hours: Instructor Sign Off  Student Sign Off  Total Hours:

#### Non-Course Assignments (Other Duties)

Term	Duty	Hours	Supervisor	Released	Accept
				<input type="checkbox"/>	<input type="checkbox"/>

Duty Hours: Supervisor Sign Off  Student Sign Off  Total Hours:

Outside Priority TA applications, submitted through Carleton Central, are displayed on the Outside Priority tab. The tab is view only.

Students are considered to be "Outside Priority" if they are

- an Undergraduate Student
- a Grad Student and have never been hired as a TA
- a Grad Student and hired as a TA for a one term "Replacement"
- a Grad Student on an "approved" program extension, or
- a Grad Student, who has completed all of their TA priority assignments

As a user highlights each application in the upper section of the form, the corresponding personal and academic information is displayed in the 6 blocks below; i.e. "Work Experience", "TA Experience/Skills", "Conflicts/Issues/Notes", "Areas of Interest", "Undergrad Courses and Grades", "Program:", "GPA:", "Prev Degrs:" and "Email:". The AD may also view any 'Messages to Student' or 'Department Comments' created by the DA.

All "Course Assignments" and "NonCourse Assignments" that have been created are displayed at the bottom of the form. Details include the subject/duty, course, section, instructor/supervisor, hours, whether the assignment is released and whether the TA/Instructor has signed off on it.





## **SZATAAS – TA Assignment Form**

This form is accessible by both DAs and ADs. While DAs will have modify access, ADs will have **view only** access. The primary function of the form is to allow DAs to assign course and/or non-course to both graduate and undergraduate TAs.

Similar to SZATAAL, the multi-tabbed SZATAAS form provides key information such as the Grad TA profile; Department Requirements; Instructor Requests, Undergrad TA; Grad TA Pool; Emails sent and TA Schedule.

# SZATAAS – TA Assignment Form- Grad TA Assignment Tab

The SZATAAS form is only available to a DA or an AD. DAs have modify access while ADs have **view only** access.

It is blank upon initial opening. The “Term:” must be chosen before using “Next Block” to populate the form with TAs allocated to the user. Only active TA’s who have been allocated and released by an AD will display.

The “Full Session” checkbox can be checked to show data for the term selected and the term that either precedes or follows the selected term to complete the full session.

Student numbers can be entered in the “Student ID:” field to query specific TAs.

The “Level (Outside Priority):” field only affects the “Outside Priority” tab. The default is will return all records; selecting ‘GR’ or ‘UG’ reduce the number of returned records.

The form defaults to displaying all TAs within a DA’s department(s) or by faculty for ADs. ADs may enter a department in the “Department:” field to view a single department.

The column title “Comments” is blue indicating the field opens into a larger text field when double clicked. Additionally, “Dept”, “Subj”, “Course”, “Section” in “Course Assignments” and “Dept” in “Non-Course Assignments” opens a pick list of values when double clicked.

There are 9 tabs across the top of this form:

- Grad TA Assignment
- Grad TA Profile
- Department Requirements
- Instructor TA Requests
- Outside Priority
- Grad TA Pool
- Email Sent
- TA Schedule
- LFDs

# SZATAAS - TA Assignment Form - Grad TA Assignment tab

The TA Assignment tab on SZATAAS the TA Assignment Form allows a DA to make assignments to all Grad TAs that have been allocated to the DA's department.

Upon initial opening, the top section displays TA records where either "Work Dept 1" or "Work Dept 2" corresponds to the user's department(s). The "Comments" field is the only editable field in this section. The 6 columns on the far right of the block display the following:

- "Trade" is checked to identify TAs that have been traded in or traded out.
- "Trade Faculty" indicates the faculty the TA has been traded to.
- "LFD" is checked when the TA has received an approved Leave From Duties.
- "Regist" is checked when the TA has registered for the term indicated in the "Term:" field. TAs may receive assignments without registration but may not accept the assignment.
- "Mentor" is checked when the TA accepts a Mentorship position from EDC.
- "Award Cancelled" is checked when the TA award has been cancelled by FGPA.

Selecting a TA in the top section will populate the student's related "Course Assignments" and/or "Non-Course Assignments (Other Duties)" data in the section below. The "Duty" section will display all duties assigned by either the student's Instructor or Supervisor.

To create a course assignment, select a student in the top section; then select from the "Course Assignments" section a "Dept", a "Subj", a "Course", and a "Section" by double clicking on each field. An "Instructor" is selected by clicking on the chevron. Course assignments must identify an instructor before the record is saved.

**Exception:** The department's "DS" may be selected in place of an Instructor. The Grad Supervisor requests FGPA to create a "DS" role.

The “Term” field will auto-populate with the term identified in the TA record upon saving.

To create a Non-Course Assignment, select a student in the top section; then double click on the “Dept” field in the Non-Course Assignment section to select a department.

Click the chevron to the right of the “Duty” field will provide a list of eligible choices.

Click the chevron to the right of the “Supervisor” field will open SOAIDEN, BANNER’s “Person Search” form, to select a supervisor.

**Exception:** Selecting the duty “Mentoring” will identify EDC’s Mentor supervisor; Selecting the duty “Writing Tutorial Service” will identify WTS’s supervisor.

Hours to be assigned are entered in the “Hours” field.

The sum of assigned hours for Course and/or Non-Course Assignments may not exceed the total allocated hours for the TA.

Course Assignments become visible in Carleton Central only after the checkbox labelled ‘R’, located next to the ‘Hours’ field in the (Non-)Course Assignments blocks has been ticked. Course Assignments will not be displayed in Carleton Central where the ‘R’ checkbox has not been ticked.

Course/Non-Course Assignment deletion is permissible if “Assignment of Duties” not completed. This includes:

- a. Assignments that have not been accepted
- b. Assignment being accepted but ‘Assignment of Duties’ not signed off by TA and Instructor

If “Assignment of Duties” completed, only assignment updates are permissible.

Course Assignments with zero (0) hours which have not been signed off must be removed.

Duties for Course and Non-Course Assignments will be completed by the Instructor/Supervisor through Carleton Central and displayed in the Course Assignment and/or Non-Course Assignment sections. The Instructor/Supervisor and TA signoff indicators are checked when both parties have accepted the assignment of duties in Carleton Central. Highlight each assignment of a multi Course or Non-Course Assignment to see the respective signoff indicators.

The 6 buttons, left to right, at the bottom of the page perform the following;

- “Release Assignments” will release all (Non-)Course Assignments for TAs currently being viewed and which have not been previously released.
- “Initial Instructor Email” where assignments have been created within the department
- “Initial GR TA Email” of pending assignments, where assignments have been created
- “Update Instructors” that are affected by TA assignment changes
- “Update GR TAs” where a TA is affected by an assignment change
- “View Timetable” provides a view of the TAs timetable for the selected term

## SZATAAS – TA Assignment Form - Grad TA Profile tab

Oracle Developer Forms Runtime - Web: Open > SZYTAFM - SPAIDEN - SZYTAFM - SZATAAS

File Edit Options Block Item Record Query Tools Help

Assignment Form SZATAAS 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department: Level (Outside Priority):

Full Session

### TA Assignment Form

Grad TA Assignment | **Grad TA Profile** | Department Requirements | Instructor TA Requests | Outside Priority | Grad TA Pool | Email Sent | TA Schedule | LFDs

Student: Carleton, Student

Current Program: PHD-SC

Previous Degree(s): BMAT (6B - Mathematics-B/MSc) MSC (5C - Pure Mathematics)

Email: @connect.carleton.ca

Program Supervisor:

Thesis Supervisor:

Thesis/Project Title:

Mother Tongue: English

Last Updated: 11-AUG-2014

Grad Courses and Grades

Course ID	Section	Course Name	Grade
200830	34798	MATH 5104	WDN
200830	34768	MATH 5306	A
200830	34801	MATH 5818	A+
200910	14780	MATH 5607	A+

Undergrad Courses and Grades

Course ID	Section	Course Name	Grade
199930	42101	BUSI 1001	B
199930	95105	COMP 1005	A-
199930	95185	COMP 1805	A
199930	43100	ECON 1000	CTN

Skills

- Analytical Skills
- Presentation Skills
- English Language proficiency
- Management

Interests

- Teaching/Instructing
- Tutoring
- Research

Course Preferences

- STAT 2655 A1 (Fall 2014)
- STAT 2559 A1 (Winter 2015)
- STAT 2559 A2 (Winter 2015)
- MATH 1007 E1 (Fall 2014)

Course Non-Preferences

- N/A
- N/A
- N/A
- N/A

Other Degrees

Other Degrees	Majors	Minors	Institute
Bachelor Degree	Architectural Engi		Ain Shams University
Masters of Scienc	Architectural Engi		Arab Academy for Science and Technolo

Course Preferences/Non-Preferences Comments

For Winter 2013 I would prefer a 1st year Algebra or Calculus class.

Other Courses and Grades

Other TA Experience

Work Experience

Conflicts/Issues/Notes

Send Update Profile Notice

Grad TAs submit profiles through Carleton Central. That information is displayed in the form under the Grad TA Profile tab.

To view a TA profile, select a student ID from the Grad TA Assignment tab and then click on the Grad TA Profile tab. Alternatively, a user enters a student ID in "Student ID:" at the top of the form and clicks on Next Block. The Grad TA Assignment tab will become active and display that TA's assignment details; the user then clicks on the Grad TA Profile tab to view the TA's profile.

The form shown under the Grad TA Profile tab is view only. Users may click on the "Send Update Profile Notice" button to send an email to request the TA to update their profile.



## SZATAAS – TA Assignment Form - Instructor TA Requests

Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SPAIDEN - SZVTAFM - SZATAAS

File Edit Options Block Item Record Query Tools Help

Assignment Form SZATAAS 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department: Level (Outside Priority):

Full Session

### TA Assignment Forms

Grad TA Assignment | Grad TA Profile | Department Requirements | **Instructor TA Requests** | Outside Priority | Grad TA Pool | Email Sent | TA Schedule | LFDs

Course	Primary Instructor	Term	Max Enrollment	Enrollment	TAs Requested	TA Hours Requested	Special Requests
ACCT 5012 B	Lastname, Firstname	201430	25	6			
ACCT 5012 B	Lastname, Firstname	201430	25	6			
ACCT 5013 A	Lastname, Firstname	201430	30	23			
ACCT 5014 A	Lastname, Firstname	201430	30	24			
ACUL 5991 W	Lastname, Firstname	201430	125	28			
AERO 3002 A	Lastname, Firstname	201430	100	71			
AERO 3002 A1	Lastname, Firstname	201430	50	50			
AERO 3002 A2	Lastname, Firstname	201430	50	21			
AERO 3101 A	Lastname, Firstname	201430	25	20			
AERO 3101 A1	Lastname, Firstname	201430	25	20			
AERO 3841 A	Lastname, Firstname	201430	29	17			
AERO 3841 A1	Lastname, Firstname	201430	29	17			

Totals: 0 0

Skills Required

Duties Expected

Hours

Total:

Instructors submit their TA requirements through Carleton Central. Their requirements are viewed on SZATAAS under the Instructor TA Requests tab.

The form shown under the Instructor TA Requests tab is view only. Users will note that the column title “Special Requests” is blue indicating the field can be double clicked to open up a larger text field.

DAs will view instructor requests for courses associated with their department only. ADs view all instructor requests for courses associated with their faculty. ADs can restrict what is shown by entering a department in the “Department.” field.

On initial opening of the page the top section will be populated, including “Total TAs Requested” and “Total TA Hours”. When a course is highlighted, the “Skills Required” and “Duties Expected” are shown in the next sections

The “Total” Hours Expected must agree with the “Total” Hours requested.

The ‘Send Request Reminder’ button will send an email to all instructors who have not submitted their requests.

## SZATAAS – TA Assignment Form - Outside Priority tab

Oracle Fusion Middleware Forms Services: Open > SZATAAS

File Edit Options Block Item Record Query Tools Help

Assignment Form SZATAAS 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department:

Full Session Level (Outside Priority):

### TA Assignment Forms

Grad TA Assignment Grad TA Profile Department Requirements Instructor TA Requests **Outside Priority** Grad TA Pool Email Sent TA Schedule LFDs

Student ID	Student Name	Level	Term	Dept	Course(s)/Area of Interest	Date Submitted	Interview Date	Interview Time	Interview Location	Status	Status Date
100	Lastname, Firstname	UG	201430	BUSI	introduction to business or, Elementary	26-JAN-2014				Application Received	26-JAN-2014
100	Lastname, Firstname	UG	201430	COMM	Journalism and Communications	29-APR-2014				Cancelled	29-APR-2014
100	Lastname, Firstname	GR	201430	CIVE	Interested in a TA position	05-AUG-2014				Waitlisted	21-SEP-2014
100	Lastname, Firstname	UG	201430	BIOL	Lab stuff	07-AUG-2014				Approved	07-AUG-2014
100	Lastname, Firstname	UG	201430	CHEM	CHEM 1001	07-AUG-2014				Declined	21-SEP-2014

Work Experience TA Experience/Skills Conflicts/Issues/Notes Message to Student Department Comments

Areas of Interest Undergrad Courses and Grades Program: BENG-821 GPA: Prev Degr: BSCH (6K - Biochem & Biotech) Email: @cmail.carleton.ca

Term	Subj	Course	Section	Instructor	Hours	Released	X-List	Accept
201430	ECOR	3800	B	Firstname Lastname	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Term	Duty	Hours	Supervisor	Released	Accept
				<input type="checkbox"/>	<input type="checkbox"/>

Duty Hours Instructor Sign Off Student Sign Off Total Hours:

Duty Hours Supervisor Sign Off Student Sign Off Total Hours:

The Outside Priority tab allows a DA to process Outside Priority applications; create Course/Non-Course assignments within their department.

Students are considered to be “Outside Priority” if they are:

- an Undergraduate Student
- a Grad Student and have never been hired as a TA
- a Grad Student and hired as a TA for a one term “Replacement”
- a Grad Student on an “approved” program extension, or
- a Grad Student, who has completed all of their TA priority assignments

Eligible UG students may express interest if all of the following conditions are true:

- have an active student record for the applied term
- are in a degree program; i.e. not Special Students, for the applied term
- are registered in the applied term
- meet the criteria set by the department to which the application is submitted; e.g. must be F/T, minimum GPA of 10.0 and minimum 3<sup>rd</sup> year standing in the applied term

Eligible GR students may express interest if all of the following conditions are true:

- have an active GR student record for the applied term
- are registered in the applied term
- are full time in the applied term
- do not have a TA award in the applied term

ADs view all applications within their Faculty. ADs may enter a department in the “Department:” field in the Keyblock before performing a Next Block to limit the applications to that department.

To view a specific student, enter the student ID in “Student ID:” at the top of the page. Clicking on Next Block makes the Grad TA Assignment tab active. Click on the Outside Priority tab to view the desired application.

The “Level (Outside Priority):” field only affects the “Outside Priority” tab. The default will return all records; selecting ‘GR’ or ‘UG’ reduce the number of returned records to that level.

Column titles “Term” and “Dept” in the top section indicate the field can be double clicked to get a pick list of values; “Course(s)/Area of Interest” opens a larger text field when double clicked. Additionally, “Dept”, “Subj”, “Course”, “Section” in “Course Assignments” and “Dept” in “Non-Course Assignments” opens a pick list of values when double clicked.

DAs can enter an Outside Priority TA application on the student’s behalf. The DA selects an empty row in the top section or highlights a “Student ID” and then selects Record/Insert from the drop down menus. The student number is entered into the empty row and the student’s name is populated automatically. Double click on “Term” and “Dept” to select the appropriate data from the list of values and enter a “Course(s)/Area of Interest”. Click Save to save the application.

Relevant “Work Experience”, “TA Experience”, “Student Comments” and “Areas of Interest” are populated by what has been provided by the student in Carleton Central.

To create interviews, enter the Date, Time and Location in the top section and use the “Email Interview Notice” button at the bottom of the form to send an email to the student.

The “Date Submitted” is the date the application was submitted. The “Status Date” changes as the “Status” of the application changes.

### **Outside Priority Application Statuses**

Approved – the status that the DA sets on the application once they have reviewed, interviewed, processed, etc and determined that the TA is being offered the position

Accepted – will show on the application once the TA goes online and accepts the position. The online acceptance will only be available if the status of an application is approved. Accepting will flip the status from Approved to Accepted.

Cancelled – this status is the one that will show if after submitting the application the TA goes online and cancels it. Only Pending applications can be cancelled.

Declined – if the DA approves an application but the TA no longer wants it they have to contact the department to decline. The DA will set the status through the form. Applications cannot be declined online.

Waitlisted – if a DA is undecided on a TA Application, a status of waitlisted may be selected.

The “Message to Student” field allows you to create messages which appear to the student in Carleton Central.

Comments entered in the “Department Comments” field are only visible by the Department.

To create a Course Assignment, the application status must first be changed from “Application Received” to “Approved”. Then select a “Dept” in the Course Assignment section; choose the following: “Subj”, “Course”, “Section” and “Instructor” from the drop downs. Enter the “Hours” to be assigned; “Hours” allows for a maximum of 130 hours.

