

Promotion and Tenure SharePoint Site

A User's Guide

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Roles within the Electronic Process

Candidate – a faculty member who applies for promotion and/or tenure (P&T) during the next promotion and tenure cycle.

- Is responsible for completing the candidate portion of the electronic dossier/folder.

College representative – a faculty or staff member in the dean's office who coordinates the electronic P&T process for the college.

- Works closely with the departments, college review committee, dean and provost's promotion and tenure liaison.
- Is responsible for creating the electronic Face Sheet, uploading documents, and confirming that the dossier/folder is complete with required documents prior to forwarding to the next review level.
- Knowledgeable about the college and university P&T guidelines and is a resource person for the candidates about the P&T guidelines and procedures.

Department representative – a faculty or staff member in the department who coordinates the electronic P&T process for the department.

- Works closely with the department chair, department review committee, and college representative.
- Is responsible for uploading external and internal letters and documents, and confirming that the dossier/folder is complete with required documents prior to forwarding to the next review level.
- Knowledgeable about the college/department and university P&T guidelines and is a resource person for the candidates about the P&T guidelines and procedures.

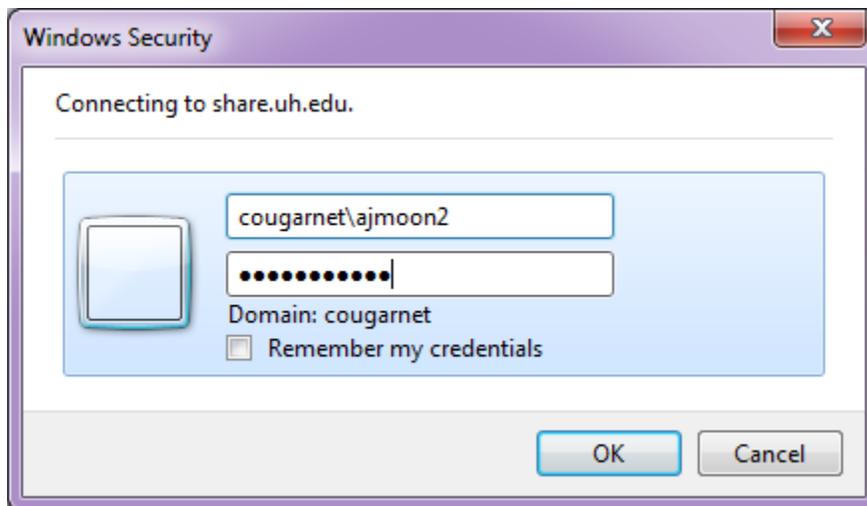
Reviewer – department chair, dean, members of the department P&T committee, college P&T committee, university P&T committee, Provost

Accessing the Site

Access is limited to current year candidates and reviewers. Please work with your department and/or college P&T representative to arrange your access.

The following is the link to the P&T SharePoint Site <https://share.uh.edu/pandt>. Please save the link to your Favorites. NOTE: SharePoint works best when using Internet Explorer as your browser.

Upon clicking the link, enter your Cougarnet username and password. IMPORTANT: Type “cougarnet\” before your username (Example – cougarnet\jdoe):



If you need to reset your Cougarnet password call the helpdesk at 3-1411 or reset it online by going to <http://www.uh.edu/infotech/password>.

FAQs

- *I keep getting an error message when I try to log in.*
If you get an error message that says “Access Denied,” you may need to reset your password.
- *I have a current password but I still cannot access. What should I do?*
Make sure you are typing in “cougarnet\” before your username. If you still cannot access contact andy@uh.edu

Candidate

Getting Started

If you plan to be a candidate, please inform the department chair and the college P&T representative. The college representative will then prepare the electronic Face Sheet (candidate information form). The candidate will receive an email notification once access has been granted to the P&T Site.

Training on the use of the P&T SharePoint site is offered through this user's guide and an online video. A face-to-face training class is also offered usually in early May. If you would like to attend this optional training, you may register for the class through the P&T Site using the [Signup for a P&T Training Class](#) link.

Uploading Documents

To access your document set please refer to page 4.

Once you are logged on, your screen should look like the following:

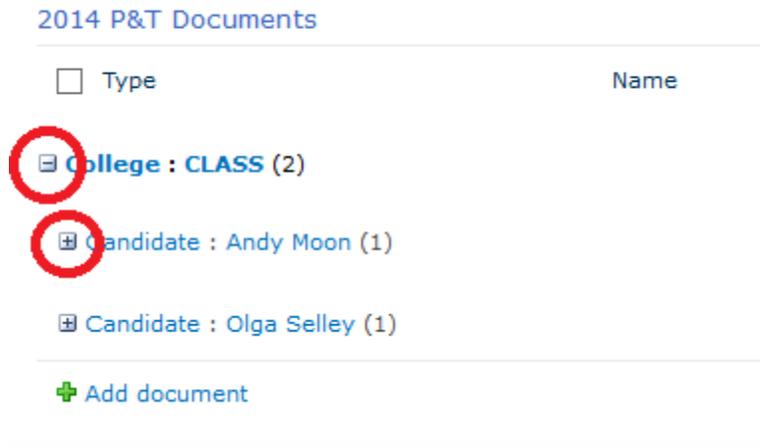
The screenshot shows a web browser window with the URL <https://share.uh.edu/pandt/SitePages/Home.aspx>. The page title is "Promotion and Tenure Home". The main content area displays a welcome message: "Welcome to the electronic Promotion and Tenure site!". Below the welcome message, there are two columns of links: "Promotion and Tenure Guidelines 2014-2015" and "Promotion and Tenure User's Guide". The "User's Guide" link is further broken down into "Promotion and Tenure Timeline" and "Signup for P&T Training class (Optional)". A link for "Training Videos for Candidates, Representatives, and Reviewers" is also present. Below this, there is a section for "2014 P&T Documents" with a table header showing "Type", "Name", and "Category". A filter for "College: CLASS (7)" is visible, and an "Add document" button is at the bottom.

Type	Name	Category

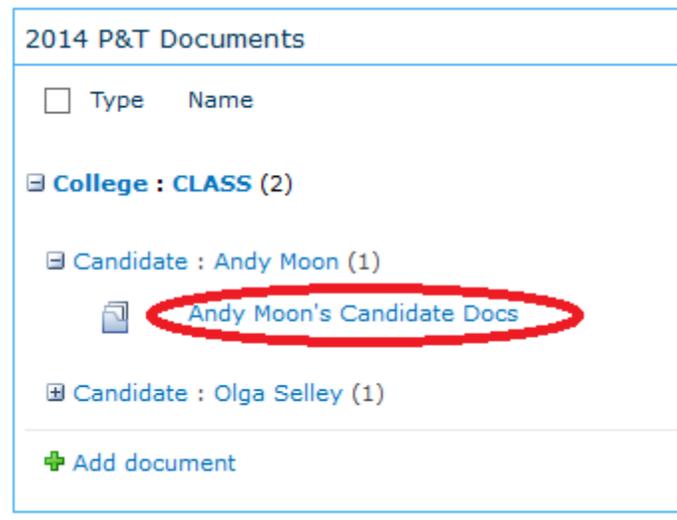
PDFs are the preferred format for uploading documents. The maximum file size for each pdf is 200 mb. To download Adobe Acrobat Pro XI, please see pages 25-26 of this guide. For music or video files, please use MP3, Quicktime, or AVI.

