

Instructor Checklist

Department and Faculty schedulers can use this checklist to ensure instructors are set up correctly in the system.

- Instructor Advisor Table
- Approved Courses
- Maintain Schedule of Classes - Meetings Page
- Instructors for Meeting Pattern
- Instructor Role
- Access
- Workload

Changing the instructor status - Activate/Inactivate Instructor status

- Instructor Advisor Table

For clarification, screen captures for each of the checklist items have been attached followed by a brief explanation of what each field pertains to.

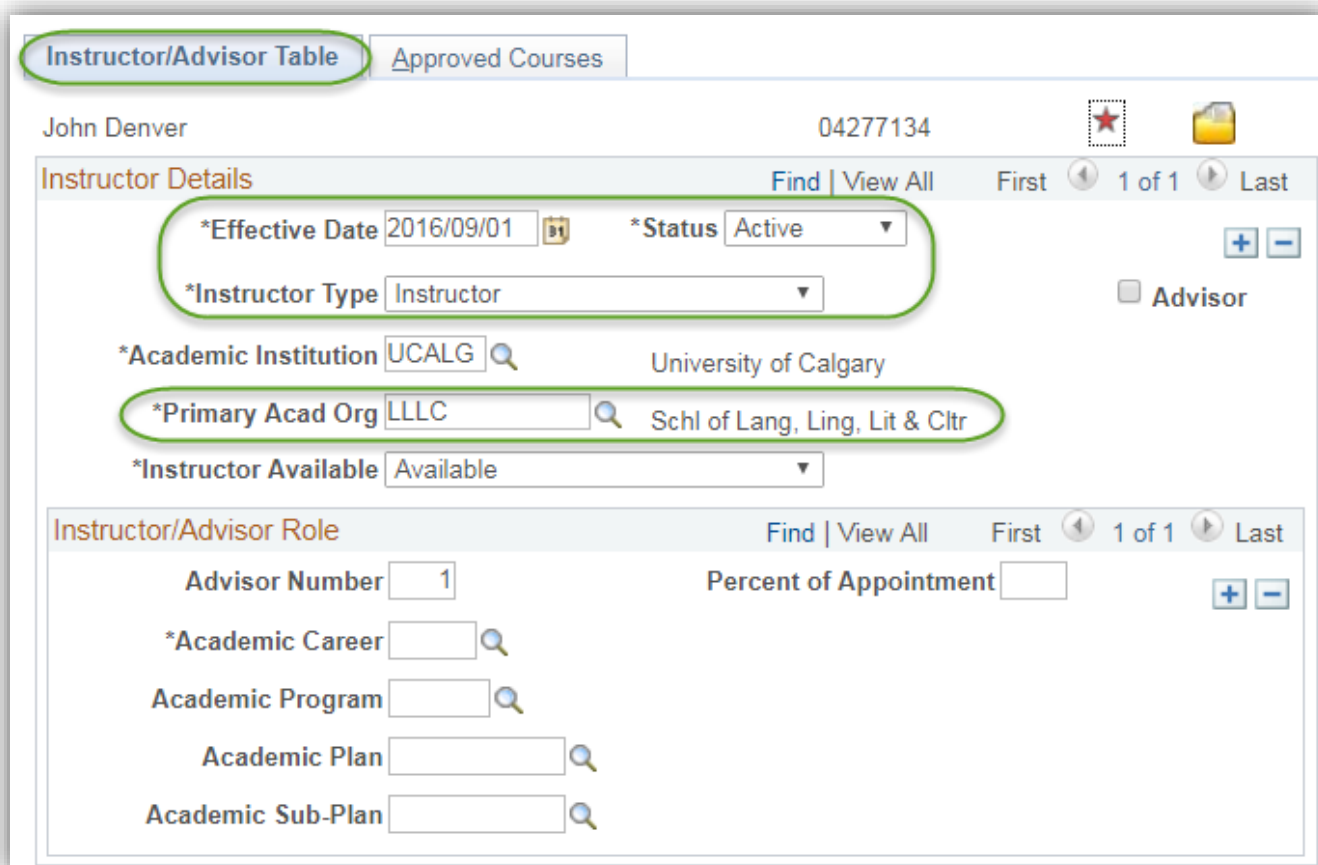
Please contact the Scheduling Office if you have any questions or concerns.