To create a Non-Course Assignment, the application status must first be changed from “Application Received” to “Approved”. Then select a “Dept” in the Non-Course Assignment section, select a “Duty”, a “Supervisor” from the drop downs. Enter the “Hours” to be assigned; “Hours” allows for a maximum of 130 hours.

The “Term” field auto-populates with the term identified in the application record upon saving.

If flagged, the checkbox labelled “R” next to the “Hours” field releases (Non-)Course Assignment(s) to Carleton Central. Only released assignments are visible to TAs/Instructors in Carleton Central. TAs/Instructors will not be able to view assignments through Carleton Central where (Non-)Course Assignments have been created and saved but the “R” checkbox has not been flagged. DAs will be restricted from updating the released indicator where a TA has accepted the assignment.

The ‘Accept’ indicator defaults to ‘N’ signifying that the TA has not made a decision. ‘Y’ indicates the TA has accepted the assignment, ‘D’ indicates the TA has declined the assignment. Only Outside Priority TAs may decline assignments.

Duties for Course and Non-Course Assignments completed by the Instructor/Supervisor through Carleton Central and displayed in the Course Assignment and/or Non-Course Assignment sections. The Instructor/Supervisor and TA signoff indicators are checked when both parties have accepted the assignment of duties. Users will need to highlight each assignment of a multi Course or Non-Course Assignment to see the respective signoff indicators.

Course/Non-Course Assignment deletion is permissible if “Assignment of Duties” not completed. This includes:

- a. Assignments that have not been accepted
- b. Assignment being accepted but ‘Assignment of Duties’ not signed off by TA and Instructor

If “Assignment of Duties” completed, only assignment updates are permissible.

Course Assignments with zero (0) hours which have not been signed off must be removed.

The 9 buttons, left to right, at the bottom of the page perform the following;

- “Release Assignments” – button releases to Carleton Central all currently viewed TA (Non-)Course Assignments which have not been previously released
- “Initial Instructor Email” – to be used when assignments have been created within the department
- “Initial UG TA Email” – to be used to notify all UG TAs of pending assignments, where assignments have been created
- “Update Instructors” – to be used to notify instructors that are affected by TA assignment changes
- “Update UG TAs” – to be used to email UG TAs that are affected by assignment changes
- “Email Interview Notice” – to be used to email students with pending interviews
- “View Application” – a .pdf displays the highlighted student’s UG TA application
- “View timetable” – to be used to view a .pdf of the TAs timetable for the selected term

## SZATAAS - TA Assignment Form - Grad TA Pool tab

The screenshot shows the Oracle Fusion Middleware Forms Services interface for the SZATAAS TA Assignment Form. The browser title is "Assignment Form SZATAAS 7.0 (PPRD)". The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. The form header contains the following fields:

- Term: 201430 (dropdown), Fall 2014 (September-December) (dropdown)
- Student ID: (dropdown)
- Department: (dropdown)
- Full Session
- Level (Outside Priority): (dropdown)

The main section is titled "TA Assignment Forms" and contains several tabs: Grad TA Assignment, Grad TA Profile, Department Requirements, Instructor TA Requests, Outside Priority, Grad TA Pool (selected), Email Sent, TA Schedule, and LFDs.

The "Grad TA Pool" tab displays a table with the following columns: Student ID, Name, Term, Home Dept, TA Hours, and Comments. The table has a yellow header row and approximately 20 empty rows below it. A vertical scrollbar is visible on the right side of the table.

This form is **view only** except for the "Comments" field. GR TAs with "Trade" checked and no faculty indicated in the "Trade Faculty" field of the TA Allocation Form will appear on this form.

Comments entered on the Grad TA Allocation form indicating available hours and/or full/partial trade are shown in the "Comment" field.



## SZATAAS – TA Assignment Form - TA Schedule Tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SZATAAS

File Edit Options Block Item Record Query Tools Help

Assignment Form SZATAAS 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department: Level (Outside Priority):

Full Session

### TA Assignment Forms

Grad TA Assignment | Grad TA Profile | Department Requirements | Instructor TA Requests | Outside Priority | Grad TA Pool | Email Sent | **TA Schedule** | LFDs

Term	Course/Duty	Max Enroll.	Actual Enroll.	Instructor/Supervisor	Sessional	TA Level	TA Name	Hours	Home Dept	Work Dept 1	Work Dept 2
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	INAF	ECON	
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 A	335	323	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	PECO	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	INAF	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 B	335	326	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 C	336	329	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 C	336	329	Lastname, Firstname	A	UG	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 C	336	329	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 C	336	329	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 C	336	329	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	
201430	ECON 1000 C	336	329	Lastname, Firstname	A	GR	Lastname, Firstname	130	ECON	ECON	

This form provides a composite view of all Grad and Outside Priority TA assignments. Data provided includes: “Term, Course/Duty”, “Max Enroll”, “Actual Enroll”, “Instructor/Supervisor”, “Sessional”, “TA Level”, “TA Name”, “Hours”, “Home Dept”, “Work Dept1” and “Work Dept 2”.

“Actual Enrol.” Indicates the real time registrations at the time of viewing.

The screenshot shows the Oracle Developer Forms Runtime window for the 'SZATAAS 7.0 (PPRD)' application. The 'LFDs' tab is active. At the top, there are search filters: 'Student ID: ALL', 'Term: ALL', 'Dept: ALL', 'Program: ALL', and 'Status: PD'. Below these are 'Go' and 'Reset' buttons. A table with 13 columns is displayed, with the first 10 columns highlighted in yellow. The columns are: Student ID, Name, App No., App Term, Home Dept, Award No., Award Status, Admit Term, Reason, Submit Date, Status, Status Description, and Status Date. Below the table, there are several text input fields: 'TA Comments:', 'Dept Comments:', 'Work Department(s):', 'Degree:', 'Program:', 'Last Updated By:', 'Last Updated On:', 'FGPA Message to Student:', 'FGPA Internal Comments:', and 'FGPA Processor:'.

The LFDs tab contains 5 filters and two buttons at the top of the page. The five filters are “Student ID:”, “Term:”, “Dept:”, “Program:”, and “Status:” to query data. The first four filters default to ‘ALL’ and the fifth defaults to ‘PD’ for ‘Pending’. The two buttons are “Go” and “Reset”. Users click on the “Go” button once filters are chosen to populate the lower block.

The lower block contains a table with 13 columns containing data from submitted LFD applications. Inserting an application on behalf of a TA is prohibited. The first 10 columns cannot be changed. The eleventh column, “Status”, allows FGPA users to enter an application decision. The final column, “Status Date”, changes when the “Status” has changed.

**LFD application Statuses**

- ‘PD’ Pending - the initial status when an application is received.
- ‘CA’ Cancelled - displays when a TA has cancelled their LFD application in Central.
- ‘AA’ Application Approved - entered by FGPA when the LFD has been approved.
- ‘AD’ Application Denied - entered when FGPA has denied the LFD application.

Users select a TA application in the top block to view “TA Comments:”, “Dept Comments:”, “Work Department(s):”, “Degree:”, “Program:”, “Last Updated By:”, “Last Updated On:”, “FGPA Message to Student:”, “FGPA Internal Comments:”, “FGPA Processor” below.

Dept Comments: entered by the TA’s Home Department, are viewed only by DAs of the Home Dept. and FGPA.

FGPA Internal Comments: entered by FGPA, viewed by DAs of the Home Dept. and FGPA.

## **SZATAMT - TA Mentoring Form**

This form is accessible only by EDC staff. It lists all Mentor applications by term. It is a multi-tabbed form and provides information such as answers provided in the application, the Grad TA Profile, Emails sent; Controlling Mentoring Supervisors, Mentoring Departments, and dates when the online application is active. EDC controls EDC's Workshop Originators, all Workshop Restrictions, Workshop Equivalencies and viewing all TA Workshops.

### **Notes:**

- Applicants must be of graduate level
- Applicants may not be 1<sup>st</sup> year TAs
- Applicants must have an active TA award in the term they apply to
- Applications must be submitted by the applicant via Central

## SZATAMT - TA Mentoring Form

Oracle Developer Forms Runtime - Web: Open > SZATAMT

File Edit Options Block Item Record Query Tools Help

Mentoring Application Form SZATAMT 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department:

Full Session

**TA Mentoring Form**

Applications Application Questions Grad TA Profile Email Sent Control TA Training Control TA Workshops Workshop Equivalencies

Student ID	Name	App Term	App Dept	Home Dept	App Date	Status	Status Date	Lead Mentor	Award Cancel Ind	Profile Updated

**BIO Information**

Mailing Address: Phone: Email: Date of Birth:

Message To Student Office Comments

**Interview Details** Interview Date: Time: HH:MM am/pm Location:

**Departmental Reference** Name: Phone: Email:

**Non-Carleton Reference** Name: Phone: Email:

SZATAMT is an 8 tabbed form which allows EDC to view and process all Mentor applications submitted by Grad TAs through Carleton Central. Users must select a “Term:” in the Keyblock before using “Next Block” to populate the form. Users may also enter a “Student ID:” and/or a “Department:” to search for a specific application.

Ticking the “Full Session” checkbox will return data for the term selected and the term that either precedes or follows the selected term to complete the full session.

The 8 tabs across the top of the form are:

- Applications
- Application Questions
- Grad TA Profile
- Email Sent
- Control
- TA Training Control
- TA Workshops
- Workshop Equivalencies

## SZATAMT - TA Mentoring Form – Applications tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SZATAMT

File Edit Options Block Item Record Query Tools Help

Mentoring Application Form SZATAMT 7.0 (PPRD)

Term: 201030 Fall 2010 (September-December) Student ID: Department:

Full Session

### TA Mentoring Form

Applications Application Questions Grad TA Profile Email Sent Control TA Training Control TA Workshops Workshop Equivalencies

Student ID	Name	App Term	App Dept	Home Dept	App Date	Status	Status Date	Lead Mentor	Award Cancel Ind	Profile Updated
100	Lastname, Firstname	201030	SYST	SYST	11-AUG-2010	Accepted	11-AUG-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100	Lastname, Firstname	201030	LAWS	LAWS	12-AUG-2010	Accepted	12-AUG-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100	Lastname, Firstname	201030	MAAE	MAAE	11-AUG-2010	Approved	11-AUG-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100	Lastname, Firstname	201030	COMP	COMP	11-AUG-2010	Accepted	11-AUG-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100	Lastname, Firstname	201030	ECON	ECON	11-AUG-2010	Accepted	24-AUG-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100	Lastname, Firstname	201030	MATH	MATH	01-SEP-2010	Approved	01-SEP-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100	Lastname, Firstname	201030	ECON	ECON	12-SEP-2010	Pending	24-SEP-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100	Lastname, Firstname	201030	COMP	MATH	24-SEP-2010	Accepted	24-SEP-2010	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**BIO Information**

Mailing Address: 1667 Terrace Bridge  
 Phone: 613  
 Email: @connect.carleton.ca  
 Date of Birth: 45-AUG-1945

Message To Student  
 Office Comments

**Interview Details**  
 Interview Date: Time: HH:MM am/pm Location:

**Departmental Reference**  
 Name: Prof. Phone: 0123 Email: @carleton.ca

**Non-Carleton Reference**  
 Name: Prof. Phone: 4567 Email: @carleton.ca

Email Interview Notice

The Applications tab contains a form which is updateable. It is accessed only by EDC. The top section displays Mentorship applications and the bottom sections provide details associated with each application.

The first 6 columns in the top section are view only. The “Status” column is updated by either the user within EDC or by the TA via Carleton Central. The “Status Date” defaults to the date the “Status” changes.

### Mentoring Statuses:

**Pending** – all applications are submitted online and default to this status.

**Approved** – this is the status that the MT will set on the application once they have reviewed, interviewed, processed, etc and determined that the TA is being offered the position

**Accepted** – this status will show on the application once the TA goes online and accepts the position. The online acceptance will only be available if the status of an application is approved. Accepting will flip the status from Approved to Accepted.

**In Progress** - Because the online application is so large and time consuming to complete the student can save periodically or save and come back later. When they do this the app will show of In Progress.

**Cancelled** – this status is the one that will show if after submitting the application the TA goes online and cancels it. Only Pending applications can be cancelled.

**Dropped Out** – this status is set by the MT when a TA that accepted the position then drops out of the mentoring program either before starting or after starting.

**Declined** – if the MT approves an application but the TA no longer wants it they have to contact EDC and decline. The MT will set the status through the form. Applications cannot be declined online.

EDC will check the “Lead Mentor” checkbox if the applicant is selected as a lead mentor.

The “Award Cancel Ind” is checked if the TA award is cancelled by FGPA.

The “Profile Updated” checkbox is checked if the applicant has updated their TA Profile in Carleton Central over the last 120 days.

The **Bio Information** section is populated from BANNER.

The Message to Student and Office Comments sections are completed by EDC. These sections are free form text. Student messages are viewed by the TA in Carleton Central while Office Comments are viewed within EDC only.

**Interview Details** can only be entered by EDC when the application “Status” is set to pending. EDC then clicks on the “Email Interview Notice” button to notify the student.

**Departmental Reference** and **Non-Carleton Reference** are populated by the students via Carleton Central.

## SZATAMT - TA Mentoring Form – Application Questions tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SZATAMT

File Edit Options Block Item Record Query Tools Help

ORACLE

Mentoring Application Form SZATAMT 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department:

Full Session

### TA Mentoring Form

Applications Application Questions Grad TA Profile Email Sent Control TA Training Control TA Workshops Workshop Equivalencies

Student ID: 100 Name: Bland Term: 201030 Department: MAAE

Write about some of the activities and programs that you have been involved with and/or life experiences you have had that you think have prepared you for a position as a Teaching Assistant Mentor.

Looking back on the program you offered this year, what would you like to add to or do differently if you are a mentor again next year?

As a mentor, what kinds of activities and support do you think might help TAs in your department? Be as specific as possible.

The TA Mentor position is a professional development opportunity that allows you to hone skills that are very transferable to jobs in industry and teaching. Based on your experience this year, what skills would you like to further develop next year?

How do you think you could influence the attitudes and actions of some Teaching Assistants?

Given that you now have experience as a TA Mentor, how do you see yourself contributing overall to the team of TA Mentors and the TA Mentorship program next year?

Write about what you would hope to learn as a TA Mentor.

**Grad TAs will complete mentor application questions through Carleton Central. Answers are displayed in the form under the Application Questions tab. The Application Questions tab is view only.**

To view a TA's answers, select a student ID from the Applications tab and then click on the Application Questions. Alternatively, a user enters a student and clicks on "Next Block" the user then clicks on the Application Questions tab to view the TA's answers.

## SZATAMT - TA Mentoring Form – Grad TA Profile tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SZATAMT

File Edit Options Block Item Record Query Tools Help

Mentoring Application Form SZATAMT 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department:

Full Session

### TA Mentoring Form

Applications Application Questions **Grad TA Profile** Email Sent Control TA Training Control TA Workshops Workshop Equivalencies

Student: Carleton, Student

Current Program: MA-231

Previous Degree(s): BA HON (23 - Music)

Email: @connect.carleton.ca

Supervisor:

Thesis/Project Title:

Mother Tongue: English

Last Updated: 05-AUG-2014

Grad Courses and Grades

201010	15744	MUSI 5013	A+
201010	15743	MUSI 5007	A
200930	34763	MUSI 5000	A+
200930	35758	MUSI 5015	A

Undergrad Courses and Grades

200530	36737	MUSI 2008	A+
200610	16741	MUSI 2105	A+
200520	21480	MUSI 1002	A
200530	31825	GERM 3105	A+

Skills

- Analytical Skills
- Presentation Skills
- English Language proficiency
- Management

Interests

- Teaching/Instructing
- Tutoring
- Research

Course Preferences

- MUSI 2009 A (Fall 2014)
- MUSI 2007 A (Fall 2014)
- MUSI 1002 A (Fall 2014)
- MUSI 2710 A (Fall 2014)

Course Non-Preferences

- N/A
- N/A
- N/A
- N/A

Other Degrees

Other Degrees	Majors	Minors	Institute

Course Preferences/Non-Preferences Comments

I am the TA mentor for the coming year.

Other Courses and Grades

Non-Carleton TA Experience

Work Experience

Conflicts/Issues/Notes

Send Update Profile Notice

**Grad TAs will submit profiles, through Carleton Central; the information is displayed in the form under the Grad TA Profile tab.**

To view a TA profile, go to the Applications tab; select a student ID and then click on the Grad TA Profile. Alternatively, enter a student ID in “Student ID:” at the top of the form and click Next Block; then click on the Grad TA Profile tab to view the desired profile.

The form shown under the Grad TA Profile tab is view only. Users may click on the “Send Update Profile Notice” button to send an email to request the TA to update their profile.

## SZATAMT - TA Mentoring Form – Email Sent tab

The screenshot shows the Oracle Developer Forms Runtime interface for the 'SZATAMT - TA Mentoring Form'. The window title is 'Mentoring Application Form: SZATAMT 7.0 (PPRD)'. The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. The form area is divided into several tabs: Applications, Application Questions, Grad TA Profile, Email Sent (selected), Control, TA Training Control, TA Workshops, and Workshop Equivalencies. The 'Email Sent' tab displays a table with the following columns: Date Sent, Sender, Receiver, Subject Line, and Reason. The table is currently empty, and a vertical scroll bar is visible on the right side of the table area.

