

For background information, review the Protocol for appointing visiting scholars on the Office of Faculty Advancement site. Per the introductory paragraph, visiting scholars are not faculty or students and should not be teaching. Visiting scholars are entered into the Faculty Database to track the visiting scholar appointment, and to provide a simple approval workflow via board actions.

All persons with access to Faculty Lists and Board Actions were given access to the Visiting Scholars module.

This document is a work in progress, and explains how to add the individual to the Faculty Database and how to enter the board action. Subsequent updates will explain how to clean-up the historical appointments and address validation messages.

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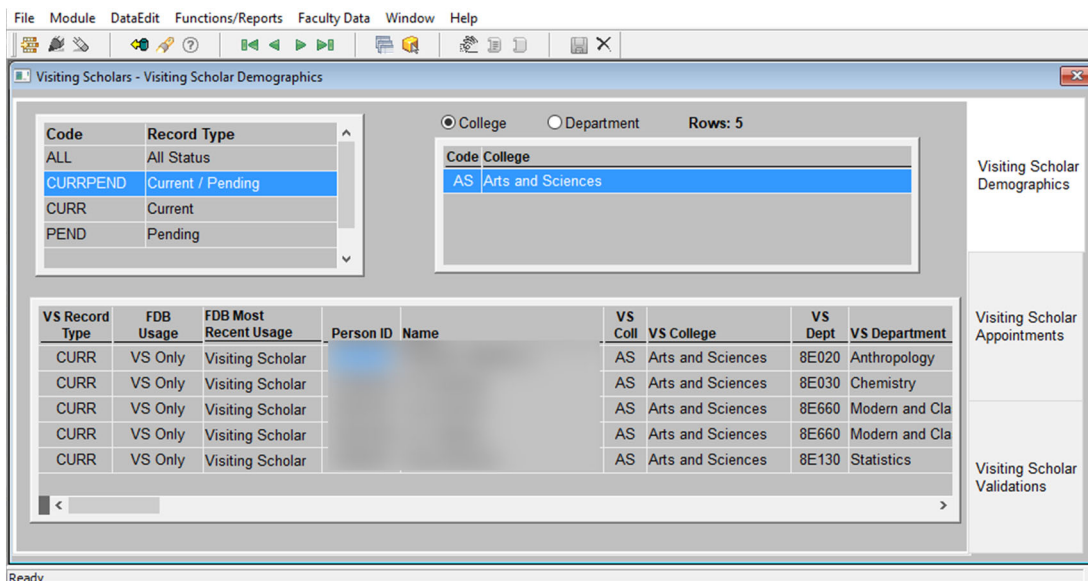
STEP 1: Add the visiting scholar to the demographics table

From FDB main menu, select the **Visiting Scholars** module. *Do not add the person under Faculty Lists!*



The Visiting Scholars module provides 3 views of the data, accessed by the tabs on the right:

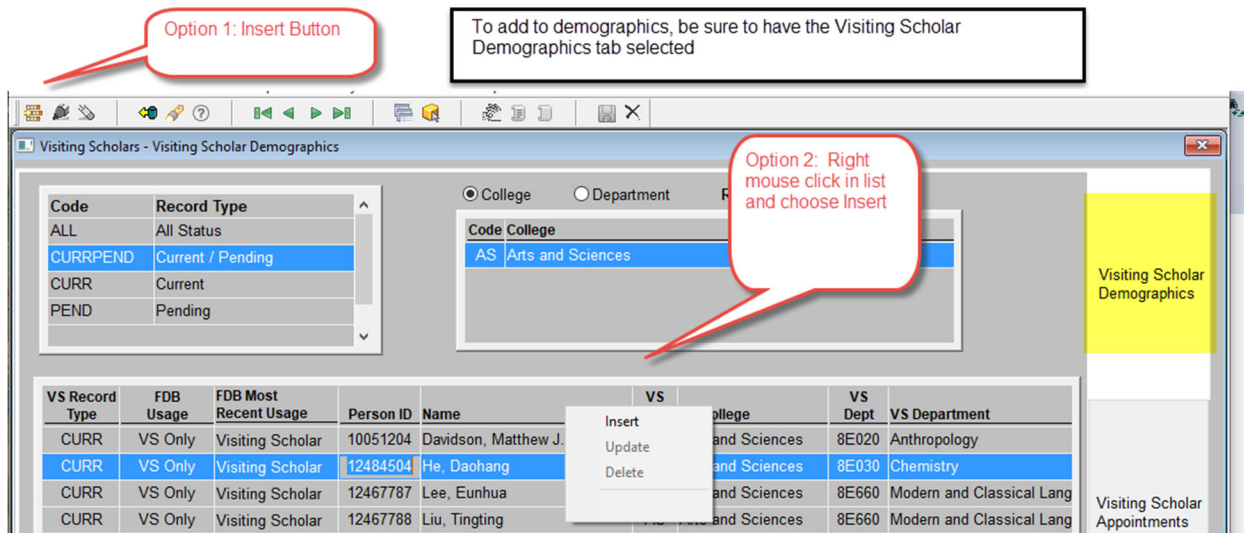
- Demographics – single row per individual. Use the Insert function from this tab to add a new visiting scholar to the FDB (see next page for directions.) Drill down to update the name, and limited demographics, campus address and external office address information – if desired by the college. Updating of gender, race and address information is optional.
- Appointments – history of all visiting scholar appointments. Find converted SAP data under this tab. Once board actions are approved, new appointments are added to this list.
- Validations – manage validation messages specific to visiting scholars. (Visiting Scholar messages will also appear in the FDB Validations Report.)



