



UNIVERSITY OF TORONTO  
FACULTY OF MEDICINE

# Guide to Academic Appointments

Using Web Forms and LaserFiche

**Non-Clinical Department Coordinators Version**

Discovery Commons

January 2019

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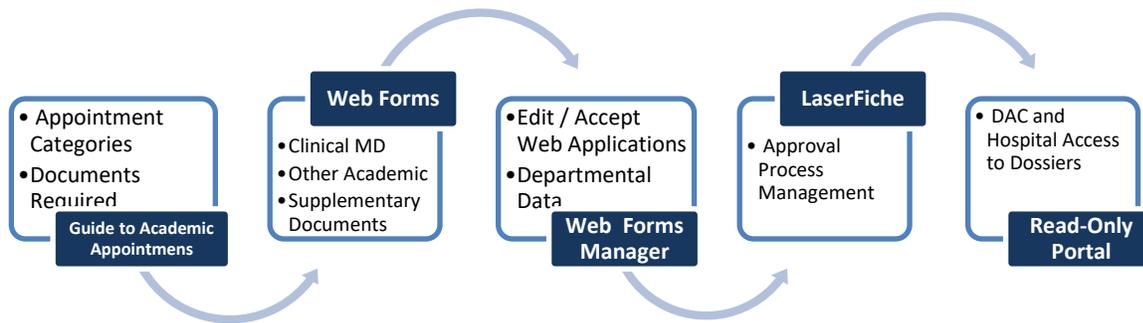
## When to Use the LaserFiche Online Appointments System

- All Clinical MD appointments including foreign-trained physician appointments, and clinical cross appointments
- Junior Promotions (this refers solely to clinical appointments where the applicant is moving from the rank of Lecturer to Assistant Professor )
- Status-Only Appointments
- Non-budgetary cross appointments
- Adjunct and Visiting Appointments
- Part-time appointments

Note: Tenure, Tenure-stream, Contractually-Limited Term Appointments (CLTAs), and Teaching-stream appointments are still processed through the university's TALEO system.

## Introduction to the Components of the Appointments System

The Appointments Workflow is carried out over five different, but inter-related modules. These will be described in more detail as we go through the Appointments workflow, but the following is a brief description of the role each application plays in the system.



1. The Guide to Academic Appointments (<http://aca.med.utoronto.ca/>) will guide you, in a step-by-step process, to the correct appointment category for your candidate and will show a list of the documents required in each appointment category's application package. The Guide also contains links to online application forms and to other helpful information.
2. An appointment candidate (or their agent) may apply for an academic appointment AND submit many of the required documents for the appointment by using the Online Application Forms and the Supplementary Document Submission form. Links to these web forms are listed below but they can also be found in the Guide to Academic Appointments. Their URLs may be bookmarked or placed in other information pages for quick access. Submission and subsequent acceptance of an online application form triggers a sequence of events in LaserFiche that result in a dossier (folder) being created for the applicant and the insertion of any documents attached to the application form into that dossier. There are 2 online applications forms, one for clinical MD appointments and one for non-MD appointments.

The Supplementary Document Submission form is used to submit supplementary documents to a dossier that has already been created (i.e. through the acceptance of an application form).

Here are the URLs for the forms:

Application Form for **Clinical** MD Appointments:

<http://documents.med.utoronto.ca/Forms/clinical>

Application Form for Other Academic (non-MD) Appointments:

<http://documents.med.utoronto.ca/Forms/nonclinical>

Form For Submitting Supplementary Documentation:

<http://documents.med.utoronto.ca/Forms/appointmentdocs>

3. WebForms Manager: Using the Online Forms Manager

(<http://documents.med.utoronto.ca/Forms>), the Departmental Coordinators (DCs) can review the submitted applications forms, correct them if necessary, add information to the form, reject, or accept a form. When an application form is accepted several functions begin, not the least of which is the automatic creation of a dossier for the candidate in LaserFiche document system. All of the functions that take place when a form is accepted are described in detail in **The Appointments Workflow** section of this manual.

4. LaserFiche: (<http://documents.med.utoronto.ca/laserfiche> ) LaserFiche is the central document management system for this project. LaserFiche is configured to allow key staff members (e.g. department coordinators, Human Resources staff and the Dean or the Dean's representatives) to route application packages through an approval process. It will accept, store and display documents for an appointment candidate, create unique ID numbers, allow changes to the access rights on document sets, record workflow events, create personalized Letters of Offer (if desired), and send notification e-mails, with attachments, to various stakeholders throughout the approval process.

5. Read-Only Portal: The Read-only Portal (<http://documents.med.utoronto.ca/appointments>) allows persons who are not licensed to use the full version of LaserFiche to view the documents in a candidate's dossier. It is used as part of the approval process mentioned above. The department coordinator can control when documents become visible on the Read-only Portal, and to whom. This portal will be used by members of Departmental Appointments Committees (DACs), Hospital Coordinators (HC), and by members of the Faculty Appointments Advisory Committee (FAAC) to view the contents of a dossier.

## Which Modules Do I Use

<b>Guide to Academic Appointments</b>
Everyone

<b>Online Applications / Document Submission</b>
Applicants (or their Agents) Department Coordinators (DCs) Hospital Contacts (HC)

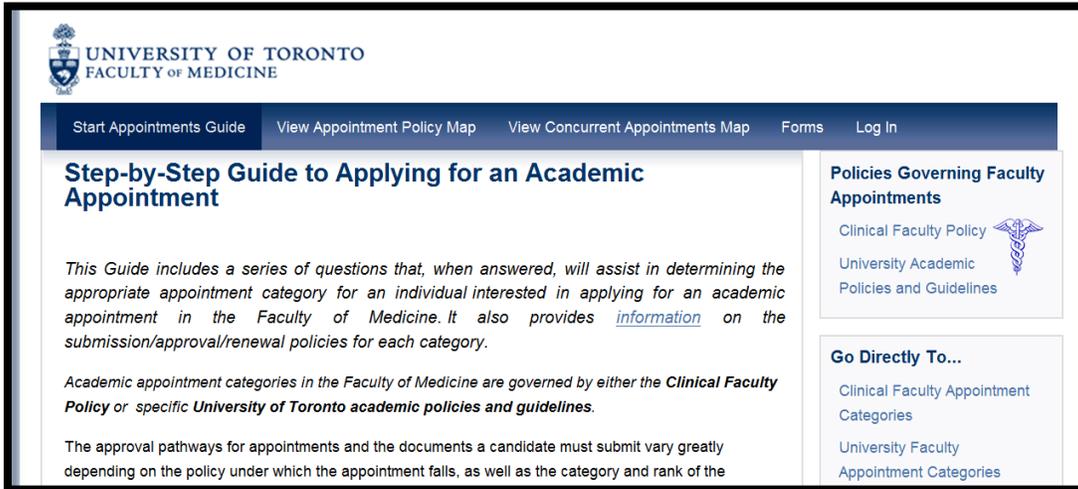
<b>Web Forms Manager</b>
Department Coordinators (DCs)

<b>LaserFiche Appointments System</b>
Department Coordinators (DCs) Human Resources Reviewer (HR) Dean / Vice Dean / Chair of FAAC

<b>Read-Only Portal</b>
Departmental Appointments Committee Members (DAC) FAAC Committee Members Hospital Coordinators (HC)

## Logging in to the Modules of the Appointments Application

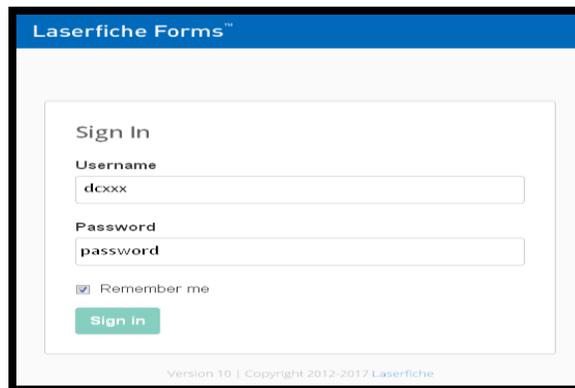
1. **The Guide to Academic Appointments** (<http://aca.med.utoronto.ca/>) requires **no login**; it is open to the public.



