Electronic Review of Tenure & Promotion Files:
Instructions for Chair of Unit Tenure and Promotion Committee

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Context and Limitations

These instructions pertain only to the technical process for electronically receiving, reviewing, appending, and forwarding tenure and promotion files that have historically been submitted in paper form. These instructions do not intend to change in any way the applicable policies, content of any file, or the criteria used to judge any file. T&P policies are described in the Faculty Manual and the USC Goldenrod Manual.

Overview

As Chair of your unit's Tenure and Promotion Committee, you are responsible for managing the electronic review process at the level of your unit. You will assemble the PDF package(s) that will be reviewed, enroll the reviewers in your unit, post the package(s) for review, collect the votes and justifications into each PDF file, and forward the file(s) to the next level of review. You will use Blackboard as the central tool in this process.

If you have previously used Blackboard to collect student work in a class, some or most of the process should be very familiar to you. The process involves the following steps, which are explained in greater detail in the remainder of this document.

1. Receive a PDF Primary File from each candidate in your department
2. Receive and insert into each file two things: 1) Summary of Teaching evaluations and 2) Statements and bios from external reviewers
3. Enroll members of your unit T&P Committee
4. Post candidate files to Blackboard for review by your unit T&P Committee
5. Create groups to manage access
6. Create and deploy ballots
7. After unit vote, download the vote justifications from the folder sent by the unit Administrative Assistant and convert the ballots to a single PDF file.
8. Append the vote justifications to the primary file using the same procedure used to append the External Reviews to the primary file.
9. Append the Vote Form as the first page of the file
10. Submit the reviewed and compiled file to the Department Chair's "homework" submission page.

Each of these ten steps are described in greater detail in the following pages.

Security and Confidentiality of Electronic Information

The electronic process allows Unit T&P Committee members, Chairs and Deans to remotely access electronic copies of all files from Blackboard using a unique ID and Password provided to each individual. To maximize confidentiality in the electronic review process,

all individuals will [1] maintain sole ownership of ID and password and protect its confidentiality at all times, [2] access on-line data only under controlled conditions where the information is not visible to others, [3] ensure that all downloaded information is password protected and [4] avoid printing of candidate file material,

If any member suspects that their Blackboard access codes have been compromised, please contact Mitchell West (mwest@mailbox.sc.edu) immediately and reset your Blackboard access.

All electronic notes and downloaded file information must be secured using password protection or encryption. At the end of the file review process, all electronic material related to the file evaluation process, including electronic note documents and downloaded file material, should be deleted.

Assembling the PDF document for each candidate in your unit

Overview
Each candidate will submit to you their primary file as one PDF document. You will also receive letters of recommendation and brief bios from external referees, and perhaps letters from other sources. These letters and bios must all be combined into one pdf file and then that combined file will be appended to the candidate's primary file before you post the file to Blackboard for review. Since you will be dealing with a lot of files, start by creating a folder on your computer for each candidate. Store all files associated with each candidate in that candidate's folder.

Document Organization
The final PDF file will have bookmarks in it associated with each document. The names and hierarchical structure of these bookmarks must be meaningful to the many people who will later review the file. Please follow these instructions carefully to maintain that hierarchical structure and naming convention of those bookmarks. In order, the bookmarks should be:

> Vote Summary Form
> Unit T&P Criteria
> Candidate Vita
> Teaching (candidate file)
> Scholarship and Research
> Service
> Other letters
> Personal Statement
> Teaching summary (from Unit T&P Committee)
> External review letters and reviewer bios
> Ballots with justifications