To upload a document:

- Click the + sign next to your college's name, then the + sign next to your name

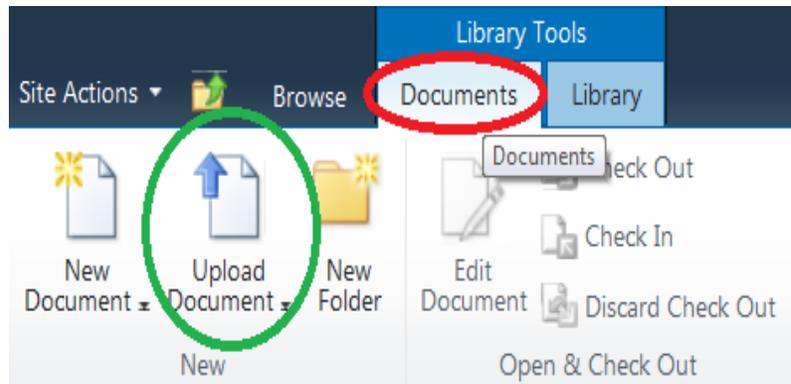


- Click the Document set labeled "<your name> Candidate Docs"

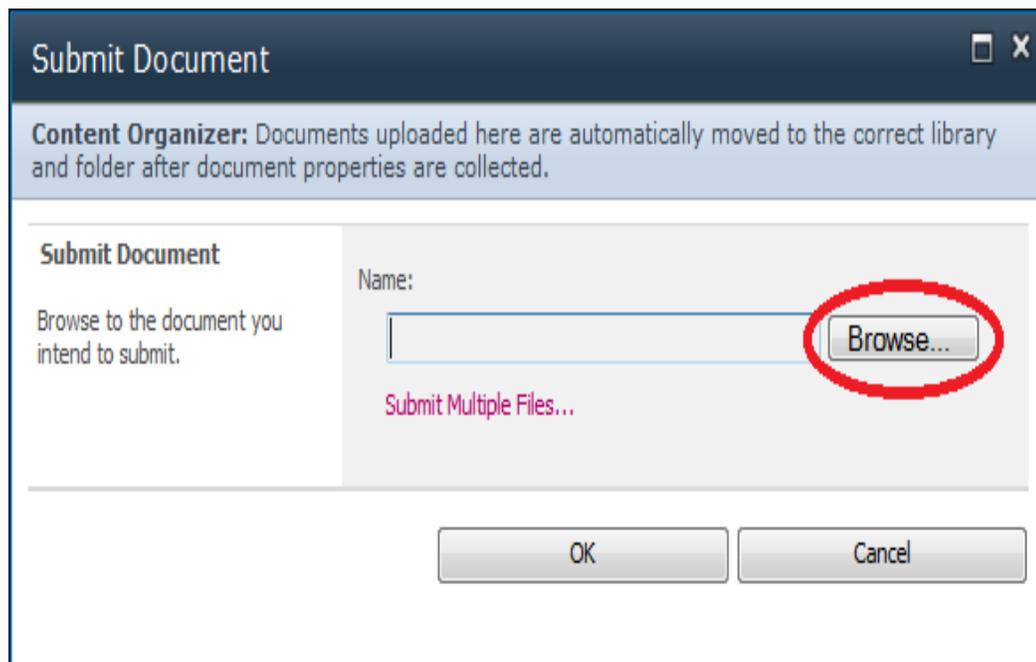


Note: Once you are in your document set, you can save the URL to your Favorites or Bookmarks for quicker access to your upload folder.

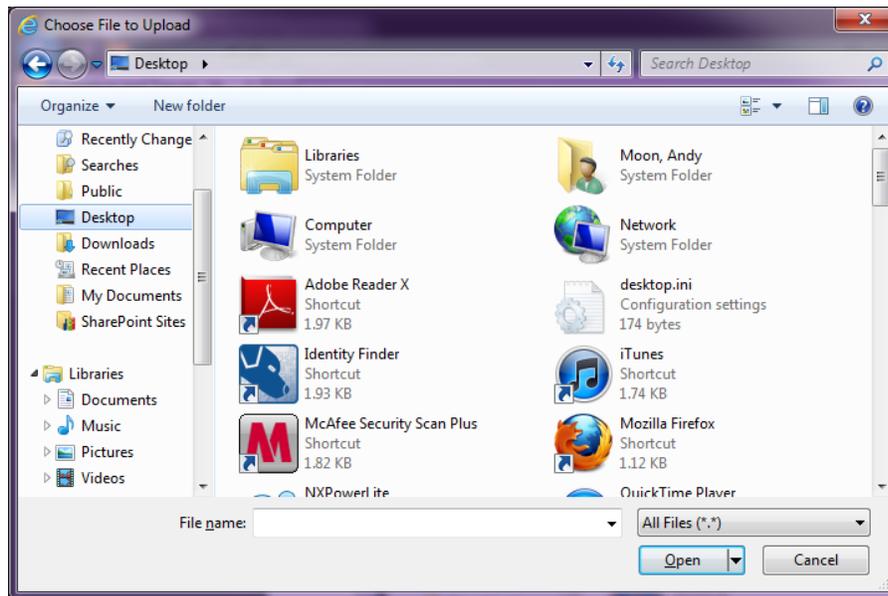
- Click on the Documents tab at the top of the screen (circled in red in the screenshot below) and then you can upload using the Upload Document button (circled in green in the screenshot below).



