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## WHAT IS ARM?

ARM is the Academic Resource Management System that is used by faculties at York University. It is a web-based system used to manage end-to-end academic resource planning and the part-time faculty/TA hiring process.

## GETTING STARTED IN ARMS (ACADEMIC RESOURCE MANAGEMENT SYSTEM)

There are several things you need to do before getting started in ARMS:

- Request access for ARM requires Passport York
- <https://arm.cns.yorku.ca/> (ARM Link – Preferred Browser Firefox)
- Read the following documentation
  - ARMS Workflow: Posted Positions and ARMS Workflow: Non-Posted Positions.
  - ARM Universal Task View and ARM Search View.
- Contact your faculty representative if you have any questions regarding process, if you don't know your faculty representative, information can be found at <http://www.yorku.ca/armhelp/help.htm>

## GENERAL REQUIREMENTS FOR ARMS

Instructors are classified under four types

1. YUFA for full time instructors
2. CUPE which represents CUPE-1, CUPE-2 and CUPE-Exempt
  - a. CUPE-1 grad students that teach
  - b. CUPE-2 contract faculty
  - c. CUPE-E not part of the union, contract faculty working in a professional program or exempt from the collective agreement
3. Faculty of Ed Secondoe: Teachers from schools that oversee York Students
4. Retirees: retired YUFA faculty

## HIGH LEVEL PROCESS (CUPE WORKFLOW)

Administrators that work with the ARM System follow the CUPE Workflow.

The process of hiring contractors is constrained by collective bargaining agreement with CUPE 3903. Below is the high-level summary of the workflow:

- Assignment created
- Posting Created + Published
- Candidate Assigned
- CUPE1 only: Candidate Approved
- CUPE2 only: NRA published
- Offer Published + Accepted + ETF Generated

## WORKFLOW STATES

Each assignment (once course assignment has been done) has one of these workflow states

1. No Candidate Assigned
2. Candidate Assigned
  - a. CUPE1
    - i. Candidate Approval through FGS
  - b. CUPE2
    - i. NRA Published (except for non-posted)
3. Offer Published
4. Offer Accepted
5. Offer Rejected
6. Offer Revoked (after accepted)
7. Assignment Revoked
8. ETF Created

## DETAILED PROCESS

The detail process is:

- Create unnamed CUPE assignment or named/un-named YUFA assignment.
- Create/edit Master Posting
- Publish Posting
- Identify candidate CUPE names, one per assignment (Name Candidate)
  - CUPE1 only: all candidate assignments must be approved (Some are auto-approved based on FGS (Faculty Graduate Students) criteria

- CUPE2 only: generate NRA (Notice of Recommended Appointments)
    - Grievance date is 4 weeks or NRAs have a grievance deadline of 28 days.
- Non-posted candidate assignment
  - Go to ARM Task View
  - Click on Non-Posted Position
  - Under “Candidate Status” - Choose No Candidate
  - Clicks assign candidate and select candidate.
- Generate Offer Letter
  - CUPE1 and CUPE2: generate offer letter
    - Both CUPE1 and CUPE2 get offer letters
      - For CUPE1, only approved or auto approved can be selected
      - For CUPE2, warning if NRA grievance date has not passed; no active grievances.
  - To generate offer letter you must do the following:
    - User goes to ARM Task View
    - Click on Offer Letters: CUPE-1/2/E
    - User chose under Actions Create an offer letter for “CUPE-1” or “CUPE-2”
    - User clicks Create Offer for the particular Candidate Search
    - User enters the information from the offer letter template.
    - Create Approved letter
    - Generate PDF
  - Non-posted: generate offer letter
    - CUPE-E and YUFA-Retirees get offer letters
    - Go to ARM Task View
    - Click on Non-Posted Position
    - Under “Candidate Status” - Choose Candidate Assigned
    - User clicks Create Offer for the particular Candidate Search
    - User enters the information from the offer letter template.
    - Create Approved letter
    - Generate PDF
- Accept Offer Letter (Record Offer)
  - User goes to ARM Task View
  - Click on Offer Letters: CUPE-1/2/E
  - User click Status “Published”
  - User selects the letters they wish to Accept and choses Bulk Record Offer Acceptance.
- Reject Offer Letter
  - Select offer letter
  - Click on declined
- When offer is accepted instructor names are pushed to SIS (some positions have delayed “push” dates)
- ETF is then created.

## POST ASSIGNMENTS

## POSTED POSITIONS

The CUPE posting process starts with a master posting. A master posting is a template that contains:

- Course details
- Position details
- Responsibilities
- Qualifications
- Dates
- Notes

Note: Master postings are not directly published but rather serve as the source to generate CUPE-1 and CUPE-2 postings.

If your department submitted Excel templates that contain posting information, you will see a number of master postings already created in ARMS. These master postings are created based on position type (such as Course Director, Tutorial Leader) and instructional format (such as LECT, TUTR, LAB).

On the other hand, you will need to create a new master postings in cases where:

- Your department has not submitted an Excel template
- Some information such as instructional format of a course is missing in your Excel template.
- You are adding a new course.

Regardless of whether you have master postings created or need to create new ones in ARMS, it is important to note that postings can be created only if the appropriate CUPE teaching assignments have been made in ARMS.

Once you have your master postings done, you can generate PDF postings, download them and then follow your department procedures to post them. This may mean posting them on your department website or on a bulletin board.

## ASSIGNMENTS WITH A MASTER POSTING

If master postings have been pre-created in ARMS for your department, you need to review them and make necessary changes before generating PDF postings.

## REVIEW AND/OR UPDATE A MASTER POSTING

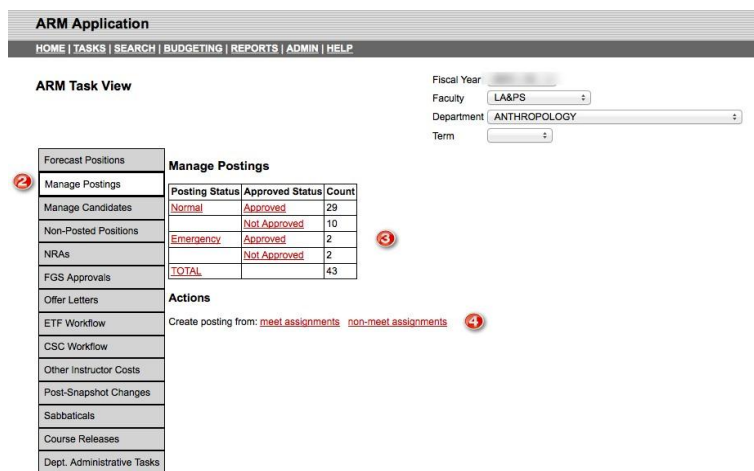
1. In ARMS, click the TASK TAB menu link to bring up the ARM TASK VIEW page.



2. From the ARM Task View Page choose "Manage Postings"

3. You can filter your search by choosing the Posting Status and the Approved Status.

4. You can also create postings from meet assignments and non-meet assignments by clicking onto Actions: Create posting from meet assignments and non-meet assignments.



**ARM Application**  
HOME | TASKS | SEARCH | BUDGETING | REPORTS | ADMIN | HELP

**ARM Task View**

Fiscal Year:   
Faculty: LA&PS  
Department: ANTHROPOLOGY  
Term:

Forecast Positions	Posting Status	Approved Status	Count
Manage Postings	Normal	Approved	29
Manage Candidates	Emergency	Not Approved	10
Non-Posted Positions	Emergency	Approved	2
NRAs		Not Approved	2
FGS Approvals	TOTAL		43

**Actions**  
Create posting from: [meet assignments](#) [non-meet assignments](#)

5. Click the "Not Approved" to view the Postings of a Position either in Normal Posting Status or the Emergency Posting Status. This will take you to the ARM Search Screen where you will be able to click the master posting number of a course and a position you wish to review. The posting details page appears. The information in the posting is from the submitted Excel spreadsheet or a previously created master posting.

Select: [All](#), [None](#) Actions: [Approve](#) -- [Assign Displayed CUPE-2](#)

## Results for Postings

[Download PDFs](#) [Download Search Results](#)

	Session	Status	Is New	Fac / Unit	Master Posting #	Course(s)	Format	Position	CUPE-1	CUPE-2	# of Assn
<input type="checkbox"/>	F12-W13	Not Approved	F	AP / ANTH	<b>M20661</b>	AP ANTH 4110 CR= 6.0 (F12-W13 Y AP)	SEMR	Course Director		...25	2
<input type="checkbox"/>	F12-W13	Not Approved	F	AP / ANTH	M21265		LECT	Course Director			0

Displaying 1 - 2 of 2

- Click the Edit Details link. The posting details page appears. If necessary, edit the appropriate fields in the master posting.

## Details for Posting #M20661

Status: Not Approved

[Edit Details](#) [Approve Posting](#) [Disable Reuse](#)

Language	EN
Faculty	LA&PS / ANTHROPOLOGY
Session	Fall 2012 / Winter 2013
Position	Course Director

Note:

- You must include content in the “Responsibilities” field in order to generate a posting.
- You must enter information in the PDF Document; also if you have completed the qualifications field for both Units, you will have the option to generate a posting for each Unit even if you have only created an assignment for one of them. This is a functionality to be used by those departments that need to post simultaneously in Unit-1 and Unit-2, without necessarily creating both Unit 1 and Unit 2 assignments in the Courses assignments screen. If you do not need to post simultaneously in both Units, select only the Unit you will be posting.
- You must include content in the “Required Qualifications” field for the applicable unit if you wish to generate a posting for that unit. Later you will have the option to generate posting for only CUPE-1 or CUPE-2 even if you have qualifications content for both units.
- All postings will automatically include the standard boilerplate language as required by the Collective Agreements as well as a sentence indicating that positions are subject to enrolment and budgetary restrictions. Statements about WHMIS training should go either in the Responsibilities or the Notes section.

- Add any additional information in the Posting Comments area if necessary. Note these comments do not appear on the posting, they are internal to ARMS for your reference.

## Posting Comments

Posting Comments	
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[Update Posting](#)

- Click the Back to Search link to return to the search results page.

Note: You can also generate PDF postings by clicking the number amount under either the column CUPE-1 or CUPE-2.

Select: [All](#), [None](#) Actions: [Approve](#) -- [Assign Displayed CUPE-2](#)

### Results for Postings

[Download PDFs](#) [Download Search Results](#)

	Session	Status	Is New	Fac / Unit	Master Posting #	Course(s)	Format	Position	CUPE-1	CUPE-2	# of Assn
<input type="checkbox"/>	F12-W13	Not Approved	F	AP / ANTH	<a href="#">M20661</a>	<a href="#">AP ANTH 4110 CR= 6.0 [F12-W13 Y AP]</a>	SEMR	Course Director		<a href="#">CUPE-25</a>	2
<input type="checkbox"/>	F12-W13	Not Approved	F	AP / ANTH	<a href="#">M21265</a>		LECT	Course Director			0

Displaying 1 - 2 of 2

## ASSIGNMENTS WITHOUT A MASTER POSTING

In the following two sections, we will show you:

- How to create a new master posting from scratch.
- How to add a course to an existing master posting.

## CREATE A NEW MASTER POSTING

1. In ARMS, click the TASK TAB menu link to bring up the ARM TASK VIEW page.



2. From the ARM Task View Page choose "Manage Postings"
3. This option allows you view the Master Postings that are approved or not approved. So you don't need to choose this option.
4. Choose Create posting from: meet assignments or non-meet assignment under the Actions to create a new master posting.

The image shows the ARM Task View page. At the top, there's a header bar with the title 'ARM Application' and navigation tabs. Below this, the 'ARM Task View' section is visible. On the left, there's a sidebar with various links, including 'Manage Postings', which is highlighted with a red box and a red circle with the number 2. On the right, there's a table titled 'Manage Postings' showing the status of various postings. Below the table, there's an 'Actions' section with a link 'Create posting from: meet assignments non-meet assignments', where 'non-meet assignments' is highlighted with a red box and a red circle with the number 4. At the bottom, there's a small text link: 'Comments and problems regarding this site can be sent to [armshelp@yorku.ca](mailto:armshelp@yorku.ca)'.

5. This will take you the ARM Universal Search Screen. There are two ways to create a new posting once you get to this screen either by:

1. Bulk Posting Creation

**ARM Universal Search**

**Search For:**

Meet Assignments

Show Extended Results

**Fiscal Year** 2012 - 13

**Faculty** LA&PS

**Department** - All -

**Course Attributes:**

Subject

Term

Course Level

Course Number

Course Title

**Meet Attributes:**

Instructional Format

Primary Meets Only

**Assignment Attributes:**

Position

Contract

Position Title

Search

Reset

**CUPE Workflow Attributes:**

Status CUPE Workflow not Started

**Instructor Attributes:**

Contract

Faculty

Department

Instructor Name

Instructor Payno

Instructor SISID

Assign: CUPE

**Bulk Posting Creation**

**Results for Meet Assignments**

[Download Search Results](#)

- a. Click onto Bulk Posting Creation.
- b. From the Create Posting Screen you then can generate posting by choosing: Group similar positions when creating new postings based on content source (except for templates).

[<< Back To Search](#)

**Create Postings**

Fiscal Year: 2012 - 13 Faculty: LA&PS CUPE Workflow Status: CUPE Workflow not Started

Use the table below to select the content source for each new posting.

