Clinical Annual Re-appointment for Part-time and Adjunct Clinical Academics Instructions for Re-appointment Eligibility Review

These instructions show how to run a search in the Permanent Record area of the Laserfiche Appointments Repository for all Part-time and Adjunct Clinical Academics' dossiers, listing the End Dates and Email Addresses in the results window.

This should be undertaken <u>prior</u> to initiating the clinical annual re-appointments process for Part-time and Adjunct Clinical Academics (Clinical ARA).

This activity gives the Department the opportunity to ensure that <u>all</u> Part-time and Adjunct Clinical Academics' appointments due for re-appointment are captured in Laserfiche prior to creating next year's set of re-appointment dossiers. The list should be thoroughly vetted by the Department Chair, or delegate (i.e. applicable Education Leader), to ensure that all faculty listed should be invited to renew their academic appointment.

- A. Search the Permanent Record Area (see illustration below)
 - a. Log in to the Appointments repository in Laserfiche Web Access using your Department username and password: <u>https://documents.med.utoronto.ca/laserfiche</u>

Be sure that your own department name is selected and that you are not in an individual faculty member's record.

b. Beside the Search bar at the top click on Advanced

Appointments X	+	
+ I Https://documents.me	d.utoronto.ca/laserfiche/Browse.aspx?db=Appointments#?id=1	C Q Search
🚺 LF Web Access 🛃 LF Forms 🛃 LF We	o Admin 🚾 CNN 🃀 Revelation 🧓 Weather Network 🏶 GO Transit 🔰 Toronto	Star
Laserfiche [.]	Search repository	Advanced C
Appointments 1 entry		\sim
Appointments Training	Name Training	Appointments
Activity Reporting *Activity Reporting *New Appointments Archives Clinical MD Other Activity	sure your own department ne is selected here and it you are not in an lividual faculty member's oid.	Fields Template No template assigned Fields

- c. In the Advanced Search Box (see below)
 - i. Beside Search Types, select Search Syntax.
 - ii. In the Search Syntax box that appears at the bottom of the box, paste in the search query shown here.

{LF:LOOKIN="Appointments\YOURDEPARTMENTNAME\Clinical MD", SUBFOLDERS=0} & ({[]:[Academic Appointment Category]="Clinical MD PartTime"}|{[]:[Academic Appointment Category]="Clinical Adjunct"})

Note: It is very important that, in the query above, you change the text \YOURDEPARTMENTNAME\to your actual department name as it exists in Laserfiche. (e.g. \Ophthalmology and Vision Sciences\)

If there are faculty who should appear in the search results but do not, then likely there is a linebreak in the search syntax. To fix this, at the end of the first and second lines, press the spacebar to add a space. Then press the delete key to remove the linebreak.

There may be other boxes visible above the Search Syntax box. Do not type anything in them. You may remove them if you wish by clicking the small x on the right hand side.

Advanced Search		×	
Search Types Add search type 🔻 🎹 🔻	Saved Searches	٣	
Field	×		^
Choose template ~			
Choose Fields			
Date	×		
Last modified ~			
(Select)			
Search syntax Learn more	×		
{LF:LOOKIN="Appointments\Paediatrics\Clinical MD", SUBFOLDERS=0} & ({[]:[A Appointment Category]="Clinical MD PartTime"} {[]:[Academic Appointment Category]] Adjunct"})	.cademic y]="Clinical		
Save Show search syntax	Search Res	et	~

iii. Click Search

- B. Configure the columns in the Search Results pane.
 - a. Right-click on the column headings bar and select Column Picker.

B Search Results × ← ○ ■ https://documents.	+ med.utoronto.ca/laserfiche/Browse.aspx?c	lb=Appointments#?view=search&sea	rch=(LF:LOOKIN C	Q. Search
Laserfiche	Web Admin 🔤 CNN 💛 Kevelabon 🔵 Weat	S Contraction of the contraction	Advanced	
K Folders Search Results	46 entries			
Search Summary	🗌 Name 🔺	Academic Appointment Category	End Date	Column Headings
	🗌 🛅 Bok Choy_Maja_99920130418	Clinical Adjunct	6/30/2016	^
Search syntax Learn more	Boxer_Bonita_99920140020	Clinical Adjunct	6/30/2016	
{LFLOOKIN="Appointments" MD", SUBFOLDERS=0} & ({ Appointment Category]="Clinics {[]:[Academic Appointment Cat Adjunct"})	Bulldog_Bruce_99920140022	Clinical Adjunct	6/30/2016	
	Cauliflower_Callie M999201	Clinical Adjunct	6/30/2016	
	Celery_Celia_99920130346	Clinical Adjunct	6/30/2016	
View search syntax	Chickpeas_Charla_9992013044	Clinical Adjunct	6/30/2016	
	Chickness Charlene 9992013	Clinical Adjunct	6/30/2017	

- b. In the Configure Column Display box that appears
 - i. Under the Available side, scroll down to the fields under the Candidate Information template.
 - One-by-one double-click on the fields Academic Appointment Category, End Date, Candidate Email Address, and Personnel Number to the Selected side. The Name field refers to the name of the dossier folder so you should not need to move it.
 - iii. Click Apply