The “Email Sent” tab provides a list of all email notices that have been generated through the TA Management System.

Email notices will only be shown if the user was named as the “Sender” or “Receiver” of an email. The chevron at the far right produces a complete list of Email Recipients and Recipient Names of each email.

## SZATAMT - TA Mentoring Form – Control tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SZATAMT  
File Edit Options Block Item Record Query Tools Help ORACLE

Mentoring Application Form SZATAMT 7.0 (PPRD)

Term: 201030 Fall 2010 (September-December) Student ID: Department:

Full Session

### TA Mentoring Form

Applications Application Questions Grad TA Profile Email Sent **Control** TA Training Control TA Workshops Workshop Equivalencies

#### Mentoring Supervisors

Banner ID	Name
100	Firstname Lastname

#### Mentoring Departments

Department	Description	Inactive
ARTC	School: Art and Culture	<input type="checkbox"/>
BIOL	Biology	<input type="checkbox"/>
BUSI	School: Business	<input type="checkbox"/>
CHEM	Chemistry	<input type="checkbox"/>
CIVE	Civil & Environmental Eng.	<input type="checkbox"/>

#### Online Application Control

Date	Description
22-DEC-2010	Opening date for accepting TA Mentor Applications.
31-JUL-2011	Closing date for accepting TA Mentor Applications.

**Mentoring Supervisors** section allows EDC to indicate supervisors for mentoring assignments.

**Mentoring Departments** section allows EDC to specify which departments include mentors.

**Online Application Control** provides EDC with a way to establish deadline dates for submitting mentor applications.

# SZATAMT - TA Mentoring Form – Training Control tab

Oracle Developer Forms Runtime - Web: Open > SZATAMT

File Edit Options Block Item Record Query Tools Help

Mentoring Application Form SZATAMT 7.0 (PPRD)

Term: 201110 Winter 2011 (January-April) Student ID: Department:

Full Session

### TA Mentoring Form

Applications Application Questions Grad TA Profile Email Sent Control **TA Training Control** TA Workshops Workshop Equivalencies

#### Workshop Originators

Banner ID	Name	Email	Supervisor	Inactive	Last Updated By	Last Updated On
100	Lastname, Firstname	@carleton.ca	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname Lastname	30-NOV-2010
100	Lastname, Firstname	@carleton.ca	<input type="checkbox"/>	<input type="checkbox"/>	Firstname Lastname	18-MAR-2011
100	Lastname, Firstname	@carleton.ca	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Firstname Lastname	30-DEC-2010
100	Lastname, Firstname	@carleton.ca	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname Lastname	18-MAR-2011
100	Lastname, Firstname	@CU.net	<input type="checkbox"/>	<input type="checkbox"/>	Firstname Lastname	12-JAN-2011

#### Workshop TA Groups

Code	Description	Inactive	Last Updated By	Last Updated On
ALL	All TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010
GR	All Graduate TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010
NGR	New Graduate TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010
CGR	Continuing Graduate TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010
UG	All Undergraduate TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010

#### Workshop Restrictions

Code	Description	Inactive	Last Updated By	Last Updated On
NT	New TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010
CT	Continuing TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010
IT	International TAs	<input type="checkbox"/>	UGAFA	15-DEC-2010
MT	TA Mentors and Lead Mentors	<input type="checkbox"/>	UGAFA	15-DEC-2010
R1	TAs that have not completed their 5 hours of training	<input type="checkbox"/>	UGAFA	15-DEC-2010

**Workshop Originators** - section allows EDC to indicate users who will be able to create EDC workshops. "Supervisor" has view and update access to any workshop in their respective department. Originator IDs may not be duplicated. Originators records may not be deleted once used. Workshop Originators records are inactivated or activated by checking or unchecking the 'Inactive' checkbox.

**Workshop TA Groups** – section allows EDC to create/maintain distinct TA groups. Users will enter codes 1 to 4 characters in length. Full length description is then entered. TA Group records may not be deleted once used. TA Group records are inactivated or activated by checking or unchecking the 'Inactive' checkbox.

**Workshop Restrictions** – section allows EDC to create/maintain workshop restrictions. Users will enter codes 1 to 4 characters in length. Full length description is then entered. Program logic for new codes will require CCS assistance. Workshop Restrictions records may not be deleted once used. Workshop Restrictions records are inactivated or activated by checking or unchecking the 'Inactive' checkbox.

# SZATAMT - TA Mentoring Form – TA Workshops tab

Oracle Fusion Middleware Forms Services: Open > SZATAMT

File Edit Options Block Item Record Query Tools Help

Mentoring Application Form SZATAMT 7.0 (PPRD)

Term: 201430 Fall 2014 (September-December) Student ID: Department:

Full Session

### TA Mentoring Form

Applications Application Questions Grad TA Profile Email Sent Control TA Training Control **TA Workshops** Workshop Equivalencies

Workshop Term: 201110 Workshop Dept: ALL Go

Term	Dept	Type	Title	Date	Time	Location	Hours	Max Enrl	Originator	Coordinator	Feedback	Certificate	Canc
201430	EDC	TRNG	EDC Online Workshop Focus Grou	01-SEP-2014	9:30	422 DT	2	60	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
201430	EDC	TRNG	EDC Online Workshop Focus Grou	01-SEP-2014	9:30	422 DT	2	6	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	PREP	TA Mentor Winter Orientation	02-SEP-2014	9:30	422 DT	3.5	21	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
201430	COMP	TRNG	Pizza Lunch Discussion	02-SEP-2014	12:00	5115HP	1	30	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	TRNG	Time Management Tips for TAs	02-SEP-2014	14:00	422 DT	2	28	Lastname, Firstname	Lastname, Firstname	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	TRNG	Developing a Framework for Teac	02-SEP-2014	10:00	422 DT	2	28	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	BIOL	TRNG	Biology TA Orientation	02-SEP-2014	12:00	206 Nesbitt	1	25	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	TRNG	Providing Feedback to Enhance St	03-SEP-2014	10:00	422 DT	2	28	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	GEOG	TRNG	Earth Science: Winter TA Orientati	03-SEP-2014	12:00	HP 2130	1	30	Lastname, Firstname	Lastname, Firstname	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	TRNG	Intro to WebCT 6	03-SEP-2014	14:00	422 DT	1	14	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Description: A full-day orientation and training session for the TA Mentors, which took place on Tuesday, Aug. 12th, 9am - 4pm, with 1 hr lunch. Topics covered included the mentor program logistics, workshop preparation, basic cuLearn, and the TA management system.

Coordinator Email: @carleton.ca

External Coordinator:

External Email:

Last Updated By: FirstnameLastname

Last Updated On: 03-SEP-2014

TA Groups:

- 1) New Graduate TAs
- 2) New Undergraduate TAs

Restrictions:

- 1) New TAs

Faculties:

- 1) TAs that belong to Faculty of Arts and Social Sciences
- 2) TAs that belong to Faculty of Public Affairs

Registered:

- 1) 100 ( @connect.carleton.ca)
- 2) 100 ( @connect.carleton.ca)
- 3) 100 ( @connect.carleton.ca)
- 4) 100 ( @connect.carleton.ca)
- 5) 100 ( @connect.carleton.ca)
- 6) 100 ( @connect.carleton.ca)

TA Workshop form is blank upon initial opening. Users select a 'Workshop Term:' and 'Workshop Dept:' from the drop downs then click the 'Go' button to populate the middle block.

Except for the "Certificate" column, the middle block provides **view only** detail that pertain to the 'Workshop Term:' and 'Workshop Dept:' as entered by the user above. "Certificate" allows EDC to flag workshops which contribute to a Training Certificate.

The 9 fields below the middle block are view only. The data displayed is dependent on the record highlighted in the middle block. The purpose of the lower fields is . . .

**Description:** - complete description of the TA Workshop as entered by the Originator in Central

**Coordinator Email:** - email address of the person delivering the workshop

**External Coordinator:** - name of the individual delivering the workshop if not from Carleton

**External Email:** - email address of the External Coordinator

**Last Updated By:** - indicates the user who last updated the workshop

**Last Updated On:** - indicates the date when the workshop was last updated

**TA Groups:** - identifies the TA groups who receive an email when the 'Send Email' button is launched from the 'TA Training Session Information' page

**Restrictions:** - identifies the TA groups who are eligible to register; multiple restrictions are connected by an 'And' statement. TAs must meet all restrictions to be eligible.

**Faculties:** - identifies the TAs within the stated faculties who are eligible to register; faculties are connected by an 'Or' statement. TAs must be in one of the stated faculties to be eligible.

**Registered:** - identifies TAs who registered at time of viewing

**Note:** "Restrictions" and "Faculties" are connected by an 'And' statement. TAs must meet all "Restrictions" AND at least one of the "Faculties" to be eligible.





## **SZVTADM – Department Maintenance Form**

The Department Maintenance form is accessible only to DAs. The multi-tabbed form allows DAs to record duties, skills and interests that are specific to the DA's department. DAs control acceptance of undergrad TA applications, undergrad TA criteria and closing days for assignment of duties through the form. The TA and Instructor/Supervisor mid-term meeting is also recorded.







## SZVTADM – Department Maintenance Form – Student Access tab

The screenshot shows the Oracle Developer Forms Runtime window for the 'Department Maintenance' form, specifically the 'Student Access' tab. The window title is 'Department Maintenance - SZVTADM 7.0 (PPRD)'. The menu bar includes 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. The Oracle logo is visible in the top right corner. The form contains three main sections:

- Undergrad TA Applications:** A section with the instruction 'Enter the term(s) for which you are not accepting undergrad TA applications.' It features a table with columns for 'Department' and 'Term', with three rows for data entry.
- Assignment of Duties:** A section with the instruction 'Enter assignment of duties closing dates for specific terms.' It features a table with columns for 'Department', 'Term', and 'Closing Date', with three rows for data entry.
- Midterm Meeting:** A section with the instruction 'Enter deadline dates, by term, for midterm meetings.' It features a table with columns for 'Department', 'Term', and 'Deadline Date', with three rows for data entry.

**Student Access** – is used to enter the Term a Department is not accepting Undergraduate TA applications – and to enter the user’s Assignment of Duties closing dates for specific Terms. Deadline dates for “Midterm Meetings” are noted in the bottom section.

## SZVTADM – Department Maintenance Form – UG TA Criteria tab

The screenshot shows a web browser window titled "Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SZVTADM". The browser's address bar shows "Department Maintenance SZVTADM 7.0 (PPRD)". The application interface has a menu bar with "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The Oracle logo is in the top right corner. The main content area is titled "Department Maintenance" and contains several tabs: "Duties", "Skills", "Interests", "Student Access", "UG TA Criteria" (which is highlighted), "General Lists", "TA Training", "TA Workshops", and "Workshop Equivalencies". Below the tabs, there is a text block that reads: "Please enter or select the minimum criteria that must be met by an undergrad TA applicant to allow their application to be submitted. If there is no criteria in a particular area, then leave that field blank (i.e. only enter criteria in the fields that are relevant)." Below this text is a form box containing four input fields: "Department" (a dropdown menu), "Full Time / Part Time Criteria" (a dropdown menu), "Minimum Year Level" (a dropdown menu), and "Minimum GPA" (a text input field). A vertical scrollbar is visible to the right of these fields.

**UG TA Criteria** – is used to enter the minimum criteria that must be met by an undergraduate student to allow their Undergraduate TA application to be submitted. Leaving the form blank indicates all applications will be accepted. Any combination of Department, Full/Part Time, Minimum Year Level, and Minimum GPA can be used.

## SZVTADM – Department Maintenance Form – General lists tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM - SZVTADM  
 File Edit Options Block Item Record Query Tools Help  
 Department Maintenance SZVTADM 7.0 (PPRD)

Department Maintenance

Duties Skills Interests Student Access UG TA Criteria **General Lists** TA Training TA Workshops Workshop Equivalencies

Duties	Inactive	Skills	Inactive	Area of Interest	Inactive
Grading	<input type="checkbox"/>	Administration	<input type="checkbox"/>	Administration	<input type="checkbox"/>
Lab Demonstration	<input type="checkbox"/>	Analytical Skills	<input type="checkbox"/>	Group Discussions	<input type="checkbox"/>
Lab Set-up	<input type="checkbox"/>	Communication	<input type="checkbox"/>	Other	<input type="checkbox"/>
Lab Supervision	<input type="checkbox"/>	English Language proficiency	<input type="checkbox"/>	Research	<input type="checkbox"/>
Marking	<input type="checkbox"/>	Goal Oriented	<input type="checkbox"/>	Supervising/Managing	<input type="checkbox"/>
Meeting with Instructor	<input type="checkbox"/>	Group Facilitation/Discussion Skills	<input type="checkbox"/>	Teaching/Instructing	<input type="checkbox"/>
Mentoring	<input type="checkbox"/>	Management	<input type="checkbox"/>	Tutoring	<input type="checkbox"/>
Office Hours	<input type="checkbox"/>	Organization	<input type="checkbox"/>		<input type="checkbox"/>
Other	<input type="checkbox"/>	Other	<input type="checkbox"/>		<input type="checkbox"/>
Proctoring	<input type="checkbox"/>	Presentation Skills	<input type="checkbox"/>		<input type="checkbox"/>
Research	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Training	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Tutorials	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Writing Tutorial Service	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

**General lists** –Shows the general Duties, Skills, and Areas of Interest that were entered by FGPA. This is a **view only** form for information purposes – intended to assist Departmental Administrators avoid duplication.

# SZVTADM – Department Maintenance Form – TA Training tab

The screenshot shows the Oracle Developer Forms Runtime interface for the 'Department Maintenance' form. The 'TA Training' tab is selected, and the 'TA Workshop Originators' section is active. The table below shows the data for workshop originators.

Banner ID	Name	Dept	Email	Supervisor	Inactive	Last Updated By	Last Updated On
100	Lastname, Firstname	ECON	@carleton.ca	<input type="checkbox"/>	<input type="checkbox"/>	FirstnameLastname	29-MAR-2011
100	Lastname, Firstname	ECON	@carleton.ca	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FirstnameLastname	14-MAR-2011
100	Lastname, Firstname	ECON	@carleton.ca	<input type="checkbox"/>	<input checked="" type="checkbox"/>	FirstnameLastname	24-DEC-2010
100	Lastname, Firstname	ECON	@carleton.ca	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FirstnameLastname	18-MAR-2011
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		

**TA Workshop Originators** - section allows DAs to indicate Workshop Originators within their Dept. BANNER IDs entered, ordered by last name, will automatically populate the user’s name and BANNER’s ‘CA’ email address. “Supervisor” has view and update access to any workshop in their respective department. Originator IDs may not be duplicated. Originator records may not be deleted. Originator records are inactivated or activated by checking or unchecking the ‘Inactive Ind’ checkbox.

# SZVTADM – Department Maintenance Form – TA Workshops tab

Oracle Fusion Middleware Forms Services: Open > SZVTADM

File Edit Options Block Item Record Query Tools Help

Department Maintenance SZVTADM 7.0 (PPRD)

Department Maintenance

Duties Skills Interests Student Access UG TA Criteria General Lists TA Training **TA Workshops** Workshop Equivalencies

Workshop Term: 201430 Workshop Dept: ALL Go

Term	Dept	Type	Title	Date	Time	Location	Hours	Max Enrl	Originator	Coordinator	Feedback	Certificate	Canc
201430	FGPA	TRNG	TA Orientation (FASS, FPA, Sprott)	03-SEP-2014	11:30	416 Southam hall	1	120	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
201430	FGPA	TRNG	TA Orientation - Fall 2014 Engine	03-SEP-2014	14:00	416 Southam hall	1	120	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	COMP	TRNG	School of Computer Science TA Tr	04-SEP-2014	15:45	416 Southam hall	1	50	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	BIOL	TRNG	Laboratory Safety	10-SEP-2014	9:00	5345 Herzberg Bldg	3	45	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	MICT	Workshop Training	12-SEP-2014	3:00	404 Dunton Tower (EDC Of	2	1	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
201430	WOMN	TRNG	TA Orientation	12-SEP-2014	9:00	TBD	1	5	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	PSYC	TRNG	PSYC Undergraduate/Graduate TA	17-SEP-2014	10:00	Loeb C760	1.5	40	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EURR	TRNG	Website management and social n	19-SEP-2014	10:00	DT 1103	5	10	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	FREN	TRNG	New Restriction format	25-SEP-2014	10:00	512 Tory Bldg	1.75	6	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	SYST	TRNG	New Restriction format	30-SEP-2014	9:45	512 Tory Bldg	1.75	3	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	TRNG	Mech & Aero Engineering Graduat	10-OCT-2014	14:00	Minto Bell Theatre	1.5	15	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
									Lastname, Firstname	Lastname, Firstname	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Description: This session is for new Teaching Assistants starting in Fall 2014 from the Faculty of Social Scienc, Faculty of Public Administration, and the Sprott School of Business. This session will provide important information on TA roles and responsibilities, training opportunities, TA support services, and payroll.