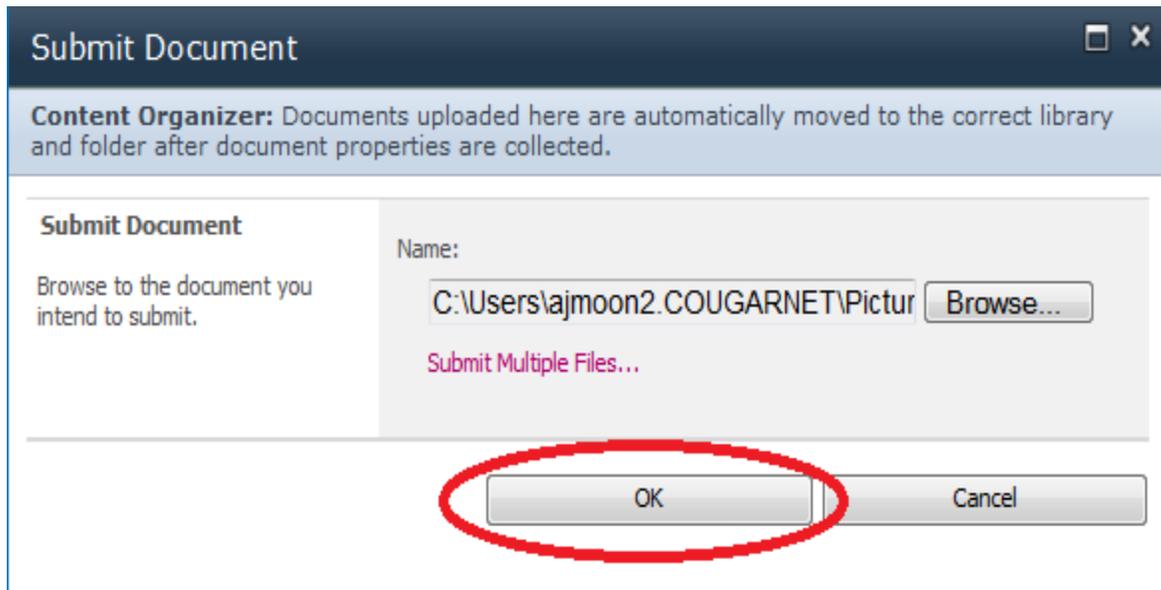
- Click the Browse button in the Submit Document dialog



- Choose your file in the file browser dialog and click Open



- Click OK in the Submit Document dialog



- Choose an option in the Category field (circled in red below) in the P&T Documents dialog, then click Save. The Candidate name should be pre-filled.

2015 P&T Documents - College Level Review Checklist.pdf

Edit

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

Name * College Level Review Checklist .pdf

Candidate Andy Moon

Category Scholarship with one page outline

Created at 4/13/2015 4:00 PM by Moon, Andy
Last modified at 4/13/2015 4:00 PM by Moon, Andy

Save Cancel

The candidate is responsible for uploading a total of (4) pdfs. One for each of the following categories:

- Candidate's Statement and Curriculum Vitae
- Research, Scholarship, Creative Work with a 1-page table of contents
- Teaching and Student Learning with a 1-page table of contents
- Service with a 1-page table of contents

Candidate's Statement and Curriculum Vitae

The Candidate's Statement should be no more than three pages long. The Candidate's Statement and CV are submitted as one pdf. The CV should be appropriate for the discipline.

Corroborating Material

The documentation for the other three categories should support the Candidate's Statement and CV. Each pdf must have a one-page table of contents.

Please contact your department chair or appropriate associate dean for guidance on the material to submit for the three categories (Research/Scholarship/Creative Work, Teaching, and Service). Please review the department, college, and university guidelines about the supporting documentation.

The maximum file size for each pdf is 200 mb. Please contact your college's IT department or Andy Moon (andy@uh.edu) if you need advice on how to minimize the size of a file.

Deadline and Completion

Your department and/or college determine the deadline for completing your portion of the folder. Please contact your department chair or college representative to confirm the deadline.

Once you have completed your portion of the folder:

- Verify that all (4) required documents have been uploaded and have the appropriate category;
- Make sure you have a full copy of all uploaded documents.

To confirm your completion you must click the **Candidates click here if you have completed your dossier/folder** link on the P&T Site. This will trigger the removal of your access to the folder and site. You will no longer have view or upload permission to the folder.

Welcome to the electronic Promotion and Tenure site!

For any Technical Assistance please contact sharepoint@uh.edu.

For people new to SharePoint, [here are some basic tips and tricks](#).

Promotion and Tenure Guidelines 2014-2015	Promotion and Tenure User's Guide
Promotion and Tenure Timeline	Sign up for P&T Training Class (Optional)
Training Videos for Candidates, Representatives, and Reviewers	Candidates, click here if you have completed your Dossier/Folder!
Download checklists for Appointments, College level reviews, Department level reviews, or External reviews	

IMPORTANT

A candidate may update the dossier/folder before the materials are sent to the next review level. A candidate should contact the appropriate reviewing party to request the documents be added to the dossier/folder.

Document Checklist

A general document checklist is found on the P&T SharePoint site. This checklist will give you an overview of the various documents that go into a candidate dossier/folder (as applicable) in preparation for University-level review.

Tips

As soon as possible, it is highly recommended that you:

- Thoroughly review the department, college, and university guidelines
- Verify the department/college deadline for completing the candidate's portion of the folder.
- Discuss with the department/college the documentation needed for the external review process. NOTE: External reviewers do not have access to the P&T SharePoint site.
- Determine type and amount of supporting documentation expected by the department and/or college.

College P&T Representative

A college representative will be given access to the P&T Site usually in late April to begin the process of creating Face Sheets for the candidates in the college.

Once you are logged on, your screen should look like the following:

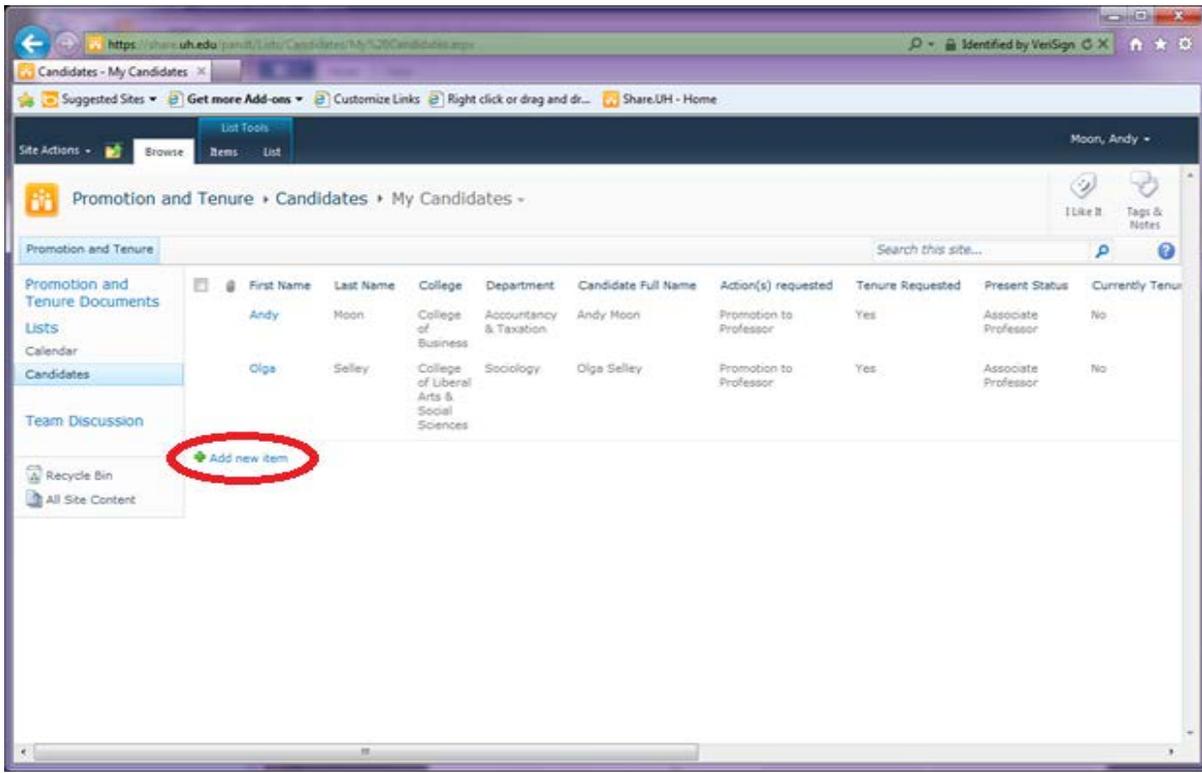
The screenshot shows a web browser window with the URL <https://share.uh.edu/panidt/SitePages/Home.aspx>. The page title is "Promotion and Tenure" and the subtitle is "This is the site dedicated to the promotion and tenure process at the University of Houston". The main content area features a welcome message: "Welcome to the electronic Promotion and Tenure site!" followed by contact information for technical assistance and a link to basic tips and tricks. Below this is a table with four links: "Promotion and Tenure Guidelines 2014-2015", "Promotion and Tenure User's Guide", "Promotion and Tenure Timeline", and "Training Videos for Candidates, Representatives, and Reviewers". A search bar is located in the top right corner. On the left side, there is a navigation menu with sections for "Libraries" (2014 P&T Documents), "Lists" (2014 Candidates), "Recycle Bin", and "All Site Content".