The Most Recent Match is the most recent master posting which contained a similar position

Options:

☒ Group similar positions when creating new postings based on content source (except for templates)

☐ Create a separate new posting for each contract position

Select: All, None

	Course Number	Format	Position	CUPE Unit	# of Assn	Most Recent Match	Content Source for New Posting
	<a href="#">AP ECON 3249 CR= 3.0 [S12 S1 API]</a>	LECT	Course Director	CUPE-2	1		No Content Available
	<a href="#">AP EN 2230 CR= 6.0 [F12-W13 Y API]</a>	TUTR	Tutor 1 Replacement	CUPE-2	2		No Content Available
	<a href="#">AP GEOG 3300 CR= 3.0 [W13 W API]</a>	LECT	T3 (Mrk/Grd)	CUPE-1	1		No Content Available
	<a href="#">AP GEOG 3740 CR= 3.0 [W13 W API]</a>	LECT	T3 (Mrk/Grd)	CUPE-1	1		No Content Available
<input type="checkbox"/>	<a href="#">AP HREQ 1920 CR= 6.0 [S12 SU API]</a>	TUTR	T1 (Tut Ldr)	CUPE-1	2	M18790 (Created 04/13/2012)	M18790 <a href="#">Info</a>
<input type="checkbox"/>	<a href="#">AP HREQ 1920 CR= 6.0 [S12 SU API]</a>	TUTR	T1 (Tut Ldr)	CUPE-2	1	M18790 (Created 04/13/2012)	M18790 <a href="#">Info</a>
<input type="checkbox"/>	<a href="#">AP HUMA 4180 CR= 6.0 [F12-W13 Y API]</a>	SEMR	Course Director	CUPE-2	1	M10139 (Created 04/14/2011)	M10139 <a href="#">Info</a>

- c. Once you have chosen the course you wish to create the post for you can generate the post.

	<a href="#">AP SOSC 1200 CR= 9.0 [F12-W13 Y API]</a>	LECT	Course Director	CUPE-2	1		No Content Available
	<a href="#">AP SOSC 1809 CR= 6.0 [F12-W13 Y API]</a>	LECT	Course Director	CUPE-2	1		No Content Available
<input type="checkbox"/>	<a href="#">AP SOSC 3041 CR= 6.0 [F12-W13 Y API]</a>	TUTR	T1 (Tut Ldr)	CUPE-2	1	M18935 (Created 04/16/2012)	M18935 <a href="#">Info</a>

Generate Postings



## 2. Finding a position within the Results for Meet Assignments

- a. Find a position within the search results that you want to create a Master Posting for that has no existing Master Posting #, and click the Create Posting link in the Action column.

Results for Meet Assignments

[Download Search Results](#)

Term	Course Resp.	Meet Resp.	Course	Sec	Meet	Contract	Position	Instructor	Assigns	Hours	Candidate Status	Master Posting #	Actions
W13	AP / ADMS	AP / ADMS	AP ADMS 2320 CR= 3.0 [W13 W AP]	T	LECT 01	CUPE-E	Course Director		0.5		No Posting		<a href="#">Non-Posted</a>
W13	AP / ADMS	AP / ADMS	AP ADMS 2320 CR= 3.0 [W13 W AP]	U	LECT 01	CUPE-E	Course Director		0.5		No Posting		<a href="#">Non-Posted</a>
W13	AP / GEOG	AP / GEOG	AP GEOG 3300 CR= 3.0 [W13 W AP]	M	LECT 01	CUPE-1	T3 (Mrk/Grd)			135	No Posting		<a href="#">Create Posting</a> <a href="#">Add to Existing</a> <a href="#">Non-Posted</a>
W13	AP / GEOG	AP / GEOG	AP GEOG 3740 CR= 3.0 [W13 W AP]	M	LECT 01	CUPE-1	T3 (Mrk/Grd)			135	No Posting		<a href="#">Create Posting</a> <a href="#">Add to Existing</a> <a href="#">Non-Posted</a>

- b. Edit the following fields as appropriate:

1. Number of positions defaults to “One or more positions” for assignment-based positions or “Based on enrolment” for Number of hours.
2. Instructional Format defaults to the Meet the Posting is.
3. Projected Enrolment defaults to the highest maximum enrolment for the course(s).
4. Date of posting defaults to “02/01/201X” for summer postings and “04/22/201X” for F/W postings. The application deadline (14 days from the date of posting) will be added on the PDF.
5. Emergency Posting: check this checkbox if applicable. Change the date of posting to when the position will be made available to applicants. Then change the application deadline date and timestamp based on 48 business hours. “Emergency Post” will appear on the PDF.

### Create Posting

Language	<input checked="" type="radio"/> English <input type="radio"/> French
Faculty	LA&PS / GEOGRAPHY
Session	Winter 2013
Position	T3 (Marker/Grader)
1 Number of hours	Based on enrolment
2 Instructional Format	LECT
3 Projected Enrolment	41
4 Date of Posting	01/22/2013 <small>(mm/dd/yyyy)</small>
5 Emergency / Late Posting	<input type="checkbox"/>
6 Is New Posting	<input type="checkbox"/>
Is Content Reusable	<input checked="" type="checkbox"/>
7 Responsibilities	<div> <div>B I U</div> <div></div> </div>
8 PDF Document	<div> <div> CUPE-1 (Not currently posted to CUPE-1) <input checked="" type="radio"/> Do not post to CUPE-1 <input type="radio"/> Generate CUPE-1 Posting </div> <div> CUPE-2 (Not currently posted to CUPE-2) <input checked="" type="radio"/> Do not post to CUPE-2 <input type="radio"/> Generate CUPE-2 Posting </div> </div>



**9 CUPE-1**

6. Check the New posting checkbox if applicable. "New" will appear on the PDF. Note: This option is only for those postings where a hiring unit has made substantive changes to a posting since the last posting for the position in question, or where a position is being posted in the hiring unit for the first time.
7. Complete the Responsibilities field. This field is required in order to generate a posting.

Qualifications Required CUPE-1	<div>B / U</div>
Qualifications Preferred CUPE-1	<div>B / U</div>
Notes CUPE-1	<div>B / U</div>

8. Enter information in the PDF Document; also if you have completed the qualifications field for both Units, you will have the option to generate a posting for each Unit even if you have only created an assignment for one of them. This is a functionality to be used by those departments that need to post simultaneously in Unit-1 and Unit-2, without necessarily creating both Unit 1 and Unit 2 assignments in the Courses assignments screen. If you do not need to post simultaneously in both Units, select only the Unit you will be posting.

**9 CUPE-2**

9. Fill in the relevant Qualifications fields for CUPE-1 and/or CUPE-2.

Qualifications Required CUPE-2	<div>B / U</div>
Qualifications Preferred CUPE-2	<div>B / U</div>
Qualifications Desired CUPE-2	<div>B / U</div>
Notes CUPE-2	<div>B / U</div>

Note:

- You must include content in the “Required Qualifications” field for the applicable unit if you wish to generate a posting for that unit. Later you will have the option to generate postings for only CUPE-1 or CUPE-2 even if you have qualifications for both units.
- All postings will automatically include the standard boilerplate language as required by the Collective Agreements as well as a sentence indicating that positions are subject to enrolment and budgetary restrictions. Statements about WHIMIS training should go either in the Responsibilities of Notes Section.

### Apply To

10

Submit Applications To	Lucia Lo Chair, Geography Department N430 Ross Building Keele Campus York University 4700 Keele Street
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### Select Assignments

Course	Section	Meet	# of Assigns/ Hours	Forecast Unit
<input checked="" type="checkbox"/> GEOG 3300 3.0 W Space/Place	M	LECT 01	135	CUPE-1

### Posting Comments

12

Posting Comments	
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Create Posting

13

10. Under the Apply field if necessary. If the Apply To field needs to be updated, please contact [ithelp@yorku.ca](mailto:ithelp@yorku.ca)
11. Add any additional information in the Posting Comments area if necessary. Note these comments do not appear on the posting; they are internal to ARM, and for your reference.
12. Click the Create Posting button to create a new master posting.

After a few seconds, you will be returned to the ARM Universal Search screen

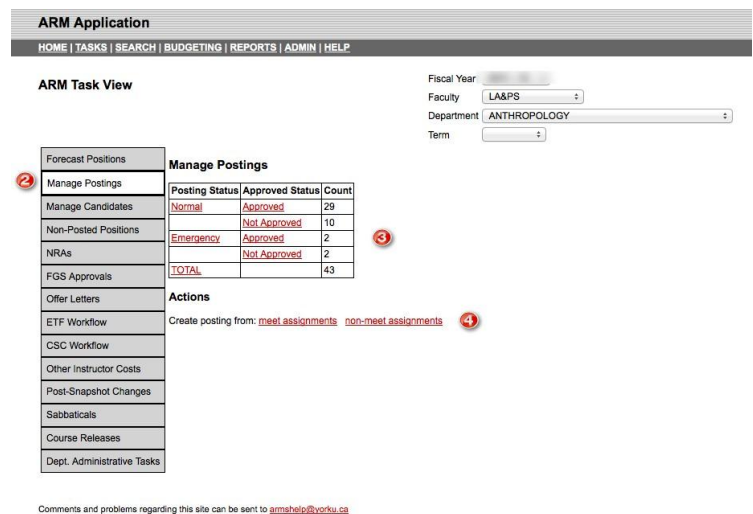
## ADD TO “EXISTING” MASTER POSTING

If you wish to add additional course assignments to a posting already created, the assignment should contain the same responsibilities, qualification requirements, position type, and instructional format as the existing posting:

1. In ARMS, click the TASK TAB menu link to bring up the ARM TASK VIEW page.



2. From the ARM Task View Page choose “Manage Postings”
3. This option allows you view the Master Postings that are approved or not approved. So you don’t need to choose this option.
4. Choose Create posting from: meet assignments or non-meet assignment under the Actions to create a new master posting.



5. This will take you the ARM Universal Search Screen.

- 3) Find the course that you want to add to an existing Master Posting, and click the Add to Existing link in the Action column. A dialog box appears and prompts you for the Master Posting number to link to.

- 4) Enter the Master Posting number to link this course to and click the Search button. More information appears to help you determine whether it is the correct master posting.

Results for Meet Assignments											Download Search Results		
Term	Course Resp.	Meet Resp.	Course	Sec	Meet	Contract	Position	Instructor	Assigns	Hours	Candidate Status	Master Posting #	Actions
S12	AP / ADMS	AP / ADMS	AP ADMS 3595 CR= 3.0 [S12 SU AP]	B	LECT 01	CUPE-E	T3 (MnkGrd)			0	No Posting		Non-Posted
S12	AP / ADMS	AP / ADMS	AP ADMS 3900 CR= 3.0 [S12 SU AP]	A	TUTR 01	CUPE-E	T1 (Tut Ldr)		0		No Posting		Non-Posted
S12	AP / ADMS	AP / ADMS	AP ADMS 4520 CR= 3.0 [S12 SU AP]	B	LECT 01	CUPE-E	Course Director		0		No Posting		Non-Posted
S12	AP / ECON	AP / ECON	AP ECON 3249 CR= 3.0 [S12 S1 AP]	A	LECT 01	CUPE-2	Course Director		0		No Posting		Create F Add to Existing
F12	AP / ADMS	AP / ADMS	AP ADMS 2200 CR= 3.0 [F12 F AP]	C	LECT 01	CUPE-E	T3 (MnkGrd)			65.564	No Posting		Non-Posted
F12	AP / ADMS	AP / ADMS	AP ADMS 2200 CR= 3.0 [F12 F AP]	D	LECT 01	CUPE-E	Course Director		0		No Posting		Non-Posted
F12	AP / ADMS	A	Add to Existing Master Posting						X	47.253	No Posting		Non-Posted
F12	AP / ADMS	A								34.259	No Posting		Non-Posted
F12	AP / ADMS	A								65.564	No Posting		Non-Posted
F12	AP / ADMS	A								32.487	No Posting		Non-Posted
F12	AP / ADMS	A	Find master posting.							31.305	No Posting		Non-Posted
F12	AP / ADMS	A	Master Posting # 19455								No Posting		Non-Posted
F12	AP / ADMS	A								20.083	No Posting		Non-Posted
F12	AP / ADMS	A									No Posting		Non-Posted
F12	AP / ADMS	AP / ADMS	AP ADMS 4370 CR= 3.0 [F12 F AP]	A	LECT 01	CUPE-E	Course Director		0		No Posting		Non-Posted
F12	AP / ADMS	AP / ADMS	AP ADMS 4563 CR= 3.0 [F12 F AP]	A	LECT 01	CUPE-E	Course Director		0		No Posting		Non-Posted
F12	AP / ADMS	AP / ADMS	AP ADMS 4708 CR= 3.0 [F12 F AP]	A	LECT 01	CUPE-E	T3 (MnkGrd)			28.943	No Posting		Non-Posted
F12	AP / HRM	AP / HRM	AP HRM 3430 CR= 3.0 [F12 F AP]	A	LECT 01	CUPE-E	T3 (MnkGrd)			49	No Posting		Non-Posted
F12	AP / HRM	AP / HRM	AP HRM 3470 CR= 3.0 [F12 F AP]	A	INTR 01	CUPE-F	T3 (MnkGrd)			49	No Posting		Non-Posted

## ASSIGN CANDIDATE

## NON-POSTED POSITION

Candidates are assigned through the ARM Task View – “Non Posted Positons”

### CUPE 1

The steps for assigning CUPE-1 candidates are as follows:

- 1) In **ARMS**, click the **TASKS** menu link to bring up the **ARM Task View** page.

HOME **TASKS** SEARCH | BUDGETING | REPORTS | ADMIN | HELP | ASK ARM

#### ARM Home

- 2) In the **ARM Task View**, you can choose the search criteria by selecting:

- a. Fiscal Year
- b. Faculty
- c. Department
- d. Term

- 3) Click **Manage Candidates** from the Task list
- 4) Click **No Candidate** link under the **Candidate Status** list to get search results that meet your criteria in the **Results for Candidates** page.