Adobe Acrobat
Before you start you will need to have Adobe Acrobat Pro loaded on your computer. You will need Acrobat Pro to append the external letters of recommendation to the candidate's file. You can buy Adobe Acrobat Pro from USC's Software Distribution. For more information about purchasing Adobe Acrobat Pro go here http://www.sc.edu/software/
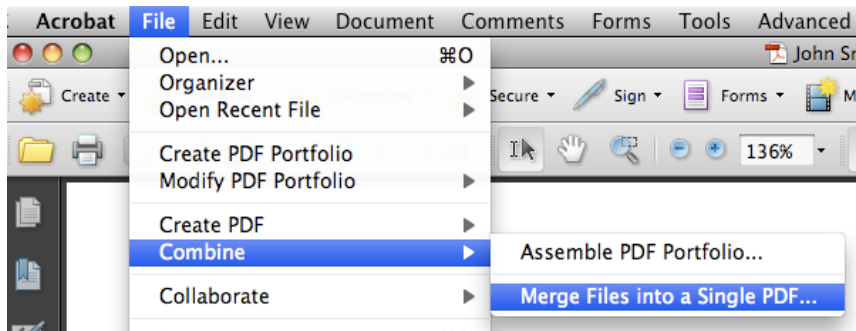
Compiling the external reviews

The external review letters will probably arrive at your desk in many formats. Some may have to be scanned to convert to PDF. Some may arrive as Word documents, and some may arrive directly as PDF files. The first step is to convert every letter, whatever form, to a PDF file, with the name of each file corresponding to the last name of its author. Whenever presented with an option between making a "fully functional PDF" or "Make Quick and Simple PDF"choose the quick and simple option. Also, convert every bio to PDF form and name it *[lastname]Bio.pdf*. After you are done, the reference letter folder should look something like this:

> Avery.pdf
> Jones.pdf
> Manerly.pdf
> AveryBio.pdf
> JonesBio.pdf
> ManerlyBio.pdf