STEP 1 (continued): Add the visiting scholar to the demographics table

From the Visiting Scholars Demographics tab, select the Insert function from the menu, or the Right Mouse menu.

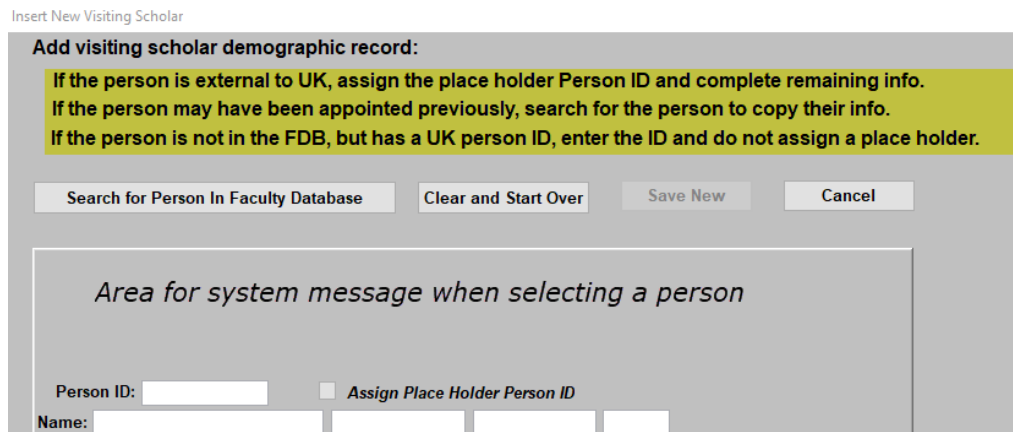
Note: Visiting Scholar entries share the same demographics table as faculty entries (i.e. Faculty Lists), but are kept separate from the faculty demographics data, to avoid mixing visiting scholars and faculty in data extracts. If a visiting scholar is ever appointed subsequently to the faculty, the faculty status values take precedence for Faculty Lists. The FDB Usage column indicates if the individual is VS Only or VS and Faculty. FDB Most Recent Usage indicates the individual’s most recent appointment type.



Complete the information on the “Insert Visiting Scholar” screen.

No social security number is entered – the system automatically assigns a place holder.

Note the 3 options at the top of the entry screen for assigning a Person ID to the visiting scholar. This is important to prevent duplicating individuals in the FDB. It is possible for persons who were once UK staff or part-time instructors to be appointed as visiting scholars. If the person might be in the FDB from the past, try the “Search for Person in Faculty Database” option.



STEP 1 (continued): Add the visiting scholar to the demographics table

Example for person external to UK: Once the information is completed, press “Save New” button.

After a successful save, you will receive a pop-up confirmation that it was successful and the demographics list tab will be refreshed automatically for location of the new entry. The list is sorted alphabetically.