- 5) Click **Show** link if you need to check the search criteria

HOME | TASKS | SEARCH | BUDGETING | REPORTS | ADMIN | HELP | ASK ARM

**ARM Task View**  
[CUPE Workflow Visualization](#)

Fiscal Year: 2013 - 14  
Faculty: LA&PS  
Department: FRENCH STUDIES  
Term:

	Candidate Status	Count
Manage Candidates	No Candidate	29
Non-Posted Positions	Candidate Assumed	0
NRAs	Assignment Approved	0
FGS Approvals	Added to NRA	0
Offer Letters: CUPE-1/2/E	Offer Drafted	0
ETF Workflow	Offer Published	0
CSC Workflow	Offer On Hold	0
Other Instructor Costs	Offer Accepted	4
Post-Snapshot Changes	Offer Declined	0
Sabbaticals	Offer Revoked	0
Course Releases	TOTAL	33
Dept. Administrative Tasks		

**Actions**  
Create posting from: [meet assignments](#) [non-meet assignments](#)

#### ARM Universal Search **Show**

- 6) You will see the criteria set through **ARM Task View**.
  - e. Search For: **Candidates**
  - f. Fiscal Year
  - g. Faculty
  - h. Department
  - i. Candidate Status: **No Candidate Identified.**

Click **Hide** to close the search criteria. If you know the criteria to search for, you can set the criteria directly using the **ARM Universal Search** without going through the **ARM Task View**. You can set **Candidate CUPE Unit** to CUPE-1 to narrow the search results CUPE-1 postings.

**ARM Universal Search** [Hide](#)

Search For: <span>Candidates</span>		Candidate Attributes:	
<a href="#">Show Extended Results</a>		Candidate Status: <span>No Candidate Identified</span>	
Fiscal Year: <span>2013 - 14</span>		Candidate CUPE Unit: <span></span>	
Faculty: <span>LA&amp;PS</span>		ETF Status: <span></span>	
Department: <span>FRENCH STUDIES</span>		Candidate Name: <span></span>	
Course Attributes:		Candidate Payno: <span></span>	
Subject: <span>- All -</span>		Candidate SISID: <span></span>	
Term: <span></span>		Posting Status: <span></span>	
Course Level: <span></span>			
Course Number: <span></span>			
Course Title: <span></span>			
Period Faculty / Code: <span></span> / <span></span>			
Meet Attributes:			
Instructional Format: <span></span>	<input type="checkbox"/> Non-Meet		
Primary Meets Only: <input type="checkbox"/>			
Assignment Attributes:			
Position: <span></span>			
Contract: <span></span>			
Position Title: <span></span>			
<a href="#">Search</a> <a href="#">Reset</a>			

- 7) On the **Results for Candidates** page, there are two ways to assign CUPE-1 candidates.
- Click the **master posting #** of a course that contains a CUPE-1 posting you wish to review. User can assign and save candidate one at a time using this method.
  - Click the **Assign** link in the Action column. User can assign and save candidate one at a time using this method.

**Results for Candidates**

[Download Search Results](#)

Master Posting #	Term	Fac / Unit	Course	Sec	Meet	Position	# of Assigns/ Hours	Candidate	Candidate Status	Grievance Deadline	ETF Status	Actions
<a href="#">M28442</a>	F13-W14	AP / FR	AP FR 1080 CR= 6.0 IF13-W14 Y AP	A	LGCL 01	T7 (Misc)	1		No Candidate		b	<a href="#">Assign</a>
<a href="#">M28448</a>	F13-W14	AP / FR	AP FR 2100 CR= 6.0 IF13-W14 Y AP	A	LGCL 01	T7 (Misc)	1		No Candidate			<a href="#">Assign</a>
<a href="#">M28449</a>	F13-W14	AP / FR	AP FR 2200 CR= 6.0 IF13-W14 Y AP	A	LGCL 01	T7 (Misc)	1		No Candidate			<a href="#">Assign</a>

- 8) If you choose option a, the **Details for Posting** page appears. Scroll down to the **CUPE-1 Posting Assignments** section at the bottom of the page, and click the **Assign Candidate** link in the Action column to go to the **Assign Candidate** page.

**CUPE-1 Posting Assignments**

ID	Course	Sect	Meet	# of Assigns/ Hours	Status	Candidate Name	Priority Pool	Approval Status	Offer Status	ETF Status	Action
<a href="#">143104</a>	<a href="#">FR 1080 6.0 Y</a> French Language & Culture	A	<a href="#">LGCL 01</a>	1	No Candidate						<a href="#">Assign Candidate</a> <a href="#">Remove Posting Assignment</a>

On the **Assign Candidate** page, make sure under Candidate CUPE Unit **CUPE-1** is selected. Search the candidate name by typing their last name (the more letters you type, the narrower your search is). Please note only students who are eligible to hold a CUPE-1 position will appear in the name pool. If a student has Part-time status, they will only show up under CUPE-2 (CUPE-1 requires Full-time status). If you notice a problem with the student's record, you should be in contact with FGS about this.

## Assign Candidate

- Faculty: AP
- Session: Fall 2013 / Winter 2014
- Course Number: FR 1080
- Credits: 6.0
- Period: Y
- Section: A
- Meet: LGCL 01
- Position: T7 (Misc)
- Current Assignment CUPE Unit: CUPE-1
- Number of Assignments / Hours: 1

## Candidate CUPE Unit

Candidate CUPE Unit: ☒ CUPE-1 ☐ CUPE-2 (not applicable)

☐ CUPE-1 Ticket

## Right of First Refusal Candidates

The following individuals have held a TAship in this course previously, and should be given preference above other possible candidates:

- Sunassee-Thapermall, Thilagavathy [PAYNO: ...112] (1 assignments AY 2013, Previous TAship: F12-W13): [View Instructor Details](#) | [Assign Candidate](#)

## Search

Candidate Name:

FCE Assigned

☒ Restrict Search to Priority Pool

[Assign Candidate](#)

Under the **Right of First Refusal Candidates** section, you will find a list of candidates who are in the Priority Pool and have held a TA-ship in this course previously. Click the **Assign Candidate** link if you wish to assign one of these individual as the candidate.

If there is no candidate to assign from the Right of First Refusal list, use the search box to look for candidates in the Priority Pool. If you uncheck the **Restrict Search to Priority Pool** box you can then extend the search to the larger group of candidates. When you find the candidate from the search result list, click their name to select it. Then click the **Assign Candidate** button.

## CUPE-1 Posting Assignments

ID	Course	Sect	Meet	# of Assigns/ Hours	Status	Candidate Name	Priority Pool	Approval Status	Offer Status	ETF Status	Action
<a href="#">143105</a>	<a href="#">FR 2100 6.0 Y</a> Intro. to the Linguistic Study of French	A	<a href="#">LGCL 01</a>	1	<a href="#">Awaiting FGS Approval</a>	<a href="#">[Candidate Name]</a>	First Refusal	Pending FGS Approval			<a href="#">Remove Candidate</a> <a href="#">Remove Posting Assignment</a>

The **Details for Posting** page refreshes with the Candidate Name filled. You will notice that the **Status** changes from **No Candidate** to **Awaiting FGS Approval** and the **Assign Candidate** link in the **Action** column is changed to **Remove Candidate**. The status will change once FGS updates the assignment. Repeat to assign other candidates.

- 9) If you choose option b by clicking the **Assign** link in the Action column directly from the search **Results for Candidates** page, you skip the **Details for Posting** page as shown in option a and go to the **Assign Candidate** page directly. The remaining process for assigning candidate is the same as in option a. Please note the **Remove Candidate** link doesn't show in the **Action** column on the search **Results for Candidates** page for those sections that candidates have been assigned. Repeat to assign other candidates.

## CUPE 2

The steps for assigning CUPE-2 candidates are as follows:

- 1) In ARMS, click the **TASKS** menu link to bring up the **ARM Task View** page.

[HOME](#) [TASKS](#) [SEARCH](#) [BUDGETING](#) [REPORTS](#) [ADMIN](#) [HELP](#) [ASK ARM](#)

## ARM Home

- 2) In the **ARM Task View**, you can choose the search criteria by selecting:

- Fiscal Year
- Faculty
- Department
- Term

- 3) Click **Manage Candidates** from the Task list
- 4) Click **No Candidate** link under the **Candidate Status** list to get search results that meet your criteria in the **Results for Candidates** page.
- 5) Click **Show** link if you need to check the search criteria

HOME | TASKS | SEARCH | BUDGETING | REPORTS | ADMIN | HELP | ASK ARM

**ARM Task View**  
[CUPE Workflow Visualization](#)

Fiscal Year: 2013 - 14  
Faculty: LA&PS  
Department: FRENCH STUDIES  
Term:

Forecast Positions	Manage Candidates																								
Manage Postings	<table><thead><tr><th>Candidate Status</th><th>Count</th></tr></thead><tbody><tr><td>No Candidate</td><td>29</td></tr><tr><td>Candidate Assumed</td><td>0</td></tr><tr><td>Assignment Approved</td><td>0</td></tr><tr><td>Added to NRA</td><td>0</td></tr><tr><td>Offer Drafted</td><td>0</td></tr><tr><td>Offer Published</td><td>0</td></tr><tr><td>Offer On Hold</td><td>0</td></tr><tr><td>Offer Accepted</td><td>4</td></tr><tr><td>Offer Declined</td><td>0</td></tr><tr><td>Offer Revoked</td><td>0</td></tr><tr><td>TOTAL</td><td>33</td></tr></tbody></table>	Candidate Status	Count	No Candidate	29	Candidate Assumed	0	Assignment Approved	0	Added to NRA	0	Offer Drafted	0	Offer Published	0	Offer On Hold	0	Offer Accepted	4	Offer Declined	0	Offer Revoked	0	TOTAL	33
Candidate Status	Count																								
No Candidate	29																								
Candidate Assumed	0																								
Assignment Approved	0																								
Added to NRA	0																								
Offer Drafted	0																								
Offer Published	0																								
Offer On Hold	0																								
Offer Accepted	4																								
Offer Declined	0																								
Offer Revoked	0																								
TOTAL	33																								
Non-Posted Positions																									
NRA's																									
FGS Approvals																									
Offer Letters: CUPE-1/2/E																									
ETF Workflow																									
CSC Workflow																									
Other Instructor Costs																									
Post-Snapshot Changes																									
Sabbaticals																									
Course Releases																									
Dept. Administrative Tasks																									

**Actions**  
Create posting from: [meet assignments](#) [non-meet assignments](#)

## ARM Universal Search **Show**

- 6) You will see the criteria set through **ARM Task View**.
- Search For: **Candidates**
  - Fiscal Year
  - Faculty
  - Department
  - Candidate Status: **No Candidate Identified**

Click **Hide** to close the search criteria. If you know the criteria to search for, you can set the criteria directly using the **ARM Universal Search** without going through the **ARM Task View**. You can set **Candidate CUPE Unit** to CUPE-2 to narrow the search results CUPE-2 postings.

ARM Universal Search **Hide**

Search For: Candidates  
[Show Extended Results](#)

Fiscal Year: 2013 - 14  
Faculty: LA&PS  
Department: FRENCH STUDIES

Course Attributes:  
Subject: - All -  
Term:   
Course Level:   
Course Number:   
Course Title:   
Period Faculty / Code: /

Meet Attributes:  
Instructional Format: ☐ Non-Meet  
Primary Meets Only: ☐

Assignment Attributes:  
Position:   
Contract:   
Position Title:

[Search](#) [Reset](#)

Candidate Attributes:  
Candidate Status: No Candidate Identified  
Candidate CUPE Unit:   
ETF Status:   
Candidate Name:   
Candidate Payno:   
Candidate SISID:   
Posting Status:

- 7) On the **Results for Candidates** page, there are three different ways to assign CUPE-2 candidates.
- Click the **master posting #** of a course that contains a CUPE-2 posting you wish to review. User can assign and save candidate one at a time using this method.
  - Click the **Assign** link in the Action column. User can assign and save candidate one at a time using this method.
  - Click the **Assign Displayed CUPE-2** link above the search results table. This method allows for saving multiple candidates assignments at a time. Please note this method only available to CUPE-2 assignment.



Actions: [Assign Displayed CUPE-2](#) ← c

#### Results for Candidates

[Download Search Results](#)

Master Posting #	Term	Fac / Unit	Course	Sec	Meet	Position	# of Assigns/ Hours	Candidate	Candidate Status	Grievance Deadline	ETF Status	Actions
M27981	F13	AP / FR	AP FR 2060 CR= 3.0 [F13 F AP]	A	LGCL 01	Course Director	0.5		No Candidate		b →	<a href="#">Assign</a> <a href="#">Convert to LSTA</a>
M27969	F13	AP / FR	AP FR 3082 CR= 3.0 [F13 F AP]	A	LGCL 01	Course Director	0.5		No Candidate			<a href="#">Assign</a> <a href="#">Convert to LSTA</a>

- 8) If you choose option a, the **Details for Posting** page appears. Scroll down to the **CUPE-2 Posting Assignments** section at the bottom of the page, and click the **Assign Candidate** link in the Action column to go to the **Assign Candidate** page.

#### CUPE-2 Posting Assignments

ID	Course	Sect	Meet	# of Assigns/ Hours	Status	Candidate Name	NRA Status	Offer Status	ETF Status	Action
133312	FR 2060 3.0 F Culture, Marketing, Operations in French	A	LGCL 01	0.5	No Candidate					<a href="#">Assign Candidate</a> <a href="#">Convert to LSTA</a> <a href="#">Remove Posting Assignment</a>

On the **Assign Candidate** page, make sure under Candidate CUPE Unit **CUPE-2** is selected. Search the candidate name by typing their last name (the more letters you type, the narrower your search is). Please note that name pool for the candidate assignment is contract faculties (including CUPE-1, CUPE-2 and CUPE-E) that exist in the ARM system, and the name pool is not restricted to the CUPE-2 candidate even the option button for CUPE-2 is selected.

When you find the candidate from the candidate name pool, click their name to select it. The **Summary of Current CUPE-2 Load** for the selected candidate will appear. You need to review the load before click the **Assign Candidate** button.