The screenshot shows the University of Toronto Faculty of Medicine website. The main content area is titled "Step-by-Step Guide to Applying for an Academic Appointment". It includes a navigation menu with options like "Start Appointments Guide", "View Appointment Policy Map", "View Concurrent Appointments Map", "Forms", and "Log In". The main text describes the guide's purpose and provides information on submission policies. A sidebar on the right contains links for "Policies Governing Faculty Appointments" and "Go Directly To..." with sub-links for "Clinical Faculty Appointment Categories" and "University Faculty Appointment Categories".

2. **Web Submission Forms:** The Application Forms do not require a log in. The Supplementary Data forms do not require a log in, but they do have a required field for the unique ID number of the appointment candidate. This unique ID is generated when an application form is accepted by the department coordinator, causing a dossier to be created in LaserFiche.

3. **Forms Manager:** (<http://documents.med.utoronto.ca/Forms>). Only the Departmental Coordinator (DC) has access to the WebForms Manager. You will be prompted to log-in. Your username is **dcxxx** where xxx is your departments Org unit. For example: dc999. Password (to begin) = password.



The screenshot shows the "Laserfiche Forms" sign-in page. It features a "Sign In" section with a "Username" field containing "dcxxx" and a "Password" field containing "password". There is a "Remember me" checkbox which is checked, and a "Sign in" button. At the bottom, it says "Version 10 | Copyright 2012-2017 Laserfiche".

If you have questions about your login and password, you may contact **Libby Shirriff** ([Libby.Shirriff@utoronto.ca](mailto:Libby.Shirriff@utoronto.ca)), **Donna Deak** ([d.deak@utoronto.ca](mailto:d.deak@utoronto.ca)) or **Tery van Taack** (<mailto:tery.vantaack@utoronto.ca>) in Human Resources.

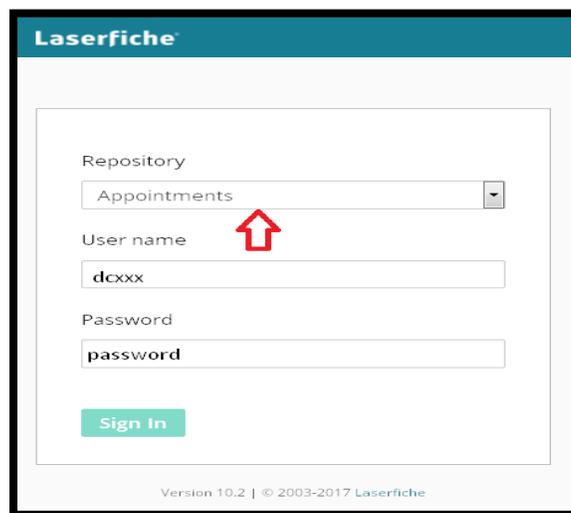
4. **LaserFiche:** (<http://documents.med.utoronto.ca/laserfiche>).

The Department Coordinators (DC), the Human Resources Coordinators (HR), the Dean, the Vice Dean of Clinical Affairs, and the Chair of the FAAC will use a web-based application (web client) to administer the Academic Appointments process.

For Department Coordinators, your username is **dcxxx** where xxx is your department's Org unit. For example: dc999. Your password, initially, is *password*.

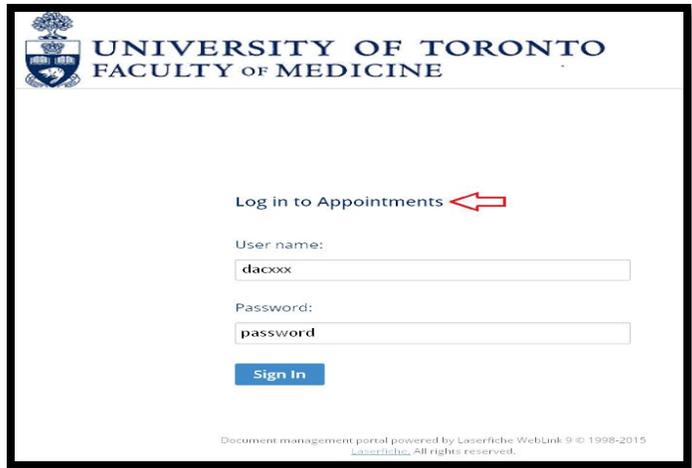
Human Resources staff, the Chair of the FAAC, the Vice dean of Clinical Affairs and the Dean of the Faculty of Medicine will be individually informed of their usernames and passwords.

You can access the LaserFiche web client by entering the URL above into a web browser from any computer that has access to the internet. For those of you familiar with our LaserFiche system for Promotions, this is an oft-used website. However, you will **select a different repository (Appointments)** and use a different login name and password. It may be a good idea to save this URL in your browser's favorites to save you from entering it in every time you'd like to access the Academic Appointments system.



5. **Read-Only Portal:** (<http://documents.med.utoronto.ca/appointments>).

The Departmental Appointments Committee (DAC) will log in to the read-only portal using the username = **dacxxx** where the **xxx** is your department's Org unit. For example: dac999. The password, initially, is *password*.



<http://documents.med.utoronto.ca/appointments>

## The Appointments Workflow

### Step-by-Step:

a. The *Guide to Academic Appointments* is open to the public; any qualified individual with an interest in an academic appointment can work through the Guide to find the appointment category appropriate for them and the documents required in an application package.

The screenshot shows the University of Toronto Faculty of Medicine website. The main content area is titled "Status Only Appointments (at the rank of Assistant, Associate or Full Professor)". It includes sections for Description, Duration, Approval, Available Rank, and Required Documents. A table lists the required documents:

Document type	Agent Responsible for Supplying	When Required
Application Form (online)	Candidate or Employer	on application
Curriculum Vitae	Candidate	on application
Statement of Research or Teaching	Candidate	on application

The right-hand sidebar contains "Policies Governing Faculty Appointments", "Apply Here!" (highlighted with a red arrow), "See Also...", and "Additionally..." sections.

b. If the appointment candidate or their agent is using the Guide, they may access the correct online application forms by clicking on Apply Here! in the right-hand side bar of the page describing the appointment category. Alternately, they may access the desired form by selecting the Forms link on the menu bar. The applicant (or their agent) will fill in the form, attach any documents that they currently have ready, and click Submit.