Combining individual letters and bios into one document

1. Open Adobe Acrobat Pro
2. From the File menu choose Combine> Merge Files into a Single PDF.

3. In the Combine Files window select Add Files….
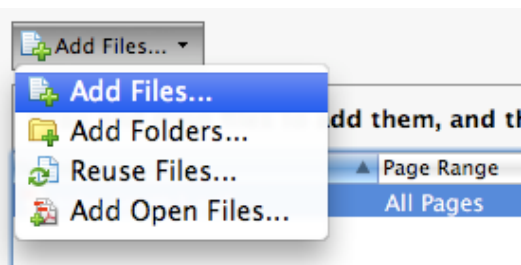
4. Navigate to and select all the External Review letters and Bios, and click the Add Files button.
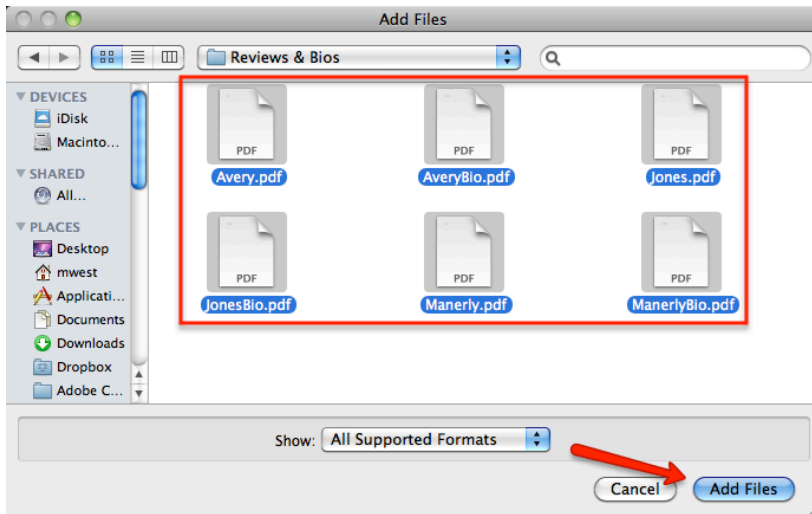
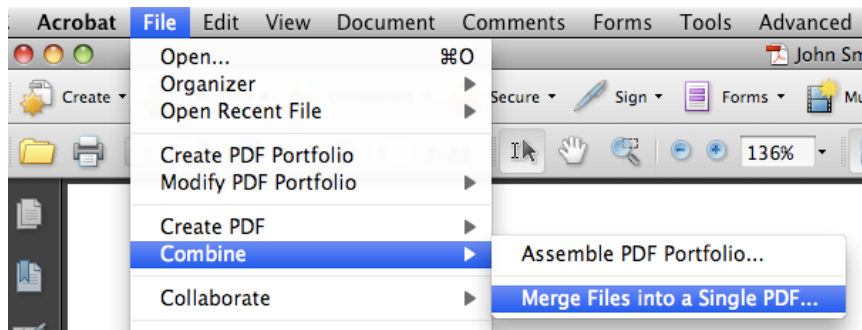5. The files will be added to the Combine Files window
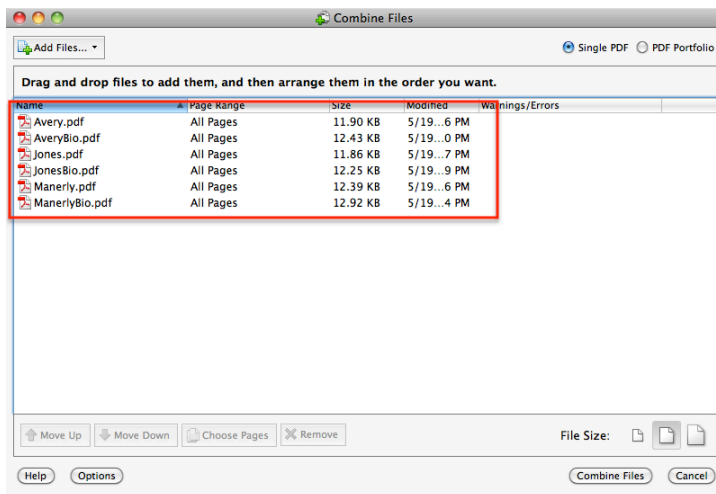
6. Arrange the pdf files so that all reviews appear at the top of the list and all bios appear at the bottom of the list.
7. You can do this by selecting a file and using to Move Up or Move Down button to move it to the correct location.
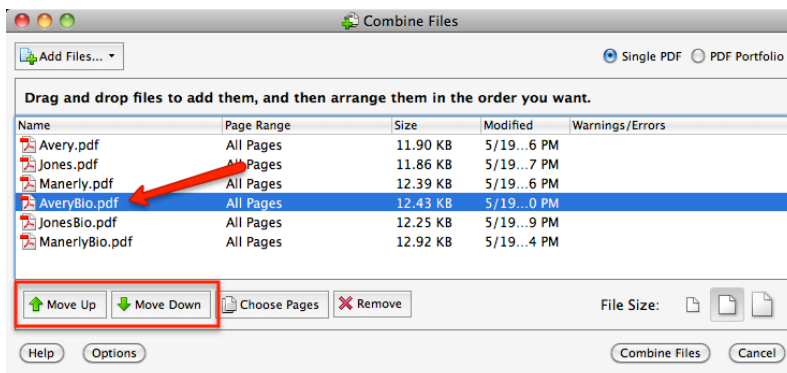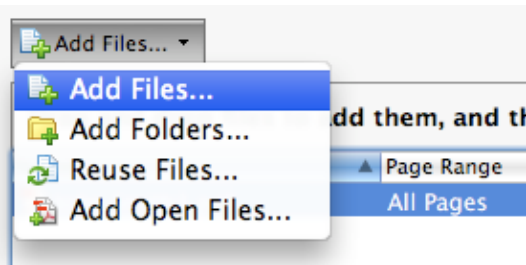
8. Click on the Combine Files button
9. Name the final pdf file: External Reviews.pdf
10. Click Save and the letters and bios will be combined into one .pdf file.

Appending the External Reviews file to the Candidate's Primary File
1. Open Adobe Acrobat Pro
2. From the File menu choose Open
3. Find the candidate's file and click Open
4. To append the External Reviews File to the Candidates Primary File click on the File menu and select Combine > Merge Files Into A Single PDF.