[<< Back to Posting](#)

#### Assign Candidate

- Faculty: AP
- Session: Fall 2013
- Course Number: FR 2060
- Credits: 3.0
- Period: F
- Section: A
- Meet: LGCL 01
- Position: Course Director
- Current Assignment CUPE Unit: CUPE-2
- Number of Assignments / Hours: 0.5

#### Candidate CUPE Unit

Candidate CUPE Unit: ☐ CUPE-1 (not applicable) ☒ CUPE-2

#### Search

Candidate Name:   
 FCE Assigned  
[Barney, Keith \[PAYNO: ...667\]](#)  
[Barney, Victoria \[PAYNO: ...111\]](#)  
[- Add New -](#)

[Assign Candidate](#)

#### CUPE-2 Posting Assignments

ID	Course	Sect	Meet	# of Assigns/ Hours	Status	Candidate Name	NRA Status	Offer Status	ETF Status	Action
133312	FR 2060 3.0 F Culture, Marketing, Operations in French	A	LGCL 01	0.5	Awaiting NRA	Barney, Victoria				<a href="#">Remove Candidate</a> <a href="#">Convert to LSTA</a> <a href="#">Remove Posting Assignment</a>

[Barney, Victoria \[PAYNO: ...111\]](#)  
 FCE Assigned

[Assign Candidate](#)

The **Details for Posting** page refreshes with the Candidate Name filled. You will notice that the **Status** changes from **No Candidate** to **Awaiting NRA** and the **Assign Candidate** link in the **Action** column is changed to **Remove Candidate**. Repeat to assign other candidates if any for the same posting.

- 9) If you choose option b by clicking the **Assign** link in the Action column directly from the search **Results for Candidates** page, you skip the **Details for Posting** page as shown in option a and go to the **Assign Candidate** page directly. The remaining process for assigning candidate is the same as in option a. Please note the **Remove Candidate** link doesn't show in the **Action** column on the search **Results for Candidates** page for those sections that candidates have been assigned.
- 10) If you choose option c, the **CUPE-2 Candidate Assignments** page appears. Remember only the posted assignments without candidates are showing on the list. The Search the candidate name by typing their last name (the more letters you type, the narrower your search is).

[<< Back To Search](#)

### CUPE-2 Candidate Assignments

**Save**

Below are posted assignments without candidates.

Fiscal Year: **2013** Faculty: **AP** Department: **FR**

(Hover over Course and Section for more information)

Term	Course	Sec	Meet	Instructor	Position Type	Assigns	Hours
F13	FR 2060	A	LGCL 01	<input type="text" value="barney"/> <a href="#">Barney Keith (PAYNO: ...667)</a> <a href="#">Barney Victoria (PAYNO: ...111)</a> <a href="#">- Add New -</a>	Course Director	0.5	
F13	FR 3082	A	LGCL 01	<input type="text"/>	Course Director	0.5	
F13	FR 3082	B	LGCL 01	<input type="text"/>	Course Director	0.5	

If the candidate does not yet exist in the HR system, click the **Add New** link. A pop-up dialog appears that allows you to enter information about this candidate. Type the payno or SIN number and hit search and ARM will check to see if the instructor already exists in HR. If the instructor is not found, enter the name for the new CUPE and ARM will create a temporary instructor record. Please note that your faculty representative needs to convert the new resources using the admin function (see document regarding Convert new Resources) to link the payno number from Peoplesoft system to the record of the new candidate.

Create New CUPE Name

Search for payno, if found in another category then use the existing one else add a new one.

Payno

Search

If they have no Payno, please enter their SIN.

First Name

Last Name

Full Name

Comments

Submit

Cancel

When you are finished assigning all the candidates, click the **Save** button to return to the **Results for Candidates** page. If you had assigned candidates through **Tasks** view, the filter of **No Candidate Identified** is still on and the **Results for Candidate** page refreshes with the those assignments that you just assigned candidates off the list. To see the updated status, click **Show** to bring up the criteria screen and leave Candidate Status blank, and then click Search

## ARM Universal Search [Hide](#)

<b>Search For:</b>	<input type="text" value="Candidates"/>	<b>Candidate Attributes:</b>	
	<input type="checkbox"/> Show Extended Results	Candidate Status	<input type="text" value="No Candidate Identified"/>
Fiscal Year	<input type="text" value="2013 - 14"/>	Candidate CUPE Unit	<input type="text" value="No Candidate Identified"/>
Faculty	<input type="text" value="LA&amp;PS"/>	ETF Status	<input type="text" value="Candidate Identified"/>
Department	<input type="text" value="FRENCH STUDIES"/>	Candidate Name	<input type="text" value="CUPE-1: Approved"/>
<b>Course Attributes:</b>		Candidate Payno	<input type="text" value="CUPE-1: -- Manually Approved"/>
Subject	<input type="text" value="- All -"/>	Candidate SISID	<input type="text" value="CUPE-2: NRA Published"/>
Term	<input type="text" value=""/>	Posting Status	<input type="text" value="Offer Generated"/>
Course Level	<input type="text" value=""/>		<input type="text" value="-- Offer Drafted"/>
Course Number	<input type="text" value=""/>		<input type="text" value="-- Offer Published"/>
Course Title	<input type="text" value=""/>		<input type="text" value="-- Offer On Hold"/>
Period Faculty / Code	<input type="text" value=""/>		<input type="text" value="Offer Accepted"/>
<b>Meet Attributes:</b>			<input type="text" value="Offer Declined"/>
Instructional Format	<input type="text" value=""/>		<input type="text" value="Offer Revoked"/>
	<input type="checkbox"/> Non-Meet		
Primary Meets Only	<input type="checkbox"/>		
<b>Assignment Attributes:</b>			
Position	<input type="text" value=""/>		
Contract	<input type="text" value=""/>		
Position Title	<input type="text" value=""/>		
	<input type="checkbox"/> Include Assignments with 0 Assigns/Hours		
	<input type="button" value="Search"/> <input type="button" value="Reset"/>		

You will notice that on the **Results for Candidates** page the **Candidate Status** changes from **No Candidate** to **Awaiting NRA**. Please note you don't have the **Remove** link available in the corresponding **Actions** column on the **Results for Candidates** page and you need to click the **Awaiting NRA** link to get to the Posting Assignment Details page if you need to remove the candidate at this stage.

### Posting Assignment Details

**Posting Assignment #:** 130591  
**Candidate:** [Barney, Victoria](#)  
**Assignment Status:** Awaiting NRA  
**Offer Status:**  
**ETF Status:**  
**Course** [AP FR 3082 CR= 3.0 \[F13 F AP\]](#)  
**Section** A  
**Meet** [LGCL 01](#)  
**Position** [Course Director](#)  
**CUPE Unit** CUPE-2  
**Posting Date** 04/22/2013  
**Posting Created** 04/18/2013  
**Posting Approved** 04/19/2013  
**Actions:** [Remove Candidate](#)  
[Convert to LSTA](#)  
[Remove Posting Assignment](#)

## NRAs (NOTICE OF RECOMMENDED APPOINTMENT)

Once you complete assigning a batch of CUPE-2 candidates, you can now generate the NRAs.

In ARMS, click the SEARCH menu link to bring up the ARM Universal Search page. Search for NRA's. Choose Fiscal Year, Term, Faculty, and Department from the drop-down menus. Click the Search button. The Search Results show you all the NRAs that have been generated. If there have been any more candidates assigned since the last time you generated NRA's, you will see a new item added to the results list.

## ARM Universal Search

<b>Search For:</b>	<input type="text" value="NRAs"/>	<b>Candidate Attributes:</b>	
	<input type="checkbox"/> Show Extended Results	Candidate Status	<input type="text"/>
Fiscal Year	<input type="text" value="2009 - 10"/>	Candidate CUPE Unit	<input type="text"/>
Faculty	<input type="text" value="QA Test Faculty"/>	ETF Status	<input type="text"/>
Department	<input type="text" value="Test Department A"/>	Candidate Name	<input type="text"/>
Session	<input type="text"/>	Candidate Payno	<input type="text"/>
		Candidate SISID	<input type="text"/>
<b>Course Attributes:</b>			
Subject	<input type="text" value="- All -"/>		
Term	<input type="text"/>		
Course Level	<input type="text"/>		
Course Number	<input type="text"/>		
Course Title	<input type="text"/>		
Period Faculty / Code	<input type="text"/> / <input type="text"/>		
<b>Meet Attributes:</b>			
Instructional Format	<input type="text"/> <input type="checkbox"/> Non-Meet		
Primary Meets Only	<input type="checkbox"/>		
<b>Assignment Attributes:</b>			
Position	<input type="text"/>		
Contract	<input type="text"/>		
Position Title	<input type="text"/>		
<input type="button" value="Search"/> <input type="button" value="Reset"/>			

### Search Results

NRA ID	NRA Number	Generated On	Assignment Count	Action
261	N-FW2009-QATSTA-1	03/16/2010 11:25:30 AM	0	<a href="#">View PDF</a>
Assignments since last NRA		1	<a href="#">Generate NRA</a>	

- 4) Click the Generate NRA link in the Assignment Count column. The Generate NRA screen appears with a list of courses and assignments that will be included in this NRA.

### Generate NRA

Fiscal Year	2009
Term	Fall
Faculty	QA
Department	TSTA

Generate NRA for the following assignments:

### Assignments

Course	Sect	Meet	Candidate Name
SUBA 1000 3.0 Q1 Sample Course 1	A	LECT 01	Barney, Victoria

- 5) Click the Generate NRA button. The screen refreshes with your NRA details. Important Note: The date on the NRA will be the date that it is generated. Therefore it is imperative that you do not generate the NRA until the day you plan to send it out.

*NRA generated*

[<< Back to NRA Search](#)

### View Details of NRA N-FW2009-QATSTA-2

- Fiscal Year: 2009
- Term: Fall
- Faculty: QA
- Department: TSTA
- Generated On: 03/23/2010 11:19:28 PM

[View PDF](#)

### Assignments

Assignment ID	Course	Sect	Meet	Candidate Name
1505	SUBA 1000 3.0 Q1 Sample Course 1	A	LECT 01	Barney, Victoria

- 6) Click the View PDF link to view the NRA and save and/or print the PDF document.

## OFFER LETTER

### NON-POSTED POSITION

Offers are created using the ARM Task View – “Offer Letters”

### CUPE 1

Please note, before an offer letter can be created, the Unit 1 candidate must first be assigned, approved by FGS.

- 1) In ARMS, click the **TASKS** menu link to bring up the **ARM Task View** page.

[HOME](#) [TASKS](#) [SEARCH](#) [BUDGETING](#) [REPORTS](#) [ADMIN](#) [HELP](#) [ASK ARM](#)

### ARM Home

- 2) In the **ARM Task View**, you can choose the search criteria by selecting:
- j. Fiscal Year
  - k. Faculty
  - l. Department
  - m. Term
- 3) Click **Offer Letters: CUPE-1/2/E** from the Task list

#### ARM Task View

[CUPE Workflow Visualization](#)

Forecast Positions	
Manage Postings	
Manage Candidates	
Non-Posted Positions	
NRAs	
FGS Approvals	
Offer Letters: CUPE-1/2/E	
ETF Workflow	
CSC Workflow	
Other Instructor Costs	
Post-Snapshot Changes	
Sabbaticals	
Course Releases	
Dept. Administrative Tasks	

Status	Count
Draft	0
Published	1
Received	32
Revoked	1
TOTAL	34

3 tions

Create an offer letter for: [CUPE-1](#) [CUPE-2](#)

Fiscal Year	2013 - 14
Faculty	LA&PS
Department	SOCIOLOGY
Term	

4

- 4) Click **Create an offer letter for: CUPE-1** link under the **Actions** to get search results that meet your criteria in the **Results for Candidates** page.
- 5) Click **Show** link if you need to check the search criteria

### ARM Universal Search [Show](#)

- 6) You will see the criteria set through **ARM Task View**.

- a. Search For: **Candidates**
- b. Fiscal Year
- c. Faculty
- d. Department
- e. Candidate Status: **CUPE-1: Approved.**

Click **Hide** to close the search criteria. If you know the criteria to search for, you can set the criteria directly using the **ARM Universal Search** without going through the **ARM Task View**.

#### ARM Universal Search [Hide](#)

Search For:	<input type="text" value="Candidates"/>	Candidate Attributes:	<input type="text" value="CUPE-1: Approved"/>
<input type="checkbox"/> Show Extended Results		Candidate Status:	<input type="text" value="CUPE-1: Approved"/>
Fiscal Year	<input type="text" value="2013 - 14"/>	Candidate CUPE Unit	<input type="text"/>
Faculty	<input type="text" value="LA&amp;PS"/>	ETF Status	<input type="text"/>
Department	<input type="text" value="SOCIOLOGY"/>	Candidate Name	<input type="text"/>
Course Attributes:		Candidate Payno	<input type="text"/>
Subject	<input type="text" value="- All -"/>	Candidate SISID	<input type="text"/>
Term	<input type="text"/>	Posting Status	<input type="text"/>
Course Level	<input type="text"/>		
Course Number	<input type="text"/>		
Course Title	<input type="text"/>		
Meet Attributes:			
Instructional Format	<input type="text"/>	<input type="checkbox"/> Non-Meet	
Primary Meets Only	<input type="checkbox"/>		
Assignment Attributes:			
Position	<input type="text"/>		
Contract	<input type="text"/>		
Position Title	<input type="text"/>		
<input type="button" value="Search"/> <input type="button" value="Reset"/>			

### Results for Candidates

[Download Search Results](#)

Master Posting #	Term	Fac / Unit	Course	Sec	Meet	Position	# of Assigns/Hours	Candidate	Candidate Status	Grievance Deadline	ETF Status	Actions
M27956	F13-W14	AP / SOCI	AP SOCI 1010 CR= 6.0 IF13-W14 Y API	B	TUTR 01	T1 (Tut Ldr)	1	<a href="#">William Schmitz</a>	Assignment Approved			<a href="#">Create Offer</a>
M27956	F13-W14	AP / SOCI	AP SOCI 1010 CR= 6.0 IF13-W14 Y API	B	TUTR 02	T1 (Tut Ldr)	1	<a href="#">William Schmitz</a>	Assignment Approved			<a href="#">Create Offer</a>

- 7) On the **Results for Candidates** page, click the **Create Offer** link for the candidate whose offer letter should be generated.
- 8) Fill out the Create Offer Letter page. Please note: Not all of the fields present on this screen will be relevant for a particular offer.