Coordinator Email: @Carleton.ca

External Coordinator:

External Email:

Last Updated By: FirstnameLastname

Last Updated On: 27-AUG-2014

TA Groups:

1) New MA TAs  
2) New PhD TAs

Restrictions:

1) New TAs

Faculties:

1) TAs that belong to Faculty of Arts and Social Sciences  
2) TAs that belong to Faculty of Public Affairs  
3) TAs that belong to Faculty of Sprott School

Registered:

1) 100 ( @connect.carleton.ca)  
2) 100 ( @connect.carleton.ca)  
3) 100 ( @connect.carleton.ca)  
4) 100 ( @connect.carleton.ca)  
5) 100 ( @connect.carleton.ca)  
6) 100 ( @connect.carleton.ca)  
7) 100 ( @connect.carleton.ca)  
8) 100 ( @connect.carleton.ca)  
9) 100 ( @connect.carleton.ca)  
10) 100 ( @connect.carleton.ca)  
11) 100 ( @connect.carleton.ca)  
11) 100 ( @connect.carleton.ca)  
12) 100 ( @connect.carleton.ca)  
13) 100 ( @connect.carleton.ca)

TA Workshop form is blank upon initial opening. Users select a 'Workshop Term:' and 'Workshop Dept:' from the drop downs then click the 'Go' button to populate the middle block.

The middle block provides 14 columns of **view only** detail that pertain to the 'Workshop Term:' and 'Workshop Dept:' as entered by the user above.

The 9 fields below the middle block are **view only**. The data displayed is dependent on the record highlighted in the middle block. The purpose of the lower fields is . . .

**Description:** - complete description of the TA Workshop as entered by the Originator in Carleton Central

**Coordinator Email:** - email address of the person delivering the workshop

**External Coordinator:** - name of the individual delivering the workshop if not from Carleton

**External Email:** - email address of the External Coordinator

**Last Updated By:** - indicates the user who last updated the workshop

**Last Updated On:** - indicates the date when the workshop was last updated

**TA Groups:** - identifies the TA groups who receive an email when the 'Send Email' button is launched from the 'TA Training Session Information' page

**Restrictions:** - identifies the TA groups who are eligible to register; multiple restrictions are connected by an 'And' statement. TAs must meet all restrictions to be eligible.

**Faculties:** - identifies the TAs within the stated faculties who are eligible to register; faculties are connected by an 'Or' statement. TAs must be in one of the stated faculties to be eligible.

**Registered:** - identifies TAs who registered at time of viewing

**Note:** "Restrictions" and "Faculties" are connected by an 'And' statement. TAs must meet all "Restrictions" AND at least one of the "Faculties" to be eligible.



## **SZVTAFM – FGPA Maintenance Form**

The FGPA Maintenance form is accessible by FGPA staff only. The multi-tabbed form allows FGPA to create general duties, general skills, general interests and assignments of duties which apply to all departments. FGPA controls user access, user roles and department faculty relationships within this form. SZVTAFM allows FGPA to viewing all TA Workshops, control FGPA's TA Workshop access and Workshop Equivalencies. Finally, FGPA processes all LFD applications in SZVTAFM.

## SZVTAFM – FGPA Maintenance Form – General Duties tab

The screenshot shows the 'FGPA Maintenance' form with the 'General DU...' tab selected. The table below represents the data visible in the 'General Duties' section.

Duty	Last Updated By	Last Updated On	Inactive
Lab Demonstration	FirstnameLastname	03-JUN-2010	<input type="checkbox"/>
Lab Set-up	FirstnameLastname	03-JUN-2010	<input type="checkbox"/>
Lab Supervision	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Marking	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Meeting with Instructor	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Mentoring	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Office Hours	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Other	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Proctoring	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Research	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Training	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Tutorials	FirstnameLastname	01-JUN-2010	<input type="checkbox"/>
Writing Tutorial Service	FirstnameLastname	18-AUG-2010	<input type="checkbox"/>
			<input type="checkbox"/>

**SZVTAFM** – is used by the Faculty of Graduate and Postdoctoral Affairs staff **only**. These forms are used to populate the relevant drop downs throughout the system. The following tabs are located at the top of the form:

**General Duties** – The FGPA will enter General Duties used to populate the non-course duties list in SZATAAS. Duties cannot be changed or deleted. Each duty can be inactivated or activated by checking or unchecking the 'Inactive' checkbox.







## SZVTAFM – FGPA Maintenance Form – Email/Notice tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM

File Edit Options Block Item Record Query Tools Help

FGPA Maintenance SZVTAFM 7.0 (PPRD)

FGPA Maintenance

General Du... General Sk... General In... User Access **Email/Notic...** Statures a... Assignmen... User Roles Faculty De... TA Training TA Worksh... Workshop ... LFD Data LFDs

Date Sent	Sender	Receiver	Subject	Reason
17-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
17-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
20-AUG-2010	FGPA (FGPA)	Student	Create Graduate TA Profile	Remind new TA to create profile
23-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
23-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
23-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Student	Create Graduate TA Profile	Remind new TA to create profile
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
24-AUG-2010	FGPA (FGPA)	Associate Deans and Dept A	Accepted TA Now Cancelled	Notify all parties that award status has change
10-AUG-2010	FGPA (FGPA)	Student	Create Graduate TA Profile	Remind new TA to create profile
11-AUG-2010	FGPA (FGPA)	Student	Create Graduate TA Profile	Remind new TA to create profile

**Email/Notice** – This is a **view only** form that lists all emails generated within the TA Management system by FPGA. It is for tracking purposes. Select the chevron beside an email to see a list of the recipients.

## SZVTAFM – FGPA Maintenance Form – Statuses and Variables tab

The screenshot shows the 'FGPA Maintenance' form with the 'Statuses a...' tab selected. The 'TA Management Statuses' section contains a table with columns for Description, Status Type (UG TA App, Mentoring App, General), Last Updated By, Last Updated On, and Inactive. The 'TA Management Variable(s)' section contains a table with columns for Variable, Description, Value, Last Updated By, and Last Updated On.

Description	Status Type			Last Updated By	Last Updated On	Inactive
	UG TA App	Mentoring App	General			
Accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	18-JAN-2010	<input type="checkbox"/>
Application Received	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	13-JAN-2010	<input type="checkbox"/>
Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	08-APR-2010	<input type="checkbox"/>
Cancelled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	18-JAN-2010	<input type="checkbox"/>
Declined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	22-JAN-2010	<input type="checkbox"/>
Dropped Out	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	23-APR-2010	<input type="checkbox"/>
In Progress	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	23-APR-2010	<input type="checkbox"/>
Pending	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	08-APR-2010	<input type="checkbox"/>
Waitlisted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Firstname.Lastname	02-DEC-2010	<input type="checkbox"/>

Variable	Description	Value	Last Updated By	Last Updated On
TA_UG_PAY_RATE	Undergraduate TA Pay Rate.	20.9	Firstname.Lastname	19-APR-2011
TA_MIN_HOURS	Minimum TA work hours required as per the Collective Agreement.	65	Firstname.Lastname	15-DEC-2010
TMS_NOTIFICATION	This variable determines when "new TA" notifications are sent to Associate Deans. Enter 1) BIWEEKLY, 2) WEEKLY, 3) MONTHLY, 4) OFF - not sent	BIWEEKLY	Firstname.Lastname	21-MAR-2011
TMS_CANCEL_NOTIFICATION	This variable determines if award cancellation notification should be sent for future terms. OFF - not sent	OFF	Firstname.Lastname	19-APR-2011

**Statuses** – is used to maintain statuses throughout the system. A status can be applied to any combination of UG TA applications, Mentoring applications, or generally throughout the system by checking the applicable Status Type checkbox. Statuses can be added but not changed or deleted. A status can be inactivated or activated by checking or unchecking the 'Inactive' checkbox.

### TA Management Variable(s)

**TA\_UG\_PAY\_RATE** – the hourly rate that an undergraduate TA earns. Used in the calculation of training pay.

**TA\_MIN\_HOURS** - minimum number of TA hours to maintain priority.

**TMS\_NOTIFICATION** – determines when ADs are notified of new TAs in the TA Management System. Under 'Value' a notification frequency may be selected by the user.

- BIWEEKLY – emails go out twice a week on Monday and Thursday
- WEEKLY – emails go out once a week on Monday
- MONTHLY – emails go out once a month on the first Monday of the month
- OFF – emails are not sent

**TMS\_CANCEL\_NOTIFICATION** – triggers when ADs are notified of TA award cancellations

- OFF - cancellation notices are for current terms, will NOT be sent for future terms
- ON(+1) - cancellation notices are sent for current term and one future term
- ON(+2) - cancellation notices are sent for current term and two future terms

## SZVTAFM – FGPA Maintenance Form – Assignment of Duties tab

Duty	Weekly	Last Updated By	Last Updated On	Inactive
Administration (compiling grades, etc)	<input checked="" type="checkbox"/>	Firstname.Lastname	07-AUG-2010	<input type="checkbox"/>
Administration (compiling grades, etc)	<input checked="" type="checkbox"/>	Firstname.Lastname	07-AUG-2010	<input checked="" type="checkbox"/>
Compulsory Orientation/Training	<input type="checkbox"/>	Firstname.Lastname	15-SEP-2010	<input type="checkbox"/>
Conduct Tutorial	<input type="checkbox"/>	Firstname.Lastname	10-SEP-2010	<input type="checkbox"/>
Conduct lab	<input type="checkbox"/>	Firstname.Lastname	10-SEP-2010	<input type="checkbox"/>
Discussion Groups/Seminars	<input checked="" type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Grading (assignments, tutorial/lab problems, e	<input type="checkbox"/>	Firstname.Lastname	10-SEP-2010	<input type="checkbox"/>
Grading (weekly assignments, labs, reports, e	<input checked="" type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Lab Clean Up	<input checked="" type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Lab Demonstration	<input checked="" type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Lab Supervision	<input checked="" type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Lecture Attendance	<input checked="" type="checkbox"/>	Firstname.Lastname	23-APR-2010	<input type="checkbox"/>
Marking Essays, other assignments	<input type="checkbox"/>	Firstname.Lastname	23-APR-2010	<input type="checkbox"/>
Marking Exams	<input type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Meeting with Supervisor	<input type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Office Hours	<input checked="" type="checkbox"/>	Firstname.Lastname	13-JAN-2010	<input type="checkbox"/>
Office Hours	<input type="checkbox"/>	Firstname.Lastname	10-SEP-2010	<input type="checkbox"/>
Other	<input checked="" type="checkbox"/>	Firstname.Lastname	13-JUL-2010	<input type="checkbox"/>
Preparation Time	<input checked="" type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
Proctoring	<input type="checkbox"/>	Firstname.Lastname	09-FEB-2010	<input type="checkbox"/>
	<input type="checkbox"/>			<input type="checkbox"/>
	<input type="checkbox"/>			<input type="checkbox"/>
	<input type="checkbox"/>			<input type="checkbox"/>
	<input type="checkbox"/>			<input type="checkbox"/>
	<input type="checkbox"/>			<input type="checkbox"/>

**Assignment of Duties** – is used to enter duties that will be used to populate the dropdowns in Carleton Central on the Assignment of Duties form. A Checkbox is provided to indicate if the duty is weekly. An Assignment Duty cannot be changed or deleted. It can be inactivated or activated by checking or unchecking the 'Inactive' checkbox.



## SZVTAFM – FGPA Maintenance Form – Faculty Department tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM

File Edit Options Block Item Record Query Tools Help

FGPA Maintenance SZVTAFM 7.0 (PPRD)

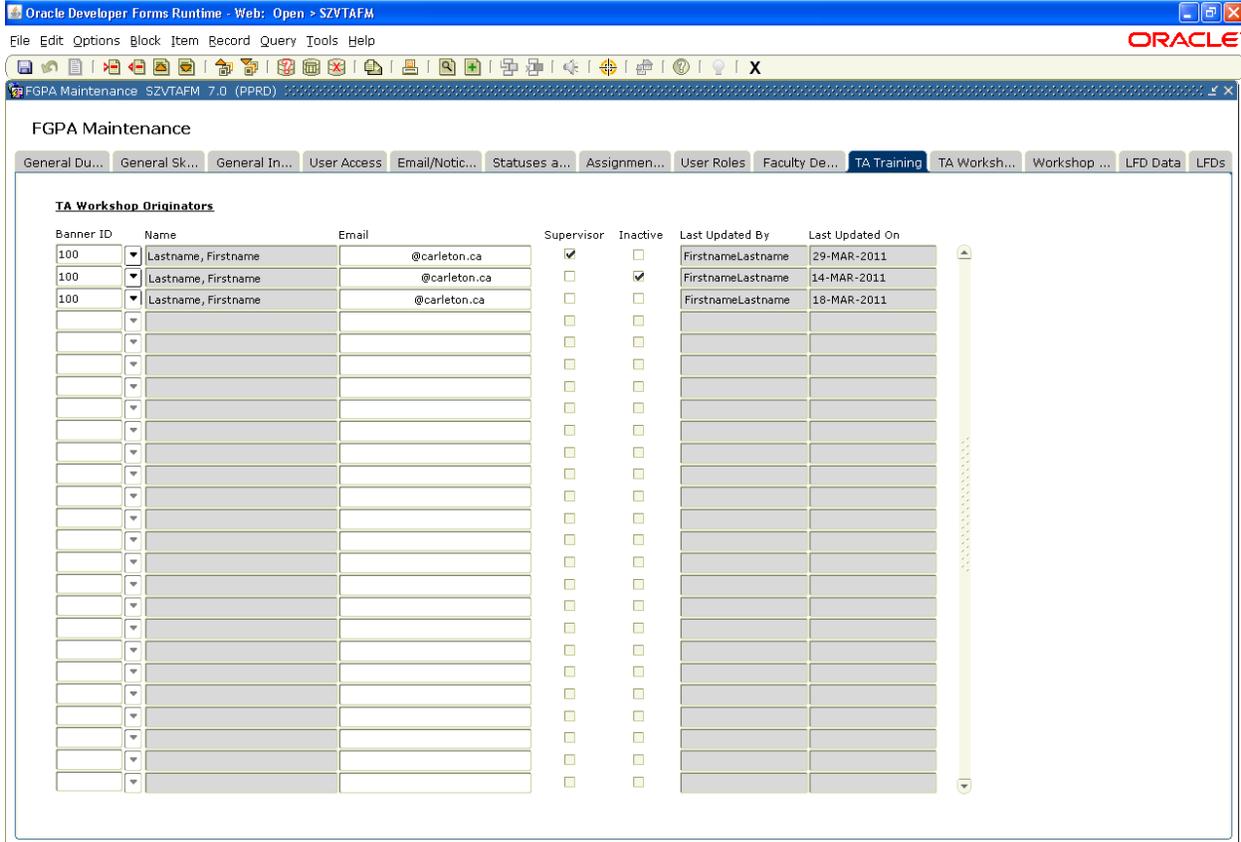
FGPA Maintenance

General Du... General Sk... General In... User Access Email/Notic... Statures a... Assignmen... User Roles Faculty De... TA Training TA Worksh... Workshop ... LFD Data LFDs

Faculty	Description	Dept	Description	Unofficial Dept	Last Updated On	Last Updated By
3	Faculty:Science	BIOC	Institute: Biochemistry	<input type="checkbox"/>	28-JUN-2010	FirstnameLastname
3	Faculty:Science	BIOL	Biology	<input type="checkbox"/>	15-JUN-2010	FirstnameLastname
3	Faculty:Science	CHEM	Chemistry	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
3	Faculty:Science	COMP	School: Computer Science	<input type="checkbox"/>	12-MAY-2010	FirstnameLastname
3	Faculty:Science	ENVS	Institute: Environ Science	<input type="checkbox"/>	20-MAY-2010	FirstnameLastname
3	Faculty:Science	GEOL	Earth Sciences	<input type="checkbox"/>	28-MAY-2010	FirstnameLastname
3	Faculty:Science	ISCS	Institute: Integrated Science	<input type="checkbox"/>	20-MAY-2010	FirstnameLastname
3	Faculty:Science	MATH	Mathematics & Statistics	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
3	Faculty:Science	NEUR	Neuroscience	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
3	Faculty:Science	PHYS	Physics	<input type="checkbox"/>	20-JUN-2010	FirstnameLastname
3	Faculty:Science	TSE	Tech, Society, Environment St.	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
3	Faculty:Science	WTS	Writing Tutorial Service	<input checked="" type="checkbox"/>	22-JAN-2010	FirstnameLastname
4	Faculty:Engineering & Design	ARCH	School: Architecture	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
4	Faculty:Engineering & Design	BIT	School: Information Technology	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
4	Faculty:Engineering & Design	CIVE	Civil & Environmental Eng.	<input type="checkbox"/>	11-JUN-2010	FirstnameLastname
4	Faculty:Engineering & Design	ELEC	Electronics	<input type="checkbox"/>	14-JUN-2010	FirstnameLastname
4	Faculty:Engineering & Design	IND	School: Industrial Design	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
4	Faculty:Engineering & Design	IPIS	Infrastructure Protection	<input type="checkbox"/>	20-JUN-2010	FirstnameLastname
4	Faculty:Engineering & Design	MAAE	Mechanical & Aerospace Eng.	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
4	Faculty:Engineering & Design	SERG	Sustainable Energy	<input type="checkbox"/>	22-JAN-2010	FirstnameLastname
4	Faculty:Engineering & Design	SYST	Systems and Computer Eng.	<input type="checkbox"/>	20-MAY-2010	FirstnameLastname
4	Faculty:Engineering & Design	WTS	Writing Tutorial Service	<input checked="" type="checkbox"/>	20-JUN-2010	FirstnameLastname
7	Eric Sprott School of Business	BUSI	School: Business	<input type="checkbox"/>	19-MAY-2010	FirstnameLastname
7	Eric Sprott School of Business	WTS	Writing Tutorial Service	<input checked="" type="checkbox"/>	19-MAY-2010	FirstnameLastname
8	Faculty:Arts & Social Sciences	AFRI	African Studies	<input type="checkbox"/>	20-MAY-2010	FirstnameLastname

**Faculty Department** – is used to identify academic departments within faculties. Used to populate the Dept/Faculty lists on the User Access tab (SZVTAFM) and all pick lists for department and/or faculty throughout the system. Also used as validation for online forms and for reports.

