

# Promotion and Tenure SharePoint Site

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## A User's Guide

For **P&T process** questions please contact:

Olga Selley  
P&T Liaison  
Office of the Provost  
[oselley@uh.edu](mailto:oselley@uh.edu)  
713-743-9576

For **technical** questions please contact:

Andy Moon  
SharePoint Administrator  
University Information Technology  
[andy@uh.edu](mailto:andy@uh.edu)  
832-842-4782

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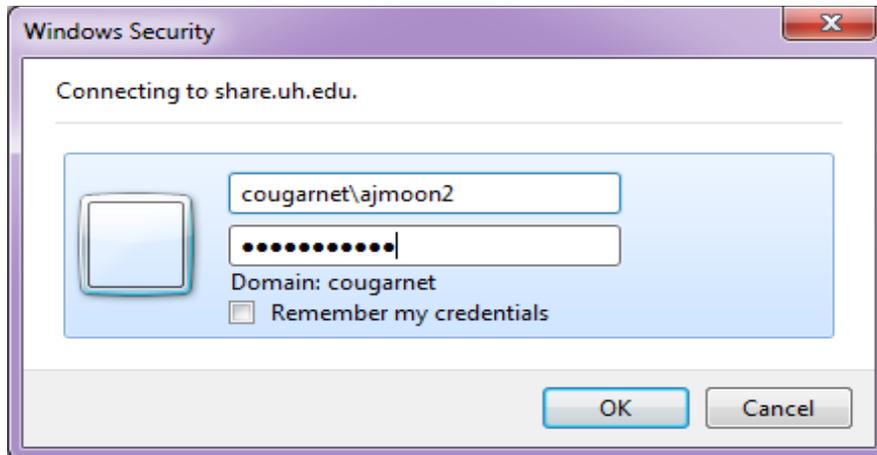
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## Accessing the Site

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. For MAC users, Firefox is suggested.

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](mailto:andy@uh.edu)

#### ***SharePoint prompts me for a password way too often. Is there any way I can reduce the number of times I have to log on?***

Using Internet Explorer, follow these steps:

1. Go to the Tools menu (if you don't see Tools, press the Alt key and the menus will pop up); Choose Internet Options; and then go to the Security tab
4. Click the icon labeled Local Intranet or Intranet Zone; Click the Sites button
6. Click the Advanced button; Enter (or copy and paste) <https://share.uh.edu> and click Add
8. Enter (or copy and paste) <https://mysite.uh.edu> and click Add
9. Click the Close button; Click OK, then click OK again.

\*NOTE: These instructions are only for IE users. Mac users should use their Keychain to manage SharePoint login information.

# 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 an electronic Face Sheet (candidate information form). Once this is done, the candidate will receive an email notification confirming access 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

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

The screenshot displays the SharePoint interface for the Promotion and Tenure site at the University of Houston. The top navigation bar includes 'Site Actions' and 'Browse' options. The main content area features a welcome message, technical assistance contact information, and a table of links for guidelines, user guides, and training. A sidebar on the left lists libraries and lists. The bottom section shows a list of documents categorized by college.

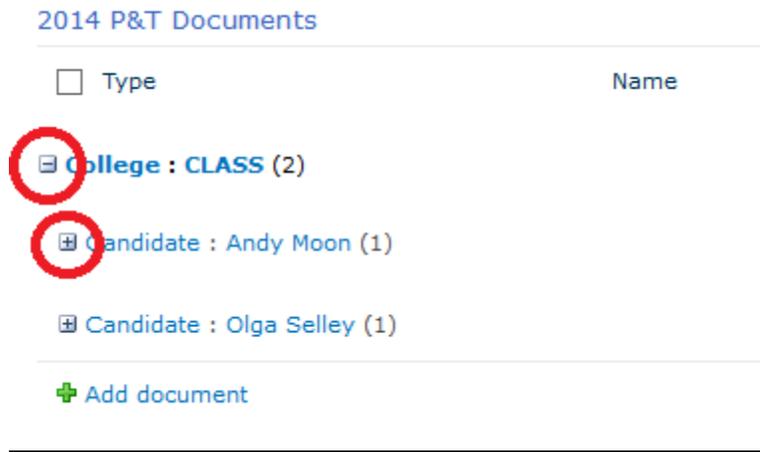
Promotion and Tenure Guidelines 2016-2017		Promotion and Tenure User's Guide	
<a href="#">Promotion and Tenure Timeline</a>		<a href="#">Signup for P&amp;T Training class (Optional)</a>	
<a href="#">Training Videos for Promotion and Tenure</a>		<a href="#">Candidates, click here if you have completed your Dossier/Folder!</a>	
<a href="#">Download checklists for Appointments, College level reviews, Department level reviews, External reviews, or the Complete Dossier</a>			
<a href="#">Archived Promotion and Tenure Guidelines</a>			