The screenshot shows the "Application Form" page for Clinical Academic Appointments and Promotions from Lecturer to Assistant Professor. The form includes the following fields:

- Requesting appointment to which Faculty of Medicine Department\* (Dropdown menu: Anesthesia)
- Department Division (if applicable) (Text input field)
- Do you hold, or have you ever held, an academic appointment at the University of Toronto? (Radio buttons: Yes, No)
- What type of University appointment are you applying for now?\* (Dropdown menu: A new primary appointment)
- Surname\* (Text input field)
- Given Name\* (Text input field)

c. The Departmental Coordinator (DC) then receives an e-mail (sender=HRAppts) informing them of the submitted application form. The DC logs in to the WebForms Manager (<http://documents.med.utoronto.ca/Forms>) and reviews the form. The DC can edit the text boxes the candidate filled in, if they wish. The DC is required to fill in additional information at the bottom of the form in boxes that were invisible to the candidate when filling out the form. The form can be rejected, or it can be accepted. (**NOTE: Unless an Application is SPAM or a DUPLICATE - All applications should be accepted for consideration.**)

d. When a form is accepted, several things happen automatically.

- i. The web form sends LaserFiche the data from the form. LaserFiche takes the data and uses it to fill in two features:
  - a. It creates a dossier for the candidate in the department's Appointments repository and fills out an information template with the data. That template is called the **Candidate Information template** and it can be viewed in the right column when the dossier checkbox is marked in the middle column or is highlighted in the right column.
  - b. LaserFiche takes the data and fills in a pdf template of the application form and inserts this new pdf document into the newly created dossier.

If changes are required to this Application PDF file, they can be made directly inside Laserfiche where the PDF can be regenerated (see Appendix B for details).

- ii. LaserFiche creates a unique ID for the dossier (Appointment ID).
- iii. Any documents that were attached to the application form are then automatically inserted into the dossier.
- iv. LaserFiche creates a second template called **Appointment Status**. This template will allow various users to trigger events by changing the status of a dossier and it will show a record of all of the status changes that have taken place for a given dossier.

e. If this application requires further documentation, the candidate or the department coordinator may submit them using the Document Submission Form <http://documents.med.utoronto.ca/forms/appointmentdocs> and attaching the documents to it. This form requires knowing the Appointment ID created above.

f. If a Document Submission form is submitted, LaserFiche inserts the attached documents into the candidate's dossier and e-mails the DC to let them know that additional documents were submitted.

g. The DC reviews the dossier. If it is customary in the department, the DC advises the DAC Committee that there are applications pending.

h. Members of the DAC can log on to the public portal and view the dossier. The DAC informs the DC of their decision about the appointment.



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Log in to Appointments →

User name:  
dacxx

Password:  
password

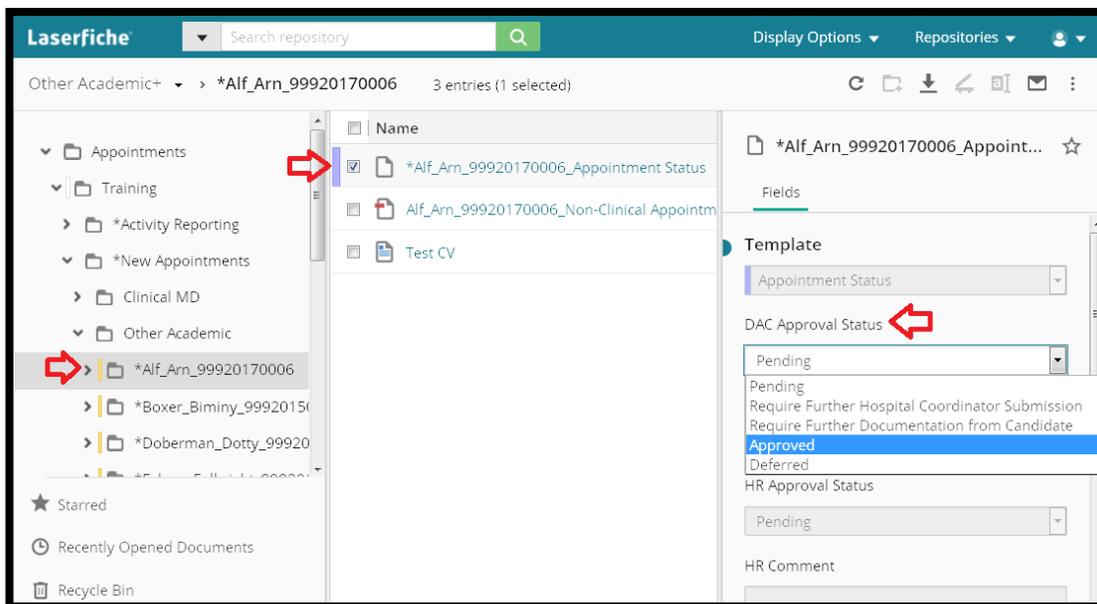
Sign In

Document management portal powered by Laserfiche WebLink 9 © 1998-2015  
Laserfiche. All rights reserved.

i. The DC uploads the Letter from the Department Chair, and a job description if one is required. See page 19 for instructions on how to upload documents directly into LaserFiche.

j. At this point, before changing the dossier status to 'DAC Approved' (see page 18), the DC will merge most of the documents into one PDF file for review by HR. Documents to merge include: Application Form, Candidate CV, supporting documentation, DAC letters, etc. The DC may upload a Letter of Offer to the dossier (Note: This letter and any Template files should NOT be included in the merged file).

k. The DC changes the status of the dossier to Approved. (see the Changing the Status of a Dossier section below).



This removes the visibility of the dossier from the DAC. It also gives access to the dossier to the Human Resources staff (HR) and sends an e-mail to HR to inform them that your DAC has approved the applicant.

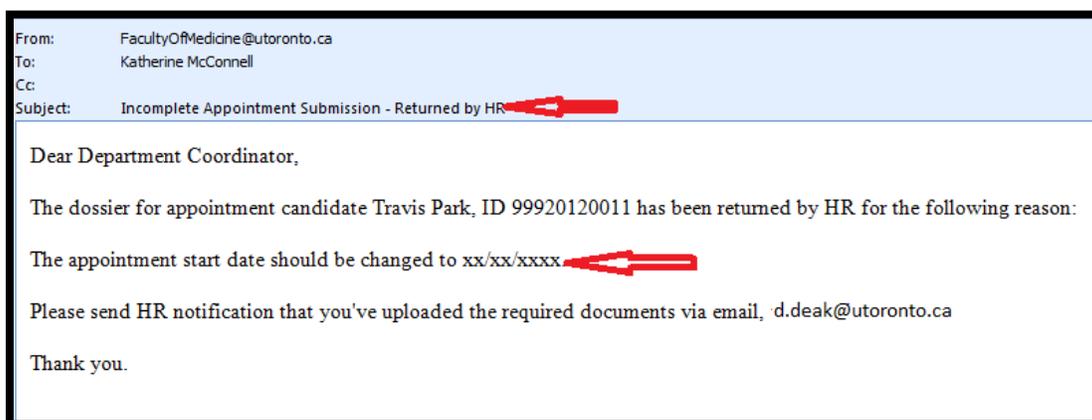
I. Human Resources reviews the dossier.

The screenshot shows the Laserfiche Web Access interface displaying a table of academic appointments. The table has the following columns: Name, Department, Academic Appointment Cat..., Rank, Primary Clinical Site, and Citizenship. Red arrows point to the Department, Academic Appointment Cat..., Rank, Primary Clinical Site, and Citizenship columns.

