



**Notes & Attachments**  
Notes and attachments can be added to any object in Salesforce. They cannot be reported on, but they can be searched for from the Global Search bar.

**Files**  
Files can be any type of file, stored in the 'Cloud', in SF, for either private or public/group use. Can be treated like 'Google Docs'.

**Accounts**  
Companies, schools, student groups, etc. Not people.

**Contacts**  
All people. Faculty, staff, students, donors, company contacts, etc.  
All Contacts belong to an Account. Every Leeds faculty/staff member belongs to 'Leeds School of Business' bucket account. Leeds Faculty Information includes primary and secondary division/program, education, certificates, faculty voting member status, eligibility for sabbatical, original hire date, rostered date, termination date and current AY and FY salary to include all positions and summer pay records.

**Leads**  
All faculty, staff and contract new hire survey responses create a new lead.

**Course Assignments**  
Faculty can have several of these per term. Includes info from what was Winnie's spreadsheets, as well as FCQ data, # of credits granted for the course, overload information, etc.

**Course Buyouts/Banking**  
A faculty member's request for a buyout or bank, with the signed request attached to the record.

**Course Releases for Service**  
A faculty member's request for a release, usually due to an administrative position, with the start and end dates and the signed request attached to the record.

**Positions**  
Every faculty member must have one position, but can have multiple – especially if administrative terms are being served. Also where named Professorships are held. Includes percentage appointment and position salary.

**Faculty Leave**  
Any time a faculty member leaves Leeds (i.e. With or Without Pay; FML, Sabbatical, etc.)

**Faculty FRPA**  
Tracks all FRPA data submitted by faculty, including publications, awards, service, creative work, grants, commissions and fellowships and works in progress.

**Relationships**  
Shows a relationship between two contacts. Can only be created from one of the two related contact records.

**Organization Affiliations**  
Secondary account affiliations for a contact. A contact can have many secondary affiliations. Can only be created from the contact record. (Ex: A faculty member's primary account affiliation is 'Leeds School of Business', but they are also a member of a Leeds committee and serve as faculty advisor for a student club. Those would both be secondary organization affiliations created from their contact record.)

**Courses**  
Basic information for courses, as they are created and approved, including name, prefix, number of credit hours. Ties into the course assignment, which shows more detail like who teaches it, which terms, etc.

**Spaces**  
The 'where' for course assignments each term. Tracks the space name, building, room # and room capacity.

**Terms**  
Two types of terms: Those coming from ISIS and Summer Pay terms. The summer pay term must be created before creating the faculty member's summer pay record.

**Summer Pay**  
One summer pay record per faculty member each summer to track up to 3 'jobs', including types of teaching/terms taught and/or summer research/grants. Keeps 1/9<sup>th</sup> and 3/9<sup>th</sup> rule validation in real-time as records are saved. Must be completed directly from the position record with which it's associated with for each faculty member.

**Faculty Workloads**  
The percentage a faculty member teaches, does research and does service. Has to total 100%. Also includes the number of courses they are required to teach.

**Faculty Tracks**  
Includes faculty for tenure and non-tenure track faculty, including leave and tenure clock stop/start dates, promotion titles and dates, and reappointment date. Faculty can have multiple track records.

**Journals**  
Where faculty's articles are published. Includes the name of the journal and discipline(s), as well as if the journal is a target indicator and what it's current AIS score is.

**FRPA Codes**  
FRPA Codes for Article and Award categorization.

**Post Tenure Reviews**  
Once a faculty member is tenured, they will have multiple post-tenure review records to track which year they were most recently reviewed. Has to be created off of the faculty track record with which it's associated.