2016 P&T Documents

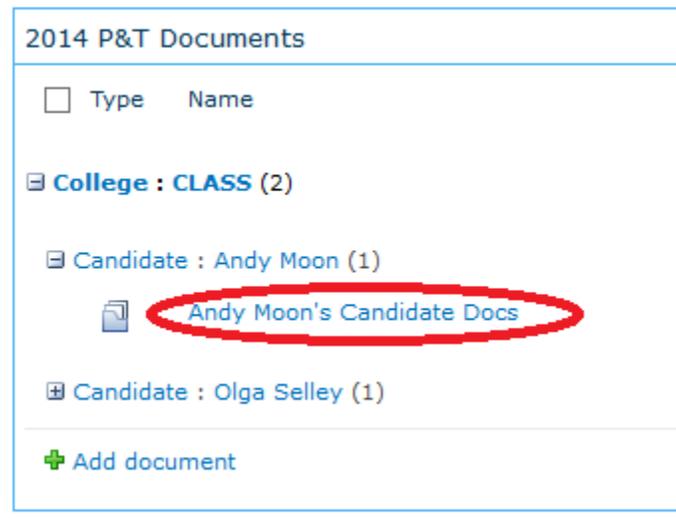
Type	Name	Category
		College : College of Architecture (17)
		College : College of Business (10)

PDFs are the preferred format for uploading documents. The maximum file size for each pdf is 200mb. To download Adobe Acrobat Pro XI, please see pages 24 of this guide. For music or video files, please use MP3, Quicktime, or AVI.

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

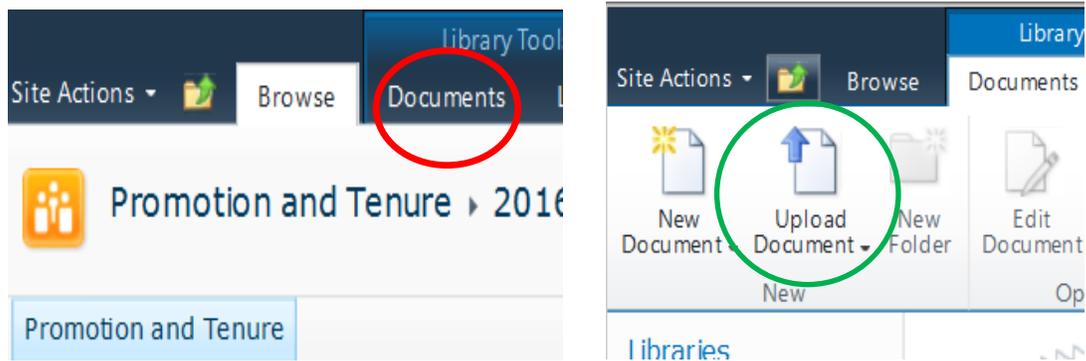


- Click the Document set labeled "<your name> Candidate Docs"

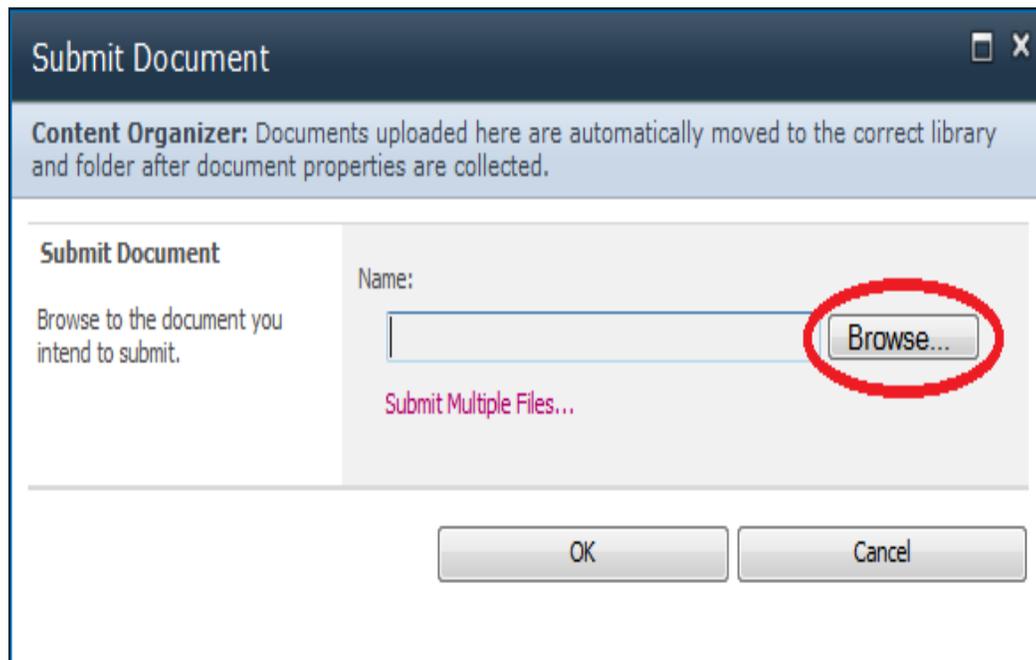


**Note:** Once you are in your document set, you can save the URL to your Favorites or Bookmarks for quicker access to your upload folder.