- a) **Name:** CUPE resource names are provided to ARM in a "lastname, firstname" format, and ARM will try to pre-populate the first and last name fields. The name field can be manually edited if corrections are required. Title (Mr., Mrs., Dr., etc.) may also be specified by the user, but the Title field is optional.
- b) **Address:** If address data is entered, then an address will be inserted into the header of the offer letter. This is optional.
- c) **Offer Letter Date:** You can pick the date that will be displayed on the offer letter; the default date is the current date.
- d) **Notes:** Any content provided in the Notes section will be inserted into the offer letter. This allows

#### Create Offer Letter

Faculty	LA&PS / SOCIOLOGY		
Session	Fall 2013 / Winter 2014		
Contract Type	CUPE-1		
Name	Title	First	Last
<input type="text" value="Mr. Mrs. Dr. etc."/>	<input type="text" value="Mr."/>	<input type="text" value="William"/>	<input type="text" value="Schmitz"/>
Address	Line 1: <input type="text"/> Line 2: <input type="text"/> City: <input type="text"/> Province: <input type="text"/> Postal Code: <input type="text"/>		
Offer Letter Date	06/11/2013 <input type="button" value="mm/dd/yyyy"/>		
Notes (Appear in Letter)	<input type="text"/>		
Comments (Do NOT Appear in Letter)	<input type="text"/>		

#### Positions

Course	Section	Meet	Position	# of Assigns/Hours	Projected Enrolment	Supplement
<input checked="" type="checkbox"/> SOCI 1010 6.0 Y Introduction to Sociology	B	TUTR 02	T1 (Tut Ldr)	1	25	
Notes: <input type="text"/> Display meeting details on Offer (i.e., daytime/location): <input checked="" type="checkbox"/> Primary meet to include on Offer: <input checked="" type="radio"/> None <input type="radio"/> LECT 01						
<input checked="" type="checkbox"/> SOCI 1010 6.0 Y Introduction to Sociology	B	TUTR 01	T1 (Tut Ldr)	1	25	
Notes: <input type="text"/> Display meeting details on Offer (i.e., daytime/location): <input checked="" type="checkbox"/> Primary meet to include on Offer: <input checked="" type="radio"/> None <input type="radio"/> LECT 01						

the departments to customize/personalize the content of the letter. For example, the Notes content may welcome back an instructor who had previously taught at the University, or extend a welcome to a new instructor.

- e) **Comments:** Comments are recorded in ARM and available to other ARM users, but are not displayed on the offer letter.
- f) **Positions:** By default, ARM shows all outstanding candidate assignments for a candidate within a particular faculty/session/contract type, which will be included in the offer. Particular assignments can be omitted from an offer by unchecking the checkbox for any position that should be omitted from the offer letter.
- 9) Once all of the relevant data has been entered on the Create Offer Letter form, you have the option to generate either a) a Draft offer letter, or b) an Approved offer letter. Any Draft or Approved Offer Letter that has been created can then be viewed, edited or deleted through the **View Offer Letter** page. Note: *Offers should only be deleted if a letter has been created in error and not yet sent to an instructor. Please see the Revoke function below for more information.*

**DRAFT**

UNIT 1 TEACHING ASSISTANTSHIP - OFFER OF APPOINTMENT  
YORK UNIVERSITY

Date: 06/12/2013

Dear **Mr/Ms/Ms/Ms/Ms/Ms**,

On behalf of the Dean, I am pleased to offer you appointment(s) as Teaching Assistant as outlined below, as:

Hiring Unit: Sociology Department  
Faculty: Faculty of Liberal Arts and Professional Studies

1) Position Title: **TA (Tut Lab)** \* Number of Assignments - Hours: 1  
Course: **SOCI 1010 - Introduction to Sociology**  
Meeting Time(s): **M 10:30-11:30 (YK ACE 008)**  
Sect: **Meet: B TUTR 01** Campus: **York**  
Session: **Fall Winter 2013/2014**  
Base Total: **\$3,364.00** \*\* Supplement:  
Vacation Pay: **\$214.36** \*\* Grant as Adj: **As per collective agreement**

2) Position Title: **TA (Tut Lab)** \* Number of Assignments - Hours: 1  
Course: **SOCI 1010 - Introduction to Sociology**  
Meeting Time(s): **M 9:30-10:30 (YK MC 216)**  
Sect: **Meet: B TUTR 02** Campus: **York**  
Session: **Fall Winter 2013/2014**  
Base Total: **\$3,364.00** \*\* Supplement:  
Vacation Pay: **\$214.36** \*\* Grant as Adj: **As per collective agreement**

It should be understood that this offer in total consists of 1,000 Full Teaching Assistantship(s)\*  
Total Value of All Contracts: **\$11,177.12 (includes Grant as Adj)**  
If you have accepted other work for this contract year please provide the following information:  
Assignment: \_\_\_\_\_ Hiring Unit: \_\_\_\_\_ Academic Session: \_\_\_\_\_

\* The present terms and conditions of your appointment, including salary and provision for cancellation of appointments, are as set out in the current Collective Agreement between York University and the Canadian Union of Public Employees, Local 9953. In particular please read Article 10.02.1 for elaboration on your Teaching Assistantship and hours of work.

THIS OFFER IS CONDITIONAL ON FACULTY OF GRADUATE STUDIES APPROVAL AND THE APPOINTEE'S RETENTION OF FULL-TIME GRADUATE STUDENT STATUS AFTER

The PDF version of the draft offer letter contains a DRAFT watermark and has a status of 'Draft'. The PDF version of the approved offer letter is rendered using the York letterhead insignia and has a status of 'published'.

**YORK UNIVERSITY**

UNIT 1 TEACHING ASSISTANTSHIP - OFFER OF APPOINTMENT  
YORK UNIVERSITY

Date: 06/12/2013

Dear **Mr/Ms/Ms/Ms/Ms/Ms**,

On behalf of the Dean, I am pleased to offer you appointment(s) as Teaching Assistant as outlined below, as:

Hiring Unit: Sociology Department  
Faculty: Faculty of Liberal Arts and Professional Studies

1) Position Title: **TA (Tut Lab)** \* Number of Assignments - Hours: 1  
Course: **SOCI 1010 - Introduction to Sociology**  
Meeting Time(s): **M 10:30-11:30 (YK ACE 008)**  
Sect: **Meet: B TUTR 01** Campus: **York**  
Session: **Fall Winter 2013/2014**  
Base Total: **\$3,364.00** \*\* Supplement:  
Vacation Pay: **\$214.36** \*\* Grant as Adj: **As per collective agreement**

2) Position Title: **TA (Tut Lab)** \* Number of Assignments - Hours: 1  
Course: **SOCI 1010 - Introduction to Sociology**  
Meeting Time(s): **M 9:30-10:30 (YK MC 216)**  
Sect: **Meet: B TUTR 02** Campus: **York**  
Session: **Fall Winter 2013/2014**  
Base Total: **\$3,364.00** \*\* Supplement:  
Vacation Pay: **\$214.36** \*\* Grant as Adj: **As per collective agreement**

It should be understood that this offer in total consists of 1,000 Full Teaching Assistantship(s)\*  
Total Value of All Contracts: **\$11,177.12 (includes Grant as Adj)**  
If you have accepted other work for this contract year please provide the following information:  
Assignment: \_\_\_\_\_ Hiring Unit: \_\_\_\_\_ Academic Session: \_\_\_\_\_

\* The present terms and conditions of your appointment, including salary and provision for cancellation of appointments, are as set out in the current Collective Agreement between York University and the Canadian Union of Public Employees, Local 9953. In particular please read Article 10.02.1 for elaboration on your Teaching Assistantship and hours of work.

THIS OFFER IS CONDITIONAL ON FACULTY OF GRADUATE STUDIES APPROVAL AND THE APPOINTEE'S RETENTION OF FULL-TIME GRADUATE STUDENT STATUS AFTER

- a) When you click **Create Draft Offer Letter** button from the **Create Offer Letter** page, the **View Offer Letter** page will appear with the status as **Draft**. The following options are available.

- **View PDF:** Clicking the View PDF link on that page will download a PDF version of the draft offer letter.
- **Edit Offer:** This option allows you to make updates and/or save current offer as a draft offer or an approved offer.
- **Delete Offer Letter:** This option allows you to delete the draft offer letter. Offer letters should only be deleted if a letter has been created in error and not yet sent to an instructor.

**View Offer Letter**

Status: **Draft**

[View PDF](#) [Edit Offer](#) [Delete Offer Letter](#)

If you go back to the **ARM Task View** you will notice that under **Offer Letter: CUPE-1/2/E**, the count for **Draft** has been increased by the number of offer you created. Click **Draft** link to get to **Results for Offers: CUPE-1/2/E** page and you will see the record of the draft offer letter just created. Click the offer number will get you to **View Offer Letter** page with the view; edit and delete offer letter options.

Select: [All](#), [None](#) Actions: [Bulk Record Offer Acceptance](#) [Bulk Approve Draft Offers](#)

#### Results for Offers: CUPE-1/2/E

[Download Entered A](#)

	Session	Fac / Unit	Status	Instructor	Offer	Course(s)	Contract
<input type="checkbox"/>	F13-W14	AP / SOCI	<b>Draft</b>	J. [REDACTED]	<b>19</b>	AP SOCI 1010 CR= 6.0 IF13-W14 Y API B TUTR 01 AP SOCI 1010 CR= 6.0 IF13-W14 Y API B TUTR 02	CUPE-1



- b) When you click **Create Approved Offer Letter** button from the **Create Offer Letter** page, the **View Offer Letter** page will appear with the status as **Published**. The following options are available.
- **View PDF**: Clicking the View PDF link on that page will download a PDF version of the approved offer letter.
  - **Edit Offer**: This option allows you to make updates and/or save current offer as a draft offer or an approved offer.
  - **Delete Offer Letter**: This option allows you to delete the approved offer letter. Offer letters should only be deleted if a letter has been created in error and not yet sent to an instructor. Delete offer letter will not remove candidate from the posting assignment. . Once Offer Letter is

**View Offer Letter**

Status: Published

[View PDF](#)
[Edit Offer](#)
[Delete Offer Letter](#)
[Record Offer](#)
[Revoke Offer Letter](#)

deleted, you will not able to find the record of Offer Letter in the search results.

- **Record Offer**: This option allows you to record the received date of particular assignments that have been accepted or declined by the instructor. If an offer letter contained more than one position, you must record the acceptance/rejection of each position independently. You can also capture any assignment-specific comments in the comments box.

#### Accepted Positions

Unselect any rejected positions below.

Accept?	Comments	Course	Section	Meet	Position	# of Assignments/Hours	Projected Enrolment	Supplement
Accepted		SOCI 1010 6.0 Y Introduction to Sociology	B	TUTR 03	T1 (Tut Ldr)	1	25	
Declined		SOCI 1010 6.0 Y Introduction to Sociology	B	TUTR 04	T1 (Tut Ldr)	1	25	
On Hold								

[Accept Offer and Create ETF](#)
[Accept Offer Only](#)

If the offer is declined, you must remove the candidate through **Posting Assignment Details** page, and then proceed to assign a new candidate either on the same page, or as candidates are normally assigned. It is important that units record the offer letter as it may impact a FGS funding commitments and instructor information in SIS.

Once you record the response for each assignment, you need choose to **Accept Offer Only** or **Accept Offer and Create ETF**. Choose **Accept Offer Only**, the View Offer Letter page will appear. Under the **Positions** section, the status for each assignment is updated.

#### Positions

Status	ID	Course	Section	Meet	Position	# of Assigns/Hours	Projected Enrolment	Supplement	ETF Status	Action
Accepted	137720	SOCI 1010 6.0 Y Introduction to Sociology	B	TUTR 03	T1 (Tut Ldr)	1	25			Decline Accepted Position
Display meeting details on Offer (i.e., day/time/location): T Primary meet to include on Offer: None										
Declined	137721	SOCI 1010 6.0 Y Introduction to Sociology	B	TUTR 04	T1 (Tut Ldr)	1	25			
Display meeting details on Offer (i.e., day/time/location): T Primary meet to include on Offer: None										

Please note if a position is recorded as **On Hold**, the status for CUPE workflow of the meet will change to **Offer On Hold**; if a position is recorded as **Declined**, status for the CUPE workflow of the meet will change to No Candidate and the **Instructor Name** of the assignment will change to **\*\*(CUPE Posting)\*\*** where you can click to get to the **Posting Assignment Details** to Assign Candidate.;

If a position is recorded as **Accepted**, the status for CUPE workflow of the meet will change to **Offer Accepted** and you will notice the name under the **Instructor Name** is in regular font style and **not** italicized with two leading and trailing asterisks. Please note once the Offer Letter is recorded, the **Revoke Offer Letter** option will not be available anymore. You can only **Decline the Accepted Position** from the **Action** column.

Choose **Accept Offer and Create ETF**, the **Create ETF Request** page will appear. You will start the ETF Workflow, please follow the instruction of the corresponding documentation to complete this process.

To check offer letters that have been recorded, go back to the **ARM Task View** you will notice that under **Offer Letter: CUPE-1/2/E**, the count for status as **Received** has been increased by the number of offer you recorded.

- **Revoke Offer Letter:** Hiring Unit can revoke the offer if the assigned Candidate changes status and does not qualify for the CUPE-1 position to void offer. User needs to be aware that if the appointment has been offered in writing and the Hiring Unit decides to cancel the appointment for reasons of insufficient enrolment, and no reasonable and equivalent alternative position is found for the assigned part-time instructor, he/she shall receive one-eighth of the salary for the position as severance pay. Please refer to collective agreement 12.16.1 for more details. Note: Offers that are extended and subsequently revoked should use this Revoke option, rather than deleting the offer. Offers should only be deleted if a letter has been created in error and not yet sent to an instructor. Click **Revoke Offer Letter** to bring up a dialog where you can describe why the offer has been revoked, and document that an offer has been revoked by the hiring unit, and is no longer valid.