# SZVTAFM – FGPA Maintenance Form – TA Training tab



**TA Workshop Originators** - section allows FGPA to indicate FGPA Workshop Originators. BANNER IDs entered, ordered by last name, will automatically populate the user's name and BANNER's 'CA' email address. "Supervisor" has view and update access to any workshop in their respective department. Originator IDs may not be duplicated. Originator records may not be deleted. Originator records are inactivated or activated by checking or unchecking the 'Inactive Ind' checkbox.

## SZVTAFM – FGPA Maintenance Form – TA Workshops tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM

File Edit Options Block Item Record Query Tools Help

FGPA Maintenance SZVTAFM 7.0 (PPRD)

FGPA Maintenance

General Duties General Skills General Int... User Access Email/Not... Statuses ... Assignment... User Roles Faculty D... TA Training TA Worksh... Workshop ... LFD Data

Workshop Term: 201430 Workshop Dept: ALL Go

Term	Dept	Type	Title	Date	Time	Location	Hours	Max Enrl	Originator	Coordinator	Feedback	Certificate	Canc
201430	FGPA	TRNG	TA Orientation (FASS, FPA, Sprott)	03-SEP-2014	11:30	416 Southam hall	1	120	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
201430	FGPA	TRNG	TA Orientation - Fall 2014 Engine	03-SEP-2014	14:00	416 Southam hall	1	120	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	COMP	TRNG	School of Computer Science TA Tr	04-SEP-2014	15:45	416 Southam hall	1	50	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	BIOL	TRNG	Laboratory Safety	10-SEP-2014	9:00	5345 Herzberg Bldg	3	45	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	MICT	Workshop Training	12-SEP-2014	3:00	404 Dunton Tower (EDC Of	2	1	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
201430	WOMN	TRNG	TA Orientation	12-SEP-2014	9:00	TBD	1	5	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	PSYC	TRNG	PSYC Undergraduate/Graduate TA	17-SEP-2014	10:00	Loeb C760	1.5	40	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EURR	TRNG	Website management and social n	19-SEP-2014	10:00	DT 1103	5	10	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	FREN	TRNG	New Restriction format	25-SEP-2014	10:00	512 Tory Bldg	1.75	6	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	SYST	TRNG	New Restriction format	30-SEP-2014	9:45	512 Tory Bldg	1.75	3	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
201430	EDC	TRNG	Mech & Aero Engineering Graduat	10-OCT-2014	14:00	Minto Bell Theatre	1.5	15	Lastname, Firstname	Lastname, Firstname	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Description: This session is for new Teaching Assistants starting in Fall 2014 from the Faculty of Social Science, Faculty of Public Administration, and the Sprott School of Business. This session will provide important information on TA roles and responsibilities, training opportunities, TA support services, and payroll.

Coordinator Email: @Carleton.ca

External Coordinator:

External Email:

Last Updated By: FirstnameLastname

Last Updated On: 27-AUG-2014

TA Groups:

- 1) New MA TAs
- 2) New PhD TAs

Restrictions:

- 1) New TAs

Faculties:

- 1) TAs that belong to Faculty of Arts and Social Sciences
- 2) TAs that belong to Faculty of Public Affairs
- 3) TAs that belong to Faculty of Sprott School

Registered:

- 1) 100 ( @connect.carleton.ca)
- 2) 100 ( @connect.carleton.ca)
- 3) 100 ( @connect.carleton.ca)
- 4) 100 ( @connect.carleton.ca)
- 5) 100 ( @connect.carleton.ca)
- 6) 100 ( @connect.carleton.ca)
- 7) 100 ( @connect.carleton.ca)
- 8) 100 ( @connect.carleton.ca)
- 9) 100 ( @connect.carleton.ca)
- 10) 100 ( @connect.carleton.ca)
- 11) 100 ( @connect.carleton.ca)
- 12) 100 ( @connect.carleton.ca)
- 13) 100 ( @connect.carleton.ca)

TA Workshop form is blank upon initial opening. Users select a 'Workshop Term:' and 'Workshop Dept:' from the drop downs then click the 'Go' button to populate the middle block.

The middle block provides 14 columns of **view only** detail that pertain to the 'Workshop Term:' and 'Workshop Dept:' as entered by the user above.

The 9 fields below the middle block are **view only**. The data displayed is dependent on the record highlighted in the middle block. The purpose of the lower fields is . . .

**Description:** - complete description of the TA Workshop as entered by the Originator in Central

**Coordinator Email:** - email address of the person delivering the workshop

**External Coordinator:** - name of the individual delivering the workshop if not from Carleton

**External Email:** - email address of the External Coordinator

**Last Updated By:** - indicates the user who last updated the workshop

**Last Updated On:** - indicates the date when the workshop was last updated

**TA Groups:** - identifies the TA groups who receive an email when the 'Send Email' button is launched from the 'TA Training Session Information' page

**Restrictions:** - identifies the TA groups who are eligible to register; multiple restrictions are connected by an 'And' statement. TAs must meet all restrictions to be eligible.

**Faculties:** - identifies the TAs within the stated faculties who are eligible to register; faculties are connected by an 'Or' statement. TAs must be in one of the stated faculties to be eligible.

**Registered:** - identifies TAs who registered at time of viewing

**Note:** "Restrictions" and "Faculties" are connected by an 'And' statement. TAs must meet all "Restrictions" AND at least one of the "Faculties" to be eligible.

## SZVTAFM – FGPA Maintenance Form –Workshops Maintenance tab

Oracle Fusion Middleware Forms Services: Open > SZVTAFM

File Edit Options Block Item Record Query Tools Help

FGPA Maintenance SZVTAFM 7.0 (PPRD)

FGPA Maintenance

General Duties General Skills General Int... User Access Email/Not... Statuses ... Assignmen... User Roles Faculty D... TA Training TA Worksh... Workshop ... LFD Data

**Workshop Equivalencies**

Workshop 1	Workshop 2	Last Updated By	Last Updated On
PMC Workshop	Supporting and Accommodating Students with Disabilities	FirstnameLastname	15-SEP-2011
Discussion Groups	Art of Conversation: Facilitating a Discussion Groups (Fall	FirstnameLastname	07-SEP-2011
Equity and Human Rights	Equity and Human Rights (2011)	FirstnameLastname	07-SEP-2011
Developing a Teaching Portfolio	Developing a Teaching Portfolio (Fall 2011)	FirstnameLastname	07-SEP-2011
Developing a Teaching Portfolio and Writing a Philosophy	Developing a Teaching Portfolio (Fall 2011)	FirstnameLastname	07-SEP-2011
Winter Teaching Event: Developing a Teaching Dossier	Developing a Teaching Portfolio (Fall 2011)	FirstnameLastname	07-SEP-2011
Developing a Teaching Portfolio and Writing a Philosophy	Developing a Teaching Philosophy Statement (Fall 2011)	FirstnameLastname	07-SEP-2011
Handling Difficult and Challenging Situations	Fall Teaching Event: Dealing with Difficult Situations	FirstnameLastname	19-SEP-2011
Handling Difficult Situations	Fall Teaching Event: Dealing with Difficult Situations	FirstnameLastname	19-SEP-2011
Art of Conversation: Facilitating a Discussion Group (Wint	Art of Conversation: Facilitating a Discussion Group (Fall	FirstnameLastname	03-JAN-2012

**Workshop Types**

Code	Description	Self Register Indicator	Send Reminder Email	Days Notice	Email Code	Inactive Indicator	Last Updated By	Last Updated On
ORIE	Orientation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	TA_WORKSHOP_REMINDER_NOTICE	<input type="checkbox"/>	FirstnameLastname	30-AUG-2012
TRNG	Workshop	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	TA_WORKSHOP_REMINDER_NOTICE	<input type="checkbox"/>	UGAFA	07-AUG-2012
PREP	Preparation	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	UGAFA	07-AUG-2012
WRES	Written Response	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	UGAFA	07-AUG-2012
TART	Research/Article	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	TA_ONLINE_ARTICLE_REMINDER	<input type="checkbox"/>	FirstnameLastname	28-AUG-2012
OBSV	Peer Feedback	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	UGAFA	07-AUG-2012
INFO	Information Session	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	TA_WORKSHOP_REMINDER_NOTICE	<input type="checkbox"/>	FirstnameLastname	28-AUG-2012
TETK	Teaching Talk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	TA_WORKSHOP_REMINDER_NOTICE	<input type="checkbox"/>	FirstnameLastname	28-AUG-2012
ONLN	Online Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	TA_ONLINE_ARTICLE_REMINDER	<input type="checkbox"/>	FirstnameLastname	28-AUG-2012
PEER	Peer Mentor	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	UGAFA	07-AUG-2012

'Workshop Equivalencies' block allows FGPA to flag workshops that have similar content as equivalent. TAs may only register in one of the two equivalent workshops. Where TAs have registered in two equivalent workshops, only one will count towards Training Hours and Workshop Transcript/Certificate.

'Workshop Types' block allows FGPA to create 'Types' of training sessions; allow/restrict TAs to self register in training sessions; set email reminders; indicate the number of days before the training session begins that the reminder is to be sent and indicate the type of email to be sent . Workshop type records may not be deleted/removed but must be made inactive.

## SZVTAFM – FGPA Maintenance Form – LFD Data tab

The screenshot shows the Oracle Developer Forms Runtime interface for the FGPA Maintenance form. The 'LFD Data' tab is selected, displaying two tables: 'LFD Statuses' and 'LFD Reasons'.

**LFD Statuses**

Status Code	Description	Inactive Ind	Last Updated By	Last Updated On
PD	Pending	<input type="checkbox"/>	FirstnameLastname	02-DEC-2010
CA	Cancelled	<input type="checkbox"/>	FirstnameLastname	02-DEC-2010
GW	Glendy Wong super special status	<input checked="" type="checkbox"/>	FirstnameLastname	02-DEC-2010
DR	Dept Reviewed	<input type="checkbox"/>	FirstnameLastname	06-DEC-2010
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

**LFD Reasons**

Reason Code	Description	Inactive Ind	Last Updated By	Last Updated On
AR	Academic Research	<input type="checkbox"/>	UGAFA	24-NOV-2010
AE	Academic Exchange	<input type="checkbox"/>	UGAFA	24-NOV-2010
CO	Co-op Position	<input type="checkbox"/>	UGAFA	24-NOV-2010
CM	Certified Medical Leave	<input type="checkbox"/>	UGAFA	02-DEC-2010
PL	Parental Leave	<input type="checkbox"/>	UGAFA	24-NOV-2010
AC	Academic Benefits	<input type="checkbox"/>	UGAFA	24-NOV-2010
		<input type="checkbox"/>		
		<input type="checkbox"/>		

**LFD Statuses** - Application statuses used by FGPA to assess LFD applications are viewed by FGPA and DAs in BANNER as well as TAs in Carleton Central. The 2 character code statuses used by FGPA cannot be changed or deleted. Each status can be inactivated or activated by checking or unchecking the 'Inactive Ind' checkbox.

**LFD Reasons** - FGPA will enter valid LFD reasons used to populate the LFD application in Carleton Central. The 2 character code reasons cannot be changed or deleted. Each reason can be inactivated or activated by checking or unchecking the 'Inactive Ind' checkbox.

## SZVTAFM – FGPA Maintenance Form – LFDs tab

Oracle Developer Forms Runtime - Web: Open > SZVTAFM

File Edit Options Block Item Record Query Tools Help

FGPA Maintenance SZVTAFM 7.0 (PPRD)

FGPA Maintenance

General Du... General Sk... General In... User Access Email/Notic... Statuses a... Assignmen... User Roles Faculty De... TA Training TA Worksh... Workshop ... LFD Data LFDs

Student ID: ALL Term: ALL Dept: ALL Program: ALL Status: PD Pending Go Reset

Student ID	Name	App No.	App Term	Home Dept	Award No.	Award Status	Admit Term	Reason	Submit Date	Status	Status Description	Status Date
100	Lastname, Firstname	72	201030	CLS	851415	Issued	201030	Academic Research	10-DEC-2010	PD	Pending	10-DEC-2010
100	Lastname, Firstname	73	201110	CLS	851415	Pending	201030	Academic Research	10-DEC-2010	PD	Pending	10-DEC-2010
100	Lastname, Firstname	74	201030	LALS	852251	Issued	201030	Certified Medical Leave	10-DEC-2010	PD	Pending	10-DEC-2010
100	Lastname, Firstname	75	201110	LALS	852251	Pending	201030	Certified Medical Leave	10-DEC-2010	PD	Pending	10-DEC-2010

TA Comments: [Text Area]

Dept Comments: [Text Area]

Work Department(s): ARTC

Degree: PHD Doctor of Philosophy

Program: PHD-BB Cultural Med. Visual Culture

Last Updated By: WWW\_USER

Last Updated On: 10-DEC-2010

FGPA Message to Student: [Text Area]

FGPA Internal Comments: [Text Area]

FGPA Processor: [Text Area]

The LFDs tab contains 5 filters and two buttons at the top of the page. The five filters are Student ID:, Term:, Dept:, Program:, and Status: to query data. The first four filters default to 'ALL' and the fifth defaults to 'PD' for 'Pending'. The two following buttons are 'Go' and 'Reset'. Users click on the 'Go' button once filters are chosen to populate the lower block.

The lower block contains a table with 13 columns containing data from submitted LFD applications. Users cannot insert an application on behalf of a TA. The first 10 columns cannot be changed. The eleventh column, 'Status', allows FGPA to enter application decision. The final column, 'Status Date', changes when the 'Status' has changed.

### LFD Application Statuses

'PD' Pending – is the initial status when an application is received.

'CA' Cancelled – will display when a TA has cancelled their LFD application in Carleton Central.

'AA' Application Approved – will be entered by FGPA when the LFD has been approved.

'AD' Application Denied – will be entered when FGPA has denied the LFD application.

Users select a TA application in the top block to view 'TA Comments:', 'Dept Comments:', 'Work Department(s):', 'Degree:', 'Program:', 'Last Updated By:', 'Last Updated On:', 'FGPA Message to Student:', 'FGPA Internal Comments:', 'FGPA Processor' below.

Dept Comments: entered by the TA's Home Department, are viewed only by DAs of the Home Dept. and FGPA.

FGPA Internal Comments: entered by FGPA, are viewed only by DAs of the Home Dept. and FGPA.

FGPA Message to Student: additional FGPA information to the TA. Text entered here is incorporated into the generic email reply.

# Carleton Central – Leave From TA Duties



## Graduate TA Management System

 [Graduate TA Profile](#)

Allows a Graduate TA to submit and update their Graduate TA Profile. Please remember to keep your TA Profile up to date.

 [Graduate TA Assignments](#)

Allows a Graduate TA to review and accept their TA course and non-course assignments and associated duties.

 [Leave From TA Duties](#)

Apply for leave from your TA duties.

**RELEASE: 8.5**

GR TAs with priority positions may apply for a Leave From Duties (LFD) after the first term of employment has been completed.

The application is located through the following path:

Carleton Central Main Menu

- Student Support Services
  - Graduate TA Management System
    - Leave From TA Duties

# Carleton Central – TA view of LFD Application



Personal Information Student Services Faculty Services Employee Services

RETURN TO MAIN MENU SITE MAP HELP EXIT

## Leave From TA Duties Summary

100##### FName LName  
Sep 05, 2014 02:48 pm

Below is displayed the details of your current Teaching Assistantship (TA). If you wish to apply for leave from TA duties, press the "Apply for Leave" button and complete the form. The form will be submitted to your respective department and reviewed by FGPA. To track your application please return to this page. To cancel a pending leave request, click the "View Application" link and use the cancel feature on that page.