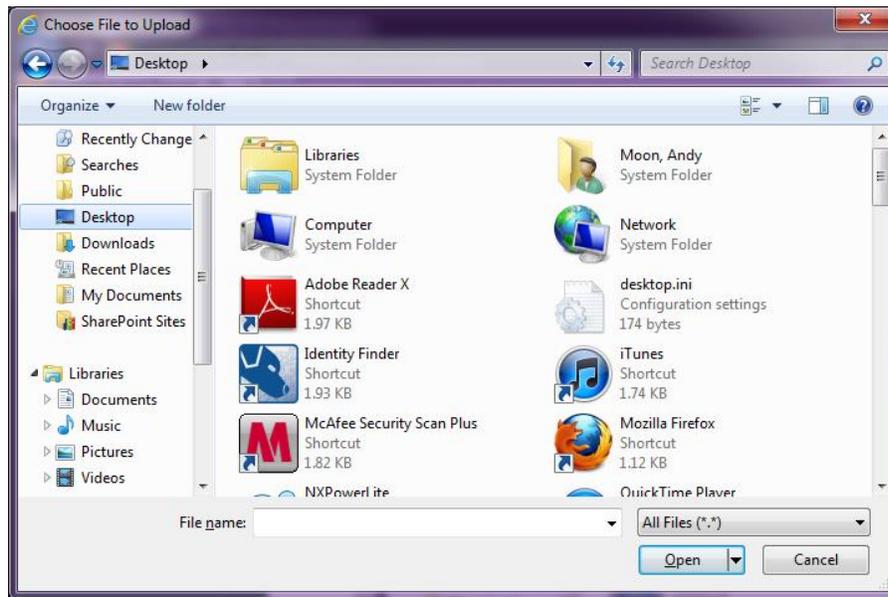
- Click on the Documents tab at the top of the screen (circled in red in the screenshot below) and then you can upload using the Upload Document button (circled in green in the screenshot below).



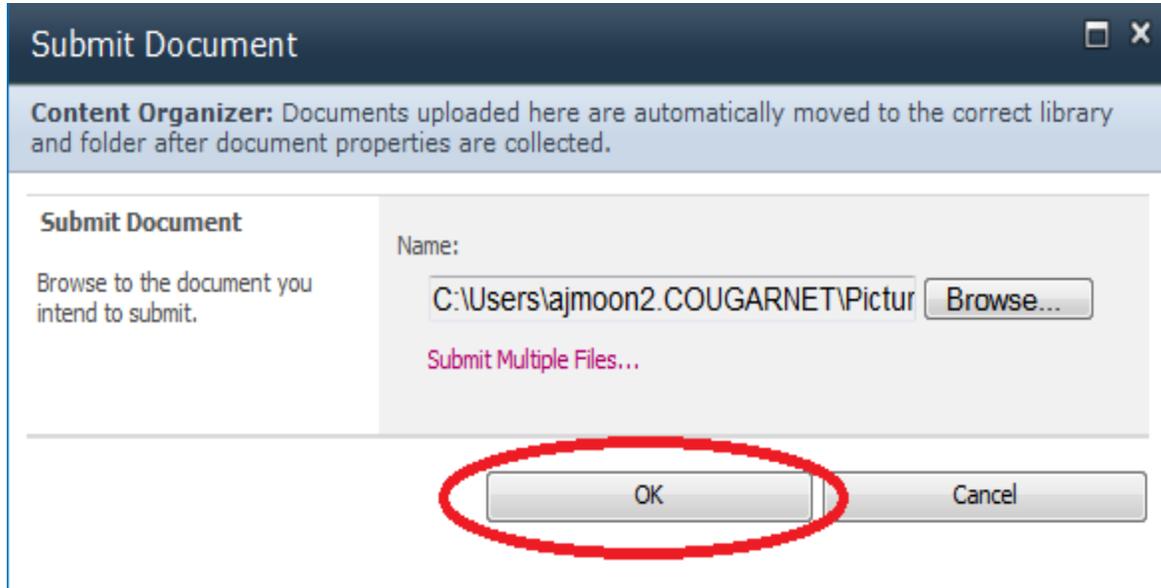
- Click the Browse button in the Submit Document dialog



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



- Click OK in the Submit Document dialog



- Pick the document category (circled in red below); the candidate name should be pre-filled. Then click Save.

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 the 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 the college's IT department or Andy Moon ([andy@uh.edu](mailto: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, click the **Candidates click here if you have completed your dossier/folder** link on the P&T Site (circled in red below). 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](mailto:sharepoint@uh.edu).