The screenshot shows a web-based dialog box titled "Revoke Offer Letter". The dialog contains a section with the same title, followed by a "Comments:" label and a large text input area. At the bottom right of the dialog, there are two red buttons labeled "Submit" and "Cancel".

To check offer letters that have been revoked, go back to the **ARM Task View** you will notice that under **Offer Letter: CUPE-1/2/E**, the count for status as **Revoked** has been increased by the number of offer you revoked. Click **Revoked** link to get to **Results for Offers: CUPE-1/2/E** page and you will see the record of the offer letter just revoked. Click the Offer number will get you to **View Offer Letter** page with the view, delete offer letter options. Once the offer is revoked, the assignment status automatically changes to **No Candidate**, and Candidate's status changes to **Cancelled Because Offer Revoked**. If the meet is not cancelled, user needs to go back to the **Posting Assignment Details** page to **Assign Candidate**.

## Comparable Criteria Using Task View and Universal Search

### ARM Task View

#### Task: To Assign Candidate

##### ARM Task View

[CUPE Workflow Visualization](#)

Forecast Positions	Manage Candidates
Manage Postings	Candidate Status Count
Manage Candidates	No Candidate 1 151
Non-Posted Positions	Candidate Submitted 19
NRAs	Assignment Approved 2
FGS Approvals	Added to NSA 12
Offer Letters: CUPE-1/2/E	Offer Drafted 2
ETF Workflow	Offer Published 32
CSC Workflow	Offer On Hold 0
Other Instructor Costs	Offer Accepted 32
Post-Snapshot Changes	Offer Declined 0
Sabbaticals	Offer Revoked 0
Course Releases	TOTAL 241
Dept. Administrative Tasks	

##### Actions

Create posting from: [meet assignments](#) [non-meet assignments](#)

Fiscal Year: 2013 - 14  
 Faculty: LA&PS  
 Department: SOCIOLOGY  
 Term:

### CUPE-1

##### ARM Universal Search [Hide](#)

Search For: [Candidates](#) [Show Extended Results](#)

Fiscal Year: 2013 - 14  
 Faculty: LA&PS  
 Department: SOCIOLOGY

Course Attributes:  
 Subject: - All -  
 Term:   
 Course Level:   
 Course Number:   
 Course Title:

Meet Attributes:  
 Instructional Format: ☐ Non-Meet  
 Primary Meets Only: ☐

Assignment Attributes:  
 Position:   
 Contract:   
 Position Title:

Candidate Attributes:  
 Candidate Status: No Candidate Identified  
 Candidate CUPE Unit: CUPE-1  
 ETF Status:   
 Candidate Name:   
 Candidate Payno:   
 Candidate SISID:   
 Posting Status:

[Search](#) [Reset](#)

### CUPE-2

##### ARM Universal Search [Hide](#)

Search For: [Candidates](#) [Show Extended Results](#)

Fiscal Year: 2013 - 14  
 Faculty: LA&PS  
 Department: SOCIOLOGY

Course Attributes:  
 Subject: - All -  
 Term:   
 Course Level:   
 Course Number:   
 Course Title:

Meet Attributes:  
 Instructional Format: ☐ Non-Meet  
 Primary Meets Only: ☐

Assignment Attributes:  
 Position:   
 Contract:   
 Position Title:

Candidate Attributes:  
 Candidate Status: No Candidate Identified  
 Candidate CUPE Unit: CUPE-2  
 ETF Status:   
 Candidate Name:   
 Candidate Payno:   
 Candidate SISID:   
 Posting Status:

[Search](#) [Reset](#)

## To Create a Draft Offer Letter

##### ARM Task View

[CUPE Workflow Visualization](#)

Forecast Positions	Offer Letters: CUPE-1/2/E
Manage Postings	Status Count
Manage Candidates	Draft 1
Non-Posted Positions	Published 18
NRAs	Received 31
FGS Approvals	Revoked 2
Offer Letters: CUPE-1/2/E	TOTAL 52
ETF Workflow	
CSC Workflow	
Other Instructor Costs	
Post-Snapshot Changes	
Sabbaticals	
Course Releases	
Dept. Administrative Tasks	

##### Actions

Create an offer letter for: [CUPE-1](#) [CUPE-2](#)

Fiscal Year: 2013 - 14  
 Faculty: LA&PS  
 Department: SOCIOLOGY  
 Term:

### CUPE-1

##### ARM Universal Search [Hide](#)

Search For: [Candidates](#) [Show Extended Results](#)

Fiscal Year: 2013 - 14  
 Faculty: LA&PS  
 Department: SOCIOLOGY

Course Attributes:  
 Subject: - All -  
 Term:   
 Course Level:   
 Course Number:   
 Course Title:

Meet Attributes:  
 Instructional Format: ☐ Non-Meet  
 Primary Meets Only: ☐

Assignment Attributes:  
 Position:   
 Contract:   
 Position Title:

Candidate Attributes:  
 Candidate Status: CUPE-1: Approved  
 Candidate CUPE Unit:   
 ETF Status:   
 Candidate Name:   
 Candidate Payno:   
 Candidate SISID:   
 Posting Status:

[Search](#) [Reset](#)

### CUPE-2

ARM Universal Search [Hide](#)

Search For: 

Candidates

Show Extended Results

Fiscal Year: 2013 - 14

Faculty: LA&PS

Department: SOCIOLOGY

Course Attributes:

Subject: - All -

Term:

Course Level:

Course Number:

Course Title:

Meet Attributes:

Instructional Format:

Primary Meets Only:

Assignment Attributes:

Position:

Contract:

Position Title:

Search

Reset

Candidate Attributes:

Candidate Status: CUPE-2: NRA Published

Candidate CUPE Unit:

ETF Status:

Candidate Name:

Candidate Payno:

Candidate SISID:

Posting Status:

To Publish an Offer Letter

ARM Task View

[CUPE Workflow Visualization](#)

Forecast Positions

Manage Postings

Manage Candidates

Non-Posted Positions

NRA's

FGS Approvals

Offer Letters: CUPE-1/2/E

Status	Count
Draft	1
Published	18
Received	31
Revoked	2
TOTAL	52

Offer Letters: CUPE-1/2/E

Actions

Create an offer letter for [CUPE-1](#) [CUPE-2](#)

ETF Workflow

CSC Workflow

Other Instructor Costs

Post-Snapshot Changes

Sabbaticals

Course Releases

Dept. Administrative Tasks

Fiscal Year: 2013 - 14

Faculty: LA&PS

Department: SOCIOLOGY

Term:

CUPE-1

ARM Universal Search [Hide](#)

Search For: 

Offers: CUPE-1/2/E

Show Extended Results

Fiscal Year: 2013 - 14

Faculty: LA&PS

Department: SOCIOLOGY

Course Attributes:

Subject: - All -

Term:

Course Level:

Course Number:

Course Title:

Meet Attributes:

Instructional Format:

Primary Meets Only:

Assignment Attributes:

Position:

Contract:

Position Title:

Search

Reset

Candidate Attributes:

Candidate Status:

Candidate CUPE Unit: CUPE-1

ETF Status:

Candidate Name:

Candidate Payno:

Candidate SISID:

Posting Status:

Offer Attributes:

Offer Status: Draft

Offer Number:

CUPE-2

ARM Universal Search [Hide](#)

Search For: 

Offers: CUPE-1/2/E

Show Extended Results

Fiscal Year: 2013 - 14

Faculty: LA&PS

Department: SOCIOLOGY

Course Attributes:

Subject: - All -

Term:

Course Level:

Course Number:

Course Title:

Meet Attributes:

Instructional Format:

Primary Meets Only:

Assignment Attributes:

Position:

Contract:

Position Title:

Search

Reset

Candidate Attributes:

Candidate Status:

Candidate CUPE Unit: CUPE-2

ETF Status:

Candidate Name:

Candidate Payno:

Candidate SISID:

Posting Status:

Offer Attributes:

Offer Status: Draft

Offer Number:

To Record an Offer

ARM Task View

CUPE Workflow Visualization

Forecast Positions

Manage Postings

Manage Candidates

Non-Posted Positions

NRAs

FGS Approvals

Offer Letters: CUPE-1/2/E

ETF Workflow

CSC Workflow

Other Instructor Costs

Post-Snapshot Changes

Sabbaticals

Course Releases

Dept Administrative Tasks

Offer Letters: CUPE-1/2/E

Status	Count
Draft	0
Published	18
Received	52
Revoked	2
TOTAL	52

Actions

Create an offer letter for: CUPE-1 CUPE-2

Fiscal Year

2013 - 14

Faculty

LA&PS

Department

SOCIOLOGY

Term

CUPE-1

ARM Universal Search Hide

Search For:

Offers: CUPE-1/2/E

Show Extended Results

Fiscal Year

2013 - 14

Faculty

LA&PS

Department

SOCIOLOGY

Session

Course Attributes:

Subject

- All -

Term

Course Level

Course Number

Course Title

Meet Attributes:

Instructional Format

Non-Meet

Primary Meets Only

☐

Assignment Attributes:

Position

Contract

Position Title

Search

Reset

Candidate Attributes:

Candidate Status

Candidate CUPE Unit

CUPE-1

ETF Status

Candidate Name

Candidate Payno

Candidate SISID

Posting Status

Offer Attributes:

Offer Status

Published

Offer Number

CUPE-2

ARM Universal Search Hide

Search For:

Offers: CUPE-1/2/E

Show Extended Results

Fiscal Year

2013 - 14

Faculty

LA&PS

Department

SOCIOLOGY

Session

Course Attributes:

Subject

- All -

Term

Course Level

Course Number

Course Title

Meet Attributes:

Instructional Format

Non-Meet

Primary Meets Only

☐

Assignment Attributes:

Position

Contract

Position Title

Search

Reset

Candidate Attributes:

Candidate Status

Candidate CUPE Unit

CUPE-2

ETF Status

Candidate Name

Candidate Payno

Candidate SISID

Posting Status

Offer Attributes:

Offer Status

Published

Offer Number

ARM Task View

CUPE Workflow Visualization

Forecast Positions

Manage Postings

Manage Candidates

Non-Posted Positions

NRAs

FGS Approvals

Offer Letters: CUPE-1/2/E

ETF Workflow

CSC Workflow

Other Instructor Costs

Post-Snapshot Changes

Sabbaticals

Course Releases

Dept Administrative Tasks

Offer Letters: CUPE-1/2/E

Status	Count
Draft	0
Published	18
Received	52
Revoked	2
TOTAL	52

Actions

Create an offer letter for: CUPE-1 CUPE-2

Fiscal Year

2013 - 14

Faculty

LA&PS

Department

SOCIOLOGY

Term

CUPE-1

ARM Universal Search Hide

Search For:

Offers: CUPE-1/2/E

Show Extended Results

Fiscal Year

2013 - 14

Faculty

LA&PS

Department

SOCIOLOGY

Session

Course Attributes:

Subject

- All -

Term

Course Level

Course Number

Course Title

Meet Attributes:

Instructional Format

Non-Meet

Primary Meets Only

☐

Assignment Attributes:

Position

Contract

Position Title

Search

Reset

Candidate Attributes:

Candidate Status

Candidate CUPE Unit

CUPE-1

ETF Status

Candidate Name

Candidate Payno

Candidate SISID

Posting Status

Offer Attributes:

Offer Status

Published

Offer Number

CUPE-2

ARM Universal Search [Hide](#)

Search For: Offers: CUPE-1/2/E

Fiscal Year: 2013 - 14

Faculty: LA&PS

Department: SOCIOLOGY

Session:

Course Attributes:

Subject: - All -

Term:

Course Level:

Course Number:

Course Title:

Meet Attributes:

Instructional Format:

Primary Meets Only: ☐

Assignment Attributes:

Position:

Contract:

Position Title:

Candidate Attributes:

Candidate Status:

Candidate CUPE Unit: CUPE-2

ETF Status:

Candidate Name:

Candidate Payno:

Candidate SISID:

Posting Status:

Offer Attributes:

Offer Status: Published

Offer Number:

Search

Reset

## CUPE 2

Please note, before an offer letter can be created for CUPE-2, the candidate must first be assigned and a "Notice of Recommended Appointment" (NRA) must be generated and published.

- 1) In ARMS, click the **TASK** menu link to bring up the **ARM Task View** page.

[HOME](#) **[TASKS](#)** [SEARCH](#) | [BUDGETING](#) | [REPORTS](#) | [ADMIN](#) | [HELP](#) | [ASK ARM](#)

### ARM Home

- 2) In the **ARM Task View** you can choose the search criteria by selecting:

- a) Fiscal Year
- b) Faculty
- c) Department
- d) Term

- 3) Click Offer Letters: CUPE-1/2/3 from the Task list

- 4) Click **Create an offer letter for: CUPE-2** under the **Actions** to get search results that meet your criteria in the **Results for Candidates** page.

- 5) Click Show link if you need to check the

### ARM Universal Search [Show](#)

- 6) You will see the criteria set through ARM Task View.

