

Promotion and Tenure SharePoint Site

A User's Guide

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

Lisa Farr
P&T Liaison
Office of the Provost
lfarr@central.uh.edu

713-743-9576

For **technical** questions please contact:

Andy Moon
SharePoint Administrator
University Information Technology
andy@uh.edu

832-842-4782

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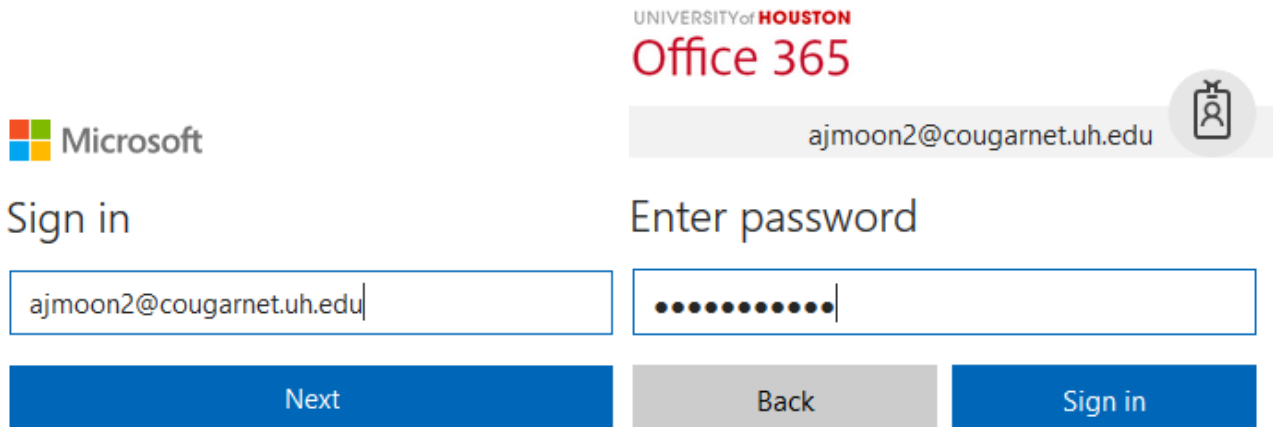
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Accessing the Site

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://uofh.sharepoint.com/sites/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.uh.edu” after your username (Example – ajmoon2@cougarnet.uh.edu). Make sure that the password box that comes up has the UH Office 365 logo as pictured below.



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.uh.edu” after your username. If you still cannot access contact 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://uofh.sharepoint.com> 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 University of Houston. The top navigation bar includes 'Office 365', 'SharePoint', and the University of Houston logo. The user 'Moon, Andy' is logged in. The main content area is titled 'Promotion and Tenure' and contains a table of links:

Promotion and Tenure Guidelines 2017-2018	Promotion and Tenure User's Guide
Promotion and Tenure Timeline	Signup for P&T Training class (Optional)
Archived Promotion and Tenure Guidelines	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	
Training videos: Access and Navigation, Reviews, Candidate, College/Department Representative	

Below the table, there is a section for '2018 P&T Documents' with options for 'New', 'Upload', 'Sync', 'Share', and 'More'. A list of documents is shown for the 'College of Liberal Arts & Social Sciences' under the user 'Candidate : Andy Moon (4)'. The documents include:

- Andy Moon Confidential
- Andy Moon's Candidate Documents
- CFIFlyer
- AndysAxiom

Additional links for 'External Reviews' and 'Candidate's Statement and Curriculum Vitae' are also present. A 'Drag files here to upload' prompt is visible at the bottom.

PDFs are the preferred format for uploading documents. The maximum file size for each document is 15 GB. 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"



2018 P&T Documents

 New
  Upload
  Sync
  Share
  More ▾

✓  Name Document Type

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

Candidate : Andy Moon (4)

-  Andy Moon Confidential ...
-  Andy Moon's 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 Upload button (circled in red in the screenshot below).