	Award No.	Home Dept	Allocated Dept(s)	Assignment(s)	Application No.	Application Date	LFD Term	Status	
<a href="#">Apply for Leave</a>	#####	BUSI	School: Business	BUSI 3704 A	15153	08-SEP-14	Winter 2015	Application Approved	<a href="#">View Application</a>
<a href="#">Apply for Leave</a>	#####	BUSI							

[ Graduate TA Management System ]

TA clicks on 'Apply for Leave' to access the application form.  
TAs with more than one award number will have multiple access points. Desired award terms will only be included under one award number.

# Carleton Central – LFDs application form



## Leave From TA Duties

Please complete the form below in its entirety and submit. Your request for Leave From TA Duties will be reviewed by the department and FGPA. Should you not be approved for a leave from duties, you will be notified by the department via email. You can also revisit the Leave From Duties Summary page to track the current status of your request.

### Deadline for Submission to the Faculty of Graduate Studies and Research\*

Fall term: August 15\*\*

Winter term: December 1

Spring term: April 15

\* except in cases of medical leave

\*\* for students with a TA assignment in Fall term or a Fall/Winter one credit course

### Definition

22. **Leave from duties** is where the Dean of Graduate and Postdoctoral Affairs approves a graduate student to decline an appointment without forfeiting his/her priority for the reappointment as set out in Article 13.01. The priority shall not be extended for the period of leave from duties unless the Parties explicitly agree to do so in writing.

### Priority

#### Article 13.01(a)

An employee who is registered as a full-time student in a graduate degree program and who has held a regular position in the bargaining unit for at least one term shall have, subject to satisfactory performance of the duties of the position(s) s/he has held, priority for appointment to available regular positions for which the employee is qualified.

Article 13.01(b) Where a member of this bargaining unit, as a full-time graduate student cannot accept an assistantship pursuant to Article 13.01(a) because:

(i) the student is off-campus performing academic research or on an academic exchange; or

(ii) the student is on an approved medical leave from duties without pay in accordance with Article 22.11; or

(iii) the student has received employment or a position as a Contract Instructor at Carleton pursuant to Article 3.02

With the approval of the Dean of Graduate and Postdoctoral Affairs, the number of consecutive terms or calendar years as set out in Article 13.01(a) shall be extended by the number of terms the student is off-campus, up to a maximum of three consecutive terms.

#### Article 13.01(d)

Subject to Article 22.11, where an employee who is a full-time graduate student declines an appointment to an assistantship during a fall or winter term pursuant to Article 13.01 (a) and has not been granted a leave from duties without pay by the Dean of Graduate and Postdoctoral Affairs, the priority for reappointment as set out in Article 13.01(a) shall be forfeit and the employee shall be deemed to have resigned his/her employment.

Student ID: 100#####  
Name: Firstname Lastname  
Email: FName LName@email.carleton.ca  
Department: School: Business  
Degree: Doctor of Philosophy  
Program Start: Fall 2014 (01-SEP-2014)

### Leave From Duties requested for the following terms:

- Fall 2014  Winter 2015
- Fall 2015  Winter 2016
- Fall 2016  Winter 2017
- Fall 2017  Winter 2018
- Fall 2018  Winter 2019

I am a full-time graduate student in the TA priority pool according to Article 13.01(a) of the Collective Agreement and am applying for Leave from Duties under Article 22.11 for the following reason (select one).

- Academic Research
- Academic Exchange
- Co-op Position
- Certified Medical Leave
- Parental Leave
- Academic Benefits
- Other

Please elaborate:

I have read the Collective Agreement details above and acknowledge my acceptance of them.

Note: submission of this Leave from Duties request form will constitute your signature electronically.

[ [Leave From TA Duties Summary](#) ]

Top part of application provides submission dates and excerpts from the collective agreement.

Below the excerpts and to the left provides the TA's personal information.

To the right provides the terms that the TA requests an LFD from under the award.

**Note:** Terms that are not identified may be under another award number; the TA will have to attempt under another award number.

Directly below the terms, the TA must indicate they are F/T in the priority pool.

TAs must tick one of the applicable reasons listed.

TAs must then elaborate on the request.

Ticking the, 'I have read the Collective ...' is mandatory.

TAs then activate the 'Apply for Leave' button.

LFD applications cannot be submitted without completing the steps above.

TAs may cancel an application if the status is 'Pending'. From the LFD summary page, the TA clicks on '[View Application](#)' to re-open the application; then clicks 'Cancel Application' in the bottom left corner.

## **Carleton Central – TA Training Sessions**

The form to Create, Update and Manage TA Training Session registrations is located in Carleton Central.

Employee Services menu / Other Services / TA Management System / TA Training and Orientation Workshops.

Users must have ‘Originator’ status in either EDC, FGPA or an academic department to create training sessions. EDC supervisors, FGPA support user and DAs maintain ‘Originator’ permissions for their respective Depts.in the maintenance forms.

Originators with Supervisor status may view and update all sessions within their respective Depts. TA Mentors are granted ‘Originator’ status for the Dept. they are assigned to during their Mentorship.

**Carleton Central**

Personal Information | Student Services | **Faculty Services** | Employee Services | Support Services | WebTailor Administration

RETURN TO MAIN MENU | SITE MAP | HELP | EXIT

100##### FName LName  
Sep 05, 2012 02:48 pm

**TA Training and Orientation Summary**

Details displayed below correspond to current and upcoming training sessions for which you are the 'Originator' or 'Coordinator'.  
 'Originators' may 'Create' or 'Update' training sessions, view 'Registration' and/or 'Attendance' details.  
 'Coordinators' may view 'Registration' and/or 'Attendance' details.

**Current and Upcoming Training Sessions**

Term	Date/Time	Location	Title	Originator	Coordinator	Registration	Waitlisted	Attendance	
Fall 2012	04-SEP-2012 10:45 am - 11:45 am	Theatre A (KMT) - Southam Hall	New TA ORIENTATION - 4 September	FName LName	FName LName	129	0	0	Registration Go
Fall 2012	04-SEP-2012 12:15 pm - 1:15 pm	Theatre B - Southam Hall	New TA ORIENTATION - 4 September	FName LName	FName LName	71	0	0	Registration Go
Fall 2012	15-SEP-2012 11:00 am - 12:00 pm	Roosters - 4th Fl UC	Welcome to Carleton	FName LName	FName LName	2	0	0	Registration Go
Fall 2012	30-SEP-2012 9:00 am - 10:00 am	Timmys - 1st Floor UC	New TA Orientation	FName LName	FName LName	1	0	0	Registration Go Registration Attendance Update Clone

**New Training Session**

Create a new training session by pressing the button below.

**Past Training Sessions**

To view a list of your previous training sessions, please select a term below.

Select a term:

RELEASE: 8.2 [ TA Management System (Faculty) | TA Management System (Employee) | TA Training Menu (Students) ]

The 'TA Training and Orientation Summary' page is accessed from the TA Management menu. Sessions displayed are for current term and two future terms where the user is an Originator or a Coordinator. Both open and cancelled workshops are displayed.

The 'Current and Upcoming Training Sessions' list is view only. Clicking on a session title opens a full training session detail page. The jump menu at the far right initially shows "Registration". "Originators" have "Registration", "Attendance", "Update" or "Clone" privileges. "Coordinators" have "Registration" and "Attendance" privileges. "Supervisors" have "Registration", "Attendance", "Update" or "Clone" privileges within their respective Depts.

Users choose an option and hit the "Go" button. Updates are not permissible when the training session term passes. The jump menu will not appear for cancelled sessions.

The 'New Training Session' button is available to users with 'Originator' status. Clicking the button opens a blank training session form.

Historical training sessions are accessed via 'Past Training Session' section at bottom of page. Select a term from the list of values drop down and click the 'Go' button. The selected term's historical training session summary page displays. Historical sessions provide 'Registration' and 'Attendance' links. 'Update' links are not permitted.

## Create TA Training Session

100##### FName LName  
Sep 02, 2014 03:38 pm

Complete the form below to create a new training session.

### Training Details

Training Title:

Training Description:

Term:

Department:

Type:

Date:  (DD-MON-YYYY)

Start Time:  (HH:MM 24 Hour Format)

Duration:

Location:

Min Enrollment:

Max Enrollment:

Coordinator1 ID:  [NAME WILL APPEAR HERE]

Coordinator2 ID:  [NAME WILL APPEAR HERE]

Coordinator3 ID:  [NAME WILL APPEAR HERE]

Coordinator4 ID:  [NAME WILL APPEAR HERE]

External Name:

External Email:

Request Feedback:

Internal Comments:

### Training TA Groups

Group 1:

Group 2:

Group 3:

### Attendance Restricted To

Eligible TAs must uphold each flagged restriction.

- Continuing TAs
- International TAs
- TA Mentors and Lead Mentors
- New TAs
- TAs that have not completed their 5 hours of training
- TAs that belong to the workshop department
- TAs that work for the workshop department
- TAs that belong to or work for the workshop department

### Faculties

TAs must uphold at least one of the flagged restrictions.

- TAs that belong to Faculty of Science
- TAs that belong to Faculty of Engineering
- TAs that belong to Sproule School of Business
- TAs that belong to Faculty of Arts and Social Sciences
- TAs that belong to Faculty of Public Affairs

RELEASE: 8.2

[ TA Training and Orientation Summary ]

The 'Create TA Training Session' page allows EDC and FGPA, Dept staff and Mentors to create TA Training Sessions. Except for the 'Term:', 'Department:', 'Type:' and 'Group 1:' fields the page will initially open blank.

In creating Training Sessions, completing all fields are mandatory except 'Training Description:', 'External Coordinator:', 'External Email:', 'Internal Comments:', 'Restrictions:' and 'Faculties:'

'Training Title:' field - is a free text field.

'Training Description:' field - is a free text field, holding 1000 characters.

'Term:' field - allows the current term and two terms into the past or future.

'Department:' field - defaults to the Dept where user has Originator status. Alphabetical drop down list provided where originator of more than one Dept.

'Type:' field – 12 types of training sessions can be created ...

- Information Session - presentations that focus on a particular office/service at Carleton University. Created to educate TAs on valuable university programs for them *and* their students, includes details such as when services/programs should be accessed and by whom, e.g. Academic Integrity or Student Distress session in which participants are learning about these programs, but are not working hand-on with the material.
- Intermediate Training – refers to training that builds off previous sessions, offering an intermediate level breadth of knowledge. Often restricted to continuing/experienced TAs, unless it is offered later in the term or the academic year (intermediate Grading)

- Online Training - Training that is completed online (may include online workshops or AODA training)
- Orientation - Use exclusively for New TA orientation, ITA orientation or departmental orientations (traditionally at the start of the year or term)
- Other - Any training that does not fall into other categories, most often used for independent, flexible departmental specific training, e.g. production of training videos.
- Peer Feedback - similar to 'Prep', only TA Mentors, EDC and Grad Admins are able to create and populate the sessions. Not displayed in Central for registration.
- Peer Mentor - Continuing teaching assistants are matched with new teaching assistants to help them acclimatize to the university, the department and balancing the demands of graduate school and TA responsibilities. Not displayed in Central for registration.
- Preparation - refers to Preparation, restricts registration to Originator's discretion; designed to record Mentors workshop prep time. Not displayed in Central for registration.
- Research/Article - refers to TA Article, opens registration to all TAs in Carleton Central. Enforces 'TA Groups' and 'Restrictions'.
- Teaching Talk - talks on different educational methods or approaches. It may introduce participants to a specific tool, or be a reflective presentation by a faculty member or experienced teaching assistant.
- Workshop – (Default) refers to Training, opens registration to all TAs in Carleton Central. Enforces 'TA Groups' and 'Restrictions'.
- Written Response, similar to 'Preparation' TA registration is restricted. In creating 'WRES' sessions, "Time:", "Duration:", "Location:", "Min Enrollment:", "Max Enrollment:" fields may be left blank. Not displayed in Central for registration.

'Date:' field - entered as DD-MON-YYYY, i.e. 25-DEC-2010

'Start Time:' field will be in 24 hour format. 0:00 to 23:59 are acceptable values.

'Duration:' field – indicates workshop length. Accepts two decimal places. Quarter hour intervals are acceptable, i.e. 1.0, 1.25, 1.5, 1.75.

'Location:' field – free text field. Building and room number would be standard.

'Min Enrollment:' field - least number of registered TAs for workshop to occur.

'Max Enrollment:' field - maximum number of TAs able to register online

'Coordinator ID:' field – valid BANNER IDs are entered. User clicks 'Validate ID' button to populate BANNER name associated to BANNER ID.

'External Name:' field - optional free text field. Records Non-BANNER names. Coordinator ID still required when 'External Name' entered.

'External Email:' field – free text field. 'External Email' is required when 'External Name' entered.

'Request Feedback:' field - Yes or No options. 'Yes' creates an optional feedback form available at Originators discretion. Hyperlink on 'TA Training and Orientation Workshop Summary' page to TAs having attended workshop. 'No' will not present hyperlink to TA.

'Internal Comments:' – free text field. Only visible to Originators in the 'Update Workshop' page.

'Training TA Groups' - 'Group 1:' defaults to 'TAs belonging to the department'. List of value drop downs maintained by EDC. Maximum of three groups that work cumulatively.

'Attendance Restricted To' - defaults to none. Restrictions work cumulatively. Restrictions are created/maintained by EDC. TAs registering into a session must pass all flagged restrictions.

'Faculties' - default to none. Faculties work with an 'Or' operator. TAs registering into a session must pass at least one of the flagged restrictions.

**Note:** 'Attendance Restricted To' and 'Faculties' are connected by an 'And' statement.

TAs must meet all "Restrictions" AND at least one of the "Faculties" to be eligible.

'Save Training Session' - pushes new sessions to 'TA Training and Orientation Summary' page.

## TA Training Registration

**i** 'Originators' or 'Coordinators' may 'Register' or 'Waitlist' TAs and restrictions will be ignored.  
'Originators' or 'Coordinators' may 'De-Register' TAs

Training Information	
Term:	Fall 2012
Training Title:	Welcome to Carleton
Date and Time:	15-SEP-2012 from 11:00 am - 12:00 pm
Location:	Roosters - 4th Fl UC
Max Enrollment:	25
Actual Enrollment:	2

### Register a TA

Student ID:

### Registration List

[Printer Friendly Version](#)

	Student ID	Name	Home Dept	Work Dept(s)	Assignment(s)	Status	De-Register / Waitlist Removal
1	100	LName, FName	PHYS	PHYS	<ul style="list-style-type: none"> <li>Lab Demonstration</li> <li>PHYS 1001</li> </ul>	Registered on 04-SEP-2012	<input type="checkbox"/>
2	100	LName, FName	ARTC	ARTC	<ul style="list-style-type: none"> <li>FILM 2000</li> <li>Office Hours</li> </ul>	Registered on 04-SEP-2012	<input type="checkbox"/>

Originators and Coordinators access the 'TA Training Registration' page from 'TA Training and Orientation Summary' page.

The top section provides **view only** details on the specific session.

Mid-page allows additional valid TAs to be registered or waitlisted. Training session restrictions are not checked here. Clicking on the 'Update List' button, bottom of page, will refresh the 'Registration List'.

The bottom section contains the 8 column 'Registration List'. The list is ordered by 'Registered', 'Waitlisted' and 'De-registered'. The first 7 columns are view only. Note the **red** titles in columns 2 thru 5. Clicking the **red** titles will re-sort the table. Checking the checkbox in the 'De-register / Waitlist Removal' column and clicking the 'Update List' will de-register the TA.

Clicking on the '**Printer Friendly Version**' provides a printable version of the Registration List.

# Carleton Central – TA Training Sessions – Workshop Attendance



Carleton Central

Personal Information Student Services **Faculty Services** Employee Services Support Services Web Tailor Administration

## Training Session Attendance

RETURN TO MAIN MENU SITE MAP HELP EXIT

100#### FName LName  
Sep 05, 2012 2:18 pm

**i** 'Originators' or 'Coordinators' may 'Register' or 'Waitlist' TAs and restrictions will be ignored.  
'Attended' box and 'Hours Attended' must both be marked.  
'Hours Attended' accepts quarter hours, i.e. 1.25, 2.5 and 3.75.

Training Information	
Term:	Fall 2012
Training Title:	Welcome to Carleton
Date and Time:	15-SEP-2012 from 11:00 am - 12:00 pm
Location:	Roosters - 4th Fl UC
Max Enrollment:	25
Actual Enrollment:	2

### Register a TA

LName, FName

Student ID:

### Attendance List

Tracking Sheet / Printer Friendly Version

	Student ID	Name	Home Dept	Work Dept(s)	Assignment(s)	Attended Select All / Unselect All	Hours Attended Full Hours / Reset
1	100	LName, FName	PHYS	PHYS	<ul style="list-style-type: none"><li>Lab Demonstration</li><li>PHYS 1001</li></ul>	<input type="checkbox"/>	<input type="text"/>
2	100	LName, FName	ARTC	ARTC	<ul style="list-style-type: none"><li>FILM 2000</li><li>Office Hours</li></ul>	<input type="checkbox"/>	<input type="text"/>

RELEASE: 8.2

[ TA Training and Orientation Summary ]



Originators and Coordinators access the 'Training Session Attendance' page from 'TA Training and Orientation Summary' page.