Instructor/Advisor Table

Instructors must first be set up in the Instructor/Advisor Table. If you do not add the Instructor to the Instructor/Advisor Table they will not display when you are assigning Instructors to the class sections.

Note: when the instructor has more than one ID, make sure they are set up with the appropriate ID number – use the Staff ID not the Student ID.

Navigation: [Curriculum Management](#) > [Instructor/Advisor Information](#) > [Instructor Advisor Table](#)



The screenshot shows the 'Instructor/Advisor Table' form. At the top, there are two tabs: 'Instructor/Advisor Table' (selected) and 'Approved Courses'. Below the tabs, the user's name 'John Denver' and ID '04277134' are displayed. The form is divided into two main sections: 'Instructor Details' and 'Instructor/Advisor Role'. The 'Instructor Details' section includes fields for '*Effective Date' (2016/09/01), '*Status' (Active), '*Instructor Type' (Instructor), '*Academic Institution' (UCALG - University of Calgary), '*Primary Acad Org' (LLLC - Schl of Lang, Ling, Lit & Ctr), and '*Instructor Available' (Available). The 'Instructor/Advisor Role' section includes fields for 'Advisor Number' (1), 'Percent of Appointment', '*Academic Career', 'Academic Program', 'Academic Plan', and 'Academic Sub-Plan'. The form also features navigation options like 'Find | View All' and 'First 1 of 1 Last'.

Effective Date – must be before the term 'begin date' in order for that instructor to be on the list to assign classes for that term. For example, January 1 for Winter, May 1 for Spring, July 1 for Summer or the beginning date of the Fall term.

Note: When adding the instructor after the term has started, the Effective Date must be changed to a date prior to the term begin date as noted above before saving the record. If the date is not changed and you have saved the record, contact the Scheduling Office to change the date for you.

If the Effective Date is not correct, you are unable to use the Instructor for that term.

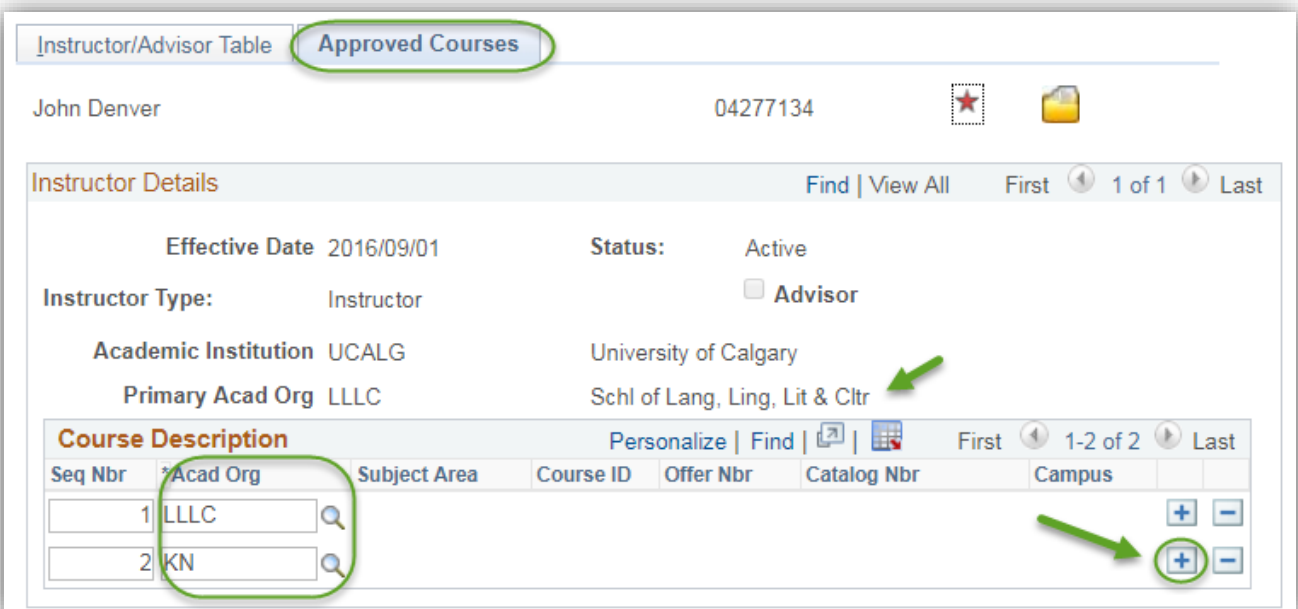
Instructor Type – this field is used to select the appropriate type.