Creating the Face Sheet

After you have logged in, click the Candidates link on the Quick Launch section on the left side of the screen under the heading "Lists" (circled in red on the screenshot below).

This screenshot is similar to the one above but highlights the "Lists" link in the left navigation menu with a red circle. The main content area is the same, but the table at the bottom has a fourth link: "Download checklists for Appointments, College level reviews, Departm".

You will see the list of candidates you have entered, as pictured below. Click the “Add new item” link at the bottom of the list and you will be presented with a form to fill out with all of the candidate’s information, as pictured below.



The screenshot shows the "Candidates - New Item" form. It includes a toolbar with "Save", "Cancel", "Paste", "Copy", "Attach File", and "Spelling" buttons. The form fields are as follows:

- First Name *
- Last Name *
- College (dropdown)
- Department (dropdown)
- Action(s) requested:
 - None
 - Promotion to Professor
 - Promotion to Associate Professor
- Tenure Requested:
 - Yes
 - No
- Present Status:
 - Professor
 - Associate Professor
 - Assistant Professor
- Currently Tenured:
 - Yes
 - No
- Initial Appointment Date
- Initial Appointment Rank:
 - Full Professor
 - Associate Professor
 - Assistant Professor
- Years in present rank
- Was there an extension of probationary period?:
 - Yes
 - No
- US Citizen or Permanent Resident:
 - Yes
 - No

Once a Face Sheet is created, the Provost's Promotion and Tenure Liaison is automatically notified. The Face Sheet will be reviewed and then access to the folder will be given to the candidate.

Department Representatives

The college representative is responsible for contacting the department chairs to identify the department representatives for those departments that have candidates. The college representative should provide the Provost's Promotion and Tenure Liaison with a list of department representatives as soon as possible.

Department Completion of Folder

The department representative is responsible for informing the college representative that the folders are ready for college-level review. It is the college representative's responsibility to verify the department has uploaded all required documents prior to notifying the Provost's Promotion and Tenure Liaison that department-level access should be removed.

College Committee and Dean – Access

The college representative is responsible for providing the Provost's Promotion and Tenure Liaison with a list of college committee reviewers. The list should include:

- Full name of committee member (as listed in PeopleSoft)
- Which candidate the member is reviewing

The college representative is responsible for notifying the committee and dean when the folder is ready for review and providing access instructions.

Uploading Documents

Each candidate dossier/folder must include the following documents:

- P&T Guidelines (College/Department P&T guidelines given to tenure-track candidate at hiring) - **(UPLOADED BY DEPT/COLLEGE)**
- Dean and College Committee - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY COLLEGE)**
- Department Chair and Department Committee - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY DEPT/COLLEGE)**
- Appointment Materials - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY DEPT/COLLEGE)**
- External Reviews - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY DEPT/COLLEGE)**
- Candidate's Statement and Curriculum Vitae
- Research, Scholarship, Creative Work with a 1-page table of contents
- Teaching with a 1-page table of contents
- Service with a 1-page table of contents

The required checklists are found on the P&T site (circled in red below). Each checklist identifies the documents that should be included in that particular pdf. The items should be uploaded in the order found on the checklist with page 1 as the completed checklist.

PDFs are the preferred format for uploading documents.

Welcome to the electronic Promotion and Tenure site!

For any Technical Assistance please contact sharepoint@uh.edu.

For people new to SharePoint, [here are some basic tips and tricks](#).

Promotion and Tenure Guidelines 2014-2015	Promotion and Tenure User's Guide
Promotion and Tenure Timeline	Signup for P&T Training class (Optional)
Training Videos for Candidates, Representatives, and Reviewers	Click here if you have completed your Dossier/Folder!
Download checklists for Appointments, College level reviews, Department level reviews, or External reviews	

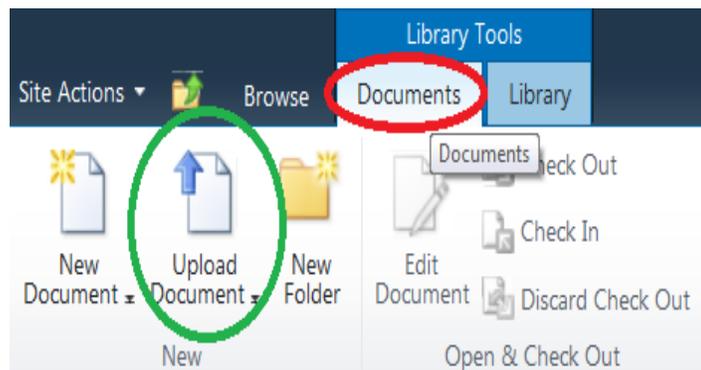
To upload a document:

- Navigate to your candidate's Confidential folder (labeled with the candidate's name followed by the word Confidential, circled in red in the first screenshot below). Click on the folder and once you are in click on the Documents tab at the top of the screen (circled in red in the second screenshot below) and then you can upload using the Upload Document button (circled in green in the second screenshot below).

