



**TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO**

FACULTY PROMOTIONS

The Senior Academic Promotions Process in LaserFiche

DPC Administrator's Guide

Discovery Commons

last updated August 2022

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Quick Reference to Promotions Websites

- **Promotion Candidate Dossier creation form:**
<https://documents.med.utoronto.ca/Forms/PromoCandidate#>
- **LaserFiche Web Access**
<https://documents.med.utoronto.ca/laserfiche>
(The main site where you will manage the Promotions process and store documents.)
➤ *Be sure to select **FacMedPromotions** under Repository*
- **Read-Only Portal**
<https://documents.med.utoronto.ca/weblink>
(The website where non-laserfiche-licensed committee members or referees can view the contents of the dossier)
- **Candidate Document Submission form**
<https://documents.med.utoronto.ca/forms/candidatesubmission#>
(This can be used by the DPCAdmin and Candidates to submit documents. Submissions will be saved into appropriate dossier category subfolders.)
- **Letter of Reference – External Referees form**
<https://documents.med.utoronto.ca/forms/externalreferee>
(This can be used by DPCAdmins and External Referees to upload reference letters)
- **Letter of Reference – Internal Referees form**
<https://documents.med.utoronto.ca/forms/internalreferee>
(This can be used by DPCAdmins and Internal Referees to upload reference letters)
- **Student Letters form**
<https://documents.med.utoronto.ca/forms/StudentLetters#>
(This can be used by DPCAdmins and Students to upload student letters)

Changes to the Senior Promotions process for June 2022:

1. Candidate folders are now created using the Promotion Candidate Dossier creation form. <https://documents.med.utoronto.ca/Forms/PromoCandidate#>
2. The Candidate Information document is created as a snapshot of the submitted form and is found in the candidate folder. It can easily be re-created if essential information is changed over the course of the Promotion process (see Appendix G for instructions).
3. When a new promotion dossier is created, subfolders for all possible document categories are now created immediately (ie. Administrative Service, Creative Professional Activity, Curriculum Vitae, etc.). These subfolders will be visible to promotions committee members even if they are empty. Promotions coordinators can delete subfolders if they do not want them. If deleted, they can be re-created by submitting a document using the Candidate Document Submission form and selecting the correct document category on the form.

The purpose of pre-creating these subfolders is to allow bulk uploading documents directly into the subfolders without having to submit them using the Candidate Document Submission form, while strictly maintaining the various permissions assigned to each subfolder (see appendix for instructions on how to bulk upload).

4. Therefore, documents can be added directly into the dossier subfolders (see appendix) OR by using the Candidate Document Submission form OR the referee OR student letters forms. These methods are interchangeable.
5. Student Letters is a new document category. There is now a subfolder named Student Letters created automatically in the repository, and, as mentioned above, a new form that can be given to students to use to submit their letters. The Document Category dropdown field on the Candidate Document Submission form has been edited to contain a value for Student Letters.
6. Summary of Submission folder. This folder contains shortcuts to all the documents in the dossier subfolders. It is used by some read-only portal users as a more convenient way of viewing documents without having to open all the subfolders. Shortcuts will be created automatically whether a document is submitted via a form or uploaded directly into the repository. They are automatically re-created if a document is renamed.
7. Upcoming Promotions folder and crossover functionality. For those departments beginning their Promotions cycles very early in the year (before the decanal committee has finalized the previous set of requests) and who have a lot of candidates, there is now a place to create folders for candidates for the upcoming year and not have them intermingle with the folders in Active Promotions. Please send a request to discovery.common@utoronto.ca if you are interested in this functionality.

Logging in to the Academic Promotions System (LaserFiche Web Access)

LaserFiche Web Access is your main administrative site for FacMedPromotions. Supported web browsers are Mozilla Firefox and Google Chrome. Please note that the Safari and Edge browsers are not supported – you may find different usability issues on different tablets. Opening LaserFiche Web Access on a full version of Safari on an Apple desktop often works well but functionality may be compromised on Apple tablets.

<https://documents.med.utoronto.ca/laserfiche>

It is a good idea to add this URL in your browser's favorites to save you from entering it in every time you would like to access the Academic Promotions system.

At the log in page select the repository 'FacMedPromotions'. Your username is **dpcadmin_<your department Org Unit number>**. For example: **dpcadmin_999**

A default password should have been provided to you, and if not, you can contact the Discovery Commons at discovery.common@utoronto.ca. Passwords should be changed from the default as soon as you log in for the first time. See 'How do I change my password?' in Appendix E for more information.

Laserfiche

Repository
FacMedPromotions

User name
dpcadmin_999

Password
.....

Sign In

Version 10.4 | © 2003-2020 Laserfiche

Adding your Department's Promotion Information to LaserFiche

Note: This section (2 pages) can be skipped altogether or filled in after you have created dossiers for your promotion candidates in the next section.

Every department within the Temerty Faculty of Medicine has their own folder in the FacMedPromotions repository. When you log in you will only see your own department's folder. This folder will hold the dossiers for your department's promotion candidates. Information specific to the department (not to the candidate), such as the Department Promotion Committee (DPC) member's email addresses and various submission deadlines, can be entered into the metadata for the department folder.

To enter your departmental metadata, in left-hand panel of the LaserFiche window expand the "Active Promotions" folder by clicking the > sign beside it. Click on your department's folder to highlight it (in the illustration below, the department name is Training). The right-hand panel will default to the Fields tab and will show the template called 'Department Information'. It is not mandatory that you fill in the fields in the Department Information template. You may fill them in or revise them at a later date.

The screenshot shows the LaserFiche interface. The top navigation bar includes 'Laserfiche', a search bar, and user information 'FacMedPromotions' and 'DPCAdmin_999'. The breadcrumb trail is 'FacMedPromotions > Active Promotions > Training' with '2 entries'. The left-hand panel shows a tree view of folders: 'Active Promotions', 'AAA_General Promotion Documents', 'Training' (highlighted with a red box and a red arrow pointing to it, with the text 'Department Highlighted' next to it), 'Archives', and 'Upcoming Promotions'. The 'Training' folder contains sub-folders for 'Basset_Barbara_999_2022_012' and 'Peacocke_Peter_999_2022_010'. The right-hand panel shows the 'Training' details page with tabs for 'Details', 'Fields', 'Preview', 'Processes', 'Records', and 'More'. The 'Fields' tab is active, showing a 'Template' dropdown set to 'Department Information'. Below this are several deadline fields: 'Deadline: Preliminary Dossier Submission' (8/15/2022), 'Deadline: Candidate Final Dossier Submission' (10/31/2022), 'Deadline: Submissions by Referees' (//), and 'Deadline: Dossier Departmental Review' (//). There are also fields for 'Upcoming Departmental Deadline' (Preliminary Dossier Submission), 'DPC Email Addresses', and 'Department Deadline Workflow'. At the bottom, there is a 'Fields' section with an 'Add/remove fields' button and the text 'No additional fields assigned'.

The screenshot shows the 'Training' template configuration page. It includes a navigation bar with 'Details', 'Fields', 'Preview', and 'More'. The 'Fields' tab is active. The 'Template' section is set to 'Department Information'. There are five deadline fields, each with a date input and a calendar icon: 'Deadline: Preliminary Dossier Submission' (8/15/2022), 'Deadline: Candidate Final Dossier Submission' (10/31/2022), 'Deadline: Submissions by Referees' (//), 'Deadline: Dossier Departmental Review' (//), and 'Upcoming Departmental Deadline' (Preliminary Dossier Submission). The 'DPC Email Addresses' section has two input fields; the first contains 'katherine.mcconnell@utoronto.ca' and the second contains 'dr.phil@cbs.com' with a character count of 15 / 40. The 'Department Deadline Workflow' field is currently empty.

For each of the deadline fields, click the calendar icon beside each field. Choose a date relevant to the deadline indicated. If the particular deadline is not yet determined, you may leave the field(s) blank. If filled in, these deadline dates are referenced and inserted into email messages that are sent out, but they do not control any dossier status changes or the permissions associated with a dossier status.