Political Science ▸ Andy Moon's Candidate Docs



Andy Moon's Candidate Docs

[View All Properties](#)
[Edit Properties](#)

 New
  Upload
  Sync
  Share
  More ▾

Find a file 

✓  Name Modified Modified By Candidate College Department Document Type Document Type 2:ID

Drag files here to upload

- Click the Browse button in the “Add a document” dialog

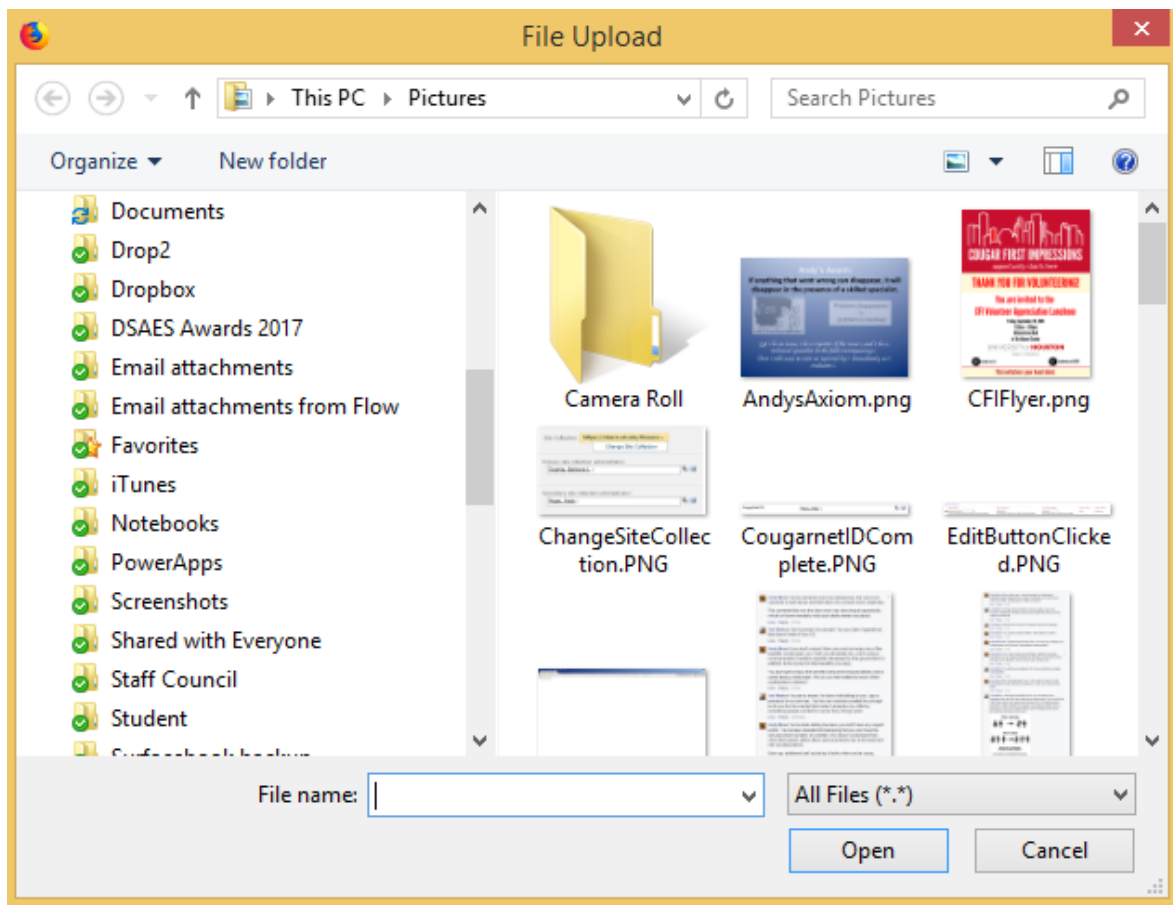
Add a document

Choose a file



Add as a new version to existing files

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



- Click OK in the “Add a document” Document dialog

Add a document ×

Choose a file

Add as a new version to existing files

Destination Folder

Version Comments

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

Add a document ×

EDIT

Commit Clipboard Actions

i The document was uploaded successfully. Use this form to update the properties of the document.

Name * .PNG

Document Type

Candidate

Version: 1.0

Created at 5/1/2018 11:26 AM by Moon, Andy

Last modified at 5/1/2018 11:26 AM by Moon, Andy

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 document is 15GB. Please contact the 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, 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.