Primary Acad Org – this field is used to enter the 'home' Department or Faculty of the instructor.

Instructor Available – is simply for information purposes only and does not restrict scheduling assignments.

Approved Courses

This page is used to enter the Academic Organizations the instructor can be assigned to on the Schedule of Classes. If this page is left blank, the instructor will not show up on the list of available instructors.



The screenshot shows the 'Approved Courses' tab selected. The instructor's name is John Denver and ID is 04277134. The 'Instructor Details' section shows an effective date of 2016/09/01, status of Active, and instructor type of Instructor. The 'Academic Institution' is UCALG (University of Calgary) and the 'Primary Acad Org' is LLLC (Schl of Lang, Ling, Lit & Ctr). The 'Course Description' table has two rows: one with Acad Org LLLC and another with Acad Org KN. A green circle highlights the 'Approved Courses' tab, another green circle highlights the 'Acad Org' field in the second row, and a green arrow points to the '+' button at the bottom right of the table.

Acad Org – this field is used to select the Academic Organizations the instructor can be assigned to. The course Academic Organization is displayed on both the Schedule A New Course and Maintain Schedule of Classes Basic Data page. See example next page.

Note: the instructor can be assigned to multiple Academic Organizations. Use the plus sign **+** to add a new row and then select another Academic Organization.

Basic Data page

Basic Data | Meetings | Enrollment Control | Reserve Cap | Notes | Exam | Exam Info | LMS Data | Class Comments

Course ID 124381 Course Offering Nbr 1
 Academic Institution University of Calgary
 Term Winter 2018 Undergrad
 Subject Area JPNS Japanese
 Catalog Nbr 207 Beginners' Japanese II

Auto Create Component

Class Sections Find | View All First 1 of 6 Last

*Session 1 Regular Academic Class Nbr 10618
 *Class Section 01 *Start/End Date 2018/01/08 - 2018/04/13
 *Component LEC Lecture Event ID
 *Class Type Enrollment Section
 *Associated Class 1 Units 3.00 Associated Class Attributes
 *Campus MAIN UCALG Add Fee
 *Location MAIN Main UofC Campus
 Course Administrator
 *Academic Organization LLLC Schl of Lang, Ling, Lit & Cltr
 Academic Group AR Faculty of Arts
 *Holiday Schedule AHS Student Admin Holiday Schedule
 *Instruction Mode P In Person
 Primary Instr Section 01

Schedule Print
 Student Specific Permissions
 Dynamic Date Calc Required
 Generate Class Mtg Attendance
 Sync Attendance with Class Mtg
 GL Interface Required

Class Topic Print Topic in Schedule

Course Topic ID

Equivalent Course Group Override Equivalent Course

Course Equivalent Course Group
 Class Equivalent Course Group

Class Attributes Personalize | Find | View All | First 1-2 of 3 Last

*Course Attribute	Description	*Course Attribute Value	Description
FCEF	Full Course Equivalent Factor	H	Half-Course
GFCH	GFC Hours	4-1	(4-1)