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

<a href="#">Promotion and Tenure Guidelines 2014-2015</a>	<a href="#">Promotion and Tenure User's Guide</a>
<a href="#">Promotion and Tenure Timeline</a>	<a href="#">Sign up for P&amp;T Training class (optional)</a>
<a href="#">Training Videos for Candidates, Representatives, and Reviewers</a>	<a href="#">Candidates, click here if you have completed your Dossier/Folder!</a>
<a href="#">Download checklists for Appointments, College level reviews, Department level reviews, or External reviews</a>	

## **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 similar to the following:

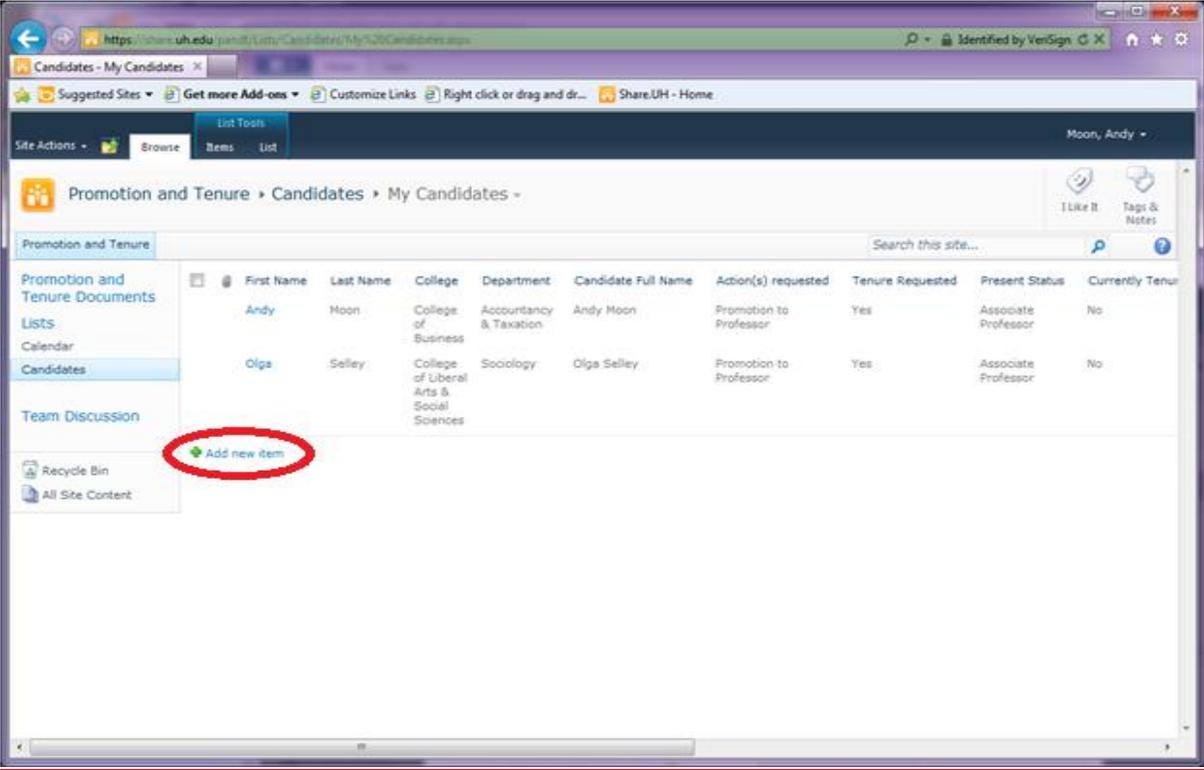
The screenshot shows the SharePoint interface for the University of Houston's Promotion and Tenure site. The top navigation bar includes 'Site Actions', 'Browse', and 'Page'. Below this is a breadcrumb trail: 'Promotion and Tenure > Home'. A search bar is located in the top right corner. The main content area features a welcome message: 'Welcome to the electronic Promotion and Tenure site!' followed by contact information for technical assistance. A table of links is provided, including 'Promotion and Tenure Guidelines 2016-2017', 'Promotion and Tenure User's Guide', 'Promotion and Tenure Timeline', 'Sign up for P&T Training class (Optional)', 'Training Videos for Promotion and Tenure', 'Candidates, click here if you have completed your Dossier/Folder!', 'Download checklists for Appointments, College level reviews, Department level reviews, External reviews, or the Complete Dossier', and 'Archived Promotion and Tenure Guidelines'. On the left side, there is a 'Libraries' section with '2016 P&T Documents' and a 'Lists' section with '2016 Candidates'. Below the 'Lists' section, there are links for 'College of Architecture (17)' and 'College of Business (10)'. The '2016 P&T Documents' section is partially visible at the bottom, showing a table with columns for 'Type', 'Name', and 'Category'.

