Electronic Promotion & Tenure Casebooks
2014 promotion cycle

Required technology
MS Word, Adobe Acrobat 8 Professional or higher, a user-friendly scanner, Hash-calc program, MS Excel, CTools
Note: the Unit needs to set aside dedicated space on its server to store documents confidentially.

Steps in the Process **Responsibility**

Step 1: Preparation of files

- Create a unique PDF* file for each promotion casebook labeled with the faculty member's last name/first name and includes: — Unit
  - Table of Contents with the number of the last page listed
  - Bookmarks to the different sections of the promotion casebook, including a page count for each section (please do not list the last page of each section)
  - After the bookmark with the External Reviewers' credentials (see Attachment G in the guidelines), also bookmark each external review letter and include the reviewer's credentials/bio from Attachment G (place the bio in front of the review letter as a separate page). For example: Reviewer A bio and letter (__ pages), Reviewer B bio and letter (__ pages), etc.
  - Note that all pages in the promotion casebook are to be in Portrait orientation, not Landscape.

- Create a single Excel spreadsheet entitled "*Your Unit* Checksum" to store the file names (by faculty member's last name/first name) and "checksum" information for each PDF file. When applicable, divide PDF files by track (Instructional, Clinical, and/or Research Professor). Note: Research Scientist track promotion casebooks, submitted to the Office of the Vice President for Research, and UM-Dearborn and UM-Flint promotion casebooks, submitted to the President's Office, are also uploaded to CTools. — Unit

  PCs only:
  - Download "Hashcalc" from <http://www.slavasoft.com/hashcalc/>
  - When asked for Data Format, select "File" and then select "SHA-1" from the list. In Find File (…), click and choose a PDF file. Click on "Calculate" to run the "SHA-1" hash (aka checksum)
  - Enter the PDF file name (by faculty member's last name/first name) and the "SHA-1" hash information into the "`Checksum" Excel spreadsheet
  - Run a "SHA-1" hash on each PDF file

  Macs only (do not use Explorer browser):
  - To download the "dropHash" utility using the Safari web browser, type in <http://www.provost.umich.edu/faculty/promotion_guidelines/dropHash.dmg>
  - Double click on "dropHash." When asked to Choose a File (Compute hash for which file?), choose a PDF file. If the "dropHash" downloads to your desktop, the PDF file can be dropped on top of it. In both cases, it will ask you to select the type of hash. Select "SHA-1." Click "ok" and a window will open with the SHA-1 hash (aka checksum).
  - Enter the PDF file name (by faculty member's last name/first name) and the "SHA-1" hash information into the "Checksum" Excel spreadsheet
  - Run a "SHA-1" hash on each PDF file

**Please use Adobe Acrobat Professional version 8.0 (with embedded fonts) or higher to create PDF files.*

Steps in the Process	**Responsibility**

Step 1: Preparation of files *cont'd*

- Create an MS Word "metadata" file containing the following information for EACH casebook: — Unit

  2014 promotion year
  School/College/Research Unit
  Last Name, First Name (EMPLID)
  Division and/or Department
  Instructional/Research/Clinical
  Current Rank to Recommended Rank
  Please note if it is a joint appointment

- Create a unique PDF file for each promotion track (Instructional/Clinical/Research) containing the Unit Criteria for promotion — Unit

- Create a unique PDF file of the **signed** Summary Memorandum from the Dean/Director and any attachments — Unit

Step 2: Transfer of files to CTools by February 12, 2014

- Log in to the CTools website using your uniquename and Kerberos password: — Unit
  - <https://ctools.umich.edu/portal> or go to *quick links* on the UM homepage and click on CTools

- Upload the PDF casebook file(s) (both positive and negative mandatory tenure): — Unit
  - Select the worksite named "Your Unit Name" Promos
  - Select the appropriate folder (Instructional/Clinical/Research) in Resources
  - Place the PDF file(s) within the appropriate folder(s) by clicking on "Add" - click "Upload Files" and "Choose File" to access the server - choose the PDF casebook file - click "Upload Files Now"

- Upload the "checksum" document: — Unit
  - Place the spreadsheet in Resources by clicking on "Add" - click "Upload Files" and "Choose File" to access the server - choose the Excel spreadsheet and click "Upload Files Now"

- Upload the MS Word "metadata" document: — Unit
  - Place this document in Resources by clicking on "Add" - click "Upload Files" and "Choose File" to access the server - choose the "metadata" document and click "Upload Files Now"

- Upload the Unit Criteria PDF document: — Unit
  - Place this document in Resources by clicking on "Add" - click "Upload Files" and "Choose File" to access the server - choose the Unit Criteria document and click "Upload Files Now"

- Upload the **signed** Summary Memorandum from the Dean/Director PDF document: — Unit
  - Place this document in Resources by clicking on "Add" - click "Upload Files" and "Choose File" to access the server - choose the Summary Memorandum document and click "Upload Files Now"

- Please remember to log out of CTools when finished — Unit

Steps in the Process	**Responsibility**
Step 3: Preliminary review of casebooks by Academic HR	
• Email Academic HR that the files are available	Unit
• Academic HR reviews the PDF casebooks for completeness: - If complete, update status sheet of promotion cases - If incomplete, Academic HR to notify the Unit of missing information *Unit is responsible for deleting incomplete file(s), re-uploading completed file(s), and re-running and re-uploading "checksum" document*	Academic HR *Unit*
• Once all the casebooks have been uploaded into CTools and reviewed, send an email (including a list of names and EMPLIDs) to the Provost's Office certifying that the electronic cases have been reviewed and are complete as of a certain date	Academic HR
Step 4: Transfer of non-CTools files from the Unit to Academic HR	
• Send *hard copies* of the following by the deadline of February 12, 2014: - **Signed** Promotion Recommendation (Instructional track only)	Unit

Questions?

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