Maintain Schedule of Classes - Meetings Page

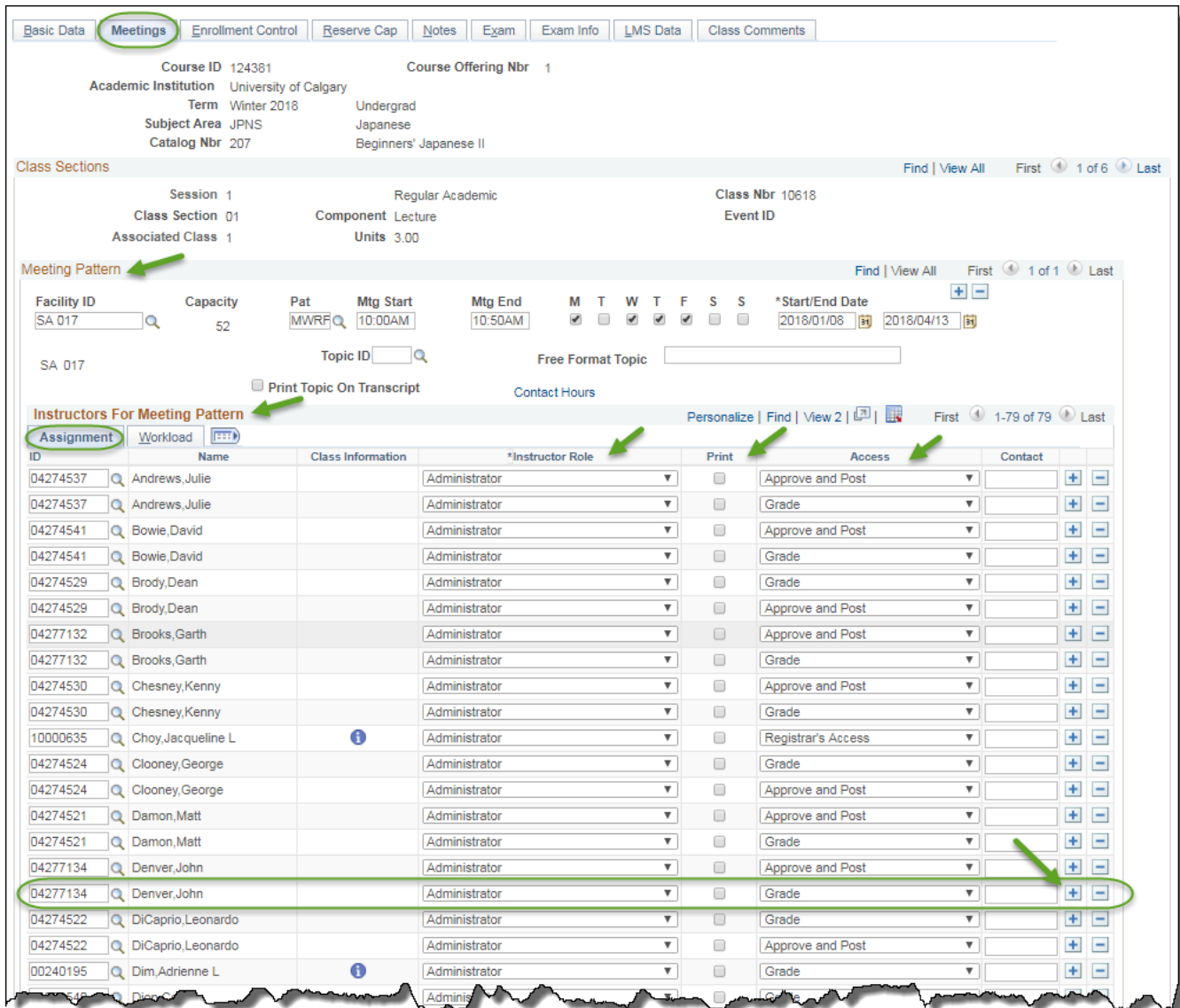
Instructors can be associated to classes on the pages noted below.

Navigation:

[Curriculum Management > Schedule of Classes > Schedule A New Class](#)

[Curriculum Management > Schedule of Classes > Maintain Schedule of Classes](#)

[Curriculum Management > Schedule of Classes > Schedule Class Meetings](#)



Basic Data **Meetings** Enrollment Control Reserve Cap Notes Exam Exam Info LMS Data Class Comments

Course ID 124381 Course Offering Nbr 1
Academic Institution University of Calgary
Term Winter 2018 Undergrad
Subject Area JPNS Japanese
Catalog Nbr 207 Beginners' Japanese II

Class Sections Find | View All First 1 of 6 Last

Session 1 Regular Academic Class Nbr 10618
Class Section 01 Component Lecture Event ID
Associated Class 1 Units 3.00

Meeting Pattern Find | View All First 1 of 1 Last

Facility ID Capacity Pat Mtg Start Mtg End M T W T F S S *Start/End Date
SA 017 52 MWRF 10:00AM 10:50AM [x] [] [x] [x] [x] [] [] 2018/01/08 2018/04/13

SA 017 Topic ID Free Format Topic

Print Topic On Transcript Contact Hours

Instructors For Meeting Pattern Personalize | Find | View 2 | First 1-79 of 79 Last