Insert New Visiting Scholar

Add visiting scholar demographic record:

If the person is external to UK, assign the place holder Person ID and complete remaining info.
If the person may have been appointed previously, search for the person to copy their info.
If the person is not in the FDB, but has a UK person ID, enter the ID and do not assign a place holder

Person ID:
 Assign Place Holder Person ID

Name:
Last First Middle Suffix

Credentials: Salutation:

Visiting Scholar Appointment:

College:

Department:

Record Type:

Comments:

Optional comments, that will be transferred to the board action and then the appointment when created. In this example, the project title was used.

STEP 1 (continued): Add the visiting scholar to the demographics table

Example for person already in the Faculty Database:

Use the Search for Person in Faculty Database option. Either Last Name or Person ID can be used for the search. If the person is found, double-click the row to copy it into the Insert New Visiting Scholar screen.

Pick Faculty

Last Name: or Person ID: Find Cancel

IRIS Person ID	Name	Rec Type	Stat Time	Prim Coll	Prim Dept	Dept Name	TS	Rank

After selecting a person, information is provided at the top of the screen. If the person is current faculty, you will be prevented from creating the entry in the demographics table. But if the person is in the past, then you would be directed as in the example below to update the visiting scholar appointment columns and press "Update Existing" button to continue with the change.

Insert New Visiting Scholar

Add visiting scholar demographic record:

If the person is external to UK, assign the place holder Person ID and complete remaining info
 If the person may have been appointed previously, search for the person to copy their info.
 If the person is not in the FDB, but has a UK person ID, enter the ID and do not assign a place

Search for Person In Faculty Database Clear and Start Over Update Existing Cancel

The individual below was selected from existing Faculty Database entries. If this individual will be appointed as visiting scholar, then update the appointment college and department and set the record type to PENDING (if it is NA or PAST).

Person ID: Assign Place Holder Person ID

Name: Benjamin Edward
Last First Middle Suffix

Credentials: D.O. Salutation: Dr.

Visiting Scholar Appointment:

College: XX Unspecified

Department: XXXXX Unspecified Department

Record Type: Not applicable

Comments:

STEP 1 (continued): Add the visiting scholar to the demographics table

After saving, the name or other information can be corrected. Open the Visiting Scholar Detail window by double-clicking.

There are 2 tabs:

- **Demographics and Address.** Use the update function from the tool bar, or use the right mouse pop-up menu to go into Update mode. In update mode you can correct the individual’s name and visiting scholar appointment information: college, department, record type and the comments. Note that on the right side of the screen “Faculty List demographic columns are displayed”. These cannot be modified from this screen. They are kept in sync automatically with the visiting scholar status, until that point in future when the person becomes faculty. At that time, the faculty status values take precedence.

Gender, race, address information is all optional entry – if helpful to the college.

- **Visiting Scholar Appointments** This tab will display the visiting scholar appointments once they exist in the FDB. You can also see all HR assignment history from this tab.

The screenshot shows a software window titled "Visiting ScholarDetail - Fahad, Ahmed". The window is divided into several sections:

- Top Section:** Name: Fahad Ahmed, Person ID: X0018263, FDB ID: 100024678. A "Visiting Scholar Demographics" tab is active.
- Visiting Scholar Status:** College: AS Arts and Sciences, Dept: 8E660 Modern and Class. Lang., Record Type: PEND.
- Comments:** Improving English Academic Writing Skills among Non-native English Graduate Students Through Utilizing Massive Open Online Courses (MOOCs).
- Faculty List (FacDemo) values:** College: AS Arts and Sciences, Department: 8E660 Modern and Class. Lang., Fac Status: VisitingScholar, Record Type: PEND, Title Series: Not Applicable, Rank: Not Applicable.
- Gender and Race:** Gender: U, Race: Black, White, Asian, Amer Indian or Alaskan Native, Native Hawaiian or Other Pacific Island, New Ethnic: Non-Hispanic.
- Optional - at discretion of College:** Birth Country: Pick XX None Specified, Citizenship: Pick XX None Specified.
- E-mail Address:** Automatic update from campus directory: Y.
- Campus Address:** Automatic update from campus directory: Y.
- External Office Address:** Institution: , Line 1: .

On the right side of the window, there are two vertical tabs: "Demographics Address" (top) and "Visiting Scholar Appointments" (bottom).