- iv. When you see the results page come up, sort the results list as you prefer by double-clicking on column headings.
- C. Download the Report to Excel
 - a. When you have the columns sorted the way you like, click on the Generate Report button to download the results to Excel.

iche [.]	Search repository	Q Advanced	Display Options DC999 🗸
ers Search Results	46 entries		<u> </u>
Summary B	□ Name ▲ Academic Appointment	ate End Date Candidate Email Address <	Column Headings
	Bok Choy_Maja_99920130418 Clinical Adjunct	6/30/2016 katherine.mcconnell@utoronto	Generate
syntax Learn more	Boxer_Bonita_99920140020 Clinical Adjunct	6/30/2016 katherine.mcconnell@utoronto	Report
OOKIN="Appointments" SUBFOLDERS=0) & ([Bulldog_Bruce_99920140022 Clinical Adjunct	6/30/2016 katherine.mcconnell@utoronto	
tment Category]="Clinic. ademic Appointment Cat	Cauliflower_Callie M_999201 Clinical Adjunct	6/30/2016 katherine.mcconnell@utoronto	

b. In the Select Report Type box that appears, click on the Metadata Report button.

Select Report Type	\times
Select a report to generate.	
Metadata Report ☆ View information about selected entries and their child entries. You can choose which information to include in the report.	
User Security Properties Report View a user's security properties, such as group membership, feature rights, and privileges.	
Can	cel

c. In the Metadata Report box that appears, click OK.

Metadata Report	×
Metadata Report Report Type Excel Include subfolders Available Search Common Columns Checked out by Classification level Created by Creation date Electronic file last modified Entry ID Extension Has tags	Selected Reset Name Academic Appointment Category End Date Candidate Email Address Personnel Number
Hit count Indexed Last modified Last modified by	
	ок Cancel

d. Generating the report may take several minutes. When it is finished, click Open with Microsoft Excel and OK.

Opening My Report.csv	Х			
You have chosen to open:				
🕼 My Report.csv				
which is: Microsoft Excel Comma Separated Values File (5.3 KB)				
from: https://documents.med.utoronto.ca				
What should Firefox do with this file?				
Open with Microsoft Excel (default)				
○ <u>S</u> ave File				
Do this <u>a</u> utomatically for files like this from now on.				
OK Cancel				

e. This Excel file will generate outside of Laserfiche.

D. Review the End Dates

a. Dossiers without End Dates:

Any Part-time and Adjunct Clinical Academic appointment dossier without an End Date should be edited immediately to include an accurate one.

If you still have the Search Results box open, put a check mark beside the person's dossier in the centre panel and the Candidate Information template will appear on the right. Fill in the End Date field and click save.

If you have closed the Search Results box, double-click on the Clinical MD folder in the left panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information template will appear on the right. Fill in the End date and click save.

<u>Note</u>: In order to change the field values in the Candidate Information template, only one person's dossier can be selected (check mark in the box) at a time. Please double-check that you do not have multiple boxes checked.

Submitted documents from an initial appointment application or activity reports for renewal exist within the faculty's Laserfiche dossier and can be reviewed to confirm end date or inform the basis for previous renewals.

b. Archive any non-active dossiers:

If a dossier has an End Date prior to the upcoming academic year-end and/or the appointment will not be renewed, it should be removed from the Permanent Record area and put into the Archives folder. Please follow these steps carefully.

- i. If the Search results tab is still open, single click on the Folders tab on the left.
- ii. When you see your regular folder display, single click on the Plus sign beside your Department folder to expand it.
- iii. Single click on the Plus sign beside the Archives folder to expand it.
- iv. If there is not a sub folder in Archives for the applicable archive year, right-click on Archives and, in the drop down, select New/New Folder to create a folder called "[year]" (e.g. 2021).
- v. Single click on the Plus sign beside the Clinical MD folder to expand it.
- vi. Drag the permanent dossier from under Clinical MD up to the appropriate archive sub folder. This removes the permanent dossier from the Permanent Record area while preserving it in Archives.
- c. Remaining End Dates:

All remaining dossiers should have an end date to reflect the upcoming academic year end (i.e. 6/30/20xx). Each dossier with this End Date will be included in the reappointment cycle for the coming academic year.

E. Verify Emails

An active email is required for the renewal process. If you need to change a faculty member's email address

- i. If you still have the Search Results box open, put a check mark beside the person's dossier in the centre panel and the Candidate Information template will appear on the right. Edit the Candidate Email Address field and click save.
- ii. If you have closed the Search Results box, double-click on the Clinical MD folder in the left hand panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information template will appear on the right. Edit the Candidate Email Address field and click save.

<u>Note:</u> In order to change the field values in the Candidate Information template, only one person's dossier can be selected at a time (check mark in the box) at a time. Please double-check that you do not have multiple boxes checked.

F. Save Excel File

It is recommended that the exported excel file is used as a working file to verify faculty eligible for re-appointment. All subsequent changes should also be made in Laserfiche as per the instructions above regarding End Date. Upon completion of the verification process, a saved excel file should indicate what confirmations were made regarding each dossier and Laserfiche should be updated appropriately.