5. In the Combine Files window select Add Files....

6. Find the External Reviews File, select it and click on the Add Files button
7. The External Reviews file will added to the Combine Files window
8. The External Reviews file should be the last file in the list so that it will be appended at the end of the document.
9. If the external letter is not the last file listed, you can select it and use the Move Down button to move it to the end of the list
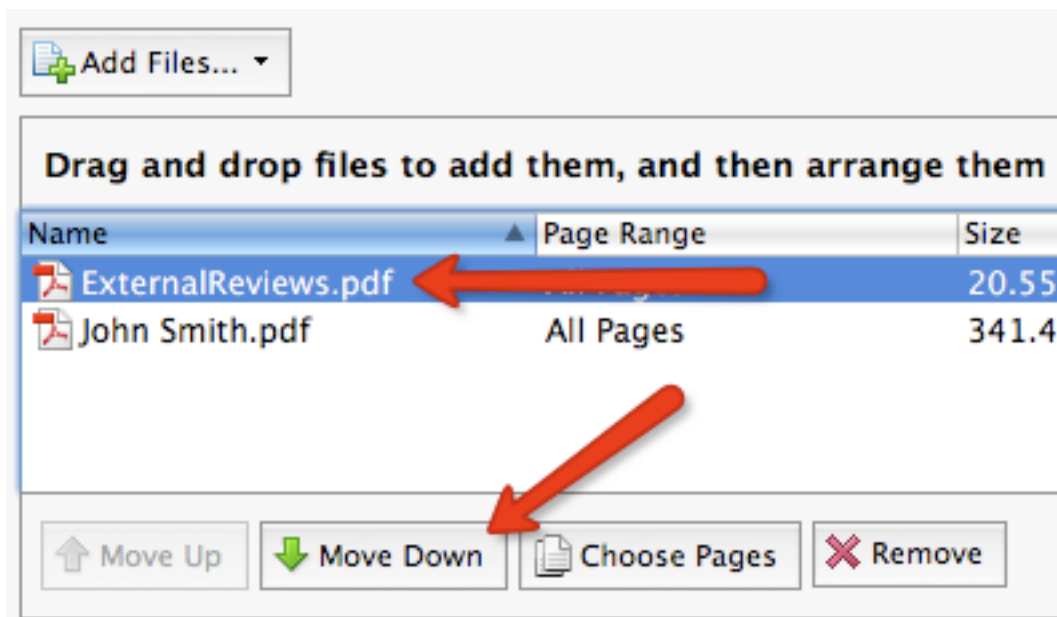
10. Next click on the Combine Files button
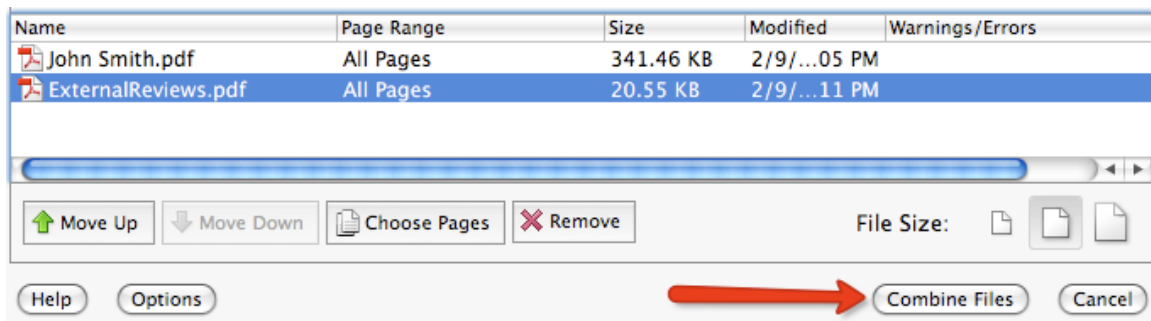
11. The files will be combined and you will be prompted to name the new combined file. Use the original name of the candidates' primary file (which should be the last name of the candidate).
12. Save the file to the candidate's folder on your computer.