STEP 2: Create the board action

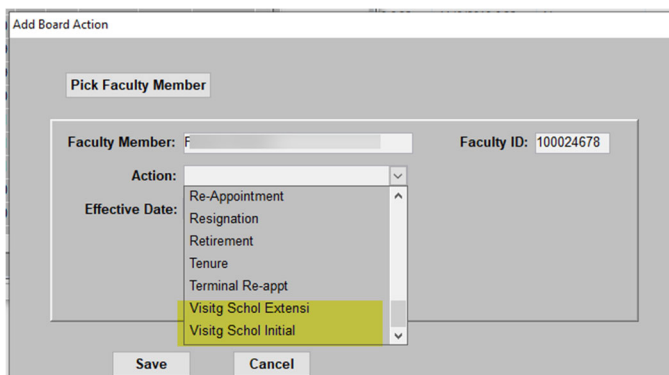
Option 1: Exit the Visiting Scholar module, and go to the Board Action module

Insert a board action following normal procedure.

Use “Pick Faculty Member” button to select the new Visiting Scholar entered in step 1

Choose BA Type and specify the appointment beginning date and SAVE

- 50 Visitg Scholar Initial
- 51 Visitg Scholar Extension

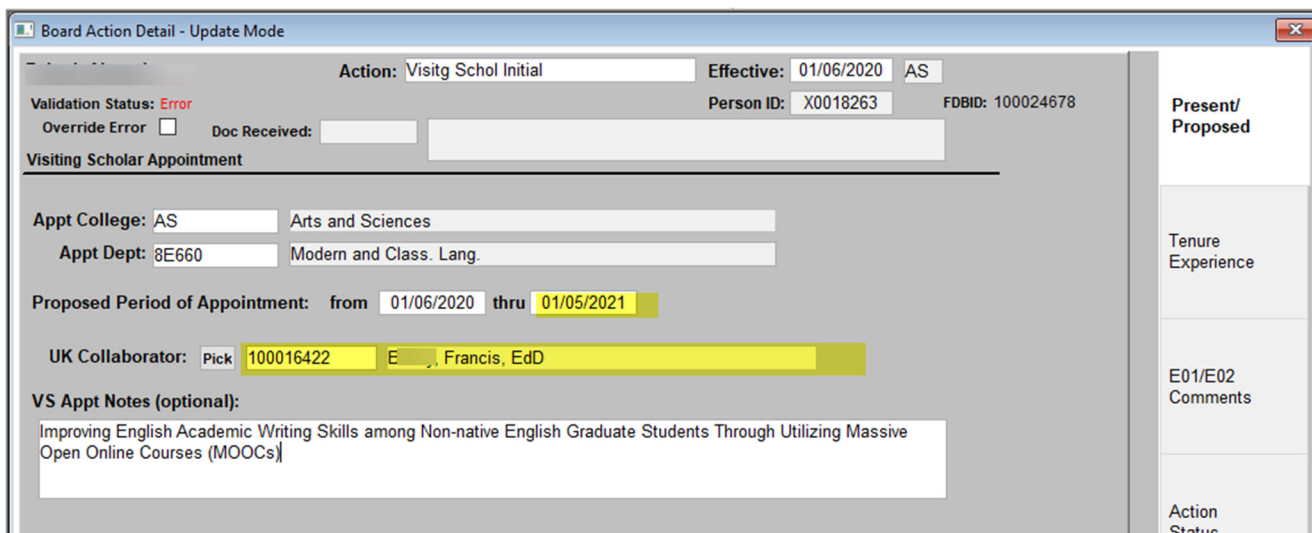


Complete the Visiting Scholar appointment information on the Present/Proposed tab. No other tabs are completed for the Visiting Scholar action type.

