e-Dossier Setup
For Tenure and Promotion Candidates
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1 Overview of the e-Dossier System

This manual is written for candidates who are seeking tenure and/or promotion and will use the e-dossier system to upload and display their materials for review. It is a technical document explaining the steps for loading content into the dossier system and is not a source of authority on the tenure and promotion process as a whole. For more information on the tenure and promotion process itself, please see the Provost’s office web page on promotion and tenure at http://www.usu.edu/provost/faculty/promotion_and_tenure/

This manual is supplemented by additional help resources, including job aids, videos, and workshops.

What the system does

Prior to the establishment of the e-dossier system, tenure and promotion candidates would build a portfolio using a physical binder, composed of binder tabs and paper files, to provide evidence of their accomplishments in the areas of their role statement. The completed binder would be passed from the candidate to his or her advisory committee and then to the various reviewers that followed, each of whom would review the contents of the binder as part of the decision-making and recommendation process.

The e-dossier system was designed to be a digital conversion of the same concept and process. It is an electronic system that:

- Accepts file uploads from a candidate and displays them in an organized, categorical manner to specific individuals who have been given permission to view it.
- Allows digital moderation of the dossier from one stage of the review process to the next in a manner that is transparent to the viewers and the candidate.
- Keeps a digital copy of the dossier in perpetuity for the candidate and others who have been granted permission to view it.

Access, Roles, and Permissions

The e-dossier system is password protected and can be accessed only by individuals with a user account in the system. Unless otherwise specified, an individual’s username and password is the A number and password used to access the campus portal and other campus systems.

There are three types of user roles in the system:

- University admin
- College admin
- Regular user (which covers all other use cases, including candidate and reviewer)

The university admin can:

- Add users to the system.
- Create, edit, moderate, redraft, and access all dossiers and external review items in any state.
- Edit and modify the system and its collection definitions and settings.
Provide viewing permissions to an individual for any dossier in any state.

The college admin can
- Create new dossiers for users in the college.
- View and edit dossiers associated with the college that are still undergoing review.
- Register votes and add recommendation letters to a dossier associated with the college.
- Moderate a dossier associated with the college, or in other words, approve it to the next review stage.
- View the moderation progress of a dossier associated with the college.
- Add and associate external review letters to a candidate's dossier and specify separate viewing permissions.

A regular user can
- View only dossiers or external review letters that a college admin or university admin has given permission to view, whether as a candidate or as a reviewer.
- View the moderation progress of a dossier he or she has been given viewer access to by a college or university admin.
- Edit a dossier for which he or she is listed as a candidate, but only when it is in the dossier preparation stage.

In summary, the only people who can view a dossier are those given permission to do so by a dossier system admin at the college or university level. Tenure and promotion candidates can edit their dossier only when it is in the dossier preparation stage. College admins can edit the dossier throughout the process but should only do so to log votes and upload recommendation letters. University admins are available as a support to assist the process at any step of the way.

Viewing privileges for external peer review letters are set up separately from dossiers to ensure that candidates are prevented from being able to view the letters.

**Categories**

When you first begin editing your dossier, you will be presented with a series of checkboxes for adding categories to your dossier relative to your role statement. These can be thought of much like tabs in a physical binder. They exist to separate files categorically for the sake of an organized presentation.

**File Attachments**

You will prepare your dossier materials as a series of digital files, which you will upload and attach under the appropriate categories. These files should be prepared on your computer in advance. Steps for uploading files will be provided in the next chapter.

**Recommendations**

Once your dossier undergoes the review process, the reviewers will submit recommendation votes and letters to the college dossier admin, who will enter them into the system. You will be able to view the recommendation letters as they are added, but will not see the individual recommendation votes.

**External Peer Review Letters**

Your department will also solicit external peer review letters, which will be attached to the dossier. You will see a link to the letters, but if you click the link you will be denied access.
The Dossier Workflow

This section briefly outlines the process your dossier will go through from start to finish. Your part in the process occurs during the Dossier Preparation stage. Afterward, you will be able to view the dossier’s moderation progress.

The life of a dossier is as follows:

1. The college dossier admin creates the dossier and adds the candidate and list of reviewers to it.

2. **Moderation Point:** The college dossier admin submits the dossier for moderation. This puts it in the Dossier Preparation stage, in which the candidate can add files.

3. The candidate selects dossier categories and uploads files, seeking help from the college dossier admin and peers as needed.

4. When the candidate is ready to submit the dossier for review, he or she provides a signature verifying his or her readiness to relinquish editing control and turn the dossier over for review.

5. At some point the college dossier admin creates a separate item for external review letters and links to it from the dossier.