## 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' section in the left-hand navigation pane. The 'Lists' section is circled in red, and the '2016 Candidates' link is visible below it. The rest of the page content, including the welcome message and the table of links, remains the same.

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 a "Candidates - New Item" form with the following fields and options:

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

The form also includes a toolbar with icons for Save, Cancel, Paste, Copy, Attach File, and Spelling, along with a "Commit" button.

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. The maximum file size for each pdf is 200mb.

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<a href="#">Training Videos for Promotion and Tenure</a>	<a href="#">Candidates, click here if you have completed your Dossier/Folder!</a>
<a href="#">Download checklists for Appointments, College level reviews, Department level reviews, External reviews for the Complete Dossier</a>	
<a href="#">Archived Promotion and Tenure Guidelines</a>	

### To upload a document:

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

2014 P&T Documents

<input type="checkbox"/> Type	Name
<input checked="" type="checkbox"/>	College : CLASS (2)
<input checked="" type="checkbox"/>	Candidate : Andy Moon (1)
<input type="checkbox"/>	Candidate : Olga Selley (1)
<a href="#">+ Add document</a>	

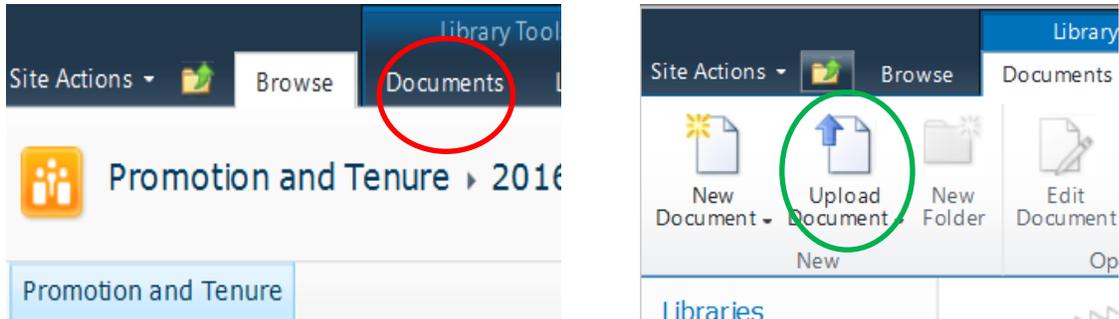
- Navigate to the candidate's Confidential folder (labeled with the candidate's name followed by the word Confidential, circled in red below). Click on the folder.

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

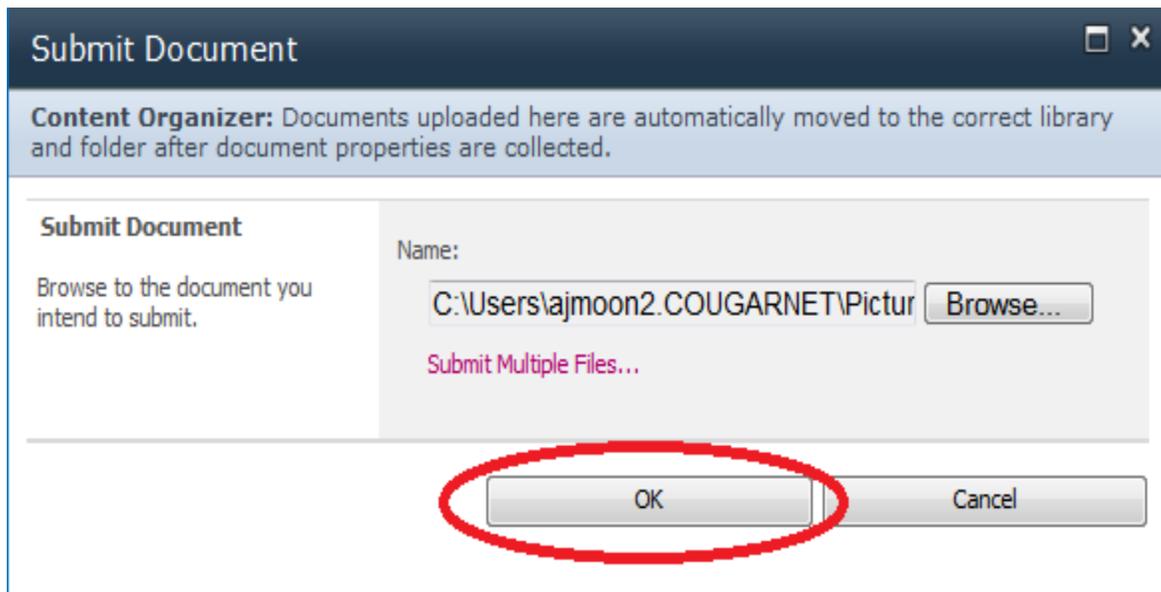
Candidate : Andy Moon (4)