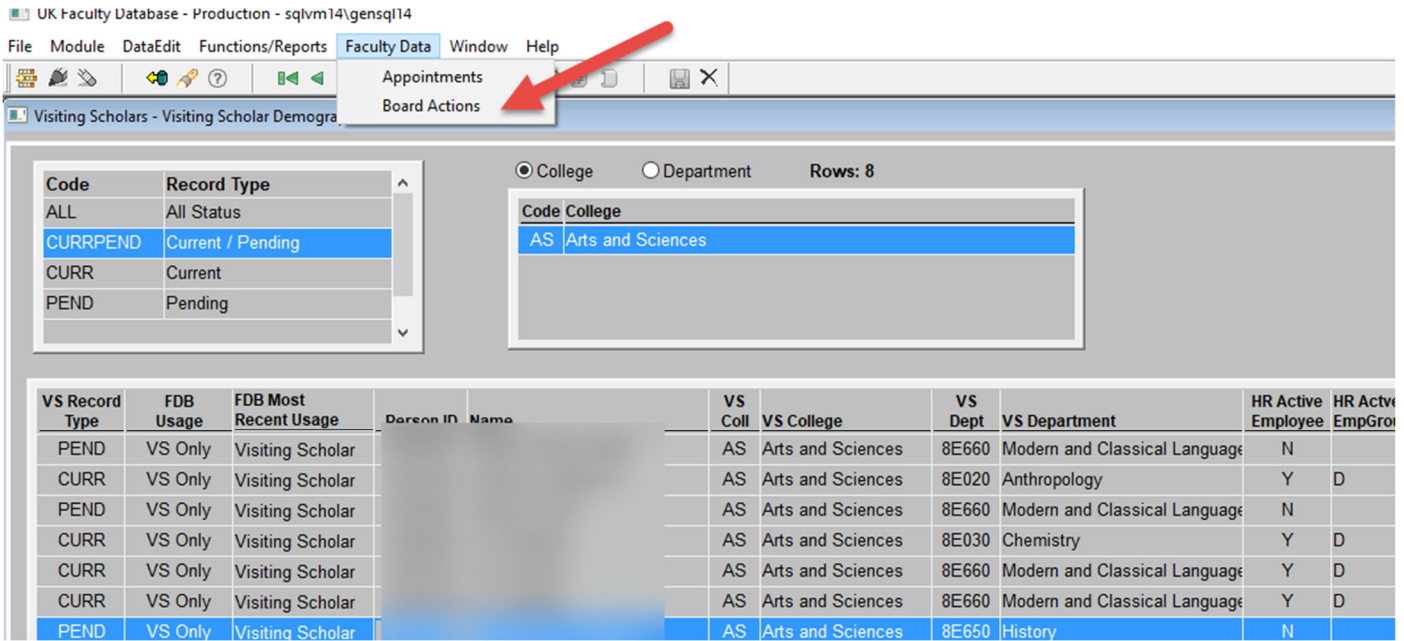
The Present/Proposed fields are different for visiting scholars. Typically you’ll need to populate the appointment end date and select the UK Collaborator.

The VS Appointment Notes are optional, and can contain any information useful to the college. In this example, the project title was included.

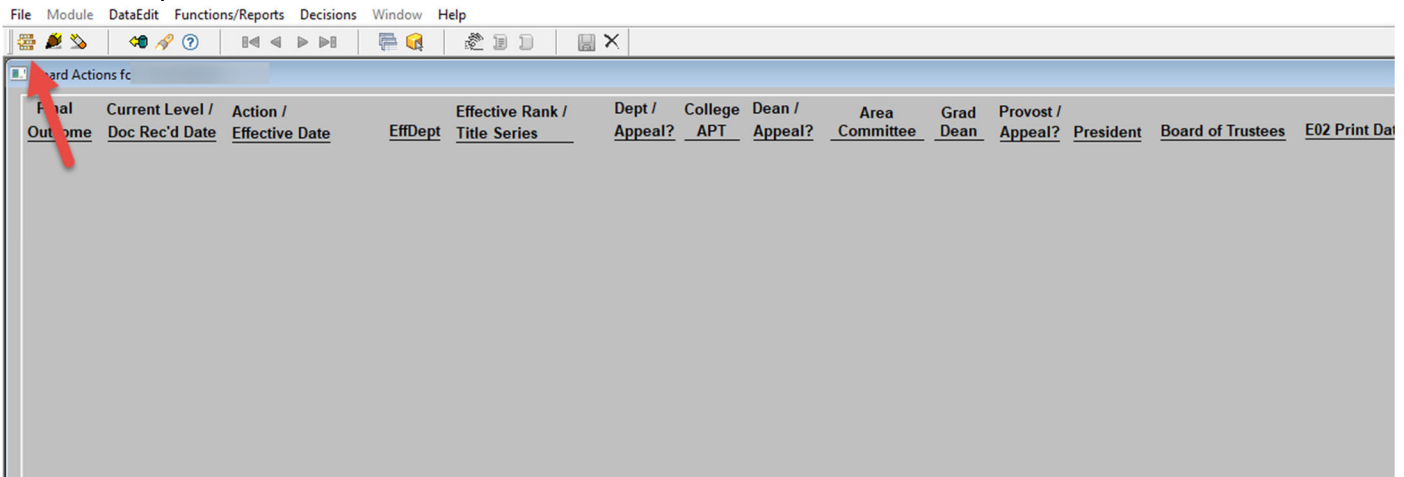
Save the board action and resolve any messages as needed. Approve at the dean’s level, when the paperwork is ready to forward to provost office.



