| Changes to Senior Promotion June 2022Demo Handout |
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Demo Location: Zoom

Date: June 22, 2022

Time: 10:00 – 11:30 am

Presenter: Katherine McConnell, Portfolio Manager, Administrative Systems

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**Relevant Websites:** For your convenience, this are the web forms currently active for the Senior Promotions process.

* To manage the Promotions process and store documents
<https://documents.med.utoronto.ca/laserfiche>
*Be sure to select FacMedPromotions under Repository*
* To create a Promotion Folder for each candidate
[https://documents.med.utoronto.ca/Forms/PromoCandidate#](https://documents.med.utoronto.ca/Forms/PromoCandidate)
* To Submit documents into a previously created Promotion Folder
[https://documents.med.utoronto.ca/forms/candidatesubmission#](https://documents.med.utoronto.ca/forms/candidatesubmission)
* To be used by students or referees to submit their student letters or letters of reference
[https://documents.med.utoronto.ca/Forms/StudentLetters#](https://documents.med.utoronto.ca/Forms/StudentLetters) <https://documents.med.utoronto.ca/Forms/externalreferee> <https://documents.med.utoronto.ca/Forms/internalreferee>
* Read-only Portal where non-laserfiche-licensed committee members or referees can view the contents of the dossier
<https://documents.med.utoronto.ca/WebLink>

**List of Changes to the Senior Promotions process for June 2022:**

1. Candidate folders are now created using the second web form shown above.
2. The Candidate Information document is created as a snapshot of this form and is found in the folder.
3. When a new folder is created, all possible dossier subfolders are now created immediately
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 web form listed above 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 for instructions on how to bulk upload).
4. Therefore, documents can be added directly into the dossier subfolders (see appendix) OR by using the document submission form OR the referee OR student letters form. 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 web form that can be given to students to use to submit their letters. The document category dropdown field on the 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. If a document is submitted via a web form, 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.
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.commons@utoronto.ca if you are interested in this functionality.

**Appendix**

**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 log in 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 at click Save.

To upload documents, go back to the folders window and highlight the dossier subfolder into which you would like to upload the documents. When this is highlighted, an Up arrow will appear in the tool bar on the right, below the green menu bar.Click the Up arrow and follow the prompts.