Name	Department	Academic Appointment Cat...	Rank	Primary Clinical Site	Citizenship
McConnell_Eric_99920120017	Training	Adjunct Professor	Not Applicable	Hospital for Sick Children	Other
McConnell_Julian_99920120018	Training	Clinical MD PartTime	Assistant Professor	Ontario Shores Centre for Mental Health	Other
McConnell_Lucky_99920120012	Training	Adjunct Professor	Professor	Holland Bloonview	Other
Mendoza_Isaac_99920120020	Training	Clinical MD FullTime	Professor	Ontario Shores Centre for Mental Health	Other
Park_Travis_99920120011	Training	Clinical MD FullTime	Assistant Professor	Hospital for Sick Children	Canadian

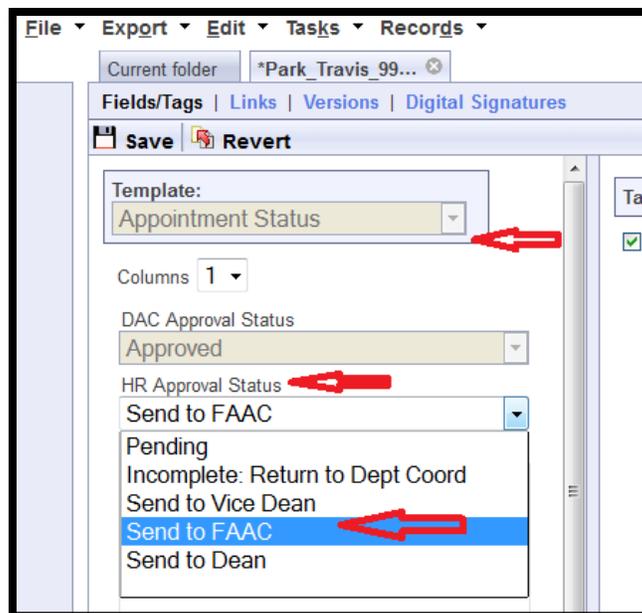
If the dossier is not satisfactory to HR, they may select the status 'Incomplete: Return to Dept Coordinator' in the Appointment Status template. Before clicking SAVE they can add a comment about what changes are necessary to the template. Clicking Save generates an e-mail to the DC and changes the DAC Approval status back to Pending.

m. If the DC receives an e-mail like this, they will make the necessary changes and/or upload any further required documentation (see the sections below on 'Editing the PDF Appointment Application Document' and on 'Uploading Documents Directly into LaserFiche').



When ready, they will once again change the DAC Approval Status on the Appointment Status template back to DAC Approved.

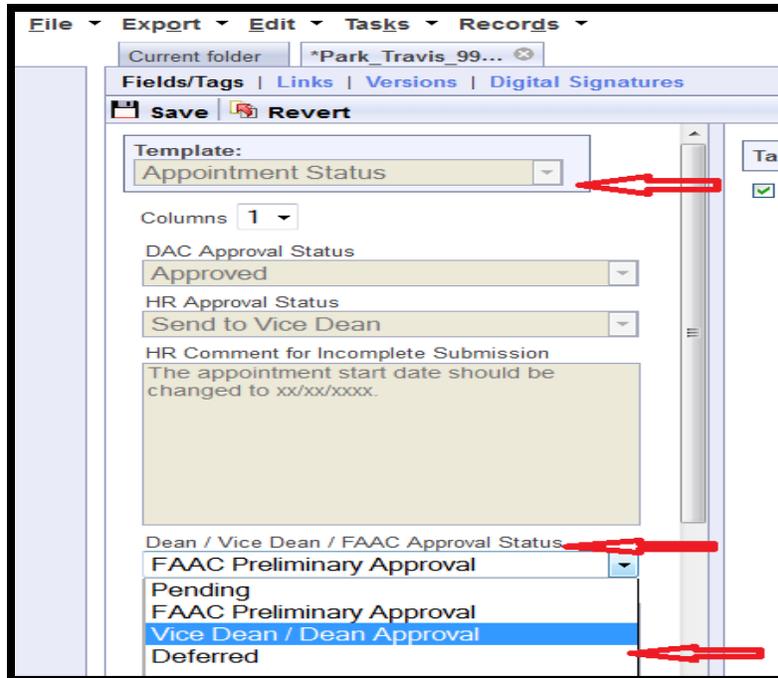
n. When HR is satisfied with the dossier, using the same Appointment Status template, they grant access to the dossier to either the Vice Dean, the FAAC, or the Dean.



o. The Vice Dean, the FAAC, and the Dean ARE NOT notified that this access has now been granted. This is to limit the amount of e-mail they get. They do have full access to the LaserFiche system and, unlike the DAC, will log in to LaserFiche (<http://documents.med.utoronto.ca/laserfiche>). When they log in they will see only the applicant dossiers that have been approved for their review.



p. To approve or defer an appointment candidate the Vice Dean, the FAAC Chair or the Dean will open the Appointment Status document (purple icon), and make a selection from the dropdown list under the Dean/Vice Dean/FAAC Approval Status.



q. When the value 'Vice Dean/Dean Approval' is selected, the Department Coordinator (DC) is alerted via e-mail that the appointment for this candidate has been approved.

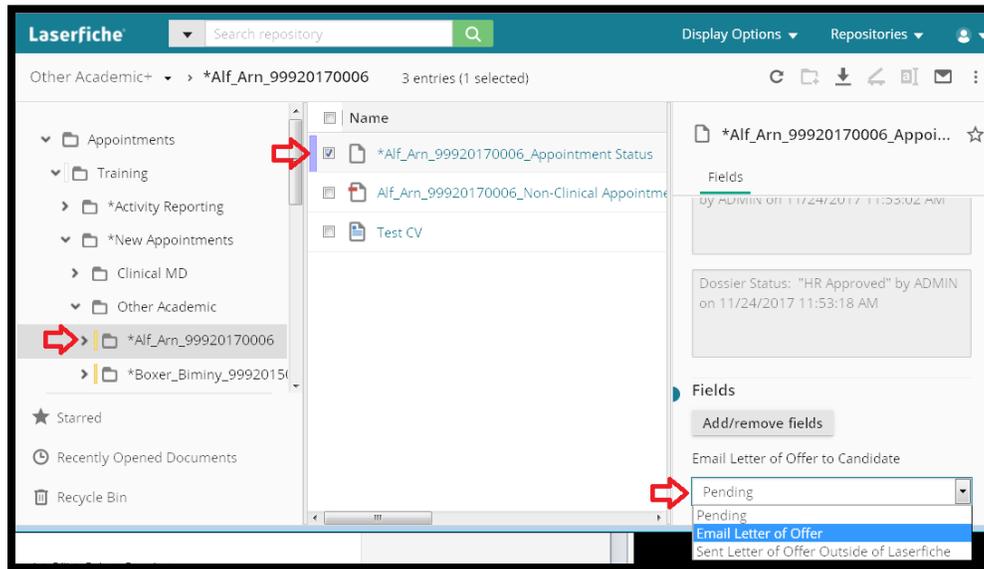
**Note:** The use of LaserFiche to manage the appointment does not end here even if the department prefers to handle the issues of notifying the candidate and extending Letters of Offer, in their own unique fashion. If the department decides to do this, please read paragraph (u) of this workflow summary to learn about updating the candidate's metadata template with a Personnel Number when one is assigned. **Adding a Personnel Number to LaserFiche is mandatory and should happen only after a signed letter of offer is received.**

r. If the department wishes, LaserFiche can send an e-mail, with an attached Letter of Offer and Job Description (if desired), to the candidate congratulating them on the appointment. In order for this to happen there must be in the dossier, a Letter of Offer that has the file name (in the format below).

Surname\_FirstName\_ApplicationID\_Letter of Offer

Similarly, if other files are indicated in the Enclosures field on the Letter of Offer template as being attached to the e-mail, the file must be included in the dossier and the file name must begin with the word Enclosure (e.g.: Enclosure\_JobDescription.pdf).

s. To send an e-mail with attached Letter of Offer and, if necessary, other Enclosures, the Department Coordinator will check the box to the left of the Appointment Status template (purple icon). Scrolling down to the bottom of the template shows a previously invisible field titled “Email Letter of Offer to Candidate”.