6. **Moderation Point:** The college dossier admin approves the dossier for the next stage, Tenure/Promotion Advisory Committee Review.

7. The Tenure/Promotion Advisory Committee accesses and reviews the dossier online and provides the college dossier admin with a recommendation letter and the committee members’ recommendation votes.

8. The college dossier admin adds the votes and recommendation letters to the dossier. The committee chair verifies this was done accurately and provides a signature indicating it is correct.

9. **Moderation Point:** The college dossier admin approves the dossier for the next stage, Department Head Review.

10. The department head accesses and reviews the dossier online and provides the college dossier admin with a recommendation vote and recommendation letter.

11. The college dossier admin adds the vote and recommendation letter to the dossier. The department head verifies this was done accurately and provides a signature indicating it is correct.

12. **Moderation Point:** The college dossier admin approves the dossier for the next stage, Dean Review.

13. The dean accesses and reviews the dossier online and provides the college dossier admin with a recommendation vote and recommendation letter.

14. The college dossier admin adds the vote and recommendation letter to the dossier. The dean verifies this was done accurately and provides a signature indicating it is correct.

15. **Moderation Point:** The college dossier admin approves the dossier for the next stage, Central Committee Review.

16. Central committee members access and review the dossier online and forward their recommendation to the Provost and President. The dossier remains in a read-only state for the candidate and all reviewers until the following year.

17. **Moderation Point:** As the next year’s tenure and promotion review process begins, the university dossier admin approves the dossier for the final stage, complete. The dossier is removed from the view of prior reviewers and remains in a read-only state for the candidate (and other viewers as requested by the candidate).

The Moderation Progress as shown by the dossier system. Completed stages are green. The current stage is red.
2 Uploading Materials

This chapter provides step-by-step information on how to add content to your digital dossier. For additional help, please contact your college dossier administrator.

Login, Access, and Edit the Dossier

1. Login to the dossier system with your university A# and password at https://dossier.usu.edu

2. The dashboard page provides a link to your dossier.

3. Click the dossier link and then click the green Edit This Dossier button.

Select Dossier Sections

The first task is to identify sections for dossier content that align with your role statement. This is done by checking the box next to the applicable sections. As the boxes are checked, the identified sections appear further down the screen.

Upload Dossier Files

Each section of the dossier has a heading followed by a button for attaching files. The process for attaching files is as follows:

1. Find the appropriate heading for the content to be uploaded and click the Add a Resource button. This opens a dialog box for uploading files.

2. The Upload Files dialog box provides two options for uploading files. You can use one or both.

Option 1: Browse Button

To browse for files on your computer the traditional way, click the Browse button. Select the file you wish to attach and click Open.

Option 2: Click and Drag

You can also click and drag files from your computer’s file browsing system onto the image of the box labeled Drag and Drop Here.
You can repeat either option to add multiple files. Each time you add a file, a green bar next to the file name indicates that the file has been uploaded and is ready to attach.

Files cannot be reordered once they are added, so be sure to upload them in the order you want them to appear.

Note: The only file types accepted by the system are PDF (for text-based material), JPG and PNG (for images), MP4 (for Video), MP3 or AAC (for Audio). This is for ease in viewing online, as these file types open readily in modern browsers. Website URLs are not accepted because they can be modified outside of the dossier once it has been submitted.

3. When the file or files have finished uploading, click the Next or Add button, depending on which is presented.

If you are only attaching one file, you will see an extra screen where you can preview the file and some of its details. There you can also give the file a different display name for its link besides the file name. Click the Save button.

4. The file or files appear below the section heading. You can click the Edit link associated with each file to modify its display name. There are also options to Replace or Delete the file.

Clicking on a file link downloads or displays the file so you can make sure the file uploaded is correct.

5. You can repeat steps 1-4 to add more files as needed.

6. Below each heading is a checkbox to add an appendix for that item, where files that do not serve as primary evidence can be uploaded. Use this option judiciously.

For the role statement, there is also a checkbox to add a past role statement, if your role statement has changed.

Saving and Returning to Edit

At any point during the Dossier Preparation stage, you can save the dossier in its current state and see how it displays. You can exit the system and return at a later date to login, view the dossier, and continue editing it.

Submitting for Review

The system does not grant you access to submit your dossier to the next level of review. This is to prevent you from accidentally doing so and thereby revoking your ability to make edits before you are ready to others to see it. Only the college admin has the ability to move the dossier to the next stage.

When you are satisfied with your dossier, inform your college dossier admin. He or she will have you provide a signature indicating that you are finished building the dossier and releasing it for review. Then the college admin will submit it to the next review level.

From then on, you will be able to view the dossier and its moderation progress at https://dossier.usu.edu.