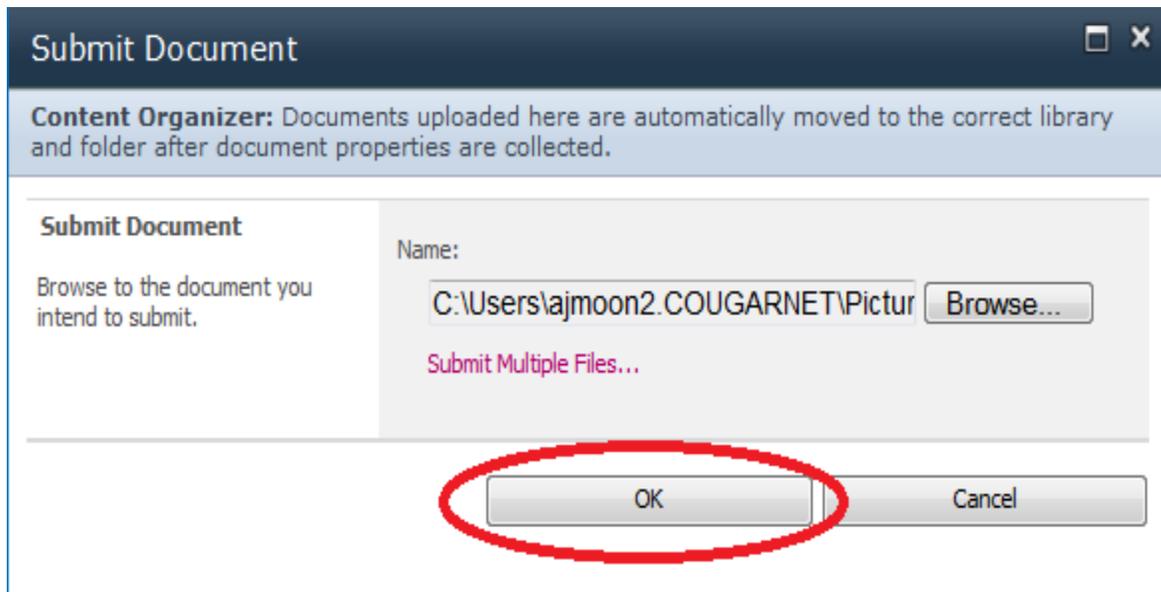
College : College of Liberal Arts & Social Sciences (4)

Candidate : Andy Moon (4)

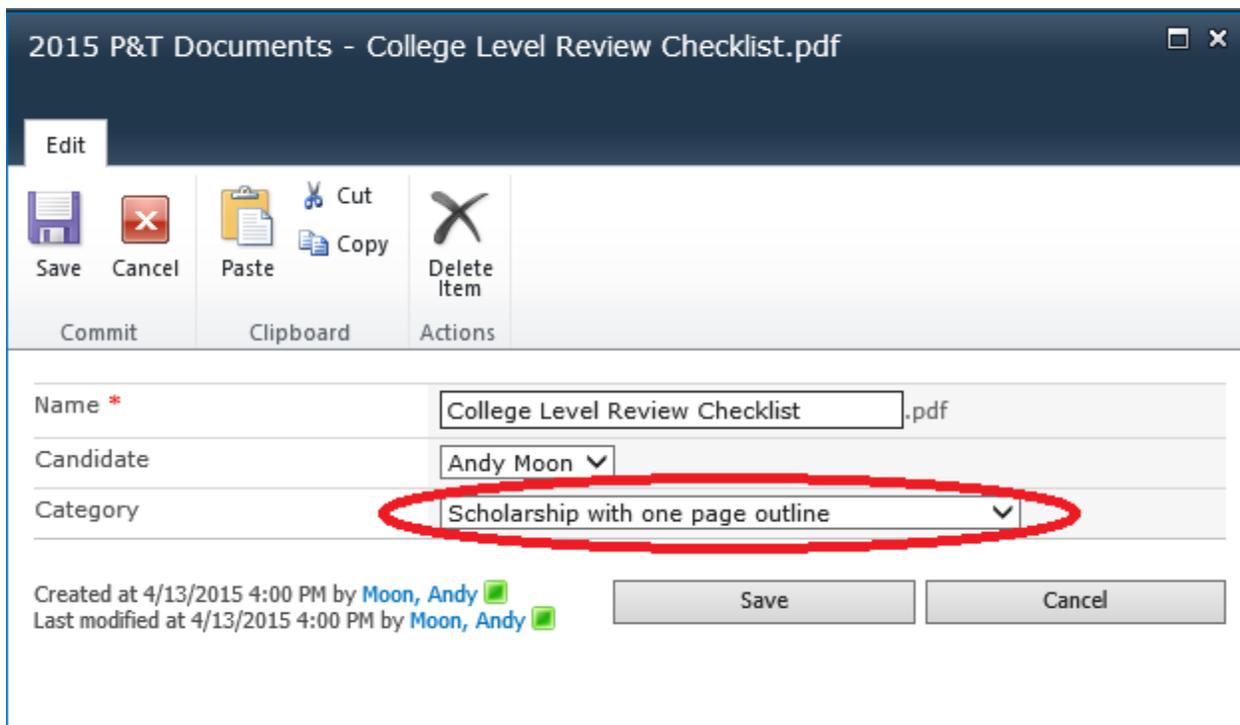
- Andy Moon's Candidate Docs
- Andy Moon's Confidential Docs
- AndyMoonresume
- College Level Review Checklist



- Click the Browse button and find the file to upload, and then click Open.
- Click OK in the Submit Document dialog



- Pick the document category (circled in red below), the candidate name should be pre-filled. Click the Save button.



IMPORTANT

The candidate loses access to the P&T SharePoint site once he/she completes their portion of the folder. This should occur before the review process begins.

A candidate may update the dossier/folder before the materials are sent to the next review level. The candidate should contact the appropriate reviewing party to request the documents be added to the dossier/folder. If it is an appropriate update, the representative should upload using the "Update" category. The representative should then inform the reviewers that an update has been added.

Vote Tabulation

The college committee vote tally is entered on the Face Sheet. The dean's recommendation (yes or no) is also entered on the Face Sheet. If there is an appeal, the associated votes and recommendation must also be added to the Face Sheet.

Completion

For each dossier, verify the following:

- Face Sheet complete with all votes entered
- All required documents have been uploaded WITH APPROPRIATE COMPLETED CHECKLISTS AND IN THE PROPER ORDER
- A copy has been made of each folder for the college record.

Once this is done, inform the Provost's Promotion and Tenure Liaison (pandt@uh.edu) that the college folders are complete and ready for university-level review. Shortly thereafter, access at the college level to the site will be removed.

NOTE

If your college does not have departments please review the **Department Representative** section and determine what is relevant to your college situation.

Department P&T Representative

Department P&T representatives receive access to the SharePoint site once the Face Sheet is created by the college representative and the name of the department representative is provided to the Provost's Promotion and Tenure Liaison.