Posting Candidate files on Blackboard for Unit Review

1. Go to http://blackboard.sc.edu and login with your USC network username and password. (Not sure what that is? Go here http://www.uts.sc.edu/tts/login.shtml
2. Although the document management process is the same as that for a class, you will find the link for the T&P process under My Organizations instead of under My Courses.
3. In the My Organization box, click on the link "Unit Tenure and Promotion". You are the leader of this organization.
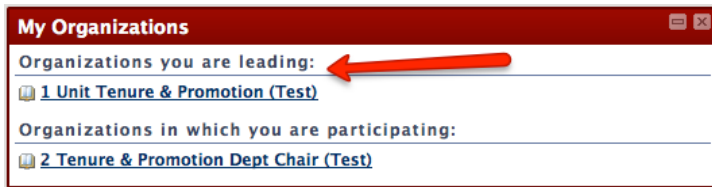
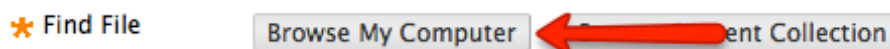4. In the menu on the left, Click on the "Tenure & Promotion Files" link.
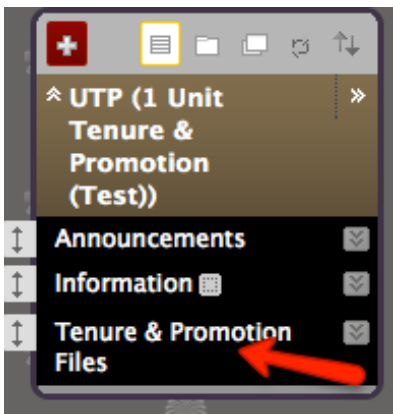
5. On the "Tenure & Promotion Files" page select the "Build Content" button.

6. From the "Build Content" menu select "File"
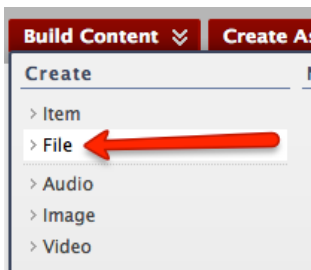
7. On the Create File page click on "Browse My Computer" to select the candidate's file

8. After you select the file you will see it in the Selected File field and the name of the file appears in the Name field.

9. Click Submit to upload the file.
10. You will be taken back to the "Tenure & Promotion Files" area of your site, and you will see a link to the candidate's file.
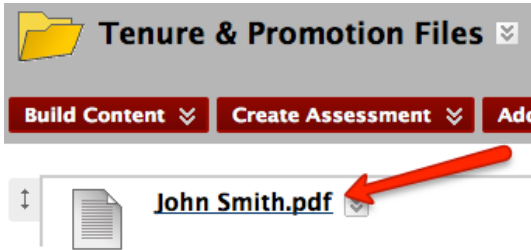
11. Members of the unit committee will be able to review the file by clicking on the Tenure & Promotion Files menu item and then clicking on the link to the candidate's file.

Managing Access by Using Adaptive Release

You must manage which of the unit faculty are eligible to view each candidate's file by using Adaptive Release. Adaptive Release allows you to set different permissions for each file uploaded to your site, ensuring that only eligible faculty have access to a candidate's file.

NOTE: If all T&P unit faculty are eligible to view a candidate's file, then it is not necessary to use Adaptive Release.

Setting Up Adaptive Release

You can set up Adaptive Release for any individual file.

1. To set up Adaptive Release for a file go to the "Tenure & Promotion Files" area, click on the drop down arrow for the file and select Adaptive Release (Note: Do not select Adaptive Release: Advanced).
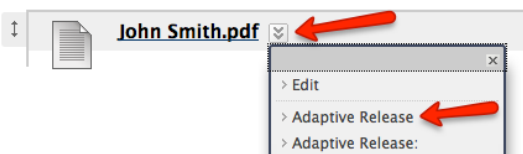
2. On the Adaptive Release page go down to Membership, leave the search field blank and click Browse.

