
Instructions for Creating a File for Electronic Submission

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Context and Limitations

These instructions pertain only to the technical process for electronically creating, compiling, or editing tenure and promotion files that have historically been submitted in paper form, but will now be submitted electronically as PDF files. These instructions do not intend to change in any way the applicable policies, the content of any file, or the criteria used to judge any file. T&P policies are described in such places as the Faculty Manual, the USC Goldenrod Manual, and the Criteria of the various units.

Technical Requirements

You will need Adobe Acrobat (not just Adobe Reader) loaded on your computer. You can buy Adobe Acrobat from USC's Software Distribution. For more information about purchasing Adobe Acrobat go here <http://www.sc.edu/software/>.

We encourage you to use the *Candidate Form Template* to create your primary file in Word (see <http://www.sc.edu/tenure/tenureandpromotion.shtml>). However, if you have been entering data into the Phase I or Phase II online form, you can use either of these versions as well to create a single word document. Either way, your next step will be to convert the file to a PDF .

The *Candidate Form Template* is a Word 2007 (.docx file). If you are working in an earlier version of Word, you may find that some of the tabs in portions of the file where you list activities (e.g., publications and grants) will need to be adjusted. To correct the formatting, select the entire document, select **Format > Tabs > Clear All**.

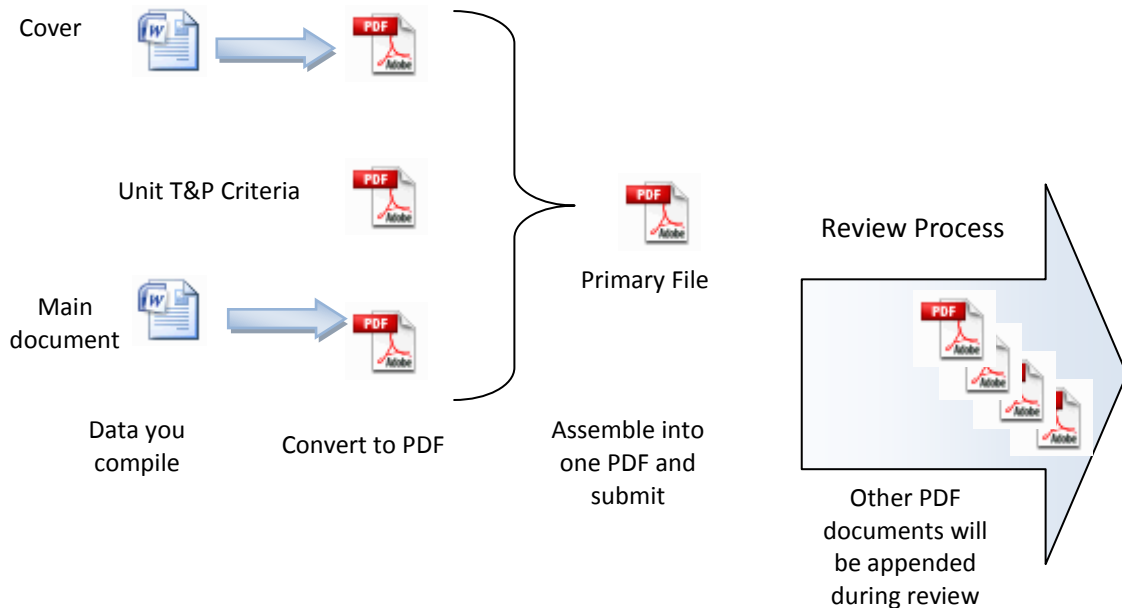
Forethoughts

Ultimately, you are responsible for the content and appearance of your Primary File. The purpose of these templates is twofold – 1) to speed your assembly of the file by eliminating the need for you to invent your own formats for the various kinds of information that you will present, and 2) to provide a significant measure of uniformity in the presentation of the file so that those who review your file will find it easier to navigate through the information that you do present.

These template is designed to meet the needs of candidates throughout the campus. Therefore, they may contain sections that are not pertinent to the criteria used by your Unit. It is appropriate to delete these inapplicable sections in order to streamline your own file. On the other hand, just because you have no input for some section does not necessarily mean that you should delete it. If such a section is applicable to your evaluation, you should enter “none”, rather than delete the section, so that your evaluators do not attempt to look elsewhere for that information. You are free to add new section headings in order to present information that best makes your case for tenure and/or promotion according to your own Unit's criteria, and you are free to change the formatting in minor ways in order to give the best appearance to your file. Keep in mind that a major purpose of these templates is to save you time, not to frustrate you by requiring an approach with which you are not familiar! Use them accordingly.

The Big Picture

The ultimate objective is for you to submit your *Primary File* as one PDF file (Portable Document Format, which is generally created by using Adobe Acrobat or a similar tool) that is organized according to one campus-wide style that is easy to navigate by virtue of having bookmarks at appropriate places. This is very similar to the paper method that contains tabbed dividers in a binder. The names of the bookmarks for each section of the final PDF file should adhere to a consistent convention. The Big Picture of the document creation process is illustrated below:



How to Use the *Candidate Form Template*

The template contains text that is formatted with headers, tables and enumerated lists that should give a good appearance to the information you enter.

Headers