Note that the e-mail will be sent to the e-mail address shown in the Candidate Email field in the Candidate Information template, in the Fields tab. The email will also be copied to any email addresses supplied on the Letter of Offer template.

t. Upon receiving the signed Letter of Offer, it should be uploaded directly into the candidate’s dossier.

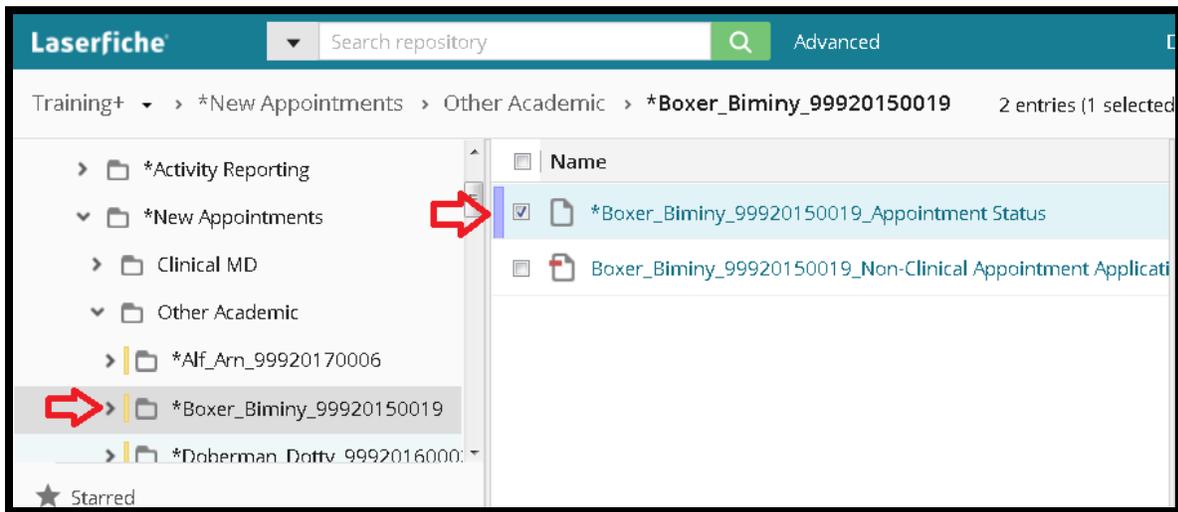
u. After you have received your signed Letter of Offer it is the department’s responsibility to add the new appointee to the HRIS database. When a Personnel Number is available **it is mandatory** that you add the Personnel Number to the Candidate Information template in LaserFiche. You do this by clicking on the candidate’s dossier. This will open the dossier and the Candidate Information Template Fields column will display to the right. Enter the Personnel Number into that field.

Adding the Personnel Number completes the application process and moves the dossier out of the \*New Appointments area and into the Permanent Record area. Once here, it is available for participation in any future activity report processes.

**\*\*This Completes the Step-by-Step Outline of the Workflow\*\***

## Changing the Status of a Dossier

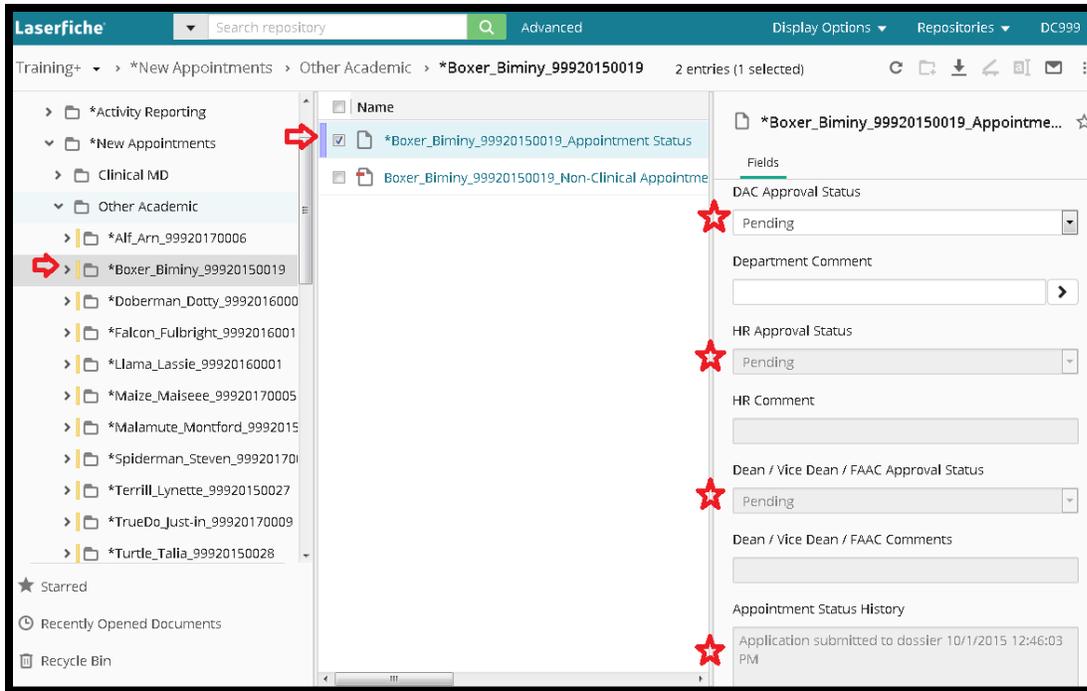
The status of a dossier is controlled and recorded on the candidate's 'Appointment Status' template. This is the file with the purple icon in dossier. It is created when the dossier is created. Put a check mark in the box beside it to view the template on the right.



The status of a dossier defines for whom the contents of the dossier are visible. (i.e. Human Resources cannot see appointment dossiers from the departments until the DAC Approval Status is set to approved. Likewise, the FAAC, the Vice Dean or the Dean cannot see the dossiers until the HR Approval Status is set to 'Send to ... (someone in the Dean's Office)').

Permission to change a dossier status is limited to the user controlling that portion of the workflow.

The Appointment Status sheet also records events as they occur in the workflow. In the illustrations below we can see the date the application form was submitted and the date the supplementary data form was submitted. As the workflow progresses, further events will be recorded.



### Change the status of a dossier

Check the box to the left of the Appointment Status template in the dossier (the one with the purple icon). The fields will be displayed to the right.

You will only be able to change the status of a workflow in areas where you have control. Change the status from the drop down box and click okay.

Refresh the screen and you will see that the status change event was recorded in the box at the lower end of the template called Appointment Status History.

### Uploading Documents Directly into LaserFiche

Uploading documents directly into the dossier is simple.

Make sure you have highlighted the folder into which you want to upload the documents. Click the Import arrow on the top right >> Select the document>> Click Start Import >> Click Next on the Message Box that appears (ignore any information inside the box) >> Refresh the screen.