3. A "Course Membership" search box will appear
4. Leave the search field blank and click Go

5. On the next page you will see a list of unit faculty who have access to the site. Select the unit faculty who should have access to the candidates file and click Submit.

6. You will be taken back to the Adaptive Release page, and you will see unit faculty's usernames added to the Username field.

7. Scroll down and click Submit.

8. You will be taken back to the "Tenure & Promotions Files" area. You will see a link to the candidate's file and below that it will say, "Enabled: Adaptive Release."

9. Only the unit faculty you selected will be able to see the link to the candidate's file.

Instructions for Anonymous Secure Submission of T&P Unit Votes

This procedure is designed to preserve the anonymity and security of the Unit T&P Committee member's votes. By following this procedure, only authorized parties will be able to access the committee member ballots and committee members will not be identifiable.

1. T&P Committee Chair obtains an electronic ballot template available at the university's Tenure and Promotion Website (http://www.sc.edu/tenure/tenureandpromotion.shtml#forms/). Note that separate ballots must be used for tenure and promotion votes; if a candidate is applying for both tenure and promotion, both ballots must be downloaded and prepared for that candidate. The Chair edits this document to include the candidate's name and candidacy (i.e., promotion to associate or full professor) and password protects it. To make passwords compatible across various versions of Word, they should be no longer than twenty characters. The Chair then distributes this document to all Unit T&P Committee members along with the password. Note that all Committee members are given the same password.

    *   For instructions on password protecting a ballot using Word for Windows 2007 see page 11.

    *   For instructions on password protecting a ballot using Word for Windows 2010 see page 12.

    *   For instructions on password protecting a ballot using Word for Mac 2008 and 2011 see page 14.

2. Committee members will use the password provided by the Unit Chair to open the ballot. After completing the ballot the committee member should save the ballot with the same name and close it. The ballot remains password protected. Thus, all Committee members submit a ballot with the same name and with the same password. This file is then sent to the unit administrative assistant designated to receive the ballots.

3. The administrative assistant renames the received files so that each has a different number (e.g., **candidatefile1**, **candidatefile2**, etc.) and copies them to a single folder

designated for this purpose. Note that because the files are encrypted, the administrative assistant cannot open the files.

4. The administrative assistant sends the folder to the Committee Chair. Note that there is no information identifying the committee members in this folder. The Chair and one other Committee member tally the votes for the candidate.

5. The Committee Chair creates a single PDF file composed of all the ballots, which is then inserted into the candidate's primary file.

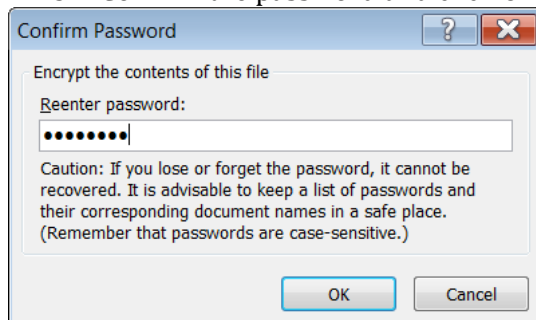## Password Protecting a Word Document in Word for Windows 2007