ID	Name	Class Information	*Instructor Role	Print	Access	Contact
04274537	Andrews, Julie		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04274537	Andrews, Julie		Administrator	<input type="checkbox"/>	Grade	+ -
04274541	Bowie, David		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04274541	Bowie, David		Administrator	<input type="checkbox"/>	Grade	+ -
04274529	Brody, Dean		Administrator	<input type="checkbox"/>	Grade	+ -
04274529	Brody, Dean		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04277132	Brooks, Garth		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04277132	Brooks, Garth		Administrator	<input type="checkbox"/>	Grade	+ -
04274530	Chesney, Kenny		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04274530	Chesney, Kenny		Administrator	<input type="checkbox"/>	Grade	+ -
10000635	Choy, Jacqueline L		Administrator	<input type="checkbox"/>	Registrar's Access	+ -
04274524	Clooney, George		Administrator	<input type="checkbox"/>	Grade	+ -
04274524	Clooney, George		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04274521	Damon, Matt		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04274521	Damon, Matt		Administrator	<input type="checkbox"/>	Grade	+ -
04277134	Denver, John		Administrator	<input type="checkbox"/>	Approve and Post	+ -
04277134	Denver, John		Administrator	<input type="checkbox"/>	Grade	+ -
04274522	DiCaprio, Leonardo		Administrator	<input type="checkbox"/>	Grade	+ -
04274522	DiCaprio, Leonardo		Administrator	<input type="checkbox"/>	Approve and Post	+ -
00240195	Dim, Adrienne L		Administrator	<input type="checkbox"/>	Grade	+ -

Instructors for Meeting Pattern – the instructors assigned to the class section are entered here. This can be as many as required, but please ensure that they are coded correctly with the proper workload assigned to each instructor. Please see next page for instructions on multiple instructors and workload.

Important Notes:

If a course is being taught on two different days, two different times, the instructors should be listed in both sequences.

Once your access is closed, you must do all updating of instructors in the Schedule Class Meetings tab. Please ensure that ALL instructors are input for the section(s) they are teaching.

Instructor Role – indicate if the instructor is the Primary Instructor, Alternate, Simultaneous or TA. These roles are all considered teaching roles (also see Appendix 1, page 9).

- Primary Instructor - only one instructor is teaching a section.
- Alternate - two or more instructors are teaching the same section, but they are not in the classroom at the same time.
- Simultaneous - two or more instructors are teaching the same section and are present in the classroom at the same time.
- TA - Can be used instead of PI in the case of a teaching assistant teaching a laboratory or tutorial section. Do not enter TA in sections where the TA is not teaching.

Note: CO - Coordinator is considered a non-teaching role and can be used for people who are lab coordinators. Non-teaching roles will not be included in reports of teaching activity.

Access

- must be set to **Grade** for **Instructors**. If this is not set to Grade, the instructors do not have access to the class roster through the Faculty Centre and do not have access to enter grades.
- must be set to **Approve and Post** for grade **Approvers**.

Note:

Course Instructors who are Approvers may have

- a) '**Admin**' as their **Instructor Role** and '**App & Post**' as their **Access**
AND '**Prim Instr**' as their **Instructor Role** and '**Grade**' as their **Access**

OR

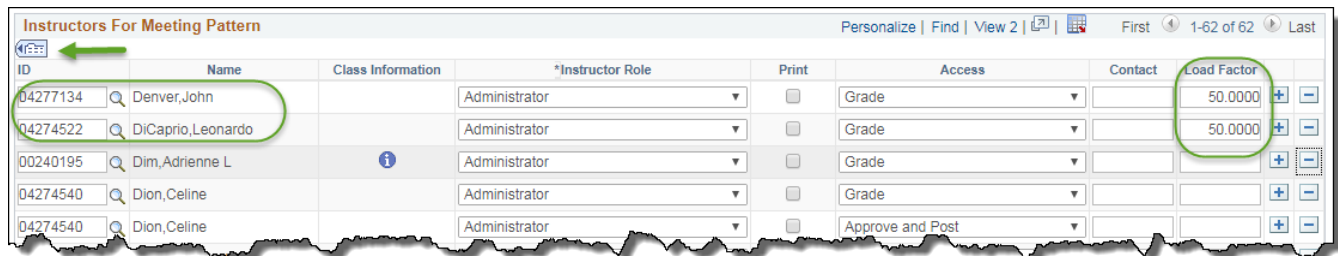
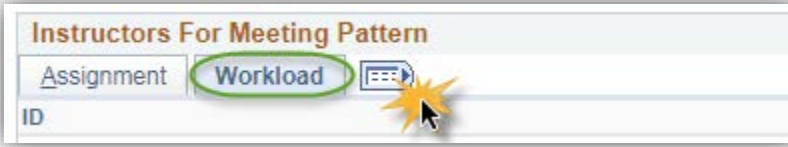
- b) '**Prim Instr**' as their **Instructor Role** and '**App & Post**' as their **Access**.