[HOME](#) | [TASKS](#) | [SEARCH](#) | [BUDGETING](#) | [REPORTS](#) | [ADMIN](#) | [HELP](#) | [ASK ARM](#)

#### ARM Task View

[CUPE Workflow Visualization](#)

Forecast Positions
Manage Postings
Manage Candidates
Non-Posted Positions
NRAs
FGS Approvals
Offer Letters: CUPE-1/2/E
ETF Workflow
CSC Workflow
Other Instructor Costs
Post-Snapshot Changes
Sabbaticals
Course Releases
Dept. Administrative Tasks

#### Offer Letters: CUPE-1/2/E

Status	Count
<a href="#">Draft</a>	0
<a href="#">Published</a>	1
<a href="#">Received</a>	26
<a href="#">Revoked</a>	0
<b>TOTAL</b>	27

#### 3 ions

Create an offer letter for [CUPE-1](#) [CUPE-2](#) [CUPE-3](#)

#### ARM Universal Search [Hide](#)

Search For: Candidates

Fiscal Year: 2013 - 14

Faculty: LA&PS

Department: LANGUAGES

Course Attributes:

Subject: - All -

Term:

Course Level:

Course Number:

Course Title:

Meet Attributes:

Instructional Format:

Primary Meets Only: ☐

Assignment Attributes:

Position:

Contract:

Position Title:

Candidate Attributes:

Candidate Status: CUPE-2: NRA Published

Candidate CUPE Unit:

ETF Status:

Candidate Name:

Candidate Payno:

Candidate SISID:

Posting Status:

Search

Reset

- a. Search For: **Candidates**
- b. Fiscal Year
- c. Faculty
- d. Department
- e. Candidate Status: **CUPE-2: NRA Published**

You can narrow down search results even further by setting the appropriate:

- **Course Attributes**
- **Meet Attributes**
- **Assignment Attributes**

Click **Hide** to close the search criteria. If you know the criteria to search for, you can set the criteria directly using **ARM Universal Search** without going through the **ARM Task View**.

- 7) On the **Results for Candidates** page, click the **Create Offer** link for the candidate whose offer letter should be generated.

#### Results for Candidates

[Download Search Results](#)

Master Posting #	Term	Fac / Unit	Course	Sec	Meet	Position	# of Assigns/ Hours	Candidate	Candidate Status	Grievance Deadline	ETF Status	Actions
M27428	F13-W14	AP / DLLL	AP ARB 1000 CR= 6.0 IF13-W14 Y APJ	A	LGCL 01	Course Director	1	Abdullah Al-Harbi	Added to NRA 06/12/2013	07/10/2013		<a href="#">Create Offer</a> <a href="#">Convert to LSTA</a>

Please note for CUPE-2 Offer, if the **Grievance Deadline** has not yet passed, you can still generate an offer letter, but will be prompted with the following warning dialog.

The deadline for submitting a query/grievance has not offer letter?

- 8) Fill out the **Create Offer Letter** page. Please note: Not all of the fields present on this screen will be relevant for a particular offer.

- a) **Name:** CUPE resource names are provided to ARM in a "lastname, firstname" format and ARM will try to pre-populate the first and last name fields. The name field can be manually edited if corrections are required. Title (Mr., Mrs., Dr., etc.) may also be specified by the user, but the Title field is optional.
- b) **Address:** If address data is entered, then an address will be inserted into the header of the offer letter. This is optional.
- c) **Offer Letter Date:** You can pick the date that will be displayed on the offer letter; the default date is the next day of the Grievance Deadline.
- d) **Requested Response Date:** A

#### Create Offer Letter

Faculty	LA&PS / LANGUAGES		
Session	Fall 2013 / Winter 2014		
Contract Type	CUPE-2		
a Name	Title	First	Last
	Mr, Mrs, Dr, etc.		
b Address	Line 1:		
	Line 2:		
	City:		
	Province:		
	Postal Code:		
c Offer Letter Date	07/11/2013	(mm/dd/yyyy)	
d Requested Response Date		(mm/dd/yyyy, optional)	
e Notes (Appear in Letter)			
f Comments (Do NOT Appear in Letter)			

#### g Positions

Course	Section	Meet	Posi
<input checked="" type="checkbox"/> ARB 1000 6.0 Y Introduction to Modern Standard Arabic	A	LGCL 01	Cou
Notes:			
Display meeting details on Offer (i.e., day/time/location):	<input checked="" type="checkbox"/>		

[Create Draft Offer Letter](#)

[Create Approved Offer Letter](#)



requested response date for the offer can be specified. This is optional, and is only applicable to CUPE-2 positions. (See CUPE Articles 12.12 and 12.13)

- e) **Notes:** Any content provided in the Notes section will be inserted into the offer letter. This allows the departments to customize/personalize the content of the letter. For example, the Notes content may welcome back an instructor who had previously taught at the University, or extend a welcome to a new instructor.
- f) **Comments:** Comments are recorded in ARM and available to other ARM users, but are not displayed on the offer letter.
- g) **Positions:** By default, ARM shows all outstanding candidate assignments for a candidate within a particular faculty/session/contract type, which will be included in the offer. Particular assignments can be omitted from an offer by unchecking the checkbox for any position that should be omitted from the offer letter.
- 9) Once all of the relevant data has been entered on the Create Offer Letter form, you have the option to generate either a) a Draft offer letter, or b) an Approved offer letter. Any Draft or Approved Offer Letter that has been created can then be viewed, edited or deleted from the **View Offer Letter** page. Note: *Offers should only be deleted if a letter has been created in error and not yet sent to an instructor. Please see the Revoke function below for more information.*

**DRAFT**

YORK UNIVERSITY  
CONTRACT TEACHING - OFFER OF APPOINTMENT  
CUPE UNIT 2

Date: 07/11/2013

Dear **Mr. G. G. G.**

On behalf of the Dean, I am pleased to offer you the contract teaching appointment(s) described below, as:  
Hiring Unit: Department of Languages, Literature, and Linguistics  
Faculty: Faculty of Liberal Arts and Professional Studies

1) Position Title: Course Director	Type: 1
Course: ABB 1000	Number of Assignments/Hours*: 1
Session: Fall/Winter 2013/2014	Meeting Times(s): T R 14:30-16:30 (YKR 8127)
Seat: Meet: A LOCL 01	Campus: York
Salary: \$16,046.00	
Vacation Pay: \$641.84	TOTAL: \$16,687.84

Total Value of All Contracts: \$16,687.84

\* For Type 1 and 2 positions, this refers to the number of teaching/tutorial groups.  
For Type 3 positions, this refers to the number of hours in the appointment.

The general terms and conditions of your appointment, including salary and provision for cancellation of appointments, are as set out in the current Collective Agreement between York University and the Canadian Union of Public Employees, Local 993 (CUPE 993), Unit 2.

If you accept this offer of appointment, and its terms pursuant to this Agreement, please complete, sign and promptly return the attached copy of this form, along with a valid cheque, to me by July 26, 2013. Any delay in responding may delay your first salary payment.

Yours sincerely,

Peter Gordan  
Chair, Department of Languages, Literature, and Linguistics  
3561 Ross Building  
Keele Campus  
York University  
4700 Keele Street  
Toronto, Ontario M3J1P3

Offer # O-FW2013-APPELL-3

**DRAFT**

The PDF version of the draft offer letter contains a DRAFT watermark and has a status of 'in progress'. The PDF version of the approved offer letter is rendered using the York letterhead insignia and has a status of 'published'.

YORK UNIVERSITY  
CONTRACT TEACHING - OFFER OF APPOINTMENT  
CUPE UNIT 2

Date: 07/11/2013

Dear **Mr. G. G. G.**

On behalf of the Dean, I am pleased to offer you the contract teaching appointment(s) described below, as:  
Hiring Unit: Department of Languages, Literature, and Linguistics  
Faculty: Faculty of Liberal Arts and Professional Studies

1) Position Title: Course Director	Type: 1
Course: ABB 1000	Number of Assignments/Hours*: 1
Session: Fall/Winter 2013/2014	Meeting Times(s): T R 14:30-16:30 (YKR 8127)
Seat: Meet: A LOCL 01	Campus: York
Salary: \$16,046.00	
Vacation Pay: \$641.84	TOTAL: \$16,687.84

Total Value of All Contracts: \$16,687.84

\* For Type 1 and 2 positions, this refers to the number of teaching/tutorial groups.  
For Type 3 positions, this refers to the number of hours in the appointment.

The general terms and conditions of your appointment, including salary and provision for cancellation of appointments, are as set out in the current Collective Agreement between York University and the Canadian Union of Public Employees, Local 993 (CUPE 993), Unit 2.

If you accept this offer of appointment, and its terms pursuant to this Agreement, please complete, sign and promptly return the attached copy of this form, along with a valid cheque, to me by July 26, 2013. Any delay in responding may delay your first salary payment.

Yours sincerely,

Peter Gordan  
Chair, Department of Languages, Literature, and Linguistics  
3561 Ross Building  
Keele Campus  
York University  
4700 Keele Street  
Toronto, Ontario M3J1P3

Offer # O-FW2013-APPELL-3

- a) When you click **Create Draft Offer Letter** button from the **Create Offer Letter** page, the View Offer Letter page will appear with the status as **Draft**. The following options are available.
  - View PDF:** Clicking the View PDF link on that page will download a PDF version of the draft offer letter.
  - Edit Offer:** This option allows you to make updates and/or save current offer as a draft offer or an approved offer.
  - Delete Offer Letter:** This option allows you to delete the draft offer letter. Offer letters should only be deleted if a letter has been created in error and not yet sent to an instructor.

**View Offer Letter**

Status: **Draft**

[View PDF](#) [Edit Offer](#) [Delete Offer Letter](#)

If you go back to the **ARM Task View** you will notice that under **Offer Letter: CUPE-1/2/E**, the count for **Draft** has been increased by the number of offer you created. Click **Draft** link to get to **Results for Offers: CUPE-1/2/E** page and you will see the

record of the draft offer letter just created. Click the offer number will get you to **View Offer Letter** page with the view, edit and delete offer letter options.

Select: [All](#), [None](#) Actions: [Bulk Record Offer Acceptance](#) [Bulk Approve Draft Offers](#)

#### Results for Offers: CUPE-1/2/E

[Download Enter](#)

	Session	Fac / Unit	Status	Instructor	Offer	Course(s)	Contract
<input type="checkbox"/>	F13-W14	AP / DLLL	Draft	<a href="#">Andrea Haddad</a>	<a href="#">...-3</a>	<a href="#">AP ARB 1000 CR= 6.0 IF13-W14 Y APIA LGCL 01</a>	CUPE-2

- b) When you click **Create Approved Offer Letter** button from the **Create Offer Letter** page, the **View Offer Letter** page will appear with the status as **Published**. The following options are

**View Offer Letter**  

Status: Published

[View PDF](#)
[Edit Offer](#)
[Delete Offer Letter](#)
[Record Offer](#)
[Revoke Offer Letter](#)

available.

- **View PDF:** Clicking the View PDF link on that page will download a PDF version of the approved offer letter.
- **Edit Offer:** This option allows you to make updates and/or save current offer as a draft offer or an approved offer.
- **Delete Offer Letter:** This option allows you to delete the approved offer letter. Offer letters should only be deleted if a letter has been created in error and not yet sent to an instructor. Delete offer letter will not remove candidate from the posting assignment. Once Offer Letter is deleted, you will not able to find the record of Offer Letter through **Offer Letters: CUPE -1/2/E Task item in the ARM Task View.**
- **Record Offer:** This option allows you to record the received date of particular assignments that have been accepted or declined by the instructor. If an offer letter contained more than one position, you must record the acceptance/rejection of each position independently. You can also capture any assignment-specific comments in the comments box.

#### Accepted Positions

Unselect any rejected positions below.

Accept?	Comments	Course	Section	Meet	Position	# of Assignments/Hours	Projected Enrolment
Accepted		ARB 1000 6.0 Y Introduction to Modern Standard Arabic	A	LGCL 01	Course Director	1	30
Accepted							
Declined							
On Hold							

[and Create ETF](#) [Accept Offer Only](#)

If the offer is declined, you must remove the candidate through **Posting Assignment Details** page, and then proceed to assign a new candidate either on the same page, or as candidates are normally assigned. . Please be mindful that you will have to generate an NRA before you can create another offer letter. It is important that units record the offer letter per deadline specified under CUPE-2 collective agreement 12.13.1 and 12.13.2

Once you record the response for each assignment, you need choose to **Accept Offer Only** or **Accept Offer and Create ETF**. Choose **Accept Offer Only**, the View Offer Letter page will appear. Under the **Positions** section, the status for each assignment is updated.

#### Positions

Status	ID	Course	Section	Meet	Position	# of Assigns/Hours	Projected Enrolment	ETF Status	Action
Accepted	129073	ARB 1000 6.0 Y Introduction to Modern Standard Arabic	A	LGCL 01	Course Director	1	30		<a href="#">Decline Accepted Position</a>
Display meeting details on Offer (i.e., day/time/location): T									

Please note if a position is recorded as **On Hold**, the status for CUPE workflow of the meet will change to **Offer On Hold**; if a position is recorded as **Declined**, status for the

CUPE workflow of the assignment will change to No Candidate and the **Instructor Name** of the assignment will change to **\*\*(CUPE Posting)\*\*** where you can click to get to the **Posting Assignment Details** to Assign Candidate.

If a position is recorded as **Accepted**, the status for CUPE workflow of the assignment will change to **Offer Accepted** and you will notice name under the **Instructor Name** is in regular font style and **not** italicized with two leading and trailing asterisk which means the candidate has become assigned instructors for the particular assignment. Please note once the Offer Letter is recorded, the **Revoke Offer Letter** option will not be available anymore. You can only **Decline the Accepted Position** from the **Action** column.

#### Sections and Meets

Meet Details					Instructor Details									
Sec	Sect Resp Fac / Unit	Format / Group # (Click to assign)	Enrolment (Current / Max)	Day/Time	Instructor Name	Contract Type	Position Type	# of Assigns	# of Hours	CSC Hours	Contract Start Date	Contract End Date	CUPE Workflow	ETF Workflow
A	AP / DLLL	LGCL 01 *	1 / 30	R T 14:30-16:30	<del>Assigned Instructors</del>	CUPE-2	Course Director	1			09/01/2013	04/30/2014	Offer Accepted	
B	AP / DLLL	LGCL 01 *	0 / 30	R T 8:30-10:30	<b>**(CUPE Posting)**</b>	CUPE-2	Course Director	1			09/01/2013	04/30/2014	No Candidate	

Choose **Accept Offer and Create ETF**, the **Create ETF Request** page will appear. You will start the ETF Workflow, please follow the instruction of the corresponding documentation to complete this process.