The top section provides **view only** details on the specific training session.

Mid-page allows additional valid TAs to be registered or waitlisted. Training session restrictions are not checked here. Clicking on the 'Update List' button, bottom of page, will refresh the 'Attendance List'.

The bottom section contains the 8 column 'Attendance List'. All registered TAs are displayed here. The first 6 columns are view only. Note the **red** titles in columns 2 thru 5. Clicking on these **red** titles will re-sort the table. Checking the checkbox in the 'Attended' column indicates the TA attended the workshop. The 'Hours Attended' must then be entered.

Clicking '**Select All**' in the 'Attended' column marks all registered TAs as attended. Clicking '**Unselect All**' indicates all registered TAs as not attended.

Click '**Full Hours**' in the 'Hours Attended' column to provide full training hours to all registered TAs. Click '**Reset**' in the 'Hours Attended' column to remove training hours for all registered TAs.

Click the '**Tracking Sheet**' to provide a printable tracking sheet. Used for sign at the session.

Clicking on the '**Printer Friendly Version**' will provide a printable version of the attendance sheet.

# Carleton Central – TA Training Sessions – Update TA Training Session



## Update TA Training Session

You may revise the fields below to update your training session details.

### Training Details

Training Title:

Training Description:

Term:

Department:

Type:

Date:  (DD-MON-YYYY)

Start Time:  (HH:MM 24 Hour Format)

Duration:

Location:

Min Enrollment:

Max Enrollment:

Coordinator1 ID:  FName LName

Coordinator2 ID:  INVALID ID

Coordinator3 ID:  INVALID ID

Coordinator4 ID:  INVALID ID

External Name:

External Email:

Request Feedback:

Internal Comments:

### Training TA Groups

Group 1:

Group 2:

Group 3:

### Attendance Restricted To

- Eligible TAs must uphold each flagged restriction.
- Continuing TAs
  - International TAs
  - TA Mentors and Lead Mentors
  - New TAs
  - TAs that have not completed their 5 hours of training
  - TAs that belong to the workshop department
  - TAs that work for the workshop department
  - TAs that belong to or work for the workshop department

### Faculties

- TAs must uphold at least one of the flagged restrictions.
- TAs that belong to Faculty of Science
  - TAs that belong to Faculty of Engineering
  - TAs that belong to Sprott School of Business
  - TAs that belong to Faculty of Arts and Social Sciences
  - TAs that belong to Faculty of Public Affairs

### Send Email / Cancel Training Session

Message to be included in email:

If you would like to send an email to the training coordinator and registered TAs to note your updates, press the button below.

Training that has passed cannot be cancelled.

Originators access the 'Update TA Training Session' page from the 'TA Training and Orientation Summary' page. EDC's Mentor Supervisor is granted 'Update' access to all sessions created by a mentor.

Previously entered/saved data auto-populates with page opening. All fields are updateable. Saved updates can be emailed to registered TAs and the Coordinator. Text entered into 'Send Email / Cancel Workshop' is included in email when 'Send Email' button is clicked.

The 'Cancel Training Session' button is active if the training session has not been delivered. Clicking the 'Cancel Training Session' button will de-register all registered TAs in the training session. Entering text into 'Send Email / Cancel Training Session' and clicking the 'Send Email' button will email all training session TAs and the Coordinator.

## **Carleton Central – Instructor TA Requests**

Requests for TAs and/or TAs with special skill sets are submitted by instructors/supervisors through the 'Submit TA Requests' form. Instructors/supervisors submit requests by term by course number.

The form is located in Carleton Central and is located under Faculty Services tab / TA Management System / Submit TA Requests.

## Carleton Central – Instructor TA Requests Summary

Instructors submit their TA requirements through the Submit TA Requests form located in Carleton Central.

The screenshot shows a web browser window titled "Instructor TA Requests Submit System - Windows Internet Explorer". The address bar shows the URL "https://central.carleton.ca/pprd/pkg\_ta\_inst\_requests.p\_main". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page content features the Carleton University logo and the text "Carleton Central" in a red banner. Below this is a navigation menu with "Personal Information", "Student Services", "Faculty Services", and "Employee Services". The main heading is "Instructor TA Requests Summary". On the right side, there are links for "RETURN TO MAIN MENU", "SITE MAP", "HELP", and "EXIT", along with the user's name "100000001 Yu Bea Moone" and the date "Feb 02, 2011 11:53 am". A red information icon is followed by a welcome message: "Welcome to the online system for submitting and reviewing TA Requests. The list below represents courses that you are responsible for in upcoming terms. To submit TA requests for each of these courses, or to review requests you have already submitted, simply click the course link." Below this is a table with a header "Request Submitted" and five rows of course information. The course codes are in red, and the "Request Submitted" date for the second row is "15-AUGUST -2010". At the bottom left, it says "RELEASE: 8.2" and at the bottom center, "[ TA Management System ]". The Carleton University logo is in the bottom right corner.

		Request Submitted
AERO 3807 A	(Winter 2011 (January-April))	
AERO 3101 A	(Winter 2011 (January-April))	15-AUGUST -2010
MAAE 2604 A	(Fall 2011 (September-December))	
MAAE 3202 B	(Winter 2012 (January-April))	
AERO 3807 A1	(Winter 2012 (January-April))	

Each course the instructor is responsible for, by term, is summarized on the Instructor TA Request Summary page. Courses listed are for the current term forward. Course codes(s) are listed in red indicating a hyperlink to the Submit TA Requests form. Instructors click on a course code to activate the Submit TA Requests form. Once a TA Request has been submitted a 'Request Submitted' date will appear beside the course. Instructors can click on that date to view or update a request.

# Carleton Central – Submit TA Requests

TA Request Submit Form - Windows Internet Explorer  
 https://central.carleton.ca/pprd/plg\_ta\_inst\_requests.p\_submit\_form

Carleton Central  
 Personal Information Faculty Services Employee Services

Submit TA Requests  
 BACK TO MAIN MENU SITE MAP HELP EXIT  
 100000001 Yu Bea Noone  
 Feb 02, 2011 12:10 pm

**i** Complete the form below, according to the instructions provided, to submit your TA requests to the department for the course in question. This information will be used by the department to assist in making TA Assignment decisions.  
 Please note, the submittal of requests does not constitute a guarantee that they will be fulfilled in their entirety.

Course: AERO 3101 A  
 Term: Winter 2011 (January-April)  
 Max. Enrollment: 25  
 Actual Enrollment: 20

Please enter a numeric value in either the "# of TAs Requested" or "# of Hours Requested" field (no alpha values please). You may enter a value in both. If you have no TA requests for this course then you must enter 0 in both boxes.

# of TAs Requested:   
 # of Hours Requested:   
 Special Requests:

**OPTIONAL**  
 Please indicate the skills that you would need TAs to possess. If there are skills that you would need that are not in the list then select "Other" and enter the skills in the box provided.

Presentation  Mentoring  Computer Aided Design and Manufacturing  
 Dynamics  Engineering Design  Feedback and Control Systems  
 Solid Mechanics  Fluid Mechanics  Thermodynamics and Heat Transfer  
 Material Science  Group Facilitation/Discussion Skills  Written Communication  
 Verbal Communication  Robotics  Thermofluids Theory  
 Thermofluids Experimental  Solids  Writing  
 Reading  Communication  Management  
 Administration  Organization  English Language proficiency  
 Goal Oriented  Presentation Skills  Analytical Skills  
 Other (specify)

**OPTIONAL**  
 From the list below please indicate which duties the TAs may be assigned to and the approximate number of hours required for each duty. Please enter only numeric values in the "Estimated Hours" fields.

	Estimated Hours
<input type="checkbox"/> Grading (assignments, tutorial/lab problems, tests, etc.)	<input type="text"/>
<input type="checkbox"/> Conduct lab	<input type="text"/>
<input type="checkbox"/> Conduct Tutorial	<input type="text"/>
<input type="checkbox"/> Office Hours	<input type="text"/>
<input type="checkbox"/> Administration (compiling grades, etc)	<input type="text"/>
<input type="checkbox"/> Proctoring	<input type="text"/>
<input type="checkbox"/> Marking Essays, other assignments	<input type="text"/>
<input type="checkbox"/> Marking Exams	<input type="text"/>
<input type="checkbox"/> Compulsory Orientation/Training	<input type="text"/>
<input type="checkbox"/> Meeting with Supervisor	<input type="text"/>
<input type="checkbox"/> Grading (weekly assignments, labs, reports, etc)	<input type="text"/>
<input type="checkbox"/> Lab Clean Up	<input type="text"/>
<input type="checkbox"/> Lab Supervision	<input type="text"/>
<input type="checkbox"/> Lab Demonstration	<input type="text"/>
<input type="checkbox"/> Lecture Attendance	<input type="text"/>
<input type="checkbox"/> Discussion Groups/Seminars	<input type="text"/>
<input type="checkbox"/> Preparation Time	<input type="text"/>
<input type="checkbox"/> Office Hours	<input type="text"/>
<input type="checkbox"/> Other (specify) <input type="text"/>	<input type="text"/>

[ Instructor TA Requests Summary ]

RFI EASF: 8.2 Carleton

The Submit TA Requests form opens providing instructors with 3 sections.

The top section identifies the "Course:" number, "Term:", "Max. "Enrollment:" count and the "Actual Enrollment:" count on the left. The instructor completes the "# of TAs Requested:" "# of Hours Requested:" and "Special Requests:" fields.

Instructors who do not wish a TA will enter a 0 (zero) in the “# of TAs Requested:” field and save.

The middle section contains 3 columns of checkboxes with various skills beside each checkbox. The section is optional and the instructor checks each skill that s/he feels is required for the course. The last checkbox of the section is “Other (specify)” with a free form text box. Users may enter a skill not listed in the section above.

The bottom section, also optional, contains 2 columns. Column 1 has checkboxes labelled with various TA duties. Instructors check the duties TAs are expected to perform. Column 2, “Estimated Hours” provides a text box where instructors enter the number of hours TAs will be performing each duty. The last checkbox of the section is “Other (specify)” with a free form text box. Users may enter a skill not listed in the section above and enter estimated hours.

The bottom of the form holds a “Submit TA Request” button and a “Clear Form” button. Instructors click the “Submit TA Request” button once input is completed. Instructors click the “Clear Form” button to clear the form and start fresh.

## **Carleton Central – TA Assignments and Duties**

Instructors/Supervisors complete the assignment of duties form in Carleton Central. One form per TA, per assignment, per term is completed by the Instructor/Supervisor. Once electronically signed, the form is made available to the TA for their electronic signature. Both signatures form a binding contract.

The form is located in Carleton Central . . .  
Faculty Services tab / TA Management System / Assign TA Duties



Carleton Central

Personal Information

Faculty Services

Employee Services

[RETURN TO MAIN MENU](#) | [SITE MAP](#) | [HELP](#) | [EXIT](#)  
 10000001 Yu Bea Noone  
 Mar 04, 2011 12:30 pm

## TA Assignments and Duties Summary

**1** Welcome to the online system for reviewing and managing TAs assigned to you and/or your courses. Through this system you can review the details of all course and non-course related TA Assignments that you are responsible for and assign specific duties to those TAs. The list below displays all the TAs that have been assigned to you for the current or upcoming terms. Please review this list on an on-going basis as it will continue to change as TA assignments are being completed by the various departments. If you have any questions regarding these assignments or wish to discuss them please contact the department directly.

**\*\*IMPORTANT\*\* - Please read**

- Assigning duties to TA Assignments is not possible until the TA has accepted the assignment with the department. Once this has happened the Assignment of Duties form will be available to you via links on this page. Once duties have been completed and signed off by both you and the TA the form will remain available for viewing but the duties will not be updateable.
- All TA Assignments are to be considered tentative until the department notifies you that they are complete and confirmed. Until this notice has been sent please refrain from assigning duties, even if the TA has accepted the assignment.
- Once the TA has signed off and accepted the duties the **Midterm Meeting** section of the form will be activated and available to you for update. This section of the form should be completed once you have conducted the midterm meeting with the TA. Once you have completed the section and saved it the TA will then review it online and signoff.

**Current & Future TA Assignments**

Term	Student	Assignment	Level	Hours Available	TA Accepted	TA Duties						
						Saved	Signed Off (supervisor)	Signed Off (student)	Deadline	Midterm Deadline		
Winter 2011	<a href="#">FName LName</a>	ELEC 3605	GR	130	Yes	Yes	22-NOV-2010	No	01-FEB-2011	01-MAR-2011	Update Duties	Go
Winter 2011	<a href="#">FName LName</a>	PHYS 4502	UG	130	Yes	No	No	No	01-FEB-2011	01-MAR-2011	Assign Duties	Go
Winter 2011	<a href="#">FName LName</a>	SOCI 2043 B	GR	130	Yes	Yes	22-NOV-2010	19-FEB-2011	01-FEB-2011	01-MAR-2011	View Duties/Midterm	Go
Fall 2010	<a href="#">FName LName</a>	HIST 1001 A	GR	130	Yes	Yes	11-SEP-2010	22-SEP-2010	01-OCT-2010	01-NOV-2010	View Duties/Midterm	Go
Fall 2010	<a href="#">FName LName</a>	SOCI 2001 A	GR	130	Yes	Yes	19-SEP-2010	22-SEP-2010	01-OCT-2010	01-NOV-2010	View Duties/Midterm	Go
Fall 2010	<a href="#">FName LName</a>	ELEC 4505 A	GR	130	Yes	Yes	11-SEP-2010	22-SEP-2010	01-OCT-2010	01-NOV-2010	View Duties/Midterm	Go
Fall 2010	<a href="#">FName LName</a>	PHYS 2604 A	UG	91	Yes	Yes	02-OCT-2010	05-OCT-2010	01-OCT-2010	01-NOV-2010	View Duties/Midterm	Go

[\[ TA Management System \(Faculty\) | TA Management System \(Employee\) \]](#)

RELEASE: 8.2


Instructors/Supervisors first opening the TA Assignments and Duties Summary page will be presented with 12 columns of information for each TA assignment impacting the instructor.

1. "Term" identifies which term the assignment relates to.
2. "Student" identifies the TA. TA's name is **Red** indicating a hyper link to the TA's "@connect.carleton.ca" email.
3. "Assignment" identifies the type of assignment.
4. "Level" identifies the level of the student.
5. "Hours Available" identifies the number of hours the TA is paid.
6. "TA Accepted" indicates whether the TA has accepted the assignment.
7. "Saved" indicates whether the instructor has entered assignment duties and saved the changes.
8. "Signed Off (supervisor)" indicates the instructor has completed the assignment of duties and signed off on the submission. No indicates assignments are to be made or changes to previous assignments. A date (DD-MMM-YYYY) indicates the instructor has signed off.
9. "Signed Off (student)" indicates the student has viewed the duties, agreed and signed off. "No" indicates the student has not signed off. A date (DD-MMM-YYYY) indicates the instructor/supervisor has signed off.
10. "Deadline" informs instructor/supervisor when Assignment of Duties is to be completed.
11. "Midterm Deadline" informs instructor/supervisor when Midterm Meeting is to be held by.
12. The last column, a jump menu, performs the following;
  - a. "Assign Duties" – Assignment of Duties opens allowing duties and hours to be recorded.
  - b. "Update Duties" - instructors/supervisors may modify previously created duties and hours. Regardless if both parties have signed off. Revised duties will automatically generate emails to the TA once saved. Revised, signed off forms will be archived and accessible.

- c. "View Duties/Midterm meeting" - indicates the status of the assignment as it pertains to the instructor/supervisor. The status is listed in red indicating a hyperlink to the Assignment of Duties form.
- d. "View/Print forms" – this allows an instructor/supervisor to view a list of current and/or revised Assignment of Duties forms. Each item in the list is a link to a .pdf file which can then be printed or saved.
- e. "Clone Duties" – allows instructors/supervisors to clone a saved Assignment of Duties form. From either current/previous terms. Cloning duties does not apply the instructor's sign off.

# Carleton Central – Assignment of Duties

The Assignment of Duties form, a replica of the paper version, contains 7 sections A - G; “General Employee Information”, “Course Information”, “Weekly Duties”, “Other Duties”, “Total Hours”, “Statement by Employee” and “Mid-Term Meeting”. Fields marked with an asterisk, are mandatory and must be completed.



Carleton Central

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Personal Information

Faculty Services

Employee Services

[BACK TO MAIN MENU](#)   [SITE MAP](#)   [HELP](#)   [EXIT](#)  
 100000001 Yu Bea Noone  
 Feb 02, 2011 11:09 am

## Assignment of Duties

**i** Please complete the TA Assignment of Duties Form below. Follow the instructions for each section carefully. Once completed, copies of the form will be made available to the following:

- the Department Chair
- the Employee
- the Supervisor
- CUPE 4600 - Unit 1

If in doubt about how to complete any part of the form, contact your department administrator or chair. Please note that if the employee has concerns, action as indicated in Article 14.03 must be taken. This article includes a time limit so prompt action to avoid violation of the contract is essential. Every effort should be made to resolve any concerns during the discussion stage.