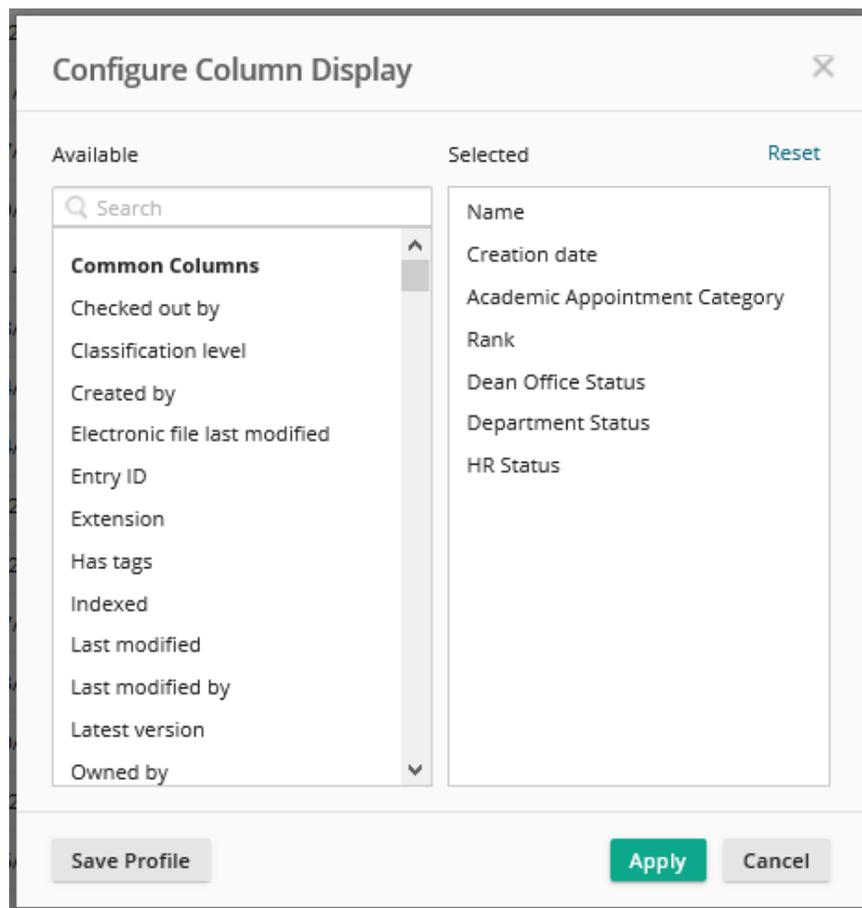
## Column Headings – Refining your View, Sorting your Lists

When viewing a list of pending or accepted appointees you may want to see some information about them displayed in the columns. The information people want displayed is quite variable, and can be individual to each department, hospital, or user. Not every piece of metadata is available, or desirable, as a column heading, but there are some that may be helpful. Other metadata may be used as a column header by default but may not be very useful.

The most useful metadata, we think, that can be used in columns comes from the Candidate Information template. This is the template that holds the data from the application form.

A. To change what columns are displayed on the web client (for Department Coordinators, Human Resources Coordinators, the Vice Dean, the FAAC or the Dean):

Right click on any existing column header bar >> Select Column Picker >> In the left column (Available) >> Drag the Field Name to the right column (Selected). To remove fields from display, drag the Field Name from the right column to the left column. Repeat these steps for each field you wish to add/remove.



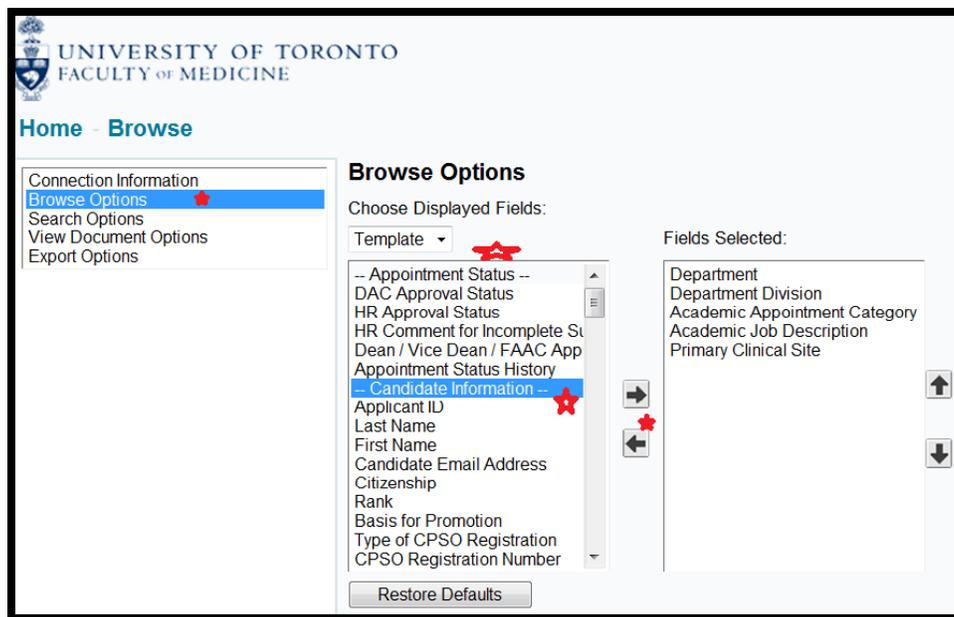
Click Save Profile when done. Then Save as a new column profile (type a name into the blank field and click Save); or select Replace an existing column profile (if one was previously saved), then click on the dropdown list, select and click Save.

B. **To change what columns are displayed on the Public Portal** (for Hospital Coordinators and DAC members): <http://documents.med.utoronto.ca/appointments>

After logging in, click on My Weblink in the top-right area of the screen >> In the leftmost box, make sure Browse Options is highlighted >> In the middle box, under Choose Displayed Fields, select Template >> Scroll down to Candidate Information >> Directly under Candidate Information, one by one, highlight the fields you would like to see as columns and click the sideways arrow to add it to the rightmost box >> When you have all the desired fields, Click SAVE.

Name	Department	Department Division	Academic Appointment Category	Academic Job Description	Primary Clinical Site
Training	Training				

By highlighting fields in the rightmost box and clicking a sideways arrow you may remove from view any columns headings that are not useful (ie. Pages).



And remember that you can sort your list by columns: Simply left-click on the column header to sort the list of appointees alphabetically, by the metadata in that column.

[Appointments](#) > [Training](#) > [Clinical](#)

Name	Department	Department Division	Academic Appointment Category	Academic Job Description	Primary Clinical Site
McConnell_Julian_99920120018	Training	Child Psychiatry	Clinical MD PartTime	Clinician Teacher	Ontario Shores Centre for Mental Heal
Park_Travis_99920120011	Training	Rheumatology	Clinical MD FullTime	Clinician Teacher	Hospital for Sick Children

## Letters of Offer

Letters of Offer are standardized for most clinical appointments. Unless there are exceptional circumstances, departments are required to use LaserFiche to generate clinical offer letters. For Non-Clinical appointments, letters are not standardized due to the individual requirements for each one. For this reason, Departments will create their own letter and upload it into LaserFiche.

Departments have the option of having LaserFiche send the Letter of Offer to the applicant attached to an email, or of sending it to the applicant themselves. Unless there are special circumstances, using LaserFiche to send the letter is the preferred method because LaserFiche will record the day it was sent.

Letters of Offer are reviewed in Human Resources before the appointment is approved so it is necessary to have an initial version of the letter (can be a draft) in the dossier before the dossier status is changed to 'DAC Approved'. It may be necessary to make some minor changes in the letter after the application receives approval from the Dean's office and before it is sent to the candidate.