In these cases, the Instructor will not be able to enter their own grades; their Grade Administrator will need to do so for them. Once the grade entry is completed by the Grade Administrator the Instructor can then go in as the Approver and 'approve and post' the grades.

To request Approver/Administrator access, contact the IT Support Center at 220-5555 option 2 or email itsupport@ucalgary.ca.

Workload

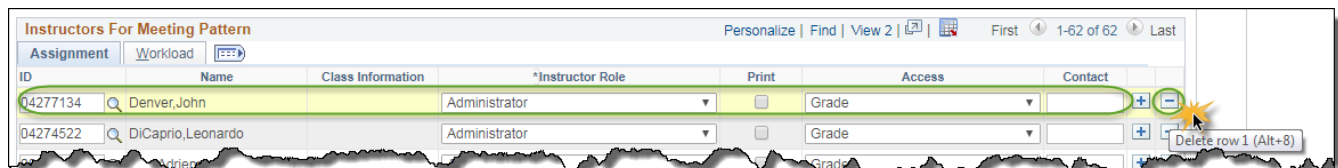
To view the Workload and additional columns, for ease of viewing, click the Show More Columns tab:



ID	Name	Class Information	*Instructor Role	Print	Access	Contact	Load Factor
04277134	Denver, John		Administrator	<input type="checkbox"/>	Grade		50.0000
04274522	DiCaprio, Leonardo		Administrator	<input type="checkbox"/>	Grade		50.0000
00240195	Dim, Adrienne L		Administrator	<input type="checkbox"/>	Grade		
04274540	Dion, Celine		Administrator	<input type="checkbox"/>	Grade		
04274540	Dion, Celine		Administrator	<input type="checkbox"/>	Approve and Post		

- Indicate the workload when entering more than one teaching instructor e.g. Alt Instr (AL) or Simultaneous (SI). This is important for the statistics for the Office of Institutional Analysis.
- It is also important how this data is entered. For example if the Load Factor is 50%, just enter the number **50** and press enter or tab to the next field.

Maintaining accurate instructor information is critical for purposes such as the University Student Ratings of Instructors (USRI) and instructional workload. Instructors no longer teaching a course must be removed from the Meetings page.



ID	Name	Class Information	*Instructor Role	Print	Access	Contact	
04277134	Denver, John		Administrator	<input type="checkbox"/>	Grade		
04274522	DiCaprio, Leonardo		Administrator	<input type="checkbox"/>	Grade		