Option 2: Remain in Visiting Scholar module, and go to the Faculty Data menu, and choose Board Actions, to list the board actions for the selected individual.



Use insert option to add the board action from this screen.



2. Visiting scholar appointment history in Faculty Database

Data conversion: Visiting scholar appointment history was loaded from SAP on 11/8/2019. Visiting scholars were selected from employee assignments with employee subgroup of 22 = Visiting Scholar.

Appointment Period:

If an individual had contiguous visiting scholar assignments, a single visiting scholar appointment record was created in the FDB, with the effective date set to the earliest assignment date and the end date set to the latest assignment end date. This was necessary to calculate a true length of assignment. The only exception to this merger of HR assignments was when the assignment crossed colleges. In this case, an appointment was created for each college, so that each college would be able to access the individual. This scenario did not occur often in the data.

Appointment Unit:

The organizational unit of the SAP employment assignment was converted to the best match for an academic unit - either a department or college. For example HR assignments in centers were converted to the FDB department that represents the college. HR assignments in organizational units subordinate to a department were assigned to the academic department. There were some exceptions for visiting scholars hired by the International Center or centers under the Vice President of Research. Special units were created in the FDB for these two exceptions. The provost office will manage these visiting scholar appointments for the present.

Going forward, in the FDB, visiting scholars will be appointed to the academic unit of the UK faculty collaborator. In SAP HR, the employee assignment may continue to be created under other organizational units for payroll purposes.

Data clean-up:

Review and clean-up is required for visiting scholars who were active employees at the time of conversion on 11/8/2019. Switch to the Visiting Scholar Appointments tab to view the converted data. Use the column Conversion Review Required = 'Y' to identify the rows requiring review. Use the Review Status column to manage your review by setting the value to "Completed" when done. Review is optional for inactive appointments.

Note the appointment status filter can be changed to show all appointments, or just the inactive history.

Rev Req	Conv Review Stat	Name	PersonID	VS Appt College name	VS Appt Dept	VS Appt Department Name	UK Collat Name
Yes	PEND			Medicine	7H350	Internal Medicine	
Yes	PEND			Medicine	7H350	Internal Medicine	
Yes	PEND			Dentistry	7A800	Oral Health Science	
Yes	PEND			Medicine	7H350	Internal Medicine	
Yes	PEND			Agriculture, Fo	81070	Animal and Food Sciences	
Yes	PEND			Engineering	8H300	Civil Engineering	
Yes	PEND			Medicine	7H350	Internal Medicine	
Yes	PEND			Agriculture, Fo	81070	Animal and Food Sciences	
Yes	PEND			Agriculture, Fo	81050	Biosystems and Agricultural Engin	
Yes	PEND			Agriculture, Fo	81040	Agricultural Economics	
Yes	PEND			Agriculture, Fo	81040	Agricultural Economics	
Yes	PEND			Agriculture, Fo	81600	Family Sciences	

The columns highlighted below can be updated for appointments with source = SAP (converted data). The columns in red are mandatory clean-up for active appointments.