1. Go to the Office Button, select Prepare > Encrypt Document
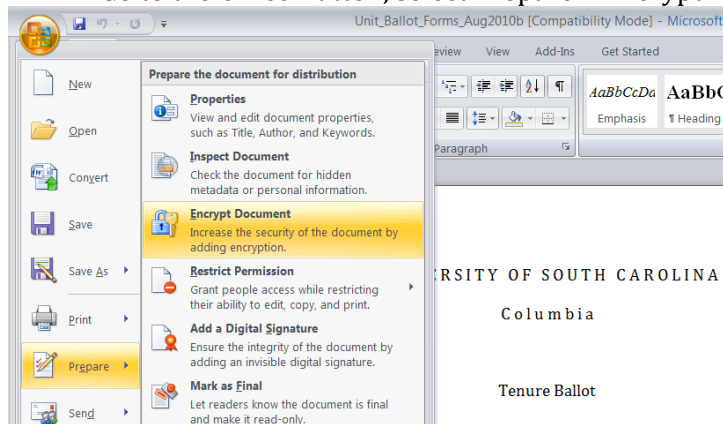
2. An Encrypt Document box will appear. Enter the password you select in the "Password " field and click OK
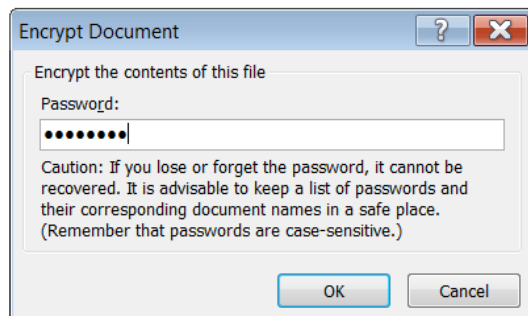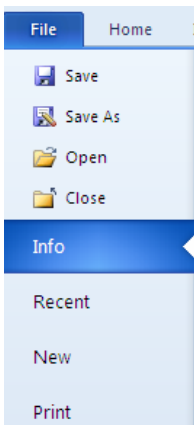

3. Confirm the password and click OK

4. Save the document.
5. Email the password protected ballot to those who are eligible to vote.
6. Separately, provide the password to those who are eligible to vote.

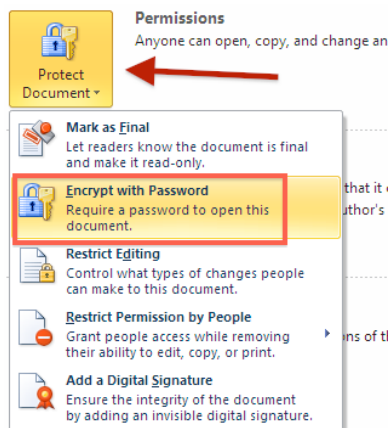## Password Protecting a Word Document in Word for Windows 2010
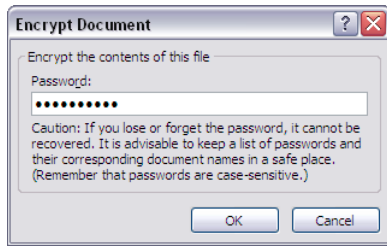
1. Click on the File menu

2. From the File drop down menu choose Info

3. Under Permissions click on Protect Document and select Encrypt with Password

4. The Encrypt Document pane enter the password in the Password field

5. You will then need to reenter the password in the Confirm Password pane
6. After you have reentered the password and clicked OK, you will see under Permission "A password is required to open this Document."
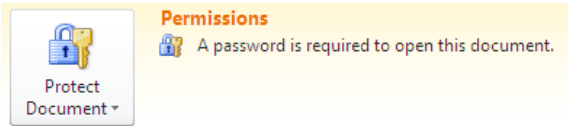
7. Email the password protected ballot to those who are eligible to vote.
8. Separately, provide the password to those who are eligible to vote.

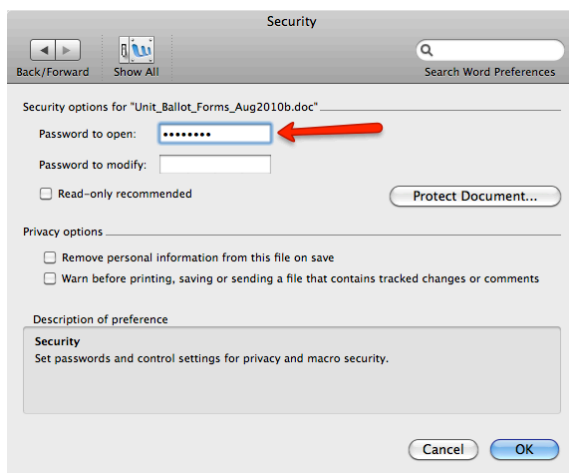## Password Protecting a Word Document in Word for Mac 2008 and 2011

