

# REQUESTING FACULTY/TA ADD OR UPDATE

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## REVISION HISTORY

Version	Date	Name	Description
1	5/31/17	M Stewart	Initial procedures for Version 8
2	9/12/17	M Stewart	Modified WF ticket illustration (after adding the mandatory faculty request form on WF request)
3	7/3/18	M Stewart	Initial procedures for Version 9.

## INTRODUCTION AND PURPOSE

The purpose of this document is to outline how academic departments request the adding of a faculty or TA to Banner or updating faculty or TA information to the instructor profile in Banner.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

In 2017, faculty/TA add and update requests were moved to be submitted via Workfront to ensure accurate tracking of these requests. Academic Scheduling is responsible for coordinating the adding or updating of instructor and TA data into Banner. Once the faculty or TA has an established instructor profile, it is the academic department's responsibility to attach the faculty or TA to the section they are teaching in a given quarter. Academic departments have until the end of third week of the quarter to add faculty and TA's to their course section(s).

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Registrar's Office
2. Academic Departments

## BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

## PAGES

The pages listed below are covered in this training.

Page	Page Name	Description
SIAINST	Faculty/Advisor Information	Where faculty & TA information is entered and updated; also where a faculty's assigned perpetual section number (PSN) is entered
SOAIDEN	Person search	Query page to find a faculty or TA name

## PROCEDURES

### SUBMITTING A FACULTY/TA REQUEST THROUGH WORKFRONT

Academic departments are to submit a faculty/TA request on Workfront ([go.ucr.edu/workfront](http://go.ucr.edu/workfront)). More than one request may be put on one Workfront ticket (e.g., add a new faculty to Banner and issue the faculty a perpetual section number).

#### STEPS

1. The following faculty/TA requests should be submitted through **Workfront**:
  - a. Add a new faculty member to Banner.
  - b. Update an existing faculty member's profile (e.g., category or department change).
  - c. Add a TA to Banner (i.e., update the student's existing Banner profile to faculty status).
  - d. Update a TA's existing profile (e.g., Associate-In appointment).
  - e. Request a perpetual section number.
2. At [go.ucr.edu/workfront](http://go.ucr.edu/workfront), select **Banner Support Ticket** as the **Request Type**.
3. In the **Banner Support Ticket** drop-down menu, select **Staff or Faculty Reporting an Issue or Submitting a Request**.
4. Select **Instructor Maintenance**.
5. Enter the subject description in the **Subject** field.
6. In the **Description** field, enter the request with regards to the faculty or TA in question.
7. Select applicable **Priority** option.
8. Select applicable **Severity** option.

**Banner Support Ticket** -

Submit a Bug Report when something is not working as expected or you receive an error message. Be sure to provide the screen name, list steps you took, the browser, and any error messages. Also please upload any screen shots of the error, if available/applicable.

Submit a Change Order when you would like a change to an existing job, process, access role, etc.

Submit a Request when you have a suggestion for an enhancement.

Submit an Issue when you are unsure of which option to choose.

**Banner Support Ticket** (?)

Staff or Faculty Reporting an Issue...

Staff or Faculty Reporting an Issue or Submitting a Request

Instructor Maintenance

**Subject**

Add new faculty to Banner

**Description**

Please add the attached list of new faculty into Banner. Also, please assign a perpetual section number to the faculty name identified on the list.

**Priority**

Normal

**Severity**

Not Applicable

9. **Documents** – if there is more than one faculty or TA to add or update, using the **Add Documents** button attach an Excel listing faculty or TA's and their data.
  - a. See final page of these procedures for an example of the Excel.
  - b. Please reference the Excel in the **Description** field (see step #6 above).

10. Under the **Banner Instructor Request** heading, check the box for the applicable **Request Type**.
  - a. More than one faculty/TA-related request type can be submitted on one **Workfront ticket**.
11. See following:

please assign a perpetual section number to the faculty name identified on the list.

Priority:  Severity:

Documents

Faculty to be ent...xlsx

**Banner Instructor Request**

**Request Type**

New Instructor  Instructor Appointment Change  Instructor Name Change

Perpetual Section Number for Existing Instructor in Banner

12. Complete the fields listed under the **Instructor Contact Information** heading:
  - a. Fill out fields for only one faculty or TA.
  - b. For entry of **more than one faculty or TA**, attach a **list on an Excel spreadsheet** (see step #10 above).
  - c. If faculty has a **dual appointment**, complete the fields that pop up after selecting **Yes** to this question.
  - d. If submitting a **list on an Excel**, and any faculty on that list has a **dual appointment**, provide information for **both appointments** on the Excel.