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

- Click 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 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**

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 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](mailto:pandt@uh.edu)) that the college folders are complete and ready for university-level review. Shortly thereafter, access to the site at the college level 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 similar to the following:

The screenshot shows the SharePoint interface for the University of Houston's Promotion and Tenure site. The top navigation bar includes 'Site Actions', 'Browse', and 'Page'. Below this, the breadcrumb trail reads 'Promotion and Tenure > Home'. A search bar is positioned in the top right corner. The main content area features a welcome message: 'Welcome to the electronic Promotion and Tenure site!' followed by technical assistance contact information. A table of links is provided, including 'Promotion and Tenure Guidelines 2016-2017', 'Promotion and Tenure User's Guide', 'Promotion and Tenure Timeline', 'Sign up for P&T Training class (Optional)', 'Training Videos for Promotion and Tenure', 'Candidates, click here if you have completed your Dossier/Folder!', 'Download checklists for Appointments, College level reviews, Department level reviews, External reviews, or the Complete Dossier', and 'Archived Promotion and Tenure Guidelines'. The left sidebar contains 'Libraries' (2016 P&T Documents, 2016 Candidates), 'Recycle Bin', and 'All Site Content'. At the bottom, a list of folders for '2016 P&T Documents' is shown, categorized by college: 'College of Architecture (17)' and 'College of Business (10)'.

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)**
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- 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)**
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- 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.

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To upload a document:

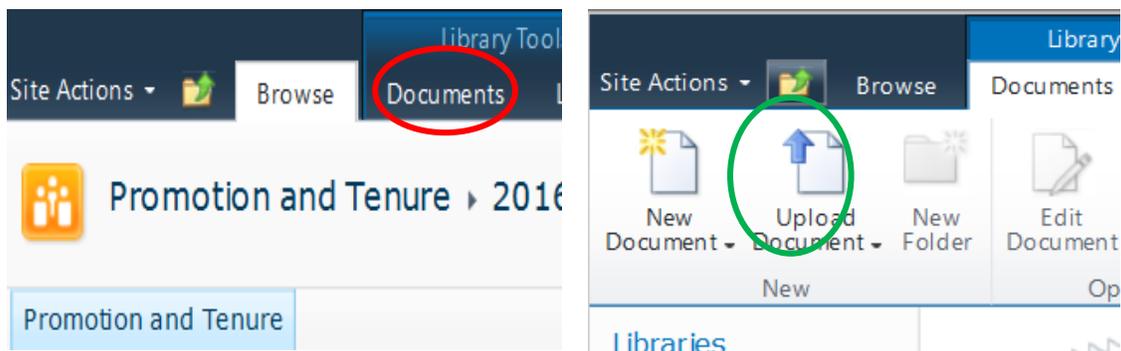
- Click the + sign next to the college's name, then the + sign next to the candidate name



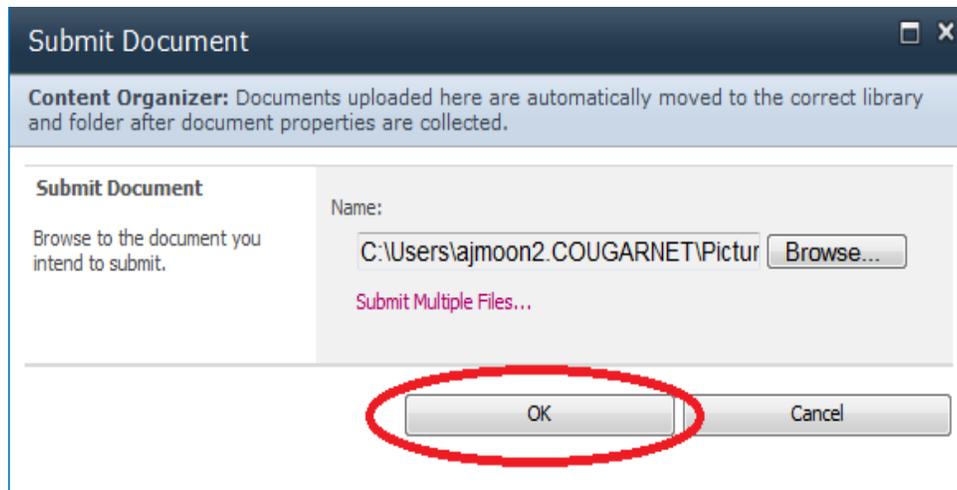
- Navigate to the candidate's Confidential folder (labeled with the candidate's name followed by the word Confidential, circled in red below). Click on the folder.