Promotion and Tenure

Promotion and Tenure Guidelines 2017-2018	Promotion and Tenure User's Guide
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Archived Promotion and Tenure Guidelines	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	
Training videos: Access and Navigation , Reviewers , Candidate , College/Department Representative	

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 early May 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 P&T site. The top navigation bar includes 'Office 365', 'SharePoint', and the 'UNIVERSITY of HOUSTON' logo. The user 'Moon, Andy' is logged in. The main content area is titled 'Promotion and Tenure' and contains a table of links:

Promotion and Tenure Guidelines 2017-2018	Promotion and Tenure User's Guide
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Below the table is a '2018 P&T Documents' section with options for 'New', 'Upload', 'Sync', and 'Share'. A 'Drag files here to upload' area is also visible.

Creating the Face Sheet

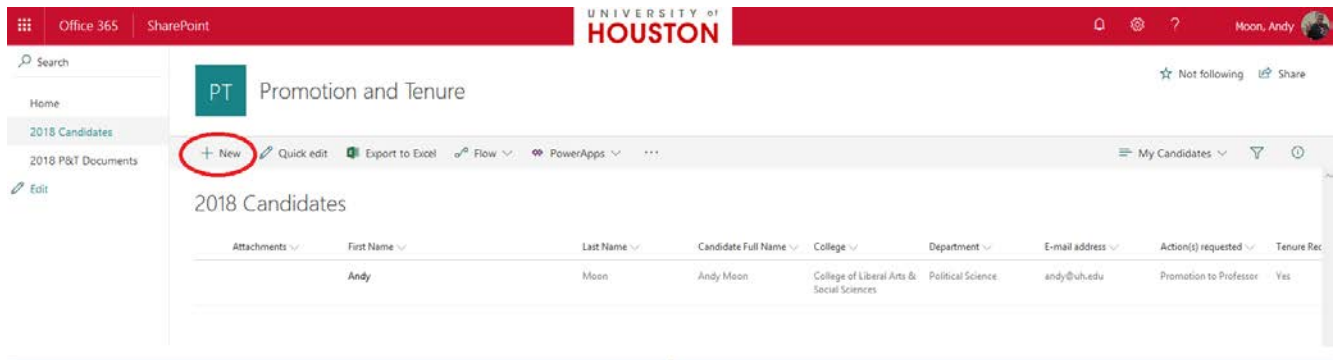
After you have logged in, click the Candidates link on the Quick Launch section on the left side of the screen under the heading "Lists" (circled in red on the screenshot below).

This screenshot is similar to the previous one but highlights the '2018 Candidates' link in the Quick Launch section on the left side of the page. The link is circled in red. The main content area contains the same table of links as the previous screenshot:

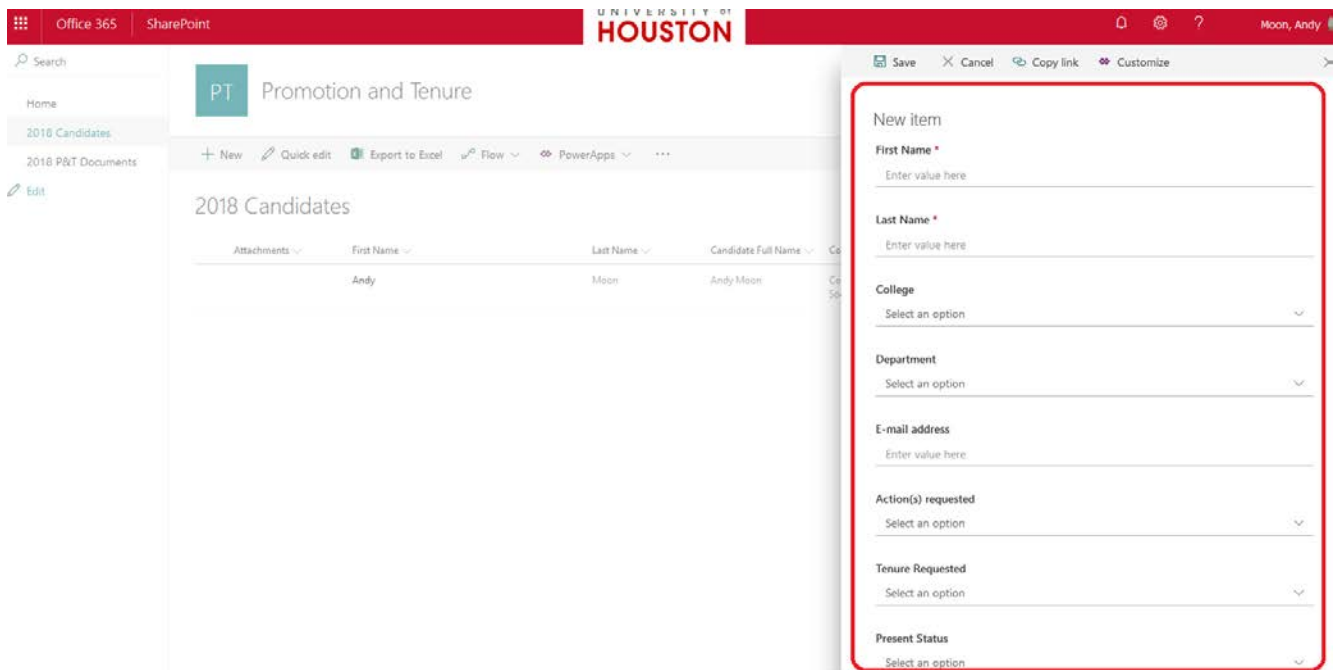
Promotion and Tenure Guidelines 2017-2018
Promotion and Tenure Timeline
Archived Promotion and Tenure Guidelines
Download checklists for Appointments, College level reviews, Department level reviews, External reviews, or the Complete Dossier
Training videos: Access and Navigation, Review, Reviewers, Candidate, College/Department Representative

The '2018 P&T Documents' section and 'Drag files here to upload' area are also visible at the bottom of the page.

You will see the list of candidates you have entered, as pictured below.



Click the “New” link at the top of the list (circled in red in the screenshot above) and you will be presented with a form to fill out with the candidate’s information on the right side of the screen, as pictured and circled in red below.



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 document is 15GB.





Promotion and Tenure


Promotion and Tenure Guidelines 2017-2018	Promotion and Tenure User's Guide
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Archived Promotion and Tenure Guidelines	Candidates, click here if you have completed your Dossier/Folder!
Download checklists: <u>Appointments, College level reviews, Department level reviews, External reviews, or the Complete Dossier</u>	
Training videos: Access and Navigation , Reviewers , Candidate , College/Department Representative	

To upload a document:

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



2018 P&T Documents

 New  Upload  Sync  Share More ▼

✓  Name Document Type

College : College of Liberal Arts & Social Sciences (2)

Candidate : Andy Moon (2)



-  Andy Moon Confidential ...
-  Andy Moon's Candidate Documents ...

Drag files here to upload

- 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 (2)

Candidate : Andy Moon (2)

-  **Andy Moon Confidential** ...
-  Andy Moon's Candidate Documents ...

- Click on the Upload link in the middle of the screen (circled in red in the screenshot below).

Promotion and Tenure

EDIT LINKS

Political Science ▸ Andy Moon Confidential



Andy Moon Confidential

[View All Properties](#)

[Edit Properties](#)

New

Upload

Sync

Share

More ▾

- Click the Browse button and find the file to upload, and then click Open.
- There should be no need to change the “Destination Folder,” it should already be set for the College, Department, and Candidate’s folders.
- Click Save in the “Add a document” dialog.

Add a document

✕

Choose a file

No file selected.

Add as a new version to existing files

Destination Folder







/CLASS/Political Science/Andy Moon Confider

Version Comments

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

Add a document ×

EDIT

 Save	 Cancel	 Paste	 Cut	 Copy	 Delete Item
Commit		Clipboard		Actions	

i The document was uploaded successfully. Use this form to update the properties of the document.

Name * .png

Document Type ▼

Candidate ▼

Version: 1.0

Created at 5/1/2018 10:52 AM by Moon, Andy

Last modified at 5/1/2018 10:52 AM by Moon, Andy

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) 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.