**Instructor Contact Information**

Instructor Full Name

Instructor NetID  Instructor Email Address

Date of Birth

**Instructor College and Rank Information**

College 1  Department 1  Rank 1

Effective From Term 1  Effective To Term 1

**Instructor Appointment Information**

Is Instructor appointment permanent?

Yes  No

Does the Instructor have a dual appointment?

Yes  No

13. When completed, click **Submit Request**. The Workfront ticket will be routed to **Academic Scheduling**.



Person Search SOAIDEN 9.3.5 (PPRDXE)

PERSON SEARCH

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix
	Hooley	Richard	J.			

1 of 1 Per Page Record 1 of 1

Case Insensitive Query  Case Sensitive Query

3. Double-click in the ID field to select a record and re-direct to page SIAINST with the faculty/TA ID number inserted in the ID field.
4. Enter desired term in the Term field.
5. Click Go.

Faculty/Advisor Information SIAINST 9.3.5 (PPRDXE)

ID: Hooley, Richard J. Term: 201840 Start Over

FACULTY MEMBER BASE DETAILS

From Term: 201710 Maintenance To Term: 999999

Status \* A Active

Status Date \* 06/15/2016

Faculty  Advisor  Override Process Rule Security

Appointment Date

Override User ID

Override Activity Date

Category: ASSCR Associate Professor

Staff Type: GRDE Faculty Can Submit Grades

Workload Rule

6. This is a view of the faculty profile information, such as rank(category) and grading status(staff type).
7. Click the Next Section button in bottom left corner of the screen.

Faculty/Advisor Information SIAINST 9.3.5 (PPRDXE)

ID: Hooley, Richard J. Term: 201840 Start Over

FACULTY CONTRACT

From Term: 201840 Maintenance To Term: 999999

Type *	Type Description	Rule	Rule Description	Default Indicator *
				<input type="checkbox"/>

1 of 1 Per Page Record 1 of 1

FACULTY COLLEGE AND DEPARTMENT

From Term: 000000 Maintenance To Term: 999999

Home	College	College Description	Department	Department Description	Percentage
<input checked="" type="checkbox"/>	NA	Natural and Agricultural Sci	CHEM	Chemistry	

1 of 1 Per Page Record 1 of 1

8. To see whether or not a faculty member has been issued a perpetual section number click the Next Section button two more times.
  - a. Refer to the Faculty Comments section of this page.
  - b. A perpetual section number will appear in the Comments field prefaced by PSN.

Faculty/Advisor Information SIAINST 9.3.5 (PPRDXE)

ID: Hooley, Richard J. Term: 201840 Start Over

**FACULTY ATTRIBUTES** Insert Delete Copy Filter

From Term: 201840 Maintenance To Term: 999999

Code \* Code Description

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**FACULTY COMMENTS** Insert Delete Copy Filter

From Term: 000000 Maintenance To Term: 999999

Comments \*

PSN: 86H

1 of 1 10 Per Page Record 1 of 1

9. If faculty does not show an assigned perpetual section number, submit a request for this number on a **Workfront ticket** (follow steps outlined above).

Sample of Excel list containing multiple faculty/TA add or update requests (attach to the Workfront ticket):

Last Name	First Name	Date of Birth	Year Hired	College	Department	Rank	Associate-In: List		Perpetual Section # Needed? (Y/N)
							Associate-In: List Course Being Taught	Term(s) Teaching Course	
Jones			2018	CNAS	CHEM	Assoc Professor			Y
Smith			2018	CHASS	PHIL	Lecturer			N
Esparza			2018	SoBA	BUS	TA			
Chang			2018	GSOE	Education	Associate-In	EDUC 003	Fall 2018	
Atiya			2018	BCOE	ENVE	TA			

## FINAL QUIZ

1. On which Banner page is faculty/TA information viewed?
  - a. SIAINST (Faculty/Advisor Information)
  
2. On which Banner page may a faculty/TA name be searched?
  - a. SOAIDEN (Person Search)
  
3. True or False: a perpetual section number may be viewed in the Comments section under the Faculty Comments heading.
  - a. True