Column Name	Notes
1) Conversion Review Status	Use this to manage the review status. Possible values: COMP – review completed – implies keep the record SKIP – review skipped. Optional – if colleges want to mark the review status for inactive appointments – as skip review. REMOVE – remove the appointment – if the assignment was miscoded as visiting scholar in SAP. These appointments may be removed from the system at a later date.
2) Appointment Begin Date	Earliest contiguous HR assignment effective date from SAP. If the date is reasonably close the appointment date in the offer letter, then no need to change.
3) Appointment End Date	For assignments that were current at time of conversion the date assigned was 12/31/9999. This date must be changed to the expected appointment end date.
4) UK Faculty Collaborator	If the UK faculty collaborator was designated in the offer letter or is known, update this information.
5) Appointment Notes	Make any notes helpful to the college. This area can be used for the research or project title. In some cases, notes were made during conversion by the system, for college FYI.
6) Exit Plan Status	Updateable by provost office only, to track exit plan status if the individual's current HR assignment length is greater than the 1 year limit per protocol. <i>When the appointment end date is updated during the review process and the appointment length changes to < 1 year, the Exit Plan Status will change to Not Applicable.</i>
7) Exit Plan Notes	Updateable by provost office only. Notes related to exit plan.

PEND	
NA-BACT	Not applicable, board action
COMP	Review completed
SKIP	Review skipped
REMOVE	Remove, miscoded in SAP

VS Appointment Source: SAP Conversion Review Required: Yes ¹ Status: PEND ¹ Ahn, Gyuchul

Person ID: 12329910 FDB ID: 100023045 RSN ID: 114

Appt Type: INIT ACTIVE ² Period: 01/20/2018 ³ to 12/31/9999 Length: 1y 10m

College: AG Agriculture, Food and Environment

Dept: 81070 Animal and Food Sciences

UK Faculty Collaborator: ⁴ Pick 000000000

Appt Notes: ⁵ [Redacted]

Exit Plan Status: ⁶ NEED

Exit Plan Notes: ⁷ [Redacted]

SAP / HR Status Active? Most Recent Emp Group: D Post Doctorate

Visiting Scholar Assignments Count: 3 Perrn: 20040509 10/01/2018 to 12/31/9999

Last VS Assianment Dept: 81070 Animal and Food Sciences

Add By: AD\dgagel 11/8/2019 08:32:58

Mod By: AD\dgagel 11/8/2019 08:32:58

Features of the Visiting Scholar Appointment Detail page:

The **appointment** detail page is available by selecting the Visiting Scholar Appointments tab on the lower right. The system opens to this tab automatically when the user drills down from the Visiting Scholar Appointments list.

Three panels are available from the page:

- 1) Top panel is a list of visiting scholar appointments. Most individuals will have one appointment, but some have multiple depending on the results of the conversion. Select a row to view or update the detail. For new visiting scholars, this page will indicate “No Appointments”, prior to approval of the board action.
- 2) Center panel is the detail information for the selected appointment.
- 3) Bottom panel is a list of all HR assignments. Visiting Scholar assignments have green text.

To update the center panel, choose the Update function in the tool bar, or use the right mouse button click in the center panel to pop up the menu.

Visiting Scholar Appointment Detail page - has 3 panels:

The screenshot shows the 'Visiting Scholar Appointment Detail' page. It is divided into three main sections:

- Top Panel:** A table titled 'Select an appointment row to view or update'. It contains one row with the following data:

S Appt status	VS Appt Eff Date	VS Appt End Date	VS Appt Yr/Mo	VS Appt Dept	VS Appt Department Name	HR VS Count	Exit Plan Status	Conv Review Status	Rev Req	Exit Plan Notes	UK Collaborator Name	RSN ID	VS Appt College name	Name
ACTIVE	01/20/2018	12/31/9999	1y 10m	81070	Animal and Food Sciences	3	NEED	PEND	Yes			114	Agriculture, Fo	
- Center Panel:** 'VS Appointment' details for the selected row. It includes fields for Source (SAP), Conversion Review Required (Yes), Status (PEND), Appt Type (INIT), Active (checked), Period (01/20/2018 to 12/31/9999), Length (1y 10m), College (AG), Dept (81070), and UK Faculty Collaborator (000000000). A right-click context menu is visible with options: Insert, Update, Delete.
- Bottom Panel:** A table of HR assignments. The first three rows are highlighted in green, indicating they are for visiting scholars.