**NOTE - items marked with an asterisk(\*) are mandatory and must be completed.**

**⚠ These duties have been signed off by the TA. They can no longer be updated.**

### Section A - General Employee Information

- Complete all items in this section. Make corrections where available. Note - corrections will be reflected only within the TA Management system and this assignment of duties, not in Banner.

Student Last Name		Student First Name		Student Id
Raven		C.U.		100000002
Phone Number	Email	Faculty	Department	
	curaven@connect.carleton.ca	Faculty:		

Supervisor Name*	Supervisor Email	Office Number	Phone Number
Yu Bea Noone	Yu_B_Noone@carleton.ca		

- “Section A - General Employee Information”** – displays the “Student Last Name”, “Student First Name”, “Student ID”, “Phone Number”, “Email”, “Faculty” and “Department” the student belongs to. Only the “Supervisor Name”, “Supervisor Email”, “Office Number” and “Phone Number” fields can be modified. The “Supervisor Email” will be pre-populated with Banner’s ‘CA’ email address. The field is left empty where an email does not exist in Banner.



### Section B - Course Information

- Complete all items in this section. Most of these items are self-explanatory but please note the following:
  - Course # and Other Assigned Courses: For TAs only; others should be put N/A and proceed to # of weeks.
  - Fill out a separate form for each assigned course.
  - Term: F - Fall Term Only; W - Winter Term Only; F/W - If assignment is continuous through both terms; S - for Summer Term.
  - Hours Per Term: Enter the number of hours per term (default is total assignment hours). This represents the number of hours per term for which the employee will be paid.

Type of Position*	Assignment Specifics	Other Assignments	
<input checked="" type="checkbox"/> Teaching Assistant <input type="checkbox"/> Research Assistant <input type="checkbox"/> Service Assistant	Assignment: SOCI 2043 B Term: Winter 2011 Year: 2nd Year	SOCI 2001 A Fall 2010	Max Enrollment: 100 Present Enrollment: 92 # Students in Section (estimate): <input type="text" value="100"/> # Students Assigned to TA: <input type="text" value="50"/>

Hours Per Term\*:

- “Section B – Course Information”** – requires the Instructor/Supervisor to enter certain data on the position.
  - The “Type of Position” – “Teaching Assistant” checkbox must be checked.
  - The “# Students in Section (estimated):” - optional.
  - The “# Students Assigned to TA.” - optional.
  - The “Hours Per Term\*.” - the TA’s assigned hours will be pre-populated.

**Section C - Weekly Duties**

- List duties to be performed on a regular weekly basis. Enter the number of weeks the duty will be performed and the number of hours per week. The total for the duty will be automatically calculated.

Description of Duty	# Weeks	Hours Per Week	Total
<input checked="" type="checkbox"/> Administration (compiling grades, etc)	13	1	13
<input checked="" type="checkbox"/> Grading (weekly assignments, labs, reports, etc)	13	6	78
<input type="checkbox"/> Lab Clean Up			
<input type="checkbox"/> Lab Supervision			
<input type="checkbox"/> Lab Demonstration			
<input checked="" type="checkbox"/> Lecture Attendance	13	2	26
<input type="checkbox"/> Discussion Groups/Seminars			
<input type="checkbox"/> Preparation Time			
<input checked="" type="checkbox"/> Office Hours	13	1	13
<input type="checkbox"/> Other			
(specify) <input type="text"/>			

Total Hours

3. **“Section C – Weekly Duties”** – An Instructor/Supervisor ticks applicable “Description of Duty” checkbox, enters a numeric value in “# Weeks” and a numeric value in “Hours Per Week”. The “Total” column will self populate. The values entered in “# Weeks” column may vary from duty to duty. The “# Weeks” and “Hours Per Week” columns allow 2 decimal places. The sum of all “Total” hours is displayed in “Total Hours” at the bottom of the “Total” column.



**Section D - Other Duties**

- List duties to be performed that are other than on a scheduled weekly basis. In the Frequency column enter, for example, "twice/term" or "once/3 weeks" then complete the last two columns using the most accurate possible estimate of the time required.

Description of Duty	Frequency	Hours Per Occasion	Total
<input type="checkbox"/> Grading (assignments, tutorial/lab problems, tests, etc.)			
<input type="checkbox"/> Conduct lab			
<input type="checkbox"/> Conduct Tutorial			
<input type="checkbox"/> Office Hours			
<input type="checkbox"/> Proctoring			
<input type="checkbox"/> Marking Essays, other assignments			
<input type="checkbox"/> Marking Exams			
<input type="checkbox"/> Compulsory Orientation/Training			
<input type="checkbox"/> Meeting with Supervisor			
<input type="checkbox"/> Other			
(specify) <input type="text"/>			

Total Hours

4. **“Section D – Other Duties”** – this section is to be used to assign duties and hours that are not weekly. An Instructor/Supervisor ticks each applicable “Description of Duty” checkbox and enters the “Frequency” (i.e. 3/week, 5/month), estimated hours “Per Occasion” and the total of “Frequency” and “Per Occasion” in “Total”. “Frequency” is a text field and therefore “Total” must be entered manually. The sum of all “Total” hours is displayed in “Total Hours” at the bottom of the “Total” column. “Total Hours” of Section D and “Total Hours” of Section C are summed in “Total Hours” of Section E.

**Section E - Total Hours**

- The total number of hours that work is expected is displayed below. This is calculated by adding the two Total Hours figures from Section C and D. This sum must not exceed "Hours Per Term" from Section B (although it may be less). The Supervisor signs and dates this part. If additional comments or instructions are considered necessary by the supervisor then add them in the Supervisor Comments box.

Total Hours:  Remaining Hours:

- I have reviewed these assignment of duties and made any corrections and adjustments. They are now ready to be released to the employee for their review and consideration. Checking this box will constitute my electronic sign off of these Assignment of Duties.

Sign Off Date:

Instructor/Supervisor Comments

5. **“Section E – Total Hours”** – “Total Hours” is the sum of assigned hours from “Total Hours (# Weeks x Hours Per Week)” of **Section C** and “Total Hours” of **Section D**. “Remaining Hours” initially displays the number of hours assigned to the TA by the DA. As instructors assign hours, “remaining hours” will decrease accordingly. The field is only visible by the instructor.

The checkbox directly below allows the Instructor/Supervisor to finalize and signoff the duties s/he has assigned to the TA. The instructor/supervisor clicks on the “Save Duties” button to submit the Assignment of Duties.

If the instructor/supervisor clicks on the “Save Duties” button without checking the checkbox, the duties and hours are saved for later amendment. TAs may not sign off on the Assignment of Duties form until the instructor checks this box.



**Section F - Statement by Employee**

- To be signed and dated by the employee indicating that the assignment has been discussed with him/her and that s/he has received a copy. It does not necessarily indicate agreement with the assignment of duties. If the employee has concerns about the allocation of time for any of the duties assigned, s/he should provide detailed information in the Employee Comments box provided

- I have discussed these assignments with the instructor/supervisor and accept them as presented.

Accepted Date  Employee Comments

6. **“Section F – Statement by Employee”** – is **view only** to inform the Instructor/Supervisor when the TA has signed off. The “Employee Comments” box displays TA comments added at the time of signing off.

**Section G - Midterm Meeting**

- Please complete and signoff the section below once the midterm meeting has been conducted.

I have conducted a midterm meeting with the TA named on this form.

Meeting Date:

(DD-MON-YY)

Course/Lab Satisfactory:

Yes  No

Work Completed in Allotted Time:

Yes  No

Follow-Up Required:

Yes  No

Instructor/Supervisor Comments

Employee Comments

I have attended a midterm meeting with the supervisor of my TA Assignment.  
The feedback provided has been reviewed by me and is accepted as accurate and fair.

[ TA Assignments and Duties Summary ]

RELEASE: 8.2



7. **“Section G – Mid-Term Meeting”** – Instructors/Supervisors manually enter a date in “Meeting Date:”. Instructors/Supervisors will tick either “Yes” or “No” to the 3 questions. Instructors/Supervisor may enter comments in “Instructor/Supervisor Comments” after the midterm meeting. Instructor/supervisors will tick the checkbox, “I have conducted ...” and click the “Sign Off Midterm Meeting” button.  
The form is then available in Carleton Central for the TA to review.

# TA Management System – Reports

There are a number of reports available to be used. Some Reports are designed to be used by the Academic Department, some are designed to be used by the FGPA, some are designed for EDC and some are designed for The Finance Office.

## *Reports for Departments:*

### **GSRO\_TA\_CUPE4600\_REPORT**

The report will identify completed/uncompleted Assignment of Duties forms for assigned TAs.

It will list all TAs (GR & UG), their assignments, the instructor/supervisor for each of those assignments, & whether or not the Assignment of Duties forms have been completed.

### **GSRO\_TA\_DEPT\_CRSE\_LIST**

This report lists all courses and any TAs assigned with those courses

### **GSRO\_TA\_DEPT\_PREF\_LIST**

The report will link Departmental UG courses with Instructor Special Requests & TA course preferences (from GR Profiles & UG applications) for the selected term. The report will include all UG courses (including labs/tutorials), excluding 5000 & 6000 level.

### **GSRO\_TA\_DEP\_TA\_LIST**

The report will list all active TAs (UG & GR) for a department.

### **GSRO\_TA\_DT\_OVDU\_SUP\_LIST**

TA Management Unsigned Duties by Supervisors.

### **GSRO\_TA\_DT\_OVDU\_TA\_LIST**

TA Management Unsigned Overdue TA Duties.

### **GSRO\_TA\_DUTY\_COMPLIANCE**

The report will identify completed/uncompleted Assignment of Duties forms for assigned TAs. All TAs (GR & UG in the Work Dept), their assignments, the instructor/supervisor for each of those assignments are listed. Whether or not the Assignment of Duties forms have been completed.

### **GSRO\_TA\_ERRORS**

The report identifies TAs whose assigned hours are greater than their allocated hours.

### **GSRO\_TA\_INST\_TA\_REQUESTS**

Instructor TA Requests report

### **GSRO\_TA\_MIDTERM\_COMPLIANCE**

The report will identify those Instructors &/or TAs who have not signed-off on the mid-term meeting by the deadline.

### **GSRO\_TA\_MIDTERM\_REPORT**

This report displays the TA midterm meeting, as recorded by the Instructor/Supervisor and TA in Carleton Central, for a specific term.

**GSRO\_TA\_PROFILE\_XLS**

Displays all GR TA Profiles in a user's dept.

**GSRO\_TA\_TRAIN\_COMPLIANCE**

This report lists TAs and the total number of training hours completed for a particular academic year.

**GSRO\_TA\_UG\_APPS\_XLS**

This report generates an emailed .xls list of UG TA applications for a select term and department. UG TA application detail includes, but not limited to, TA ID, TA Name, TA Email, Term, Dept., Course/Area applied to and Work experience.

## ***Reports for the EDC:***

### **GSRO\_TA\_DUTY\_SUM**

This pdf report is emailed to the user and provides statistics of the assignment of duties for TAs for a specified term.

### **GSRO\_TA\_Mentor\_APPS**

This report generates an emailed .xls list of Mentor applications for a select term. Application detail includes TA ID, TA Name, Application Term, Dept, Status and Status Date.

### **GSRO\_TA\_TRAIN\_CERTIFICATE**

This report lists students who are eligible for a training certificate or who are progressing towards a certificate.

### **GSRO\_TA\_TRAIN\_COMPLIANCE**

This report lists TAs and the total number of training hours completed for a particular academic year.

### **GSRO\_TA\_TRAIN\_TRANSCRIPT**

The emailed .pdf report provides details of training all active TAs have completed during their career at Carleton.

### **GSRO\_TA\_WS\_EVALUATION**

This report displays the results from workshop evaluations in a consolidated .pdf format.

## ***Reports for the FGPA:***

### **GSRO\_TA\_ALLOCATION\_COMPLIANCE**

This report primarily identifies GR TAs who have not been allocated in a specific term by an AD, either by Campus, by Faculty or by Department. TAs are not considered allocated if the "Rel." column is not flagged.

Additionally the report can identify TAs who have been allocated but not assigned or TAs who have been canceled before or after allocation.

### **GSRO\_TA\_ASSIGN\_SUM**

This report will display how TAs for a specified term and faculty (optional) were assigned/used.

### **GSRO\_TA\_AWARD\_ELIGIBILITY**

The report will identify students who are no longer eligible for their TA award.

### **GSRO\_TA\_CUPE4600\_REPORT**

The report will identify completed/uncompleted Assignment of Duties forms for assigned TAs.

It will list all TAs (GR & UG), their assignments, the instructor/supervisor for each of those assignments, & whether or not the Assignment of Duties forms have been completed.

### **GSRO\_TA\_DEPT\_CRSE\_LIST**

This report lists all courses and any TAs assigned with those courses

### **GSRO\_TA\_DEPT\_PREF\_LIST**

The report will link Departmental UG courses with Instructor Special Requests & TA course preferences (from GR Profiles & UG applications) for the selected term. The report will include all UG courses (including labs/tutorials), excluding 5000 & 6000 level.

### **GSRO\_TA\_DEP\_TA\_LIST**

The report will list all active TAs (UG & GR) for a department.

### **GSRO\_TA\_DT\_OVDU\_SUP\_LIST**

TA Management Unsigned Duties by Supervisors.

### **GSRO\_TA\_DT\_OVDU\_TA\_LIST**

TA Management Unsigned Overdue TA Duties.

### **GSRO\_TA\_DUTY\_COMPLIANCE**

This report lists TA assignments which are complete/incomplete.

### **GSRO\_TA\_MIDTERM\_REPORT**

This report displays the TA midterm meeting, as recorded by the Instructor/Supervisor and TA in Carleton Central, for a specific term.

### **GSRO\_TA\_DUTY\_SUM**

This pdf report is emailed to the user and provides statistics of the assignment of duties for TA for a specified term.

### **GSRO\_TA\_ERRORS**

The report identifies TAs whose assigned hours are greater than their allocated hours.

**GSRO\_TA\_FIN\_BUDGET**

The report will display Financial Budget information supplied by TAs who have been determined, by the system, to be Potentially MSA eligible.

All the information supplied on the Financial Budget form will be displayed – in a format similar to the form itself – with the addition of the individual TA's work dept.

**GSRO\_TA\_INST\_TA\_REQUESTS**

Instructor TA Requests report

**GSRO\_TA\_LFD**

This report generates a list of LFD applications.

**GSRO\_TA\_LIST**

This report lists all TAs for a term by department.

**GSRO\_TA\_MIDTERM\_COMPLIANCE**

The report will identify those Instructors &/or TAs who have not signed-off on the mid-term meeting by the deadline.

**GSRO\_TA\_MSA\_ELIGIBILITY**

The report will identify UG TAs who have been determined to be MSA eligible or Potentially MSA eligible.

**GSRO\_TA\_PROFILE\_XLS**

Displays all GR TA Profiles in a user's dept.

**GSRO\_TA\_STATS**

The report will compare total numbers of TAs (GR & UG) as of the fall term of the current year & the fall of the previous year. Used for budget process analysis commences.

**GSRO\_TA\_SYSTEM\_COMPLIANCE**

The report will identify faculties &/or departments within faculties who are NOT using the TA Management System. Only those who are not 100% compliant will be shown.

**GSRO\_TA\_TRAIN\_CERTIFICATE**

This report lists students who are eligible for a training certificate or who are progressing towards a certificate.

**GSRO\_TA\_TRAIN\_COMPLIANCE**

This report lists TAs and the total number of training hours completed for a particular academic year.

**GSRO\_TA\_TRAIN\_TRANSCRIPT**

The emailed .pdf report provides details of training all active TAs have completed during their career at Carleton.

**GSRO\_TA\_UG\_APPS\_XLS**

This report generates an emailed .xls list of UG TA applications for a select term and department. UG TA application detail includes, but not limited to, TA ID, TA Name, TA Email, Term, Dept., Course/Area applied to and Work experience.

**GSRO\_TA\_WS\_EVALUATION**

This report displays the results from workshop evaluations in a consolidated .pdf format.

## **Paymaster Report modification**

Currently Paymaster reports discrepancies between a student's registration & funding until such time as payroll begins to process payments.

FGSR would like the report to be modified so that it identifies any student with issued awards:

- Whose registration status has changed from the initial FT to either PT, NR, etc.
- Has withdrawn from their program
- Is not registered in any course or has withdrawn from all their courses

***Reports for the Awards Office:***

**GSRO\_TA\_MSA\_ELIGIBILITY**

The report will identify UG TAs who have been determined to be MSA eligible or Potentially MSA eligible.

***Reports for the Finance Office:***

**GSRO\_TA\_FIN\_BUDGET**

The report will display Financial Budget information supplied by TAs who have been determined, by the system, to be Potentially MSA eligible.

All the information supplied on the Financial Budget form will be displayed – in a format similar to the form itself – with the addition of the individual TA's work dept.

**GSRO\_TA\_MSA\_ELIGIBILITY**

The report will identify UG TAs who have been determined to be MSA eligible or Potentially MSA eligible.