Once you are logged on, your screen should look like the following:

The screenshot shows a web browser window with the URL <https://share.uh.edu/pandt/SitePages/Home.aspx>. The page title is "Promotion and Tenure" and the breadcrumb is "Home". The main content area displays a welcome message: "Welcome to the electronic Promotion and Tenure site!". Below this, there are two columns of links: "Promotion and Tenure Guidelines 2014-2015" and "Promotion and Tenure User's Guide". A table below these links contains the following information:

Promotion and Tenure Guidelines 2014-2015	Promotion and Tenure User's Guide
Promotion and Tenure Timeline	Signup for P&T Training class (Optional)
Training Videos for Candidates, Representatives, and Reviewers	Click here if you have completed your Dossier/Folder!

Below the table, there is a section for "2014 P&T Documents" with a table header:

Type	Name	Category
------	------	----------

Below the table, there is a filter for "College : CLASS (7)" and an "Add document" button.

You will have upload permission to a folder that is not viewed by the candidate. It is a secure folder. This allows you to begin uploading prior to the candidate completing their folder.

Candidate Completion of Folder

The candidate is responsible for confirming completion of their portion of the dossier/folder by clicking the **Candidate click here if you have completed your dossier/folder** link on the P&T site. This will trigger the removal of the candidate's access to the site. The department representative and department chair will be notified once the candidate no longer has access.

Department Committee and Chair – Access

The department representative is responsible for providing the Provost’s Promotion and Tenure Liaison with a list of department committee reviewers. The list should include:

- Full name of committee member (as listed in PeopleSoft)
- Which candidate the member is reviewing

The department representative is responsible for notifying the committee and chair when the folder is ready for review and providing access instructions.

Uploading Documents

Each candidate dossier/folder must include the following documents:

- P&T Guidelines (College/Department P&T guidelines given to tenure-track candidate at hiring) - **(UPLOADED BY DEPT/COLLEGE)**
- Dean and College Committee - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY COLLEGE)**
- Department Chair and Department Committee - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY DEPT/COLLEGE)**
- Appointment Materials - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY DEPT/COLLEGE)**
- External Reviews - **(MUST INCLUDE COMPLETED CHECKLIST) (UPLOADED BY DEPT/COLLEGE)**
- Candidate's Statement and Curriculum Vitae
- Research, Scholarship, Creative Work with a 1-page table of contents
- Teaching with a 1-page table of contents
- Service with a 1-page table of contents

The required checklists are found on the P&T site (circled in red below). Each checklist identifies the documents that should be included in that particular pdf. The items should be uploaded in the order found on the checklist with page 1 as the completed checklist.

PDFs are the preferred format for uploading documents.

Welcome to the electronic Promotion and Tenure site!

For any Technical Assistance please contact sharepoint@uh.edu.

For people new to SharePoint, [here are some basic tips and tricks](#).

Promotion and Tenure Guidelines 2014-2015	Promotion and Tenure User's Guide
Promotion and Tenure Timeline	Signup for P&T Training class (Optional)
Training Videos for Candidates, Representatives, and Reviewers	Click here if you have completed your Dossier/Folder!
Download checklists for Appointments, College level reviews, Department level reviews, or External reviews	

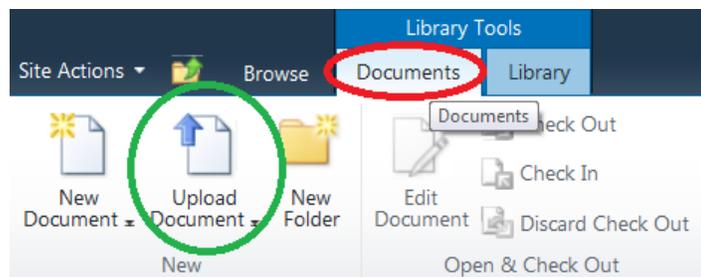
To upload a document:

- Navigate to your candidate's Confidential folder (labeled with the candidate's name followed by the word Confidential, circled in red in the first screenshot below). Click on the folder and then click on the Documents tab at the top of the screen (circled in red in the second screenshot below) and then you can upload using the Upload Document button (circled in green in the second screenshot below).

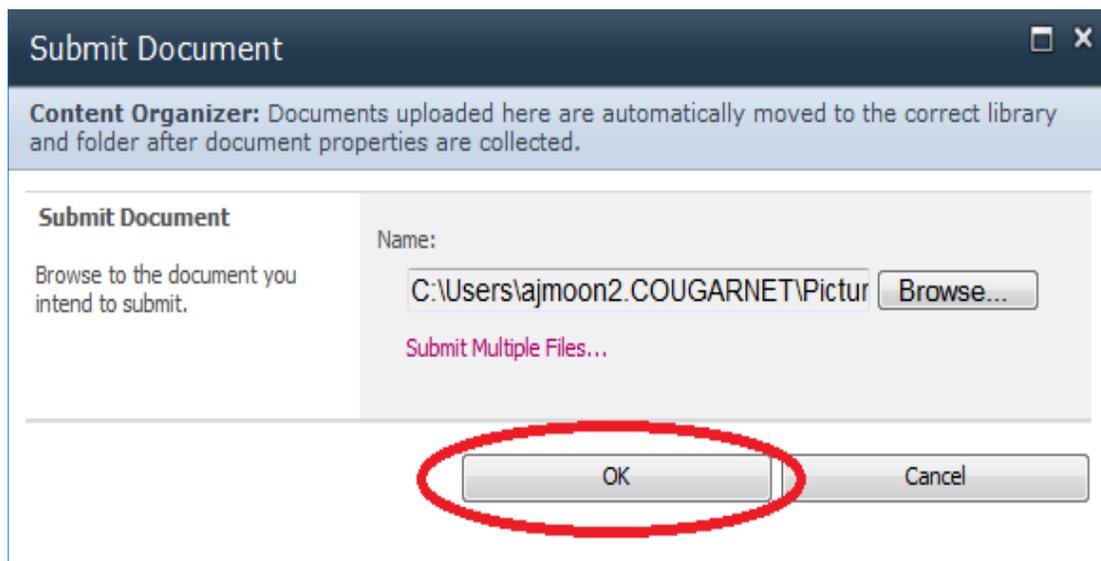
College : College of Liberal Arts & Social Sciences (4)

Candidate : Andy Moon (4)

- Andy Moon's Candidate Docs
- Andy Moon's Confidential Docs
- AndyMoonresume
- College Level Review Checklist



- Click the Browse button and find the file to upload, and then click Open.
- Click OK in the Submit Document dialog



- Pick the document category (circled in red below), the candidate name should be pre-filled. Click the Save button.