1. Go to the Word menu and select Preferences
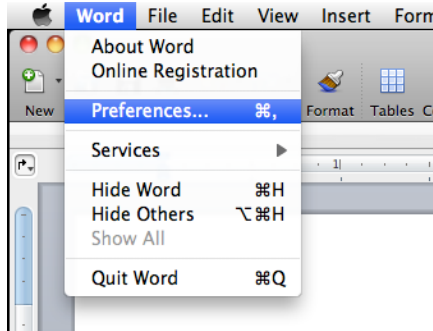
2. Select Security from the Word Preferences

3. Enter the password in the "Password to open" field and click OK

4. Confirm the password and click OK

Confirm Password

Reenter password to open:

••••••••

Caution: If you lose or forget the password, it cannot be recovered. It is advisable to keep a list of passwords and their corresponding document names in a safe place. (Remember that passwords are case–sensitive.)

Cancel   OK

5. Save the document.
6. Email the password protected ballot to those who are eligible to vote.
7. Separately, provide the password to those who are eligible to vote.

## Submitting a Candidate's File to the Department Chair

1. Log in to Blackboard as usual and in the My Organizations box, this time select the organization "Tenure & Promotion – Dept Chair". You are a participant in this organization, not the leader. At this point you are essentially assuming the role of a "student" so that you can submit your "assignment" to the Department Chair.
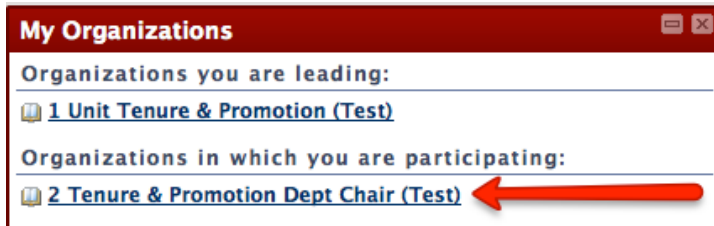
2. In the menu on the left select "Tenure & Promotion Files" (In some older T&P sites this may simply say "Files.")
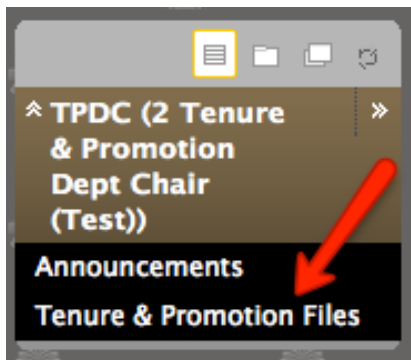
3. On the next page you will see a link for the relevant candidate. Click on that link.
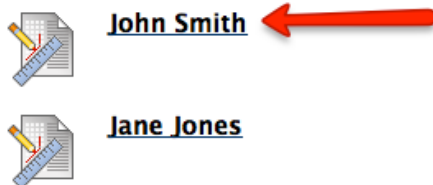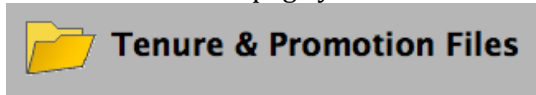
4. On the "Upload Assignment" page you will be able to upload the candidate's file, augmented with votes and justifications and vote summary, to satisfy the Dept. Chair's "assignment".

Upload Assignment: John Smith

1. Assignment Information

Name:	John Smith
Instructions	
Due Date	
Points Possible	0

2. Assignment Materials

Submission

Path: body

Attach File   [Browse My Computer] [Browse Content Collection]

Comments

5. Click on the Browse button for Attach Local File
6. Select the file from your computer.
7. Once the file has been selected click the Submit button.
8. The Dept. Chair will be able to access the file after you click Submit.