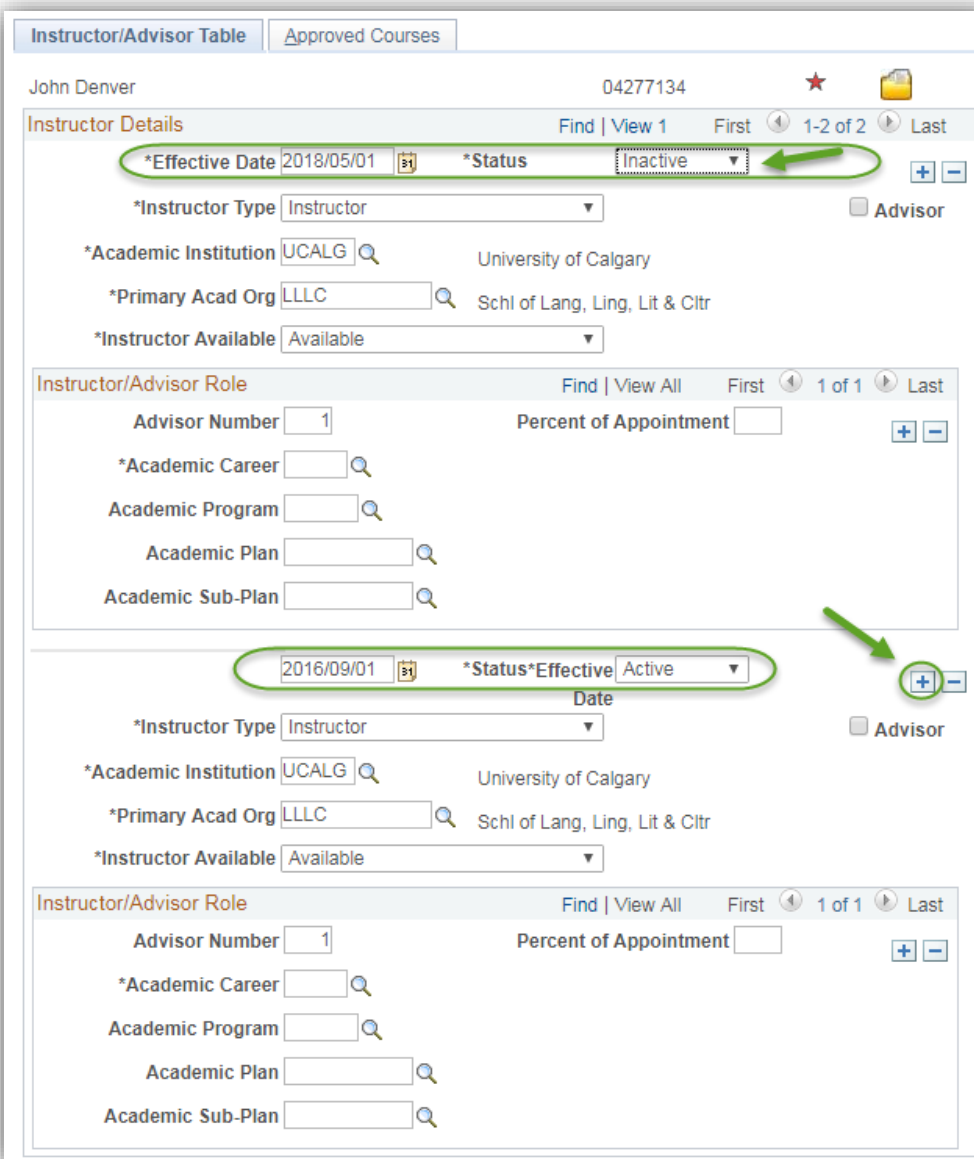
Inactivate Instructors/Advisors

Faculty/Department schedulers are responsible for updating the Instructor's 'Status' when required.

The Instructor's status is updated on the Instructor/Advisor Table mentioned in step 1.

Navigation: [Curriculum Management](#) > [Instructor/Advisor Information](#) > [Instructor Advisor Table](#)

This example illustrates changing the instructor status from 'Active' to 'Inactive' (for example, if they were to leave the U of C).



The screenshot shows the 'Instructor/Advisor Table' interface. At the top, there are tabs for 'Instructor/Advisor Table' and 'Approved Courses'. The user 'John Denver' is logged in, and the ID '04277134' is displayed. The interface is divided into three main sections: 'Instructor Details', 'Instructor/Advisor Role', and another 'Instructor/Advisor Role' section.

Instructor Details Section:

- *Effective Date: 2018/05/01
- *Status: Inactive (highlighted with a green circle and a green arrow pointing to it)
- *Instructor Type: Instructor
- *Academic Institution: UCALG (University of Calgary)
- *Primary Acad Org: LLLC (Schl of Lang, Ling, Lit & Cltr)
- *Instructor Available: Available


Instructor/Advisor Role Section (Top):

- Advisor Number: 1
- Percent of Appointment: []
- *Academic Career: []
- Academic Program: []
- Academic Plan: []
- Academic Sub-Plan: []

Instructor/Advisor Role Section (Bottom):

- Date: 2016/09/01
- *Status*Effective: Active (highlighted with a green circle and a green arrow pointing to it)
- *Instructor Type: Instructor
- *Academic Institution: UCALG (University of Calgary)
- *Primary Acad Org: LLLC (Schl of Lang, Ling, Lit & Cltr)
- *Instructor Available: Available

At the bottom right of the second 'Instructor/Advisor Role' section, there is a green circle with a '+' sign, which is also pointed to by a green arrow, indicating the 'Add' button.