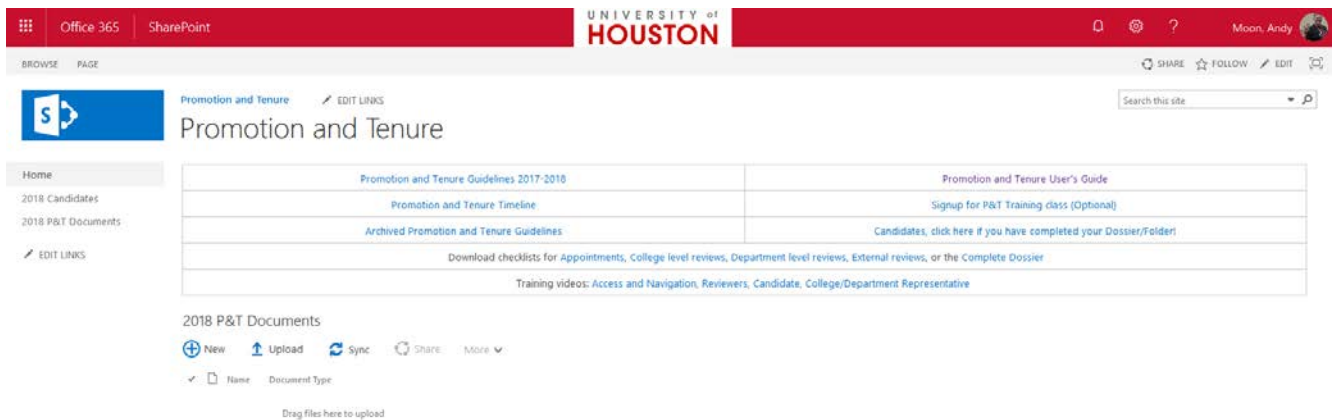
NOTE

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:



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)**
- Candidate's Statement and Curriculum Vitae
- Research, Scholarship, Creative Work with a 1-page table of contents
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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.

PDFs are the preferred format for uploading documents. The maximum file size for each pdf is 15 GB.






Promotion and Tenure


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Archived Promotion and Tenure Guidelines	Candidates, click here if you have completed your Dossier/Folder!
Download checklist: Appointments, College level reviews, Department level reviews, External reviews, or the Complete Dossier	
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To upload a document:

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



2018 P&T Documents

 New
  Upload
  Sync
  Share
  More ▾

✓  Name Document Type

▾ College : College of Liberal Arts & Social Sciences (2)

▾ Candidate : Andy Moon (2)

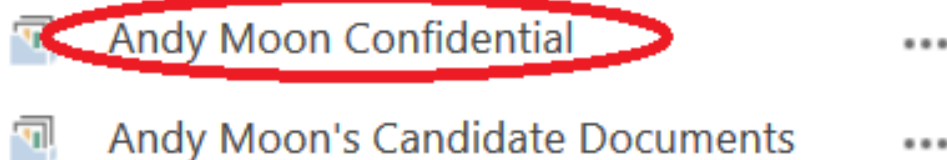
-  Andy Moon Confidential ...
-  Andy Moon's Candidate Documents ...

Drag files here to upload

- 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 (2)

Candidate : Andy Moon (2)



- Click on the Upload link in the middle of the screen (circled in red in the screenshot below).

Promotion and Tenure

 EDIT LINKS

Political Science ▸ Andy Moon Confidential



Andy Moon Confidential

[View All Properties](#)

[Edit Properties](#)



- Click the Browse button and find the file to upload, and then click Open.
- There should be no need to change the "Destination Folder," it should already be set for the College, Department, and Candidate's folders.
- Click OK in the "Add a document" dialog.

Add a document



Choose a file

Browse... No file selected.

Add as a new version to existing files

Destination Folder

/CLASS/Political Science/Andy Moon Confiden

Choose Folder...

Version Comments

OK

Cancel

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

Add a document



EDIT

Save	Cancel	Paste	Cut	Copy	Delete Item
Commit		Clipboard			Actions

i The document was uploaded successfully. Use this form to update the properties of the document.