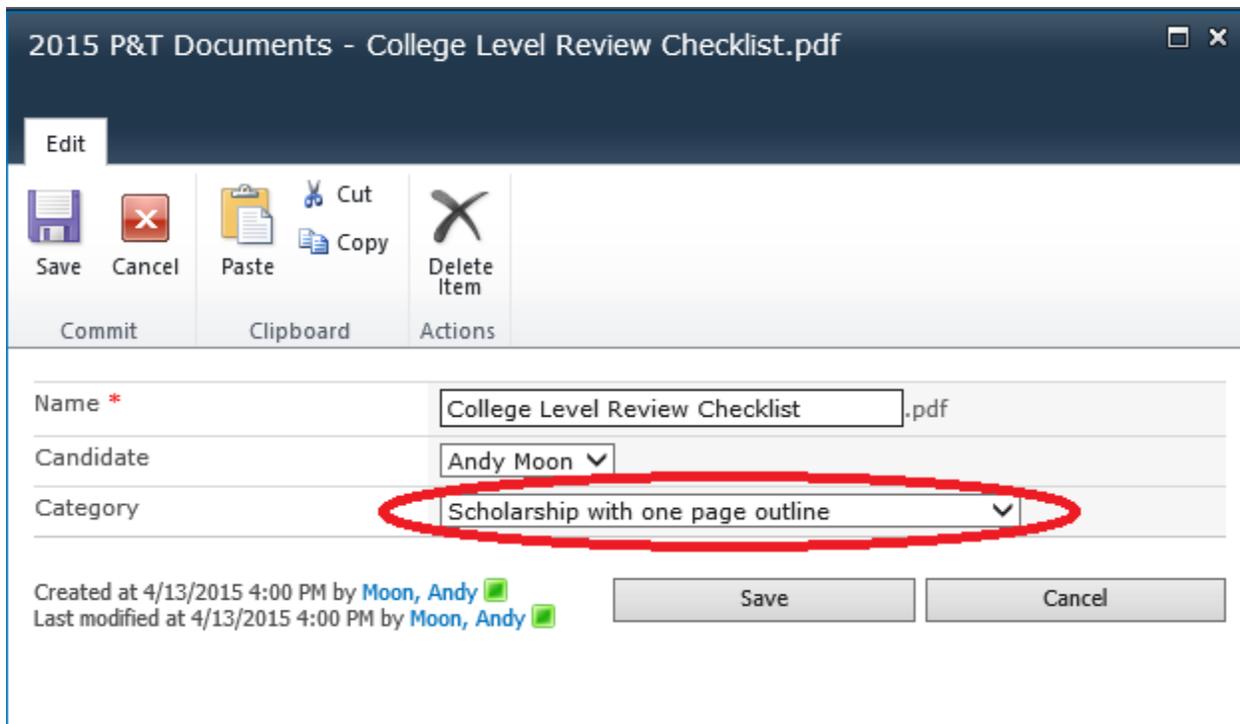
- Click on the Documents tab at the top of the screen (circled in red in the screenshot below) and then you can upload using the Upload Document button (circled in green in the screenshot below).



- Click the Browse button 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**

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.

Type	Name	DocumentCategory	DocumentType
		College : Business (3)	
		Candidate : Andy Moon (circled in red)	
		College : CLASS (1)	
		<a href="#">+ Add document</a>	

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 must also be added to the Face Sheet.

## **Completion**

For each dossier, verify the following:

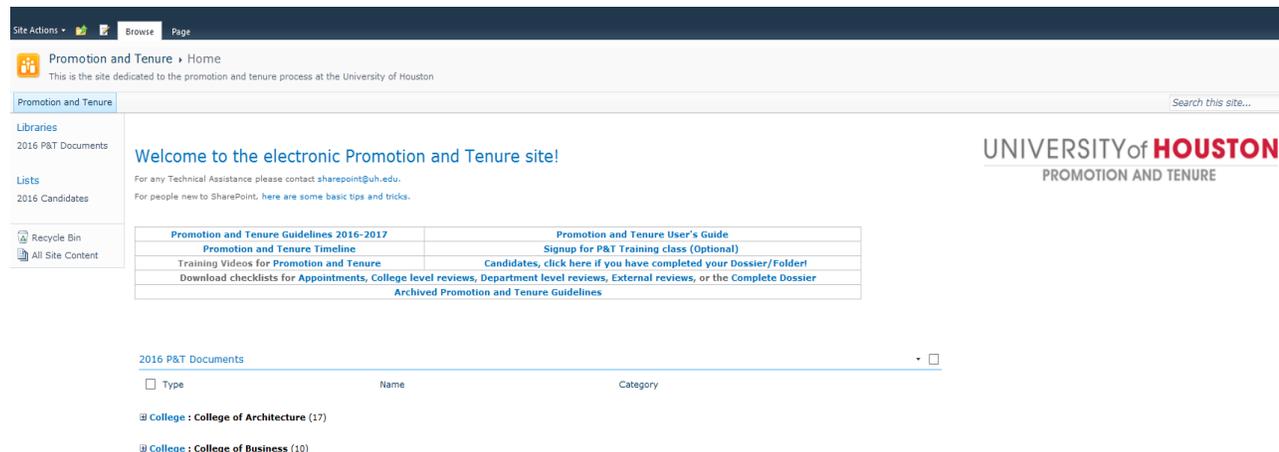
- Votes have been entered on the Face Sheet
- All required documents have been uploaded **WITH APPROPRIATE COMPLETED CHECKLISTS AND IN THE ORDER LISTED**
- A copy has been made of each folder including the candidate materials for the department records.