To check offer letters that have been recorded, go back to the **ARM Task View** you will notice that under **Offer Letter: CUPE-1/2/E**, the count for status as **Received** has been increased by the number of offer you recorded.

- **Revoke Offer Letter:** User needs to be aware that if the appointment has been offered in writing and the Hiring Unit decides to cancel the appointment for reasons of insufficient enrolment, and no reasonable and equivalent alternative position is found for the assigned part-time instructor, he/she shall receive one-eighth of the salary for the position as severance pay. Please refer to collective agreement 12.16.1 for more details. Note: Offers that are extended and subsequently revoked should use this Revoke option, rather than deleting the offer. Offers letters should only be deleted if a letter has been created in error and not yet sent to an instructor.

Click **Revoke Offer Letter** to bring up a dialog where you can describe why the offer has been revoked, and document that an offer has been revoked by the hiring unit, and is no longer valid.

Revoke Offer Letter

Revoke Offer Letter

Comments:

Submit

Cancel

To check offer letters that have been revoked, go back to the **ARM Task View** you will notice that under **Offer Letter: CUPE-1/2/E**, the count for status as **Revoked** has been increased by the number of offer you revoked. Click **Revoked** link to get to **Results for Offers: CUPE-1/2/E** page and you will see the record of the offer letter just revoked. Click the Offer number will get you to **View Offer Letter** page with the view, delete offer letter options.

Once the offer is revoked, the assignment status automatically changes to **No Candidate**, and Candidate's status changes to **Cancelled Because Offer Revoked**. If the meet is not cancelled, user needs to go back to the **Posting Assignment Details** page to **Assign Candidate**

## ETF (Employee Transaction Form) Workflow

### GENERATING AN ETF WHILE RECORDING AN OFFER FOR CANDIDATE

In this new process users now can create an ETF request while recording an accepted offer for either a CUPE-1, CUPE-2 or some CUPE-E appointments in one single step:

**Accepted Positions**

Unselect any rejected positions below.

Accept?	Comments	Course	Section	Meet	Position	# of Assignments/Hours	Projected Enrolment	Supplement
Accepted ▾		ECON 2350 3.0 S2 Intermediate Microeconomic Theory II	B	LECT 01	T3 (Mrk/Grd)	135	123	

**Accept Offer and Create ETF** **Accept Offer Only**

On the View Offer Letter Screen do the following:

1. Chose the “**Accept Offer and Create ETF**”
2. Once clicked the **Create ETF Request** screen will appear.

For CUPE-E, YUFA overload and YUFA Retirees you must have assigned a candidate prior to creating the ETF request.

Please note: Hiring units should record accepted offers and generate ETFs on a daily basis, as offers are received in order to avoid bottlenecks and payment delays.

See “**Create ETF Request**” below for continued process.

### GENERATING AN ETF BY USING THE TASK TAB FOUND ON THE ARM APPLICATION

HOME | TASKS | SEARCH | BUDGETING | REPORTS | ADMIN | HELP | ASK ARM

### ARM Task View

[CUPE Workflow Visualization](#)

Fiscal Year: 2013 - 14  
 Faculty: LA&PS  
 Department:   
 Term:

Forecast Positions	ETF Workflow	
	Type	Count
Manage Postings	No ETF Yet	321
Manage Candidates	Created in ARM	1028
Non-Posted Positions	Created Externally	3
NRAs	None Required	0
FGS Approvals	TOTAL	1352
Offer Letters: CUPE-1/2/E		

ETF Workflow

Status	Count	Status	Count	Status	Count
Accepted by PeopleSoft	610	Not Yet Created	0	Meet Deleted	2
Rejected by PeopleSoft	0	Created	3	Assignment Deleted	1
Saved in CUPE Hiring	418	TOTAL	3	Meet / Assn Deleted	0
Incomplete in CUPE Hiring	0			TOTAL	3
TOTAL	1028				

Created in ARM      Created Externally      Cancelled / Deleted

Actions

[Search for ETF Workflow](#)

Comments and problems regarding this site can be sent to [ithelp@yorku.ca](mailto:ithelp@yorku.ca)

On the ARM Task View Screen do the following:

1. Chose the appropriate **Fiscal Year**, **Faculty** and **Department**.
2. Chose **ETF Workflow**.
3. Within the ETF Workflow Page, generate the ETF request either by chosen “**No ETF Yet**” or under Action that states **Search for ETF Workflow**.
4. Once this is chosen to generate the ETF the ARM Universal Search screen will appear.

See “**Create ETF Request**” below for continued process.

## CREATE ETF REQUEST

On the Create ETF Request screen, you can do the following:

- Edit Assignment before creating an ETF request.
- Create one or more ETFs for a candidate that has been assigned to one or more assignments within the same department.
- Track External ETFs.
- Indicate no ETF required for a meet assignment.
- Skip an ETF for a particular meet assignment.

## EDIT ASSIGNMENT BEFORE CREATING AN ETF REQUEST

To edit an assignment before creating an ETF request chose either the Course (1) or the Job Id (2). For example, this functionality may be required to edit the start and end date of an assignment.

[HOME](#) | [TASKS](#) | [SEARCH](#) | [BUDGETING](#) | [REPORTS](#) | [ADMIN](#) | [HELP](#) | [ASK ARM](#)

[<< Back To Search](#)

### Create ETF Request

First Name: Gary P  
 Last Name: Spraakman  
 Employee ID: 101023000  
 Other Instructor ID: 838  
 Student ID:  
 Dept: AP / ADMS  
 Session: F13-W14

**Create ETF Request**

Note: Columns with asterisks below are not sent to CUPE Hiring.

ETF Action	Create ETF	Create ETF
ETF Comments		
Course <b>1</b>	AP ADMS 2510 CR= 3.0 SECT:E IF13 F API	AP ADMS 2510 CR= 3.0 SECT:Q IW14 W API
Meet *	INTR 01	INTR 01
Enrolment (Current / Max) *	42 / 100	41 / 100
Position Type *	Course Director	Course Director
Job Id <b>2</b>	132149	132156
Assignment Comments *		
Payroll Start Date	09/01/2013	01/01/2014
Payroll End Date	12/31/2013	04/30/2014
Actual Start Date *	09/01/2013	01/01/2014
Actual End Date *	12/31/2013	04/30/2014
Contract Type	OVERLOAD	OVERLOAD
Total Assignments	0.5	0.5
Appointment Hours	0	0
Contract Rate	\$9,000.00	\$9,000.00
Reg Chart of Accounts	12200020016100000000000000000000	12200020016100000000000000000000
Reg Account Id	122000 Sal Pt Acad Yufa	122000 Sal Pt Acad Yufa
Reg Cost Centre	161000 LAPS	161000 LAPS
Reg COA Fund	200	200

This will take you to the meet assignment screen where you will be able to edit the assignment. Please note: editing an assignment may require a Dean's Office approval and may require re-issuing of an NRA, offer letter, etc.

[HOME](#) | [TASKS](#) | [SEARCH](#) | [BUDGETING](#) | [REPORTS](#) | [ADMIN](#) | [HELP](#) | [ASK ARM](#)

### Meet Detail for ADMS 2510

Fiscal Year: 2013 - 14  
 Responsible Fac / Unit: AP / ADMS  
 Course Number: ADMS 2510  
 Credits: 3.0  
 Term: F13  
 Period: F  
 Period Faculty: AP  
 Lang: EN  
 Course Title: Introduction to Management Accounting  
 Section: E  
 Format: INTR  
 Meeting Group: 01

#### Edit Meet Assignment

Contract Type	Full-time (Overload)	
Instructor Name	Spraakman, Gary P [PAYNO: ...000]	<input type="checkbox"/> Include All Instructors
Position Type	Course Director	<input type="checkbox"/> Exclude from SIS Export
# of Assignments	0.5	
Contract Start Date	09/01/2013	(mm/dd/yyyy)
Contract End Date	12/31/2013	(mm/dd/yyyy)
Comment		

**Update Assignment**

Comments and problems regarding this site can be sent to [ithelp@yorku.ca](mailto:ithelp@yorku.ca)

1. Edit the Assignment
2. Click Update Assignment

HOME | TASKS | SEARCH | BUDGETING | REPORTS | ADMIN | HELP | ASK ARM

[<< Back To Search](#)

### Create ETF Request

First Name: Gary P  
 Last Name: Spraakman  
 Employee ID: 101023000  
 Other Instructor ID: 838  
 Student ID:  
 Dept: AP / ADMS  
 Session: F13-W14

**1 Create ETF Request**

Note: Columns with asterisks below are not sent to CUPE Hiring.

ETF Action	Create ETF	Create ETF
ETF Comments		
Course	AP ADMS 2510 CR= 3.0 SECT:E IF13 F API	AP ADMS 2510 CR= 3.0 SECT:Q IW14 W API
Meet *	INTR 01	INTR 01
Enrolment (Current / Max) *	42 / 100	41 / 100
Position Type *	Course Director	Course Director
Job Id	132149	132156
Assignment Comments *		
Payroll Start Date	09/01/2013	01/01/2014
Payroll End Date	12/31/2013	04/30/2014
Actual Start Date *	09/01/2013	01/01/2014
Actual End Date *	12/31/2013	04/30/2014
Contract Type	OVERLOAD	OVERLOAD
Total Assignments	0.5	0.5
Appointment Hours	0	0
Contract Rate	\$9,000.00	\$9,000.00
Reg Chart of Accounts	12200020016100000000000000000000	12200020016100000000000000000000
Reg Account Id	122000 Sal Pt Acad Yufa	122000 Sal Pt Acad Yufa
Reg Cost Centre	161000 LAPS	161000 LAPS
Reg COA Fund	200	200

1. Click the Create ETF Request.
2. Once clicked this will enable the demographic, banking and emergency contract screens to appear and users will be able to complete the ETF transaction:

Submit ETF

Person Bank Emergency Contact

Employee ID: 102058628 SIN No.:

Name: Liang Wang

Address:

City:

Province: Select ... Postal Code:

Telephone (Home): Is A Citizen

Telephone (Work): Extension:

Date of Birth: 1-Jan-1932 Gender: Male Female

Student ID: 207675242 Visa Expiry: 20-Feb-2012

Level of Study: Select ... Graduate Program: Select ...

Save Record



If the candidate is a re-hire, this information will be pre-populated based on information available in PeopleSoft. Users should review this information for accuracy and make required changes.

If the information is not provided, users can enter the information, please note that if you provide the employee number or social insurance number it will pull any information from PeopleSoft and compare if this is the same candidate.

Once information has been inputted, save the record and a confirmation screen will appear:

**Submit ETF**

**Employee Information**

Name	Liang Wang	Employee ID	102058628
SIN No.	999999998	Telephone (Home)	416-123-7436
Address	2 tonoto, ON l4h 1n3 CANADA	Telephone (Work)	
		Is A Citizen	No

Contract Start Date	Contract End Date	Union Code	Job Code	Job Title	Department	
01-Aug-2011	31-Aug-2011	QU1	12345	T3 (Mrk/Grd)	LAPS - Economics	<a href="#">View</a>
01-Aug-2011	31-Aug-2011	QU1	12345	T3 (Mrk/Grd)	LAPS - Economics	<a href="#">View</a>
01-Aug-2011	31-Aug-2011	QU1	12345	T3 (Mrk/Grd)	LAPS - Economics	<a href="#">View</a>
01-Aug-2011	31-Aug-2011	QU1	12345	T3 (Mrk/Grd)	LAPS - Economics	<a href="#">View</a>

[Confirm](#)

A user can **view** a printable copy of the ETF from the above confirmation screens.

Once confirmed, ARM will be updated:

#### Results for ETF Workflow

[Download Search Results](#)

Term	Fac / Unit	Instructor	Course	Sec	Meet	Contract	Position	# of Assign Hours	ETF Type	Rec'd by CUPE Hiring	PeopleSoft Status	Actions
S11	AP / ECON	<a href="#">Barbu, Emilia</a>	<a href="#">AP ECON 1530 CR= 3.0 [S11 S1 AP]</a>	A	<a href="#">LECT 01</a>	CUPE-1	<a href="#">T3 (Mrk/Grd)</a>	135				<a href="#">Create ETF Request</a>
S11	AP / ECON	<a href="#">Brunet, Ryan</a>	<a href="#">AP ECON 1010 CR= 3.0 [S11 S2 AP]</a>	B	<a href="#">LECT 01</a>	CUPE-1	<a href="#">T3 (Mrk/Grd)</a>	67.5				<a href="#">Create ETF Request</a>
S11	AP / ECON	<a href="#">Colby, Gordana</a>	<a href="#">AP ECON 1000 CR= 3.0 [S11 S2 AP]</a>	C	<a href="#">LECT 01</a>	CUPE-2	<a href="#">Course Director</a>	0.5				<a href="#">Create ETF Request</a>
S11	AP / ECON	<a href="#">Colby, Gordana</a>	<a href="#">AP ECON 1530 CR= 3.0 [S11 S1 AP]</a>	A	<a href="#">LECT 01</a>	CUPE-2	<a href="#">Course Director</a>	0.5				<a href="#">Create ETF Request</a>
S11	AP / ECON	<a href="#">Colby, Gordana</a>	<a href="#">AP ECON 2500 CR= 3.0 [S11 S1 AP]</a>	A	<a href="#">LECT 01</a>	CUPE-2	<a href="#">Course Director</a>	0.5				<a href="#">Create ETF Request</a>

The **ETF Type, Rec'd by CUPE Hiring and PeopleSoft Status** will be updated as the moves through the process.

#### Note:

The new system will handle changes to ETFs in the same way as it does today. If a change is made prior to an upload to PeopleSoft, users can make the change and re-submit the ETF request. If a change is required after the upload to PeopleSoft, users will need to print the ETF and make manual changes to the printed document and submit the paperwork to payroll; e.g. maternity/parental leaves, cancelled contracts, etc.