If Letters of Offer are going to be sent automatically by LaserFiche, the file name for the letter must be in this format: '**Lastname\_Firstname\_ApplicantID\_Letter Of Offer**'. Additional attachments can also be included as Enclosures. Simply name each filename with the word Enclosure (e.g.: Enclosure\_DepartmentProfile, EnclosureAcademicPositionDE-Mail Letters of Offer:

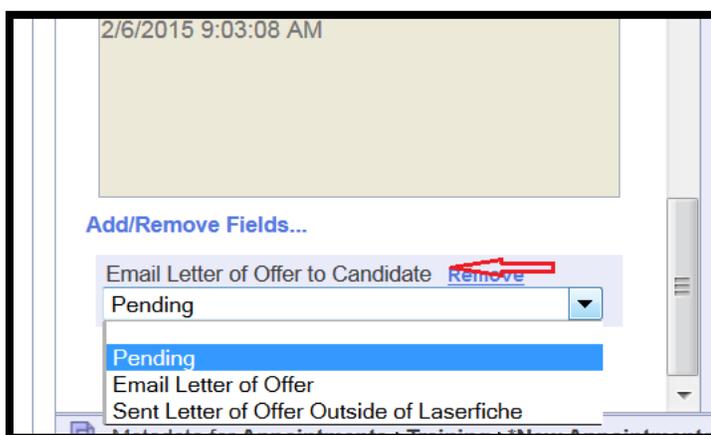
To send an e-mail with an attached Letter of Offer and, if desired, some additional attachments (enclosures) follow these steps below:

1. Make sure that a Letter of Offer is in the dossier and that it is named in the format **Lastname\_Firstname\_ApplicantID\_Letter of Offer**
2. Make sure that any Enclosures you wish to send with the Letter of Offer and/or are mentioned in the Letter of Offer Enclosures field, exist within the dossier **AND** that their file names begin with the word Enclosure.  
examples: Enclosure\_DepartmentProfile, EnclosureAcademicPositionDescription, etc.

### Important Notes on Enclosures:

- a. The letter of offer itself does not need to have word Enclosure at the beginning of the file name.

- b. Any file beginning with the word Enclosure will be picked up and attached to the Letter of Offer email regardless of whether or not it is mentioned in the Enclosures field in the Letter of Offer template.
3. Make sure that the e-mail address for the candidate is correct in the Candidate Email Address field in the Candidate Information template. You can view and edit this in the Candidate Information template by checking the box to the left of the candidate's name (yellow folder) in the middle column and editing the Candidate Email Address field in the right column.
4. Once again, open the Appointment Status template (purple icon) by checking the box to the left to display the Template fields. Scrolling down to the bottom of the template shows a previously invisible field titled "Email Letter of Offer to Candidate. This field only becomes visible when the application receives final approval.



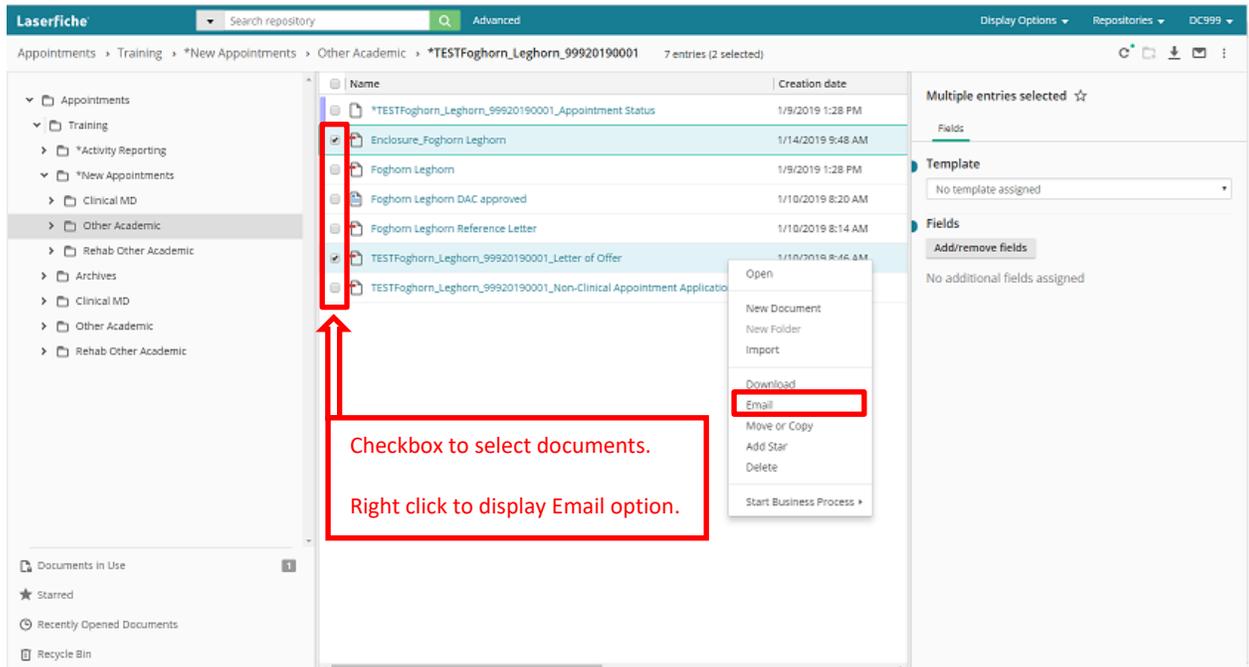
5. Select Email Letter of Offer, and up at the top of the template, click Save. An email will be sent to the candidate with the letter of offer and any files beginning with the word Enclosure attached. The email will be automatically copied to the department coordinator, to any email addresses in the **Letter of Offer CC Email Addresses field**, and, if there is an email address in the Hospital Administrative Email field in the Candidate Information template, to the hospital coordinator.

## E-Mailing Other Documents Directly From LaserFiche

In the preceding section, we talked about how the Appointments approval workflow is set up to send automated notification e-mails to the Vice Dean, the Dean, the FAAC, and/or back to the Department Coordinator. The Provost, however, is not included in this list of automated e-mails.

It is easy to send copies of documents directly from LaserFiche to anyone using your Outlook e-mail application.

- I. Open the Original Application folder for the candidate so that you can see the list of the documents. (steps 1 – 4 of the last section)
- II. Select the documents you want to send by checking the box to the left of the file names. You may select more than one. The 'templates' will not attach to your e-mail even if they are selected.
- III. Hover your mouse pointer over the selected documents, right click, and select 'Email'.



IV. The box below will appear with your selected documents listed. Click Send.

Name	Send as Pages	Pages	Page Range	Clear All
*TESTFoghorn_Leghorn_9992...	<input type="checkbox"/>	0	0	✕
Enclosure_Foghorn Leghorn	<input type="checkbox"/>	1	1	✕
TESTFoghorn_Leghorn_99920...	<input type="checkbox"/>	1	1	✕

These documents have been selected to be sent via email. Enter page numbers and/or page ranges separated by commas. Example, 1,3,5-12.

Send as:

Email:  Use Microsoft Outlook to manually send the email message

Buttons: **Send** (highlighted), Cancel

If a Security Warning displays, click Continue. Then click OK to send the email through Microsoft Outlook.

Opening Message generated by Laserfiche web client.msg

You have chosen to open:

- Message generated by Laserfiche web client.msg
- which is: Outlook Item (772 KB)
- from: https://documents.med.utoronto.ca

What should Firefox do with this file?