Further down you will see a field for DPC Email Addresses. This is a multi-valued field, meaning that when you enter data into the first blank text box, an additional blank text box will appear. This allows a user to enter as many DPC email addresses as there are members of your Departmental Promotions Committee. LaserFiche will use these addresses when sending email alerts when a candidate's dossier is ready for review by the committee.

The emails must be filled in before changing the dossier status from 5. to 6. DPC Review.

Ignore the faded-out *Department Deadline Workflow* field.

When you are satisfied with the information you entered, click on "Save" near the bottom of the template. If you do not see the Save button at the bottom of the template it is because you have not made any changes to the template that require saving.

Creating a Candidate's Dossier

Create a Promotion Candidate Dossier by completing the form found here:

- <https://documents.med.utoronto.ca/Forms/PromoCandidate#>

The webform contains the following fields:

Field names:	Field values and notes:
*Required fields	
Department*	Primary department in the Temerty Faculty of Medicine ➤ Select department from drop down list
Candidate Lastname*	Surname or Family Name as it appears in FOCUS or HRIS
Candidate Firstname*	Please do NOT include nicknames or brackets
Personnel Number*	Cannot contain leading zeros or letters
Candidate Email Address*	Use a departmental email address if you do not want the candidate to be notified immediately of the promotion candidate dossier creation. This email address can be changed later.
Appointment Type*	➤ Select from drop down list <i>(Note: If Appointment Type value selection is Teaching Stream, Tenured, Contractually Limited Term, or Non-clinical Part-time; then Primary Employment Arrangement, Affiliated Hospital, Research Institute, or Other Employment Arrangement fields are not required and will not be displayed.)</i>
Appointment Date*	The date the candidate began a faculty appointment at the University of Toronto. This may be found in FOCUS or HRIS
Cross Appointment(s)	(if applicable)
Primary Employment Arrangement*	➤ Select from drop down list (This field and those below are not visible if your candidate is Tenured, Teaching Stream or CLTA as those individuals work for U of T by default.)
Affiliated Hospital*	➤ Select from drop down list
Research Institute*	➤ Select from drop down list
Other Employment Arrangement*	Text field
Current Rank*	➤ Select either Assistant Professor or Associate Professor from drop down list
Start Date of Current Rank*	This may be found in FOCUS or HRIS
Proposed Rank*	➤ Select either Associate Professor or Professor from drop down list
Basis for Promotion Checkboxes	(check all that apply) <input type="checkbox"/> Competence in CPA <input type="checkbox"/> Competence in Research <input type="checkbox"/> Competence in Teaching Education <input type="checkbox"/> Excellence in CPA <input type="checkbox"/> Excellence in Research <input type="checkbox"/> Excellence in Teaching Education <input type="checkbox"/> Administrative Service
Review Submission*	Please review submission for completeness and accuracy then check the box below. <input type="checkbox"/> Submission Reviewed <i>When checked, the Personnel Number field will disappear from this form but it will be saved in the database.</i>

Outcomes of submitting the Promotion Candidate Dossier creation form

1. A new promotion candidate folder (dossier) is created for this candidate. It can be found by expanding the folder titled Active Promotions (by clicking the > sign next to it) and then expanding the department folder (by clicking the > sign next to it).

This folder name has the following format: Lastname_Firstname_PromotionID

The candidate folder will be assigned the 'Promotion Candidate Information' template and the values submitted on the webform are saved to the fields on the template. The template can be seen in the right-hand panel when the candidate folder is highlighted in the left-hand panel.

2. A snapshot of the submitted form and is created and saved in the candidate folder as a PDF file. It is named CandidateInformation_Lastname_Firstname_PromotionID. See Appendix G for instructions on how to re-create this form if data in the Candidate Information template is changed or updated.
3. Inside the candidate's folder is a folder called 'Dossier' and within it are all possible subfolders for each document category. These subfolders will be visible to promotions committee members even if they are empty. They can be deleted by department coordinators if you do not want them. If deleted, they can be re-created by submitting a document using the candidate submission form [<https://documents.med.utoronto.ca/forms/candidatesubmission#>](https://documents.med.utoronto.ca/forms/candidatesubmission#) and selecting the correct document category on the form.

The purpose of pre-creating these subfolders is to allow you to bulk upload documents directly into the subfolders without having to submit the document submission form, while strictly maintaining the various permissions assigned to each subfolder (see Appendix D on page 37 for instructions on how to bulk upload).

4. A **Promotion ID** has been created for this candidate.
The Promotion ID is a unique number created for each candidate. It will be used to enter all subsequent documents into the candidate's dossier. It has the format below:
<Department Number>_<Year>_<Incremental Number>

(For example, for promotion year 20xx, the Promotion ID for the department of Training could be: 999_20xx_004.

The Promotion ID is always the number you see after the Lastname_Firstname portion of the candidate's dossier name. It can also be found at the bottom of the 'Promotion Candidate Information' template (see previous note 1).

5. Once a candidate dossier has been created, the DPC Administrator, the candidate and selected referees can submit documents to the dossier, depending on the status of the dossier within the workflow. Dossier Status is explained later in this manual.
6. Immediately after the DPC Administrator creates the dossier (by submitting the Promotion Candidate dossier creation form), the candidate will receive an automated email message indicating that the academic promotion dossier has been created. The email provides instructions on how to submit documents to the dossier. The candidates and, later, the referees, cannot see or manage the submitted documents, but they will receive email confirmation when they upload a document.

Sample email sent to candidate when Promotion Candidate dossier creation form is submitted

Subject: *Promotion Candidate Dossier Created for <Firstname Lastname>*

Dear <Firstname Lastname>

I am pleased to inform you that a Promotion Dossier has been established for you in our records management system and is ready to accept your promotion documents. Please note that documents must be in PDF file formats.

You may upload your documents by accessing the online candidate submission form:

<https://documents.med.utoronto.ca/forms/candidatesubmission>

You will be asked to enter your Promotion ID, select a document category, and browse to upload your documents.

Your Promotion ID is: ###_####_###

Please contact your Department Promotion Committee administrator if you have any questions or concerns, at <**Department Coordinators Email**>.

Thank You.

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Note: If the department does not want the candidate to receive this email then, when first submitting the Promotion Candidate Dossier creation form, use a departmental email address in the candidate's email address field.

Submitting Documents to Dossier

Once a dossier has been created, both DPC Administrators and candidates will use the same form to upload any subsequent documents into the dossier.

<https://documents.med.utoronto.ca/forms/candidatesubmission#>

Users will likely attach documents to this form and submit it several times. Using the web form to submit documents allows LaserFiche to collect documents into several different document category subfolders in a candidate's dossier.

Document category subfolders include:

- Administrative Service
- Creative Professional Activity
- Curriculum Vitae
- External Assessments
- Internal Assessments
- Reporting Letters
- Research
- Student Letters
- Teaching and Education

For convenience these categories are repeated on the document submission form with examples. The user may submit documents one-by-one or may attach multiple documents to the form. But all documents attached to one submission of the form must belong to the same category.

1. Go to <https://documents.med.utoronto.ca/forms/candidatesubmission#>
2. Fill in the fields and upload (attach) documents from one category. Click Submit
3. To confirm the successful submission of the documents log back in to FacMedPromotions with LaserFiche Web Access and look in the Dossier for the candidate.



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Senior Academic Promotions

Candidate Document Submission Form

Promotion ID *
 format: ###_####_###
 Note that these are underscores, not hyphens.

Your E-mail *
 This is required to send you confirmation of successful submission.

Select Document Category
 You may upload multiple documents at the same time using this form, as long as they all belong to the same document category. You may submit this form more than once to cover the categories.
 You are not responsible for submitting every document listed below, some will be submitted by others on your behalf. Please see the [Promotions Manual](#) or your Department Coordinator for more information.