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

## Reviewer

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. For MAC users, Firefox is suggested.

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



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

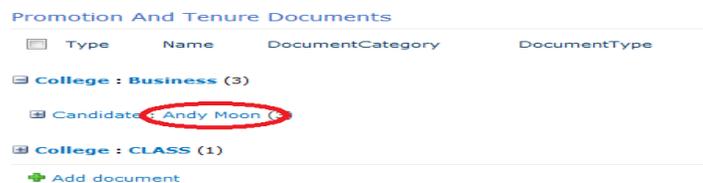
### Accessing the Candidate Documents

To access the candidates by college, click the + sign next to the college name. Click the + sign by the candidate's name to see the list of documents. Click the name of any file to open and review it, as pictured below.



### Accessing Candidate Face Sheets

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

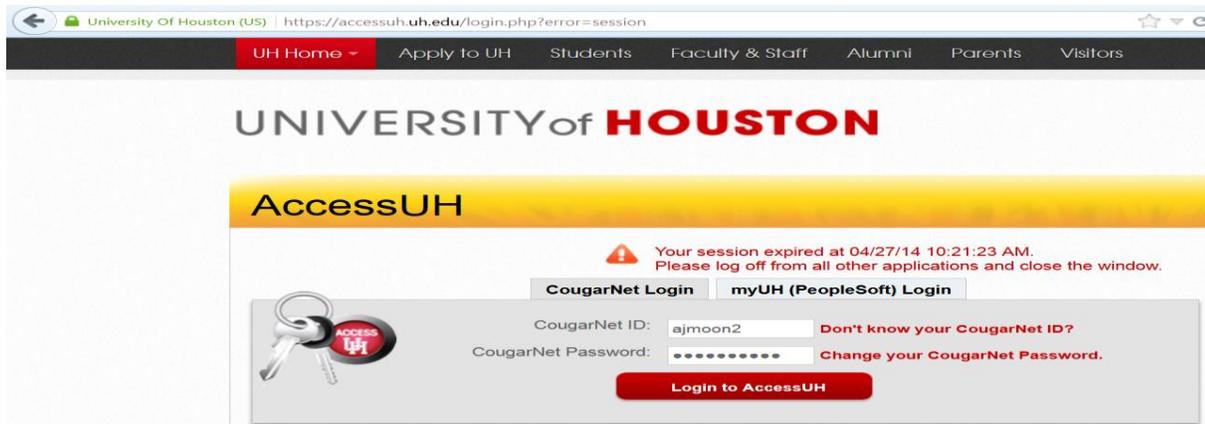


### Exiting the Site

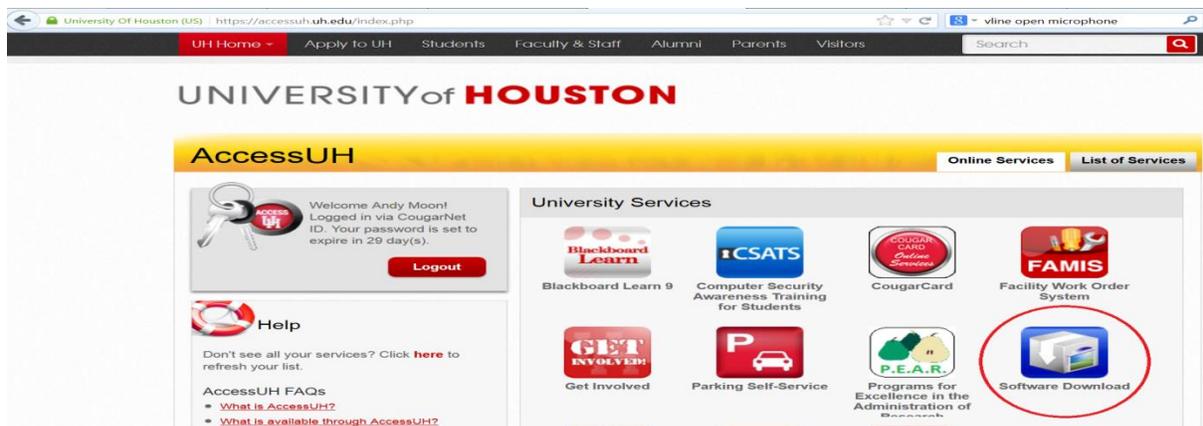
To exit the Site, close your browser by clicking the X button at the top right corner of the window.

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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).