Main	Permn	Assign To	Assignfrom	Position	Job	Emp Subgroup	Emp Group	Org Unit	Org Unit Description	Area	Pers Area	FDBID
X	20040505	12/31/9999	10/01/2018	50128709	40501669	Visiting Schola 22	Visiting Scholar	D Post Doctorate	30000234	81070 Animal and Food Sciences	0007 Temp PT > .20	1000 Main Campus 100023045
	20040505	09/30/2018	09/01/2018	51023871	40501669	Visiting Schola 22	Visiting Scholar	D Post Doctorate	30000234	81070 Animal and Food Sciences	0011 Unpaid	1000 Main Campus 100023045
	20040505	08/31/2018	01/20/2018	50128709	40501669	Visiting Schola 22	Visiting Scholar	D Post Doctorate	30000234	81070 Animal and Food Sciences	0011 Unpaid	1000 Main Campus 100023045

Callout boxes in the image provide additional context:

- Box 1: 'Top panel lists all visiting scholar appointments for the individual. If more than one row, select a row, to display in the center panel.'
- Box 2: 'Center panel displays the detail information for the row selected above. Columns are updateable by the department, depending on whether the source is SAP or Board Actions.'
- Box 3: 'Bottom panel displays ALL HR assignments. Visiting scholar assignments will be in green text.'

Example of converted data, showing history of HR assignments. The size of three panels can be changed to show more or less information, by dragging the edges of the panels. This example shows more of the assignment information. The assignments are sorted by end date – with most current to the top.

Visiting ScholarDetail -

Select an appointment row to view or update

S Appt Status	VS Appt Eff Date	VS Appt End Date	VS Appt Yr/Mo	VS Appt Dept	VS Appt Department Name	HR VS Count	Exit Plan Status	Conv Review Status	Rev Req	Exit Plan Notes	UK Collaborator Name
ACTIVE	06/04/2014	08/14/2014	0y 02m	8E050	Geography	1	NA	PEND	No		

Appt type: HIS1 INACTIVE Period: 06/04/2014 to 08/14/2014 Length: 0y 02m

College: AS Arts and Sciences

Dept: 8E050 Geography

UK Faculty Collaborator: Pick 000000000

Appt Notes: CONVERSION NOTE: Visiting scholar has CURR record in Faculty Lists, in College of Arts and Sciences, FacStatTime = FT , TitleSeries SPEC

Exit Plan Status: NA

Exit Plan No:

Active? Y Most Recent Emp Group: C Faculty

Add By: ADldgagel

Mod By: ADldgagel

Assignments Count: 1 Pernr: 20004979 06/04/2014 to 08/14/2014

VS Assignment Dept: 8E050 Geography

Main	Pernr	Assign To	Assignfrom	Position	Job	Emp Subgroup	Emp Group	Org Unit	Org Unit Descri	Pers Subarea
X	20004979	12/31/9999	07/01/2019	51038653	40501840 Special Faculty	03 Exempt Monthly	C Faculty	30000469	8E050 Geog	0001 Reg FT
	20004979	06/30/2019	01/01/2017	51029305	41011676 Teaching Post	21 Scholars	D Post Doctorate	30000469	8E050 Geog	0006 Temp FT
	20035435	06/30/2019	06/01/2019	50117196	40501373 Teaching Overl	03 Exempt Monthly	C Faculty	30000482	8E300 Biolog	0007 Temp PT > .20
	20035435	12/31/2018	12/01/2018	50117196	40501373 Teaching Overl	03 Exempt Monthly	C Faculty	30000482	8E300 Biolog	0007 Temp PT > .20
	20035435	09/30/2017	07/01/2017	50117196	40501373 Teaching Overl	03 Exempt Monthly	C Faculty	30000482	8E300 Biolog	0007 Temp PT > .20
	20004979	12/31/2016	12/01/2016	51029305	41011676 Teaching Post	21 Scholars	D Post Doctorate	30000469	8E050 Geograph	0006 Temp FT
	20004979	11/30/2016	07/01/2015	51010134	40501695 Post-Doctoral	21 Scholars	D Post Doctorate	30000469	8E050 Geograph	0006 Temp FT
	20004979	06/30/2015	08/15/2014	51010134	40501695 Post-Doctoral	21 Scholars	D Post Doctorate	30000469	8E050 Geograph	0006 Temp FT
	20004979	08/14/2014	06/04/2014	51020675	40501669 Visiting Schola	22 Visiting Scholar	D Post Doctorate	30000469	8E050 Geograph	0007 Temp PT > .20

Example of conversion note from the system.

Example, showing visiting scholar appointment in green text. Individual is now a faculty member. User can change the size of the panels. This shows the HR assignment panel expanded to show more.