2015 P&T Documents - College Level Review Checklist.pdf

Edit

Save Cancel Paste Copy Delete Item

Commit Clipboard Actions

Name * College Level Review Checklist .pdf

Candidate Andy Moon

Category Scholarship with one page outline

Created at 4/13/2015 4:00 PM by Moon, Andy
Last modified at 4/13/2015 4:00 PM by Moon, Andy

Save Cancel

IMPORTANT

The candidate loses access to the P&T SharePoint site once he/she completes their portion of the folder. This should occur before the review process begins.

A candidate may update the dossier/folder before the materials are sent to the next review level. The candidate should contact the appropriate reviewing party to request the documents be added to the dossier/folder. If it is an appropriate update, the representative should upload using the "Update" category. The representative should then inform the reviewers that an update has been added.

Vote Tabulation

To access the Face Sheet, click the + sign next to the college name, and then click the candidate's name, circled in red below. Click Edit Item.

Promotion And Tenure Documents

<input type="checkbox"/>	Type	Name	DocumentCategory	DocumentType
<input type="checkbox"/>		College : Business (3)		
<input type="checkbox"/>		Candidate : Andy Moon (1)		
<input type="checkbox"/>		College : CLASS (1)		
<input type="checkbox"/>		+ Add document		

The department committee vote tally is entered on the Face Sheet. The chair's recommendation (yes or no) is also entered on the Face Sheet. If there is an appeal the associated votes should be added to the Face Sheet.

Completion

For each dossier, verify the following:

- Votes have been entered on the Face Sheet
- All required documents have been uploaded WITH APPROPRIATE COMPLETED CHECKLISTS AND IN THE ORDER LISTED
- A copy has been made of each folder including the candidate materials for the department records.

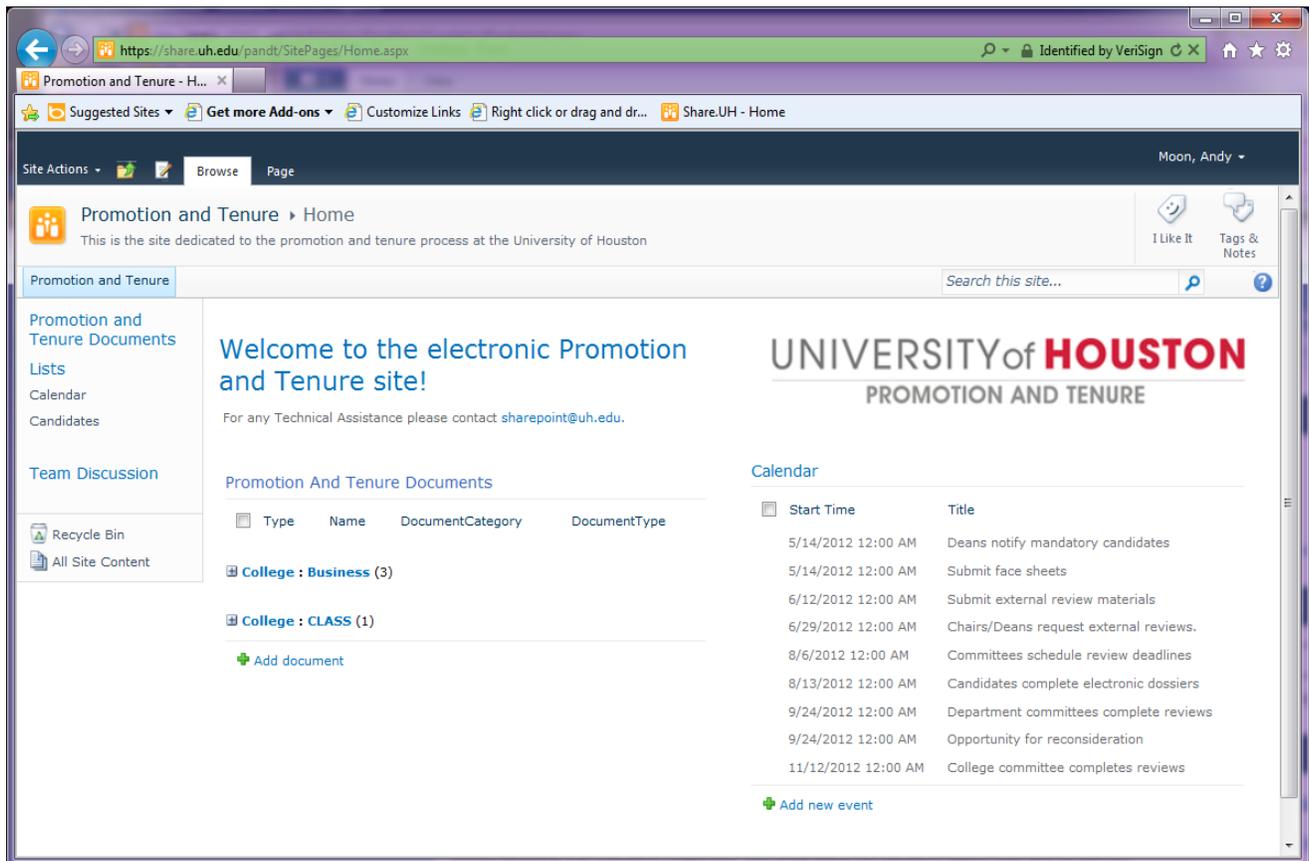
Once this is done, email the college representative and the Provost's Promotion and Tenure liaison (pandt@uh.edu) that the folders are ready for college-level review. Shortly thereafter, access at the department level to the site will be removed.

Reviewer

To access the site please refer to page 4.

The following is the link to the P&T SharePoint Site <https://share.uh.edu/pandt>. Please save the link to your Favorites. NOTE: SharePoint works best when using Internet Explorer as your browser.

Once you are logged on, your screen should look like the following:



The screenshot shows the SharePoint site for Promotion and Tenure at the University of Houston. The page includes a navigation bar with 'Promotion and Tenure' and 'Home' links. A search bar is located in the top right corner. The main content area is divided into two columns. The left column contains a list of documents, and the right column contains a calendar of events.

Promotion And Tenure Documents

Type	Name	DocumentCategory	DocumentType
		College : Business (3)	
		College : CLASS (1)	
			Add document

Calendar

Start Time	Title
5/14/2012 12:00 AM	Deans notify mandatory candidates
5/14/2012 12:00 AM	Submit face sheets
6/12/2012 12:00 AM	Submit external review materials
6/29/2012 12:00 AM	Chairs/Deans request external reviews.
8/6/2012 12:00 AM	Committees schedule review deadlines
8/13/2012 12:00 AM	Candidates complete electronic dossiers
9/24/2012 12:00 AM	Department committees complete reviews
9/24/2012 12:00 AM	Opportunity for reconsideration
11/12/2012 12:00 AM	College committee completes reviews
	Add new event

Please note that you will only see the candidates you are responsible for reviewing.

Accessing Candidate Face Sheets

To access the Face Sheet, click the + sign next to the college name, and then click the candidate's name, circled in red below.

