

Department Retention/Promotion Reports

Digital Measures

Overview

Faculty will enter their information in the Manage Activities area. As a chair, you will have access to Manage Data for individuals and the Department. You will also be able to run **Reports**. This document will describe the three processes.

- Upload Departmental information in advance of running promotion or retention reports.
- Upload retention/promotion materials for an individual
- Run retention/promotion reports

Upload Departmental Information

1. Click **Activities > Manage Data for Departments > select your department > Annual Department Information**
2. **+ Add New Item.**
3. Update College, and Department Chair information.
4. Upload descriptions for department inclusive excellence, merit and scholarship processes.
5. **Save.**

Upload Annual Inclusive Excellence

Drop file here or click to upload

Description of departmental merit processes

Drop file here or click to upload

Department's definition of scholarship

Drop file here or click to upload

For the “Description of Department Merit Processes” and “Department’s Definition of Scholarship” links to appear and be active in the DEPT: Personnel Report, **you must complete two additional steps.**

1. On your Activities Manage Data screen:
 - a. Scroll to the Department Reporting section and select **FOR CHAIRS: Department Annual Report.**
 - b. Add an item for the current Academic Year.
 - c. In the drop down, select your department and the current academic year (e.g., Archaeology & Anthropology, 2019-2020).
2. Next, Manage Data for the individual faculty member up for retention, tenure, or promotion.
 - a. Scroll to the Department Reporting section and select **FOR CHAIRS: Department Annual Report.**
 - b. Add an item for the current Academic Year.
 - c. In the drop down, select your department and the current academic year (e.g., Archaeology & Anthropology, 2019-2020).

Upload retention/promotion materials for an individual

1. Click **Activities > Manage Data for Users > select the individual > under Personnel Review/Promotions Materials Management section > FOR CHAIRS: Retention/Promotion Materials**

<p>▼ Personnel Review/Promotions Materials Management</p> <p>Retention/Tenure and/or Merit Review</p> <p>Promotion</p> <p>IAS Promotion Materials</p>	<p>FOR CHAIRS: Retention/Promotion Materials</p> <p>FOR CHAIRS: IAS Annual Review</p> <p>FOR CHAIRS: IAS Promotion Materials</p>
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2. **+ Add New Item.**
3. Update Academic Year and upload files for TAI, Merit, and SEI if needed.
4. **Save.**

Run retention/promotion reports

1. Click **Reports > select DEPT: Personnel Supporting Materials**
2. Select date range (e.g. June 1, 2018 – May 31, 2019).
3. There are two options for running the report:
 - a. To run the report for the **department**, under Whom to Include, click **Change Selection** and select your **department**. This will include all individuals up for promotion or retention.
 - b. To run the report for an **individual**, under Whom to Include, click **Change Selection** and select the individual. (If you are Chair of two departments, you must follow this step for each faculty member in each department individually).
4. **Save.**
5. Select your file format.
6. **Run Report.**