Name * CFIFlyer .png

Document Type

Candidate

Andy Moon

Version: 1.0

Created at 5/1/2018 10:52 AM by Moon, Andy

Last modified at 5/1/2018 10:52 AM 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.

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) 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://uofh.sharepoint.com/sites/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

Click the ▶ next to the college’s name, then the ▶ next to the candidate name. Click the name of any file to open and review it, as pictured below.

Accessing Candidate Face Sheets

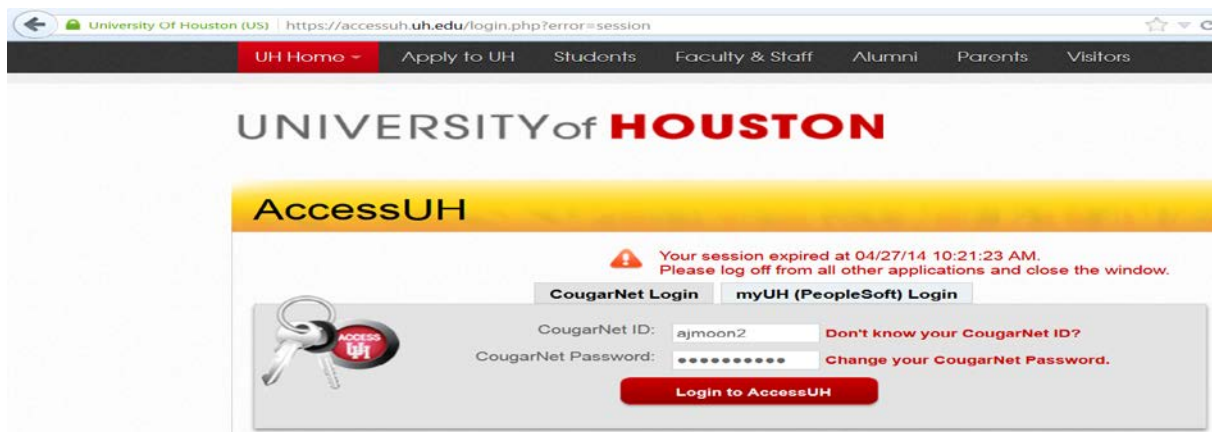
To access the Face Sheet (candidate information sheet), click the + sign next to the college name, and then click the candidate’s name, circled in red below.

Exiting the Site

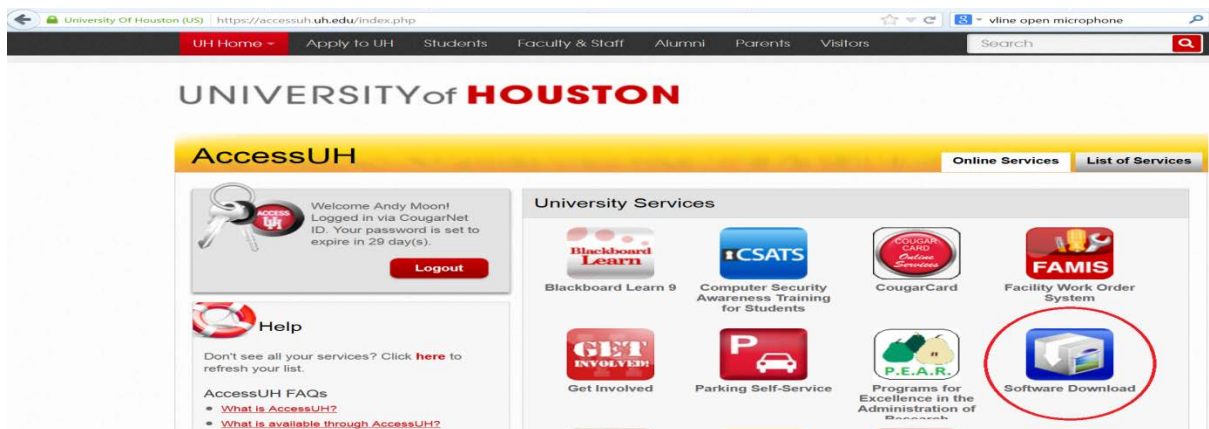
To exit the Site, close your browser by clicking the X button at the top right corner of the window.

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



Adobe Acrobat Pro 11

License Key:

