REQUESTING FACULTY/TA ADD OR UPDATE

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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.

<table>
<thead>
<tr>
<th>Page</th>
<th>Page Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIAINST</td>
<td>Faculty/Advisor Information</td>
<td>Where faculty &amp; TA information is entered and updated; also where a faculty’s assigned perpetual section number (PSN) is entered</td>
</tr>
<tr>
<td>SOAIDEN</td>
<td>Person search</td>
<td>Query page to find a faculty or TA name</td>
</tr>
</tbody>
</table>
SUBMITTING A FACULTY/TA REQUEST THROUGH WORKFRONT

Academic departments are to submit a faculty/TA request on Workfront (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, 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.

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:

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.

13. When completed, click **Submit Request**. The Workfront ticket will be routed to **Academic Scheduling**.
14. If a new faculty:
   a. Workfront ticket will be routed to Integrated Technology Solutions (ITS) to issue a Banner ID.
   b. ITS will then route ticket back to Academic Scheduling to enter category, rank, department, and, if requested on the ticket, to issue a perpetual section number.

15. Academic Scheduling will update the Workfront ticket when
   a. Clarification is needed regarding the request (status will be updated to Waiting Feedback).
   b. Confirming faculty or TA entry and/or issuing of perpetual section number is completed (status will be updated to Closed).

16. Once a faculty or TA has a Banner faculty profile, they can be attached to a course section in Banner.
   a. See procedures Add Faculty Information for these steps.

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**VIEWING INSTRUCTOR DATA IN BANNER**

Academic departments can view faculty profiles in Banner including if a perpetual section number was issued for a given faculty.

**STEPS**

1. Navigate to SIAINST (Faculty/Advisor Information).
2. In the ID field, enter the faculty/TA’s Banner ID or click the Search button (contains three dots to the right of the field).
   a. If entering the Banner ID – it must begin with 86.
   b. If searching for the faculty/TA’s name – in the Option List box, click on Person Search.
      i. This directs to query page SOAIDEN (Person Search).
   c. Click in the Add Another Field drop-down box.
   d. Click on Last Name.
   e. In middle drop-down box, leave default (Contains).
   f. In text field at the end of the row, enter faculty/TA’s last name.
      i. A partial last name with a wildcard (%) can also be entered.
   g. In the second Add Another Field drop-down box, click on First Name.
   h. In middle drop-down box, leave default (Contains).
   i. In text field at the end of the row, enter faculty/TA’s first name.
      i. A partial first name with a wildcard (%) can also be entered.
   j. Click Go. Search results will display.
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**.

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.

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**.
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):

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Date of Birth</th>
<th>Year Hired</th>
<th>College</th>
<th>Department Rank</th>
<th>Associate-In: List Course</th>
<th>Associate-In: List Term(s) Teaching Course</th>
<th>Perpetual Section # Needed? (Y/N)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jones</td>
<td></td>
<td></td>
<td>2018</td>
<td>CNAS</td>
<td>Assoc Professor</td>
<td></td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>Smith</td>
<td></td>
<td></td>
<td>2018</td>
<td>CHASS</td>
<td>Lecturer</td>
<td></td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>Esparza</td>
<td></td>
<td></td>
<td>2018</td>
<td>SoBA</td>
<td>TA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chang</td>
<td></td>
<td></td>
<td>2018</td>
<td>G50E</td>
<td>Associate-In</td>
<td>EDUC 003</td>
<td>Fall 2018</td>
<td></td>
</tr>
<tr>
<td>Ahino</td>
<td></td>
<td></td>
<td>2018</td>
<td>BCDE</td>
<td>ENVE</td>
<td>TA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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