The instructor is not 'deleted' from the table. Instead the 'plus' sign  is used to add a new row so the history of the instructors record is maintained.

Effective Date – again the effective date must be set prior to the term begin date for the term the instructor's status is changed. For example, if the instructor's status needs to be changed mid-term the effective date would still be Jan. 1 for Winter, May 1 for Spring, July 1 for Summer or the first day of the Fall term.

Note: Keep in mind the Effective Date must be unique from the previous row. For example if the previous row Effective Date was Jan 1 and the instructor status changed mid-term, the Effective Date could be January 2nd but not January 1st.

Status – select the appropriate value to reflect the instructor's status; 'Active' or 'Inactive'.

Appendix I – Instructor Roles

Instructor roles are not tied to payroll information for a person. The application of an instructor role is based on the following guidelines.

A. Teaching Roles

The following instructor roles are considered teaching roles and apply to people who are involved in the teaching activity of a section. Do not use these instructor roles for people who need access to class lists for marking or are otherwise assisting the teaching instructor. People indicated with the following teaching roles **will be included in reports of teaching activity**.

PI Primary

Used when only one instructor is teaching a section. **Don't enter more than one PI instructor per section.**

AL Alternate

Used when two or more instructors are teaching one section, but are not in the classroom at the same time. Can also be used when instructors split the teaching of a section over time, for example, one teaches the first half of a term and the other teaches the second half of a term. **For each instructor attributed with an AL instructor role, indicate a percentage of time spent in the classroom teaching.** Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

SI Simultaneous

Used when two or more instructors are teaching one section simultaneously. **For each instructor attributed with an SI instructor role, indicate a percentage of time spent in the classroom teaching.** Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

Used when the section is taught on a one-on-one basis with students (individual instruction). In this case enter 100% workload for each SI instructor listed.

TA Teaching Assistant

Can be used instead of PI in the case of a teaching assistant teaching a laboratory or tutorial section. **Do not enter TA in sections where the TA is not teaching.**

In the cases where more than one TA is teaching one section, please indicate a percentage of time spent in the classroom teaching. Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

B. Non-Teaching Roles

The following instructor roles are considered non-teaching roles and apply to people who are assisting with a section. This would include people who are markers, need access to class lists, Blackboard, etc. People indicated with these non-teaching roles will not be included in reports of teaching activity.

CO Coordinator

Can be used for people who are lab coordinators.

RD Reader/Demonstrator

Can be used for people who are markers or general assistants to the class.

PERCENTAGE WORKLOAD

Used for multiple entries of instructors (SI, AL or TA) in one section. A percentage workload reflects the amount of time an instructor is teaching a class. The following examples represent instructors entered in one section.

Example 1: Two instructors are teaching one section at the same time.

Smith, John	SI	100.0000
Roberts, Jane	SI	100.0000

Example 2: Two instructors are teaching one section at the same but Roberts is present only 50% of the time.

Smith, John	SI	100.0000
Roberts, Jane	SI	50.0000

Example 3: Four instructors are teaching one 3 hour section per week; different teaching workloads.

Smith, John	SI	100.0000 (3 hours per week for 13 weeks-entire term)
Roberts, Jane	SI	54.0000 (3 hours per week for 7 weeks)
Jones, Jack	SI	23.0000 (3 hours per week for 3 weeks)
Lee, Joe	SI	8.0000 (3 hours for one week)

Example 4: Three TA instructors are teaching one section at the same but Jones is present only 25% of the time.

Smith, John	TA	100.0000
Roberts, Jane	TA	100.0000
Jones, Jack	TA	25.0000

Example 5: Three instructors are teaching one section alternately.

Smith, John	AL	33.0000
Roberts, Jane	AL	33.0000
Jones, Jack	AL	33.0000

Example 6: Three TA instructors are teaching one section alternately.

Smith, John	TA	33.0000
Roberts, Jane	TA	33.0000
Jones, Jack	TA	33.0000

Example 7: Two instructors are teaching one section alternately

Smith, John	AL	65.0000
Roberts, Jane	AL	35.0000