Promotion And Tenure Documents

Type	Name	DocumentCategory	DocumentType
College : Business (3)			
Candidate : Andy Moon (+)			
College : CLASS (1)			
+ Add document			

Accessing the Candidate Documents

To see the list of documents a candidate has submitted, click the + sign next to the candidate's name and the list will expand. Click the name of any file to open and review it, as pictured below.

Promotion And Tenure Documents

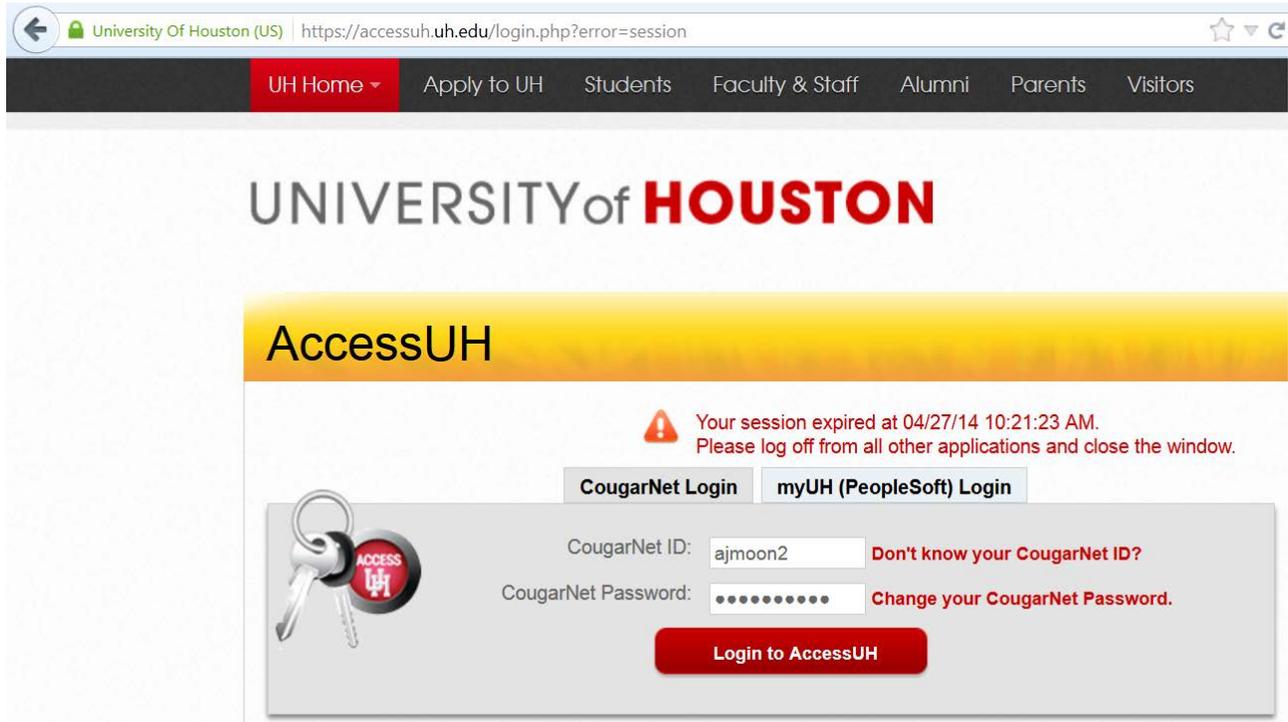
Type	Name	DocumentCategory	DocumentType
College : Business (3)			
Candidate : Andy Moon (+)			
	Desert NEW	Curriculum Vitae	Curriculum Vitae
	Koala NEW	External Reviews	Letters
	Koala NEW	External Reviews	Letters

Exiting the Site

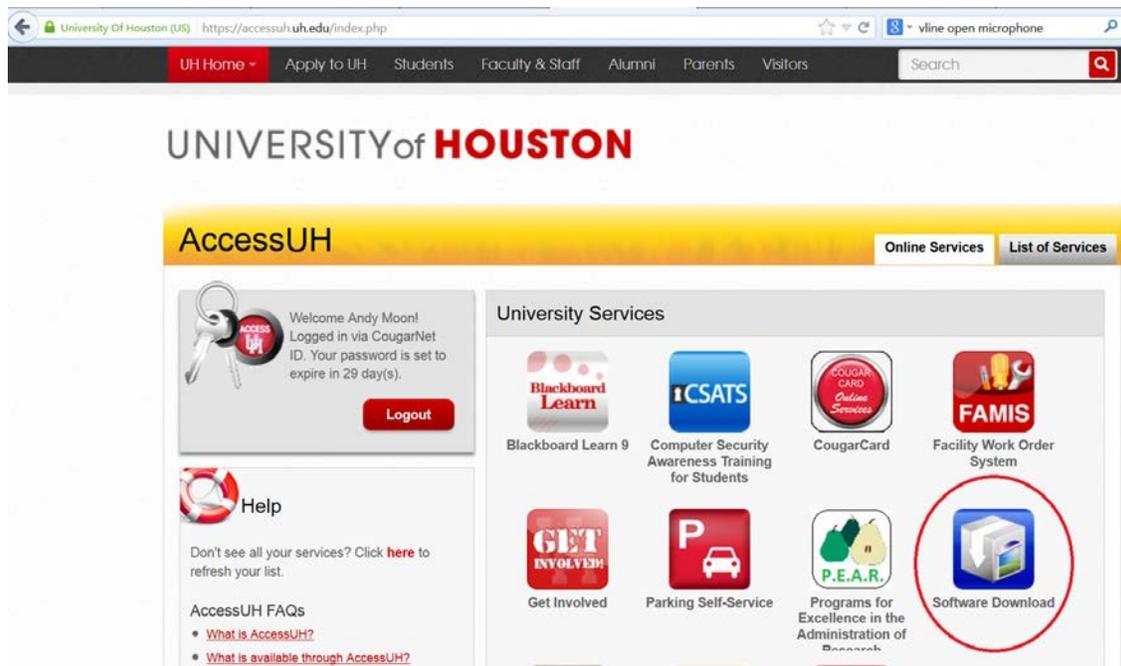
To exit the Site, close your browser by clicking the X button at the top right corner of the window.

Downloading Adobe Acrobat Pro XI

Log in to AccessUH at <http://accessuh.uh.edu> with your CougarNet credentials. Unlike SharePoint, AccessUH does not need the cougarnet\ in front of your user name (see the screenshot below).



Find the Software Download link (circled in red in the screenshot below) and click it.



Scroll down to the Utilities section, looking for Adobe Acrobat Professional 11 and click the Download link. Make a note of the License Key, which you will need when you set up Acrobat for the first time (the key is not in this document for security purposes).

Utilities

7-Zip

7-Zip is open source software.

You can use 7-Zip on any computer, you don't need to register or pay for 7-Zip.

7-Zip  **Download** off site

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