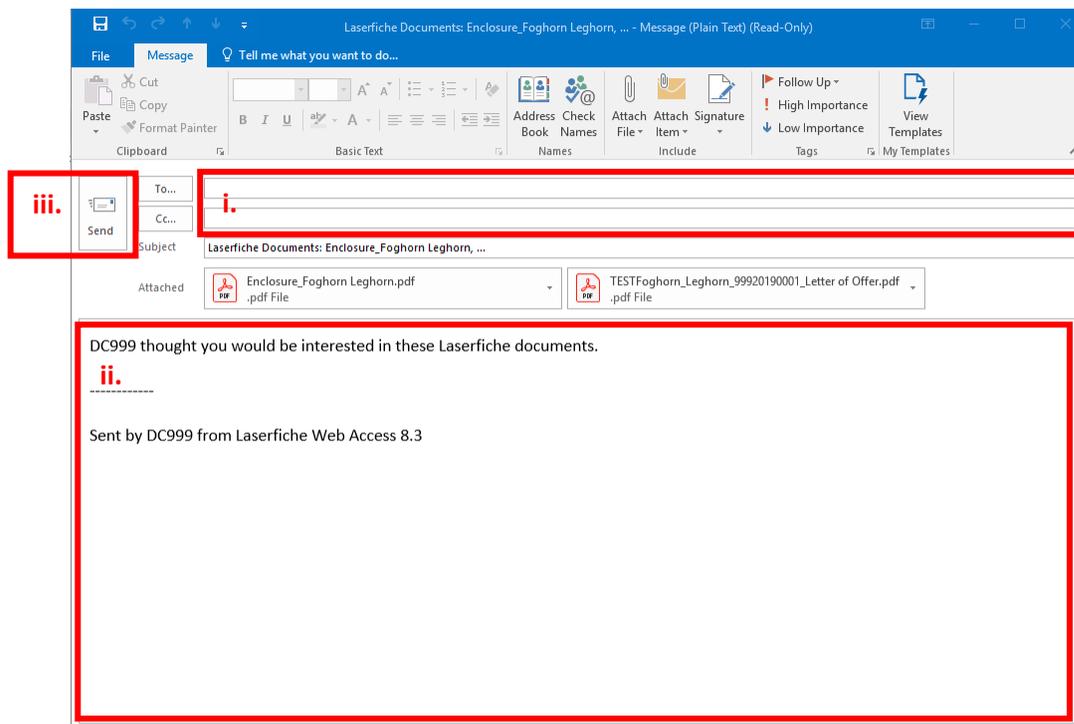
Open with Microsoft Outlook (default)

Save File

Do this automatically for files like this from now on.

Buttons: OK (highlighted), Cancel

- V. Your Outlook Email application will open and it can be sent like a regular email with attachments.
- i. Enter recipient name in the To (and CC, if desired) field; ii. Customize the body of the message; iii. Then click Send.



## Appendix A - Quick Reference to Appointments System Websites

<b>Guide to Academic Appointments</b>
<a href="http://aca.med.utoronto.ca">http://aca.med.utoronto.ca</a>

<b>Online Applications / Document Submission</b>
<a href="http://documents.med.utoronto.ca/Forms/nonclinical">http://documents.med.utoronto.ca/Forms/nonclinical</a> <a href="http://documents.med.utoronto.ca/Forms/clinical">http://documents.med.utoronto.ca/Forms/clinical</a> <a href="http://documents.med.utoronto.ca/Forms/appointmentdocs">http://documents.med.utoronto.ca/Forms/appointmentdocs</a>

<b>Web Forms Manager</b>
<a href="http://documents.med.utoronto.ca/Forms">http://documents.med.utoronto.ca/Forms</a>

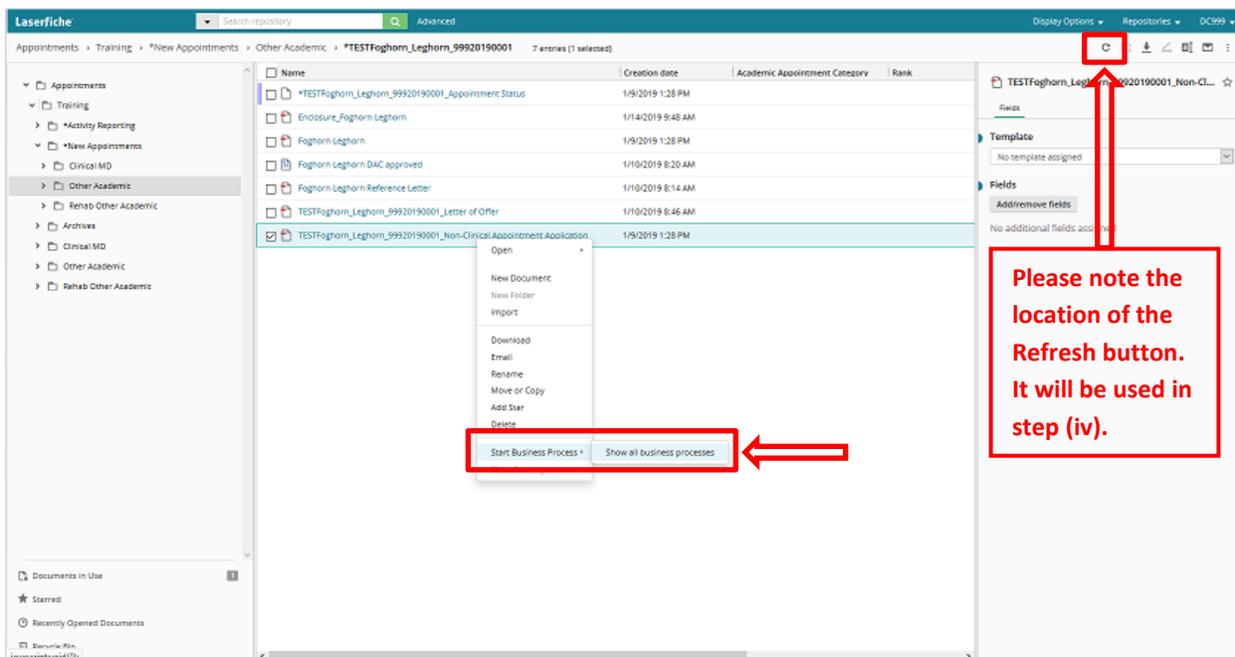
<b>LaserFiche Appointments System</b>
<a href="http://documents.med.utoronto.ca/LaserFiche">http://documents.med.utoronto.ca/LaserFiche</a>

<b>Read-Only Portal</b>
<a href="http://documents.med.utoronto.ca/appointments">http://documents.med.utoronto.ca/appointments</a>

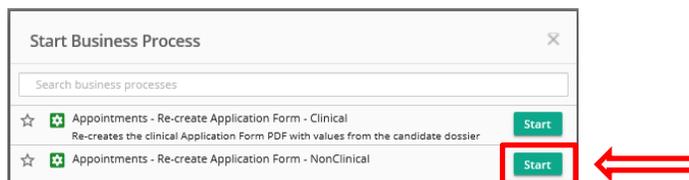
## Appendix B – Regenerating the Appointments PDF

The Appointment Application Form PDF is a system generated file triggered initially when a Candidate application is accepted for consideration by the DC. If editing is required it can be done inside Laserfiche.

- i. Click on the Candidate dossier to display the Candidate Information template.
- ii. The fields in the far right column will be displayed and can be edited. Click Save after making changes.
- iii. Right click on either the Appointment Application PDF (or the Appointment Status file), select Start Business Process, then Show all business processes.



- iv. Beside “Appointments – Re-create Application Form – NonClinical” Click Start.



The Application PDF will be regenerated with your edits. To view the revised PDF, click on the refresh button to the upper right (the Creation date will change), then click on the PDF.