

# REQUESTING FACULTY/TA ADDS OR UPDATES

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## REVISION HISTORY

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

## INTRODUCTION AND PURPOSE

How academic departments request adding an instructor or TA to Banner or updating faculty or TA information to an existing Banner instructor profile.

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

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Registrar's Office
2. Academic Department

## BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training ([bannersbx.ucr.edu](http://bannersbx.ucr.edu)) to follow along.

## FORMS

The forms listed below are covered in this training.

Form	Form Name	Description
SIINST	Faculty/Advisor Information	Form where faculty, TA, and advisor data can be viewed and where Academic Scheduling can update category, department, and enter the faculty's assigned perpetual section number (PSN)

## PROCEDURES

1. Departments are to submit a ticket via **Workfront** ([go.ucr.edu/workfront](http://go.ucr.edu/workfront)) for the following requests:
  - 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. More than one request may be put on one ticket (e.g., add new faculty to Banner and issue them a perpetual section number).
3. Workfront submission:
  - a. Once at [go.ucr.edu/workfront](http://go.ucr.edu/workfront), select **Banner Support Ticket** as the **Request Type**.
  - b. In the **Banner Support Ticket** drop-down menu, select **Staff or Faculty Reporting an Issue or Submitting a Request**.
  - c. Select **Instructor Maintenance**.
  - d. Enter the subject in the **Subject** field.
  - e. In the **Description** field, enter what you'd like done re: the applicable instructor or TA.
  - f. Select applicable **Priority** option.
  - g. Select applicable **Severity** option.
  - h. Screen should look similar to the following:

**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 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

- i. **Documents** – if you have more than one faculty or TA to add or update, attach an Excel listing instructors or TA's and their data (see final step of procedures for example). Please reference the Excel in the **Description** field.
- j. In the **Banner Instructor Request** section, select the applicable option(s) under **Request Type**.
- k. Screen should now look similar to the 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
- Perpetual Section Number for Existing Instructor in Banner

- Instructor Appointment Change
- Instructor Name Change

**Instructor Contact Information**

Instructor Full Name

Instructor NetID

Instructor Email Address

**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

**Banner ID Number**

Banner ID Number

- I. Complete the fields illustrated above.
  - i. Fill out fields for only one faculty or TA.
  - ii. For entry of more than one faculty or TA, attach a list on an Excel spreadsheet.
  - iii. If faculty has a **dual appointment**, complete the fields that pop up after selecting **Yes**.
  - iv. If submitting an Excel and any faculty listed on it has a **dual appointment**, provide that information on the Excel.
  - v. If updating faculty information or adding a TA - provide the faculty/TA's **Banner ID number** if available.

- m. When finished, click the **Submit Request** button.
4. The Workfront ticket will be routed to **Academic Scheduling**.
  - a. If new faculty – ticket will be routed to **SAIS** to add faculty to Banner.
  - b. **SAIS** will then route ticket back to **Academic Scheduling** to enter category (rank), department, and, if requested, a perpetual section number.
  - c. **Academic Scheduling** will update the Workfront ticket when
    - i. Clarification is needed regarding the request (status will be updated to **Awaiting Feedback**).
    - ii. Confirming faculty or TA entry and/or issuing of perpetual section number is completed.
5. Once the faculty or TA has a Banner faculty profile, they can be attached to a course section on form SSASECT.
  - a. To enter a faculty or TA on a course section, please refer to procedures “**How to add Faculty information**” available at [ucrbanner.ucr.edu](http://ucrbanner.ucr.edu) on the Training Resources page.
6. On form **SIAINST**, departments can view a faculty’s data including if a perpetual section number was issued.
7. Navigate to **SIAINST**.
8. In the **ID** field, either enter the instructor/TA’s ID or click the **Search** (down arrow) button to find the instructor/TA’s name on query form **SIAIQRY**.
  - a. If entering the ID – all faculty and TA ID numbers will begin with 86.
  - b. If searching for the name - in the **Option List** box that comes up after clicking the **Search** button, select **Person Search**.
  - c. You will then be in query form **SIAIQRY**.
  - d. Enter effective term in the **Term** field.
  - e. Click on the first row.
  - f. Tab to **Last Name** field; enter last name of faculty or TA. This field is case-sensitive.
  - g. Tab to **First Name** field; enter first name of faculty or TA. This field is case-sensitive.
  - h. Execute the query.
  - i. If name is in Banner, screen should appear similar to the following:

The screenshot shows the Oracle Fusion Middleware Forms Services interface for the SIAIQRY query form. The form includes search criteria fields for Term, Staff Type, Contract Type, Tenure Status, Category, and Status. Below the search criteria is a table with columns for ID, Last Name, First Name, Middle Name, Faculty, Advisor, College, and Department. The first row of the table is highlighted with a red box, showing the name 'Plemmons, Dena' and a checked 'Faculty' checkbox.

ID	Last Name	First Name	Middle Name	Faculty	Advisor	College	Department
	Plemmons	Dena		<input checked="" type="checkbox"/>	<input type="checkbox"/>	GD	GDIV
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		

9. Double-click on the desired name; it will bring you back to form **SIAINST**.
10. If **Term** field in the **Key Block** is blank, enter effective term of faculty or TA appointment and **Next Block**.
11. Screen should appear similar to the following:

Faculty/Advisor Information SIAINST 8.5.4 (BANPROD)

ID:  Term:

**Faculty Member Base Details**

From Term:  Maintenance  To Term:

Status:  Status Date:

Faculty

Advisor

Override Process Rule Security

Appointment Date:

Override User ID:  Override Activity Date:

Category:  Associate Professor

Activity Date:

Staff Type:  Faculty Can Submit Grades

User ID:

Workload Rule:

12. To see whether or not a faculty member has been issued a perpetual section number:
  - a. From the SIAINST main page (see above), navigate to the **Faculty Attributes and Comments** page by clicking **Next Block** three times.
  - b. **Next Block** one more time to navigate to the **Faculty Comments** section.
  - c. The perpetual section number will be in that field prefaced by **PSN**.
  - d. Screen should appear similar to the following:

Faculty/Advisor Information SIAINST 8.5.4 (BANPROD)

ID:  Term:

Faculty Attributes and Comments SIAINST 8.5.4 (BANPROD)

**Faculty Attributes**

From Term:  Maintenance  To Term:

Code

**Faculty Comments**

From Term:  Maintenance  To Term:

PSN: 86H

13. If faculty does not show an assigned perpetual section number, submit a request for this number via a Workfront ticket following steps outlined above.

14. Sample of Excel to submit with instructor data (attach to Workfront ticket):

LAST NAME	FIRST NAME	YEAR HIRED	COLLEGE	DEPARTMENT	RANK	ASSOCIATE-IN: LIST COURSE BEING TAUGHT	ASSOCIATE-IN: LIST TERM(S) TEACHING COURSE	PERPETUAL SECTION # NEEDED? Y/N
Jones	Mary	2017	CNAS	Chemistry	Associate Professor			Y
Smith	Jeremy	2017	CHASS	Philosophy	Lecturer			N
Esparza	Miguel	2017	SoBA	BUS	TA			
Chang	Ming	2017	GSOE	Education	Associate-In	EDUC 003	Fall 2017	
Atiya	Akram	2017	BCOE	ENVE	TA			