<p>Administrative Service</p> <ul style="list-style-type: none"> Administrative Service Documentation Administrative Service Additional Assessments <p>External Assessments</p> <ul style="list-style-type: none"> External Letters of Reference Waiver of External Peer Review External Referee List (Table 1) Letters to Referees Requesting Written Assessment <p>Internal Assessments</p> <ul style="list-style-type: none"> Internal Letters of Reference Internal Referee List (Table 2) Letters to Referees Requesting Written Assessment Colleague Letters <p>Student Letters</p> <ul style="list-style-type: none"> Student Letters Student Letters List (Table 6) Letters to Students Requesting Student Letter <p>Reporting Letters</p> <ul style="list-style-type: none"> Recommendation to Dean Confirmation Letter from Chair Recommendation of Division/Hospital Head Letters from Chairs of Cross-appointments Letters to Candidate Advising of Negative Recommendation Candidate Direct Application to DecPC Letter of Grievance 	<p>Creative Professional Activity</p> <ul style="list-style-type: none"> CPA Dossier CPA Appraisal Letters from Community Agencies CPA: Additional Assessments <p>Curriculum Vitae</p> <ul style="list-style-type: none"> Curriculum Vitae Most Significant Publications List <p>Research</p> <ul style="list-style-type: none"> Research Statement and Documentation Data Summary Sheet: Research Awards Data Summary Sheet: Refereed Publications Data Summary Sheet: Research Supervision <p>Teaching and Education</p> <ul style="list-style-type: none"> Teaching and Education Report Teaching Evaluation Committee Report Data Summary Sheet: Teaching
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Document Category * Please select a document category.
 

Only documents that fall within the same category can be attached to one form

Attach Files * Remember, for each submission of this form, only upload documents that belong in the category you selected above. You may submit this form multiple times for different document categories.

Very Important Note: File names should not contain spaces, hyphens, commas, brackets, or extra dots. If necessary, please rename your files before attaching them here. Contact your departmental coordinator if you need help doing this.

Use the Upload button to attach documents to the form.

Click the 'x' to remove document selection.

My-CV.pdf	448.04KB	✕
My-Publications.pdf	58.57KB	✕

 Submit the form with the attached documents

Outcomes of Document Submission

- Whether or not FacMedPromotions will accept the documents coming in from a web form is entirely dependent on the status of the dossier. See *Progressing Through the Promotions Approval Process* on page 16.
- If the document submission was successful an email notification is sent out to the person submitting a web form confirming this. The message is as follows:

Subject: *Promotion Document Successfully Uploaded*

Dear Promotion Candidate,

I am pleased to inform you that the upload of your document(s) to your Promotion Dossier 999_xxxx_xxx was successful.

Document Type: <Document Category, eg. Curriculum Vitae>

NOTE: You cannot see the list of documents in your Promotion Dossier. You will receive emails, such as this one, notifying you about the success or otherwise of your document uploads.

Please consult your Department Promotion Administrator if you have any questions or concerns. You may reach them via email at the address <Department Coordinators Email>.

Thank You.

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The document submission process looks very closely at the conditions and criteria of the documents being submitted, and will send the following email if the document upload was unsuccessful.

Subject: *Promotion Document Submission Unsuccessful*

Dear Promotion Candidate,

You have recently attempted to submit documents to your Promotion Dossier, and although we did receive the web form, there has been an error with receiving your uploaded document(s). Document Category = <Document Category, eg. Curriculum Vitae>

At your earliest convenience, please resubmit your document(s) by accessing a new web submission form located at:

<https://documents.med.utoronto.ca/forms/candidatesubmission#>

There are several reasons why this upload may have failed.

- a. The most likely reason is that you were working with a cached instance of the webform. This means your browser was holding values from an earlier submitted instance of the web form. You may clear a browser cache for a site by entering Ctrl and F5 on your keyboard at the same time or by closing all browsers windows before returning to the site.
- b. The name of your file may contain spaces, commas, extra periods, brackets or other unprocessable characters. You can try renaming the file at its source and upload it again. If you need help renaming a file, please contact the department coordinator.
- c. You may have opened the file after having attached it to the submission form. This sometimes disrupts the attachment of the file to the form. Please fill out the form again and re-select your file.
- d. Your computer, or your network may not allow you, for security purposes, to upload documents to internet sites. This is true of some hospital supplied computers or computers in hospitals. Please discuss this with your hospital or institution's own IT personnel.

If this issue continues, we suggest that you try using a different computer at a different site. Alternately you may email your documents to your Department Promotions Administrator at <Department Coordinators Email>.

Thank You.

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Dossier Subfolders

Every promotion candidate dossier created by submitting the webform will have two folders automatically created under their name; a 'Dossier' folder, and a 'Summary of Submissions' folder.

Also inside the **Dossier** folder, subfolders for all possible document categories are now created immediately (ie. Administrative Service, Creative Professional Activity, Curriculum Vitae, External Assessments, Internal Assessments, Reporting Letters, Research, Student Letters, Teaching and Education). Documents subsequently uploaded using the web form will be saved to the selected document category subfolder. If the subfolder for that category is not present, one will be created. This scenario would be if the subfolder was previously deleted, and later a document is uploaded in that category.

The **Summary of Submissions** subfolder contains shortcuts to all the documents in the dossier subfolders. It is used by some read-only portal users as a more convenient way of viewing documents without having to open all the subfolders. If a document is submitted via a webform, the shortcut to it will be created automatically. If a document is uploaded directly into the subfolder using the Upload feature in the repository, the shortcut will be created overnight. If the actual file in the Dossier subfolder is deleted then the shortcut to that file in the Summary subfolder will automatically be deleted as well.

Active Promotions+ > Training > Chocolate_Cadbury_999_2022_024 > Summary of Submissions 17 entries

Starred

Recent Documents

FacMedPromotions

- *General Promotion Documents
- Active Promotions
 - Training
 - *Departmental Information
 - Chocolate_Cadbury_999_2022_024
 - Dossier
 - Administrative Service
 - Creative Professional Activity
 - Curriculum Vitae
 - External Assessments
 - Internal Assessments
 - Reporting Letters
 - Research
 - Student Letters
 - Teaching and Education
 - Summary of Submissions

Name

- *CandidateInformation_Chocolate_Cadbury_999_2022_024
- CandidateInformation_Chocolate_Cadbury_999_2022_024
- CPA_AppraisalLetter3.pdf
- CPA_CPA_Sample2
- Curriculum Vitae-CV_1
- Curriculum Vitae-CV_2
- Curriculum Vitae-CV_Sample3
- Curriculum Vitae-CV_Sample4
- ReportingLetter_2.pdf
- ReportingLetter_3.pdf
- ReportingLetter_4.pdf
- ReportingLetter_5.pdf
- Research-DataSummary_Publications
- ResearchStatement_2.pdf
- ResearchStatement_3.pdf
- RS_DataSummary_GrantsTest.docx

Summary of Submissions shortcuts to documents housed in Document Category Subfolders

Summary of Submissions

Details Fields Preview More

Template

No template assigned

Fields

No additional fields assigned

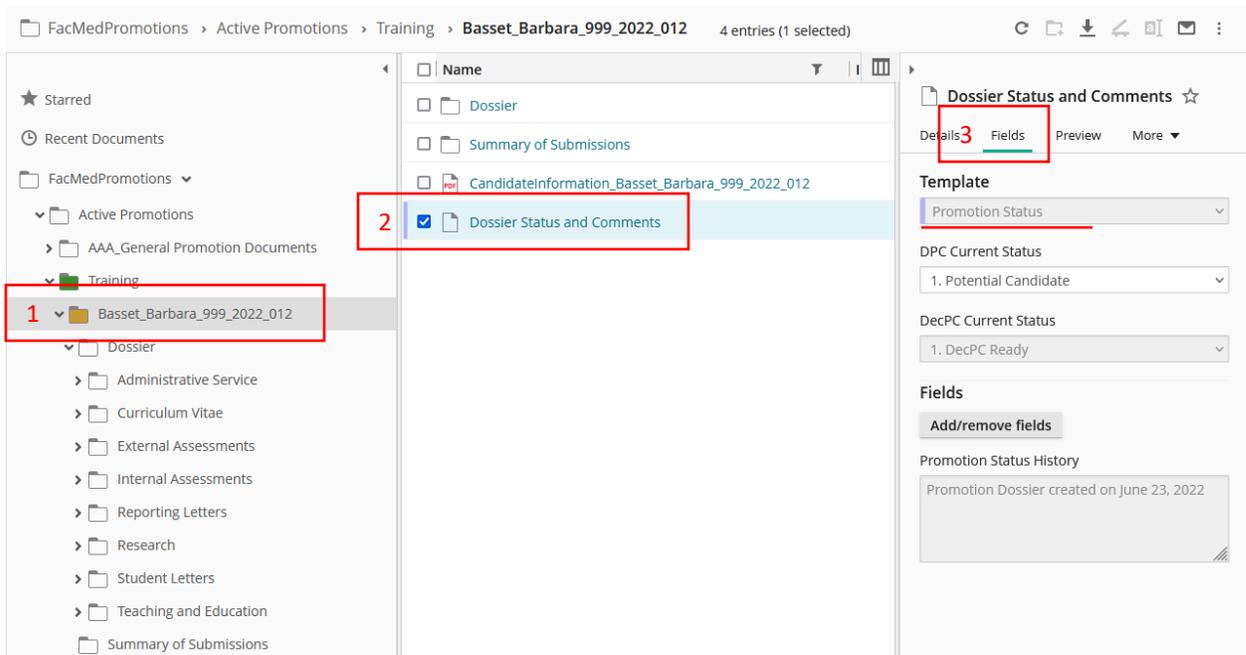
Progressing Through the Promotions Approval Process

A dossier can be in any one of several approval phases (status) in the promotion process, each status giving or removing user permissions or initiating a task. Examples include sending notifications to DPC members to review a dossier, allowing a candidate's referees to review a completed dossier, approving a candidate to move forward to the decanal committee, or withdrawing a candidate completely from the promotion process while retaining a history of their application.

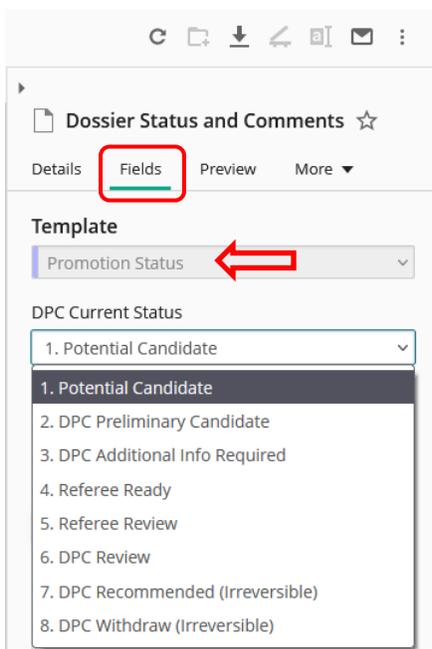
Caution: Changing the status of a dossier is often accompanied by a change in permissions to the dossier for certain users. See Approval Status Conditions on page 17 for clarification.

To access and administer the approval status of a candidate's dossier:

- Expand the candidate's folder in the left-hand frame and check the box beside the Dossier Status and Comments file. The Promotion Status template will open in the right-hand frame (see illustration below). Be sure the Fields tab is selected.



- Under DPC Current Status, select the desired approval Status and click Save. Note the Save button only becomes visible if you have made a change to the selection in this drop down list.



Although there are 17 possible phases (dossier statuses) in the promotion process, DPC Administrators only have to concern themselves with the first eight. They are as follows:

1. Potential Candidate
2. DPC Preliminary Candidate
3. DPC Additional Info Required
4. Referee Ready
5. Referee Review
6. DPC Review
7. DPC Recommended (Irreversible)
8. DPC Withdraw

See below for a description of, and the requirements of each status.

Approval Status Descriptions

Important: Read the descriptions of each status **BEFORE** saving a change. The workflow that triggers the change to the new status may require certain data that may or may not be present in the templates.

It is the change from one status to another that triggers the desired activity, not the status itself.

1. Potential Candidate

This status is the default that is set when a candidate dossier is first created in the Academic Promotions system. When a dossier is created, the candidate is automatically notified by email of the creation of the dossier, and is given instructions how to submit documents to the dossier folder (see sample email on page 10).

The permission on the dossier is configured to accept submissions from the web form.

2. DPC Preliminary Candidate

If your department does not do formal preliminary reviews of the candidates, where only selected members of the DPC review a dossier assigned to them, this step can, and should, be skipped. If your entire DPC participates in a formal preliminary review then just leave the Dossier Status at '1. Potential Candidate'.

Changing the status to 2 DPC Preliminary Candidate will notify the one or two DPC members *specifically assigned* to do a preliminary review of this specific candidate that there are documents available for viewing. The email addresses of these assigned DPC members would need to have been added to the candidate's 'Promotion Candidate Information' template **PRIOR** to selecting this status.

To add these email addresses and proceed with this status:

- Highlight the main folder for a candidate in the left panel.
- In the right panel, ensure the Fields tab is selected to display the 'Promotion Candidate Information' template. Scroll down the list of fields and fill in the assigned DPC Members emails in the field titled 'DPC Assigned Email Addresses'. Click Save.
- In the centre panel, checkmark the box beside the **Dossier Status and Comments**.
- In the Promotion Status template on the right panel, change the status from '1. Potential Candidate' to '2. DPC Preliminary Candidate' and click Save.

The email message sent to the 'assigned' DPC members looks like this:

Subject: *Candidate Dossier Ready for Your Review*

Message:

Dear Departmental Review Committee Member,

You have been selected to perform a preliminary review of the Promotion Dossier of a potential senior promotion candidate from your department.

Candidate's Name: <Candidate First and Last Name>
 Current Rank: <Current rank>
 Proposed Rank: <Proposed rank>

To access the Candidate's promotion dossier, please follow this link:
<https://documents.med.utoronto.ca/weblink>

username = dpc_xxx
 password = xxxxxxx

Please contact your Department Promotions Administrator at <Department Coordinators Email> for further information and support.

Thank You.

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The username and password for your department's Read-Only Portal, mentioned in the email above, should have been given to you in your training. If not, please contact Libby Shirriff at libby.shirriff@utoronto.ca. You will eventually need to make this username and password available to all your department's Promotion Committee members, either now or later in the process.

3. DPC Additional Info Required

Selecting this approval status indicates either that a candidate has been preliminarily approved and you are now requesting more documentation **OR that** this candidate did not require preliminary approval but you want to remind them to complete the submission of their documents.

Changing to this status and clicking Save will send an email notification to the candidate requesting that they submit any documents they have not yet supplied. So the status change to this step may be used as a reminder to candidates to send in the rest of their documents.

You will notice in the email message below it indicates a deadline date for the submissions. This deadline date must be input into the Department Information template BEFORE a change to the promotion status 3. DPC Additional Info Required is saved.

To add this date and proceed with this status change

- Double check that the 'Candidate Email Address' in the Promotion Candidate Information template is correct.
 - Highlight the candidate's folder in the left panel.
 - In the Promotion Candidate Information template in the right panel, scroll down and check that the 'Candidate Email Address' field value is correct. Click Save.
- Highlight the Department folder in the left panel.

- In the Department Information template that appears in the right panel scroll down to the **Deadline: Candidate Final Dossier Submission** field and select a date. Click Save.
- Highlight the candidate's folder in the left panel.
 - In the centre panel, checkmark the box beside the 'Dossier Status and Comments'.
 - In the Promotion Status template on the right panel, change the status to '3 Additional Info Required' and click Save.

The email message sent to the candidate looks like this:

Subject: *Additional Info Required: Firstname Lastname*

Message:

Dear Firstname Lastname

Please note that your Promotion Dossier has been reviewed by the Departmental Promotions Committee and we would now like to see the complete set of your documents.

The deadline date for document submission is <Deadline: Candidate Final Dossier Submission>.

You may upload further documents to you promotion dossier by accessing the following URL:

<http://documents.med.utoronto.ca/webforms/candidatesubmission>

Your Promotion ID is: *###_####_###*

Please contact your Department Promotion Committee administrator if you have any questions or concerns, at *<Department Coordinators Email>*.

Thank You.

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4. Referee Ready (*very important, please read*)

A Word about Referees: Referees require special care. Unlike DPC Committee members who have permission to see all of the candidate dossiers from their department, referees have permission to see the dossiers of only the candidate's to whom they are specifically assigned. To allow Referees to **see** only the documents pertaining to specific candidates, they must each be given a unique username and password. Referees will use this username and password on the **read-only** portal (<https://documents.med.utoronto.ca/weblink>). This username and password is created by Human Resources personnel. This 'read-only' website is discussed in the next section.

For now, the dossier status #4, Referee Ready, is a **holding stage**. It allows you, the DPC Administrator:

- to check that you have collected all the documents that you require thus far for a candidate
- to compile a list of persons who have agreed to be Referees for a candidate
- to obtain from Human Resources unique usernames and passwords that can be assigned to each referee for a candidate.
- In the past, a status change to 4. *Referee Ready* used to close off the dossier from any further document submissions to a dossier. This was to align with the policy that all referees for one candidate see the same set of documents regardless of the day they review the dossier. This policy still applies but the restriction on any further document upload has been removed.

If you haven't yet compiled a list of referees and/or received a list of available user names and passwords from HR, this status reminds you that now is the time to do so.

Steps to Obtaining Reference Letters from Referees

Step 1. Ask potential referees if they are willing to be referees. You may send them a standardized letter if you wish, an example of which is shown in the Academic Promotions Manual. Confirm their email address. This step is **not** a LaserFiche function.

Step 2. Ask Human Resources libby.shirriff@utoronto.ca to supply you with a list of usernames and passwords. You will assign one username and password pair to each referee. You should obtain this list in advance of your need for them as there is often a 1-2 week turnaround time from HR. It is the responsibility of the departmental administrator (dpcadmin) to keep track of which referee is assigned to which username and password pair.

Step 3. Fill in each referee's username (just the username) on the candidate's 'Promotion Candidate Information' template by highlighting the candidate's folder in the left panel. The template appears on the right panel under the Fields tab. Scroll down to the Internal and External Usernames text boxes. As soon as you type one username into the text box, another, empty, text box will appear below it for each successive username you need to add. Click Save at the bottom of the template.



Step 4. Using your own email application, send each referee an email giving them their user name and password, the Read-Only Portal website <https://documents.med.utoronto.ca/weblink>, and instructions on how to upload their Letters of Reference. Here is an example.

IMPORTANT: You MUST change everything in brackets to refer to the correct candidate and this specifically assigned referee. This MUST be done for each email. In the second part of the letter select ONLY ONE web submission form URL, either for an internal referee or for an external referee. Delete the other one.

Dear Colleague,

You have been selected as a reference for [name of candidate], who is being considered for academic promotion at the University of Toronto.

Current Rank: [current rank]

Proposed Rank: [proposed rank]

Please click on the link below to review the promotion dossier.

<https://documents.med.utoronto.ca/weblink>

User name = [insert referee user name]

Password = [insert referee password]

Once you have reviewed the materials please follow the steps below to submit your Letter of Reference to the Promotion Candidate's dossier. Your letter should include your title, your institution's name, and it should be signed. The letter is due no later than [date].

1. Visit a different website at <https://documents.med.utoronto.ca/forms/ExternalReferee> for External Referees

OR

1. Visit a different website at <https://documents.med.utoronto.ca/forms/InternalReferee> for Internal Referees]

2. Under Promotion ID, enter: **XXX_XXXX_XXX**

3. Enter your email address in the Your Email Address field.

4. Upload your Letter of Reference and click Submit.

You will receive an automated email confirming the receipt of your Letter. If everything seemed to go well but you do not receive an email please check the junk mail folder of your email application. Some institutions' mail filters divert these confirmation messages.

We very much appreciate you taking the time to prepare a letter of reference. Please feel free to contact the Department Promotion Committee administrator at [\[your_own_@utoronto.ca\]](mailto:your_own_@utoronto.ca) if you have any questions or concerns.

Thank you.

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Step 5. Shortly before or immediately after you have completed steps 3 and 4 above for a candidate, change the dossier status to 5 - Referee Review (see below). The change in status from status 4 to status 5 initiates the workflow granting the referee permission to see the dossier.

5. Referee Review

Saving the change in going from Status 4 to Status 5 triggers a behind-the-scenes process that gives permission to each referee to see, in the Read-only Portal, the dossier(s) assigned to them. Therefore, it is crucial that you add the referee usernames to the candidate template prior to changing the status to "5. Referee Review".

Possible Problem: Saving new referee usernames to the candidate's template after the dossier status is already at 5-Referee Review, will not trigger the behind-the-scenes process that activates permissions. Whereas you can save the username in the template, permission on that dossier will not be granted to that user. If that occurs, the Referee would be able to log into the Read-Only Portal but they would not see any dossiers.

Solution: If you want to add extra referee usernames to the candidate's template after having changed the dossier status from status 4 to status 5, follow these steps:

- In the left panel, highlight the candidate's main folder, then in the centre panel checkmark the 'Dossier Status and Comments' document. The Promotion Status template will appear in the Fields tab in the right panel. Change the 'DPC Current Status' field value back to status 4-Referee Ready. Click Save at the bottom of the template.
(If you do this, none of the previously activated referees will be able to see their assigned dossiers, their permission will have been removed, so move on to the next steps quickly.)
- In the left panel, highlight the candidate's main folder. The 'Promotion Candidate Information' template will appear in the Fields tab of the right panel. Add the new referee user names to the Internal or External Referee User Accounts text boxes. (At this point you can remove any referee usernames from the template if they have already submitted a letter. If they have not, leave them in.) Click Save at the bottom of the template.
- Back in the centre panel, checkmark the candidate's 'Dossier Status and Comments' document. The Promotion Status template will appear in the Fields tab in the right panel. Change the 'DPC Current Status' field value back to status 5-Referee Review. Click Save at the bottom of the template.

Now all of the referees whose user names are currently in the candidate's template will be able to log into the Read-Only Portal and see their assigned dossier(s).

You may perform this exercise multiple times.

Step 6. Obtaining Reference Letters from Referees. Wait for the referees to upload their letters. Below are illustrations of the External Referee and Internal Referee web submission forms that you supplied to the referee in your email.

Letter of Reference Submission – External Referees<https://documents.med.utoronto.ca/forms/externalreferee>

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UNIVERSITY OF TORONTO

Senior Academic Promotions

Letter of Reference Submission - External Referees

Promotion ID*
format: ###_####_###
Note that these are underscores, not hyphens.

Your E-mail*
This is required to send you confirmation of submission

Attach Letter of Reference*
File names should not contain spaces, hyphens, commas, extra dots or brackets.

Upload

If you see the file name, the file has been successfully attached to the form. Clicking on the file name before submitting the form will disrupt the proper attachment of the file to the form.

Submit

Letter of Reference Submission – Internal Referees<https://documents.med.utoronto.ca/forms/internalreferee>

TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

Senior Academic Promotions

Letter of Reference Submission - Internal Referees

Promotion ID*
format: ###_####_###
Note that these are underscores, not hyphens

Your E-mail*
This is required to send you confirmation of successful submission

Attach Letter of Reference*
File names should not contain spaces, hyphens, commas, extra dots or brackets.

Upload

If you see the file name, the file has been successfully attached to the form. Clicking on the file name before submitting the form will disrupt the proper attachment of the file to the form.

Submit

When a referee submits a letter of reference using these webforms, they will receive an email confirming the letter was received. The DPCAdministrators are copied on this confirmation email. The letters of reference will be loaded automatically into Dossier subfolders titled 'External Assessments' or 'Internal Assessments' respectively. Shortcuts to the letters can also be seen in the Summary of Submissions folder. Aligning with the Promotions policies, DPCAdministrators do not have access to delete letters from these referee subfolders.

6. DPC Review (Departmental Promotions Committee Review)

Departmental Promotions Committee members view the contents of the Promotions dossiers in the Read-Only Portal. Each department has one user account in the Read-Only Portal that is used by all of their DPC members.

Read-Only Portal: <https://documents.med.utoronto.ca/weblink>

Login: dpc_{3 digit org unit code} Password: password

Change the dossier status to 6-DPC Review when you are at the departmental approval stage of your promotions process. You must first have informed the DPC members of the URL for the Read-Only Portal, the user name and the password for your department.

- To make this change, in the centre panel highlight the candidate's 'Dossier Status and Comments' document. The Promotion Status template will appear in the Fields tab in the right panel. Change the 'DPC Current Status' field value to status 6-DPC Review. Click Save at the bottom of the template.

If you have input DPC member email addresses into the Department metadata (see page 6) then, moving to this step and clicking Save triggers LaserFiche to send an email notification to all DPC members whose addresses it finds in the Department metadata. The email indicates that this particular candidate's dossier is complete and ready for review and provides a link directly to the candidate's dossier. If you don't want to inform your DPC members every time you change a candidate's dossier status to '6-DPC Review' then simply leave the metadata fields blank in the Department metadata template.

The email notification is as below:

Subject: *Promotion Dossier for <Candidate First and Last Name> Ready for Review*

Dear Departmental Review Committee Member,

The full Promotion Dossier for <Candidate First and Last Name> is ready for review.

Candidate's Name: <Candidate First and Last Name>
 Promotion ID: <Promotion_ID>
 Current Rank: <Current rank>
 Proposed Rank: <Proposed rank>

To access the Candidate's Promotion Dossier, please follow this link:

<A direct link to the candidate's dossier will be provided here>

username = dpc_xxx
 password = xxxxxx

deadline for review: <Dept_Deadline>

You will receive an email notification when each additional candidate's Promotion Dossier is ready for review. Please consult your Department Promotion Committee administrator at [email address] if you have any questions or concerns.

Thank You

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On or Shortly Before the Deadline for Submission to HR

VERY IMPORTANT!

Prior to proceeding to Status 7 or Status 8, upload any Reporting Letters proceeding from the Departmental Review Committee meetings, including the Confirmation Letter from the Department Chair and/or Letters Advising of Negative Recommendations.

Moving forward from status 6 by changing the status of a dossier to Status 7 or Status 8 removes all ability to upload any further documents into the dossier, unless, at a later date, you are specifically asked to supply deferral documents by the decanal review committee. Move on to these status selections only when the dossier is complete and ready to be passed to HR for decanal review OR when a dossier is not approved by the DPC and that decision will not be challenged.

7. DPC Recommended (Irreversible)

This status should be selected if, after the departmental review committee members have made their decision

- The candidate has received departmental approval and the candidate dossier will be offered for review by the Decanal Promotions Committee

OR

- The candidate has not received departmental approval but decides to petition the decanal committee on their own.

If there are any documents proceeding from the committee meeting (e.g. Confirmation from the Chair), upload them BEFORE selecting this status. Changing the dossier status to '7- DPC Recommended' gives the Decanal Administrator (DecPC Administrator) in Human Resources permission to see and control the dossier. The DecPCAdmin will promote it to the decanal committee. You (the DPC Administrator) will still be able to view the dossier but cannot act on it unless given permission, at a later date, by the decanal committee.

You will receive an email confirming the recommendation to the Decanal Committee.

Dear DPC Administrator,

This message is confirmation that Promotion Candidate <Firstname Lastname>, ID <xxx_xxxx_xxx> has been recommended to the Decanal Promotions Committee to continue the promotion approval process.

Permission to add documents to this dossier has now been removed. If you attempt to add any documents to this dossier at this time, they will be diverted to a 'Rejected Documents Folder' which is not visible to you.

The Decanal Administrator will inform you via email if further documentation is requested by the Decanal Committee. At that time, the Decanal Administrator may re-instate your permission to add documents to this candidate's dossier.

If you have any questions, please contact Libby Shirriff at libby.shirriff@utoronto.ca.

Thank you.

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Unless, at a later date, you are given further instructions by the decanal committee regarding deferral documents, the role of the DPC Administrator is now over. Please see the section that follows for more information about deferral documents.

8. DPC Withdraw

This status should be selected if, after the departmental review committee meetings have taken place, the DPC members recommend that the candidate dossier NOT be offered for review by the Decanal Promotions Committee AND the candidate has accepted this decision. **If there are any documents proceeding from the committee meeting (e.g. Letter to Candidate Advising Negative Recommendation), upload them prior to selecting this status.**

The role of the DPCAdmin, for a candidate whose dossier has been withdrawn, will now be over. LaserFiche will no longer accept documents to this dossier. The Dossier folder will disappear from your list of dossiers in Active Promotions and re-appear in Archives. Once archived, the dossier and its contents will never be visible to the DecPC Administrator in Human Resources or to the Decanal Committee. The files will be kept in archives for 7 years, during which time the DPCAdmin has access to view the contents of the dossier, but the dossier cannot be re-instated for another promotion application in later years. A new dossier needs to be created for each promotion cycle.

Therefore, it is advisable to wait to see if the committee's decision not to recommend the candidate will be challenged because changing the status to '8-DPC Withdraw' will automatically archive the dossier. It cannot be re-instated as an 'active' promotion. If a challenge was successful OR if the candidate decided to apply to the Decanal Committee directly, a new dossier in Active Promotions would need to be created.

Dealing with Requests for Deferral Documents

If your candidate has been recommended to the Decanal Committee, the Decanal Committee may, at a later date, request that further documentation be supplied. You will be advised by the Decanal PC Administrator if this is the case. These extra documents are referred to as Deferral Documents.

If the Decanal Committee requests deferral documents, the Decanal PC Administrator will set the status of the dossier to '6. DecPC Additional Info Required'. (Note that this is a decanal status 6, not the status 6 we covered previously, and not a status available for you to select). You will receive an email like the one below.

Subject: *Promotions - Additional Info Required - <First Name Last Name>*

Dear DPC Administrator,

The Decanal Committee has reviewed the promotion dossier of Candidate <Firstname Lastname>, ID <xxx_xxxx_xxx> and has expressed the desire to see further documentation from your department. Human Resources will contact you with more information.

You have been temporarily granted the ability to upload additional documents to this dossier. Please use the Candidate Document Submission Web Form at <https://documents.med.utoronto.ca/forms/candidatesubmission>.

Simply upload the requested document(s) and send HR an email that you have done so. Any documents uploaded at this point will be placed in a new subfolder called Deferral Documents.

If you have any questions, please contact Libby Shirriff at libby.shirriff@utoronto.ca.

Thank you.

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When the dossier status is thus set, you will again be able to upload documents using the Candidate Submission Form. These documents will be routed to a newly created subfolder in the dossier called 'Deferral Documents'.

Exporting Documents from LaserFiche

- **To obtain a copy of a single document** navigate to the document, right-click on it and select Download from the dropdown menu that appears. Save it to your Windows directory or to an external drive.
- **To export an entire dossier** (or a folder within a dossier) navigate to the folder of interest and highlight it. In the LaserFiche menu bar click Download. Wait while a zip file is created and Save the file to a place where it can be found again. It is probably best to re-name the file with the candidate's name but be sure to leave the .zip extension.

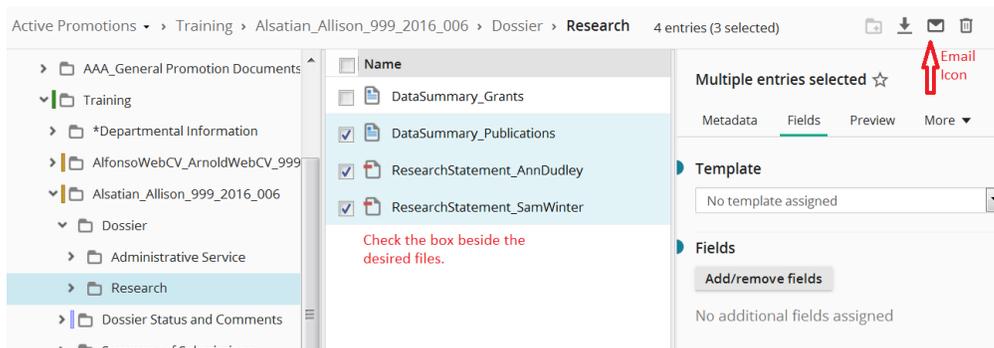
These files can now be attached to an email or saved to USB keys. Be forewarned that full dossiers can create very big zip files and may be too large to be sent by email.

If that is the case, you can export the individual subfolders one-by-one and send them separately.

Email Documents Directly from LaserFiche

If you are an Outlook user, you may attach files in LaserFiche directly to emails.

- Select the documents desired by putting a check mark beside them in the centre panel and click the email icon in the menu bar in the upper right-hand corner of the screen.



- You will see the documents listed in the Email basket that appears. Be sure that you select Send As Files from the drop down field. Type in a recipient email address, a subject line and a short message and click Send.

Email Basket ✕

the documents listed below will be attached to the email

General Password

Name	Send as Pages	Pages	Page Range	Clear All
ResearchStatement_AnnDudley	<input type="checkbox"/>	0	<input type="text"/>	<input type="button" value="✕"/>
DataSummary_Publications	<input type="checkbox"/>	0	<input type="text"/>	<input type="button" value="✕"/>
DataSummary_Grants	<input type="checkbox"/>	0	<input type="text"/>	<input type="button" value="✕"/>
ResearchStatement_SamWinter	<input type="checkbox"/>	0	<input type="text"/>	<input type="button" value="✕"/>

These documents have been selected to be sent via email. Enter page numbers and/or page ranges separated by commas. Example, 1,3,5-12.

Send as: ← send documents as attached files

Email: Use Microsoft Outlook to manually send the email message

To:

Subject:

Message:

Appendix A: Summary of Dossier Status Permissions

	Dossier Status	Permissions	
		Web Document Submission Forms	Read-Only Portal https://documents.med.utoronto.ca/weblink
1	Potential Candidate	DPCAdmin can submit Candidate can submit	DPCAdmin DPC
2	DPC Preliminary Candidate	DPCAdmin can submit Candidate can submit	DPCAdmin DPC
3	DPC Additional info Required	DPCAdmin can submit Candidate can submit	DPCAdmin DPC
4	Referee Ready	DPCAdmin can submit Candidate can submit	DPCAdmin DPC
5	Referee Review	DPCAdmin can submit Candidate can submit Referees can submit	DPCAdmin DPC Referee
6	DPC Review	DPCAdmin can submit Candidate can submit Referees can submit	DPCAdmin DPC
7	DPC Recommended	No one can submit	The DPCAdmin and the DPC can see what has been uploaded this far, but nothing submitted after this point.
8	DPC Withdraw	No one can submit	No one can view the documents on this read-only portal.

Appendix B: Summary of Metadata Templates

There are three places where departmental administrators may input metadata into the LaserFiche Promotions application.

- **Department Information** template (e.g. departmental deadlines, dpc member email addresses). Data here applies to every candidate
 - In the left panel, after expanding the Active Promotions folder, highlight your department folder (the one named after your department). The Department Information template will appear under the Fields tab in the right panel.
- The **Promotion Candidate Information** template is where individual candidate information is stored. This template is created when you first submitted the webform to create the dossier for the candidate. This template holds information specific to the candidate and allows you to assign referee user names that have permission to view only this candidate's dossier.
 - In the left panel, after expanding your department folder, highlight the candidate's main folder. The template called Promotion Candidate Information will appear under the Fields tab in the right panel.
- The **Promotion Status** template is where the dpc administrator will control the status of a candidate's dossier.
 - In the left panel, select the candidate's main folder. In the centre panel, checkmark the 'Dossier Status and Comments' document. The template called Promotion Status will appear under the Fields tab in the right panel.

More information about the templates listed above can be found in the main section of this document (see table of Contents).

Appendix C: Glossary of Terms

- Active Promotions:** A primary folder in the repository FacMedPromotions that contains the departmental folder. Only folders under Active Promotions can receive submitted documents, move through status changes and be visible to DPC and DecPC members on the Read-Only Portal.
- Archive:** Another primary folder in the repository FacMedPromotions. It contains the completed, previous years' promotion documents.
- Assigned Email Address:** A field in the **Promotion Candidate Information** template to be used only if individual DAC members will be doing a preliminary review, in depth, of a candidate's dossier. If you do not use LaserFiche for this activity then leave this field blank.
- Candidate:** A faculty member who is being considered for senior promotion.
- Dossier:** A subfolder within a candidate's main folder that contains most of the submitted promotion documents. It may itself contain several subfolders. The documents involved may be authored by the candidates themselves, referees, students, review committees, or the Dean.
- DPC:** Departmental Review Committee – usually used to describe the members collectively.
- DPCAdmin:** Departmental Review Committee Administrator – the person in a department responsible for using the Academic Promotions System to manage the promotion candidate's dossier.
- DecPC:** Decanal Promotions Committee– usually used to describe the members collectively.
- DecPCAdmin:** Decanal Review Committee Administrator – the person working for the Dean who is responsible for using the Academic Promotions System to manage the promotion candidate's dossier after it has been approved by the Department (currently Libby Shirriff).
- FacMedPromotions:** The overall Laserfiche repository for Promotions documents that is accessed using Web Access. All Temerty Faculty of Medicine departments have a folder in FacMedPromotions. FacMedPromotions repository is separate from other departmental repositories that may be used for, for example, financial documents or faculty appointments and activity reporting.

- LaserFiche:** The name of the Content Management System that is used for this Academic Promotions workflow. It is also the name of the company that created the content management system.
- Metadata:** Data entries that are collected about a certain candidate, department, or user group. Metadata is often requested in a template that appears in association with a folder, subfolder, user or user group. (For example, metadata about a candidate includes name, Promotion ID, Personnel Number, and assigned referees and reviewers. Metadata about a department includes document submission deadlines, DPC member email addresses, etc.)
- Permissions:** Access rights that specify which users of a system can view or make changes to field values and add or delete the contents of folders or documents. Permissions on a candidate's folder change as the promotion status is moved through the several stages of the approvals process.
- Promotion Candidate Information template:** This template holds data specific to one promotion candidate. This template is created when the Promotion Candidate Dossier webform is submitted. Required fields in this template must be filled in when submitting the webform, but some of the fields can be edited at a later date.
- To view the Promotion Candidate Information template after the candidate folder has been created, highlight the folder in the left panel of the screen. The template will appear under the fields tab in the right panel.
- Promotion ID:** The unique identifier given to a candidate's promotion folder. It has a standardized format made up of the departmental Org Unit number, the promotion year, and an incremental identifier
- example 1: 555_xxxx_001
example 2: 555_xxxx_002
- This unique identifier will be used by DPCAdmins, candidates, referees, and DecPCAdmins to allow them to submit documents in to the correct promotion dossier.
- Promotion Status:** As a candidate's folder is moved through the stages of the Promotions process, the permissions on the dossier change and email alerts may be sent to various users informing them of the change. The Promotion Status field tells you what stage the workflow is in and allows you to change the status.

- Public Portal:** (also known as the **Read-Only Portal**) A web site that referees and departmental and decanal review committee members use to view the documents in a candidate's folder. The Public Portal is **read-only**. No one can submit documents using this website. Viewing permissions are strictly controlled throughout the promotions process. The URL is: <https://documents.med.utoronto.ca/weblink/>
- Referees:** Those individuals who will be asked to supply Letters of Reference for the candidate. They may be Internal Referees or External Referees depending on their relationship with the University of Toronto.
- Repository:** The area of a LaserFiche database apportioned off to contain specific sets of documents. The Senior Promotions documents are housed in the repository FacMedPromotions. There is a workflow configured to control permissions on the folders and subfolders this repository.
- Template:** A pre-defined form containing information (metadata) about a certain candidate or document.
- Web Access:** Department Administrators (DPCAdmins) create and manage Promotions folders using this web site.
- The URL is: <https://documents.med.utoronto.ca/laserfiche>
- Web Forms** Web forms are web pages that are used to submit documents into existing candidate dossiers. Documents can be attached to these web forms and submitted.
- A quick reference to the addresses for the various web forms can be found on page 3 of this manual.
- Workflow:** A sequence of operations that control the creation, upload, routing, and approval of data and documents in a content management system. Primarily, the workflow controls and changes Permissions on folders and subfolders and sends out email alerts when appropriate.

Appendix D: Bulk uploading documents to category subfolders

Very Important - BEFORE you upload any documents into the repository using the Upload feature (Up Arrow in the top right hand side of the menu bar), please be sure to configure your account properly. Failure to do so will cause you to be prompted for template data when uploading. This is very undesirable from a technical standpoint and confusing to the user.

To configure your account, when logged in to the repository, click your login name (DPCAdmin_xxx) in the top right-hand of the green menu bar and select Options. In the Options page, click 'New Document' on the left and configure the selections exactly as shown below. Scroll down and click Save. Click 'Go to documents' (in the upper right) to return to the folders.

The screenshot shows the Laserfiche Options page for 'New Document'. The left sidebar contains a menu with 'New Document' selected. The main content area is divided into several sections:

- Import Documents:**
 - Always show import dialog
 - Generate searchable text when importing documents
 - Retain file extensions in electronic document names
 - Automatically extract text when saving documents from Microsoft Office
- For PDF files:**
 - Generate pages when importing PDFs
 - Keep original PDF files
 - Preserve PDF annotations on Laserfiche pages
 - Import monochrome images
- File Conversion:** Extensions that will be converted when imported into Laserfiche. A text box contains: 'tif,tiff,bmp,pcx,jpg,jpeg,txt,gif,png'.
- Import Email:** Default template: '<None>'.
- Import Default:**
 - Default template: 'No template assigned'
 - Default volume: 'FacMed'
 - Count token value: '358'
- Import Profiles:** Default profile: '(None)'. Below this is an 'Add' button and the text 'No import profiles added'.

To upload documents, go back to the candidate folder, click on the 'Dossier' subfolder, then click on the document category subfolder into which you would like to upload the documents. The Up arrow will appear in the tool bar on the right, below the green menu bar. Click the Up arrow and follow the prompts.

Note: Shortcuts to bulk uploaded documents will be not be created to the 'Summary of Submissions' folder immediately, but they will be created overnight.

Appendix E: Troubleshooting and FAQs

What is the difference between LaserFiche Web Access and the Read-Only website?

Web Access is the site where departmental promotions administrators can administer their promotions folders and documents. The URL is:

<https://documents.med.utoronto.ca/laserfiche>.

This is the application where promotions documents are stored and approval processes are changed. It is a licensed site and each department has one account.

The Read-Only website is just that, read-only. A user on this site is not able to upload or delete documents. It does not require a license to access but free accounts may be made to control access to folders and documents. It is used by referees and review committee members to view the promotions documents. The URL is: <https://documents.med.utoronto.ca/weblink>. If, after viewing the documents here, a referee wants to submit a letter of reference, he or she will use the internal or external web submission forms.

My candidate received an email telling them they have the wrong PromotionID.

Promotion IDs must be in this format. ###_#####_###

The candidate may be inserting hyphens or spaces in between the numbers instead of underscores.

Where do I add my departmental deadlines and the email addresses for the departmental review committee members (dpc)?

Data specific to a department is located in the Department Information template.

Under Active Promotions in the left-hand panel, highlight the department folder.

The Department Information template will appear in the right-hand panel under the Fields tab.

Oops! I changed to status on a candidate's dossier before I added the necessary email addresses or usernames. What should I do?

An approval status may be set back to a previous stage if the status was not changed to status 7 or 8. Status 7 and 8 are irreversible.

If the status is not at 7 or 8, simply re-set the dossier status back to the prior stage and click Save. Go to the template with the appropriate fields and fill in the desired data. Now advance the dossier status again to the next stage. Click save and the activity will be triggered. Note that it is necessary to click Save after every status change.

How do I download documents from LaserFiche Web Access?

In the left-side panel, navigate to the folder that contains the desired documents.

Highlight the folder so that the documents appear listed in the centre panel.

Right-click on the desired document and click Download from the drop down menu that appears.

Select Electronic File and click Download.

When the document opens save it to a folder on your own drive.

One of my referees cannot see the documents in the Read-only portal.

The referee with this problem could be referring to one of three different issues: they may not be able to log in to the read-only portal, they may be able to log in but they do not see the folder for their candidate, or they see the folder for their candidate but cannot open the documents. It is necessary to find out which scenario they are experiencing.

- Cannot log in to the read-only portal. User names and passwords should be tested before they are assigned to a referee. If the read-only portal accepts the log in then the user name and password are functional. If the dpcadmin can log in but the referee cannot then the referee is likely typing in either the user name or password incorrectly. The number one, and the small letters 'l' and 'i' often look different in different email applications and web browsers. If the username or password contains a combination of these characters then do not use the account. Try re-assigning the referee a new account.

If the department coordinator also cannot log in to the read-only portal with the account then the account may be corrupt. Use another account from the batch of accounts received from HR. Test it first to see if it is accepted before assigning it to the referee for this candidate. Note that you will need to reset the status of the candidate back to 4 Referee Ready, add the new user name and set again to 5 Referee Review for the user account to show the documents for the candidate (see page 23 of this document).

- The referee can log in to the read-only portal but does not see the folder for the candidate then either the user name was not assigned properly to the Promotion Candidate Information template or the correct status has not been assigned, or both.

You will need to reset the status of the candidate back to 4 Referee Ready, add the user name and set again to 5 Referee Review for the user account to

show the documents for the candidate (see pages 21-26 of this document). Remember that it is the transition from status 4 to 5 that assigns the listed user accounts to the read-only portal, not the status itself. User names must be saved in the 'Promotion Candidate Information' template before the status is changed to 5.

- The referee can log in to the read-only portal, and can see the folder for the candidate, but cannot open any of the documents.

The dpcadmin should always check to see if the functions they are being asked about work for them or not. If the dpcadmin, while logged in to LaserFiche Web Access, cannot open a document in a candidate folder than the document is likely corrupt or of a file type that is not widely used. If that is the case the dpcadmin needs to obtain a valid document from the source – the Discovery Commons cannot re-constitute corrupt documents.

If the file is valid and the dpcadmin can open it in Web Access, then it is possible the referee does not have the requisite application on their device to open these documents or they are being blocked from doing so by security on their network. Ask if they can normally open pdf and Word documents on this device and if they are logging in from a hospital.

My candidate has decided to go against the DAC's decision not to approve his/her application and to apply directly to the Decanal Committee. Which dossier status do I select?

Select Status # 7-DPC Recommended. This is the only way to maintain the 'active' status of the dossier and to get it in front of the Decanal Committee.

How do I change my password?

Log in to Laserfiche Web Access.

Your user name will appear in the top right-hand corner of the window with a down arrow key beside it. Click the down arrow key and select Options. Make sure the General tab in the left-side panel is selected. The option to change your password is in the centre panel.

Appendix G: Re-create the Candidate Information Document

The original Candidate Information document is a snapshot of the web form submitted when the Candidate dossier was first created. It is automatically put into the Candidate's folder. At times, information on this document needs to be updated. It is a PDF so the document needs to be re-generated.

1. Enter the correct data into the Promotion Candidate Information template seen on the right when the Candidate's main folder is selected. Save
2. Right-click on the Candidate's main folder and select Start Business Process. If you do not see this option, make sure the main brown folder for the candidate is highlighted
3. Click the green Start button beside 'Promotions - Re-create Candidate Information Form'.
4. Wait several seconds and then refresh your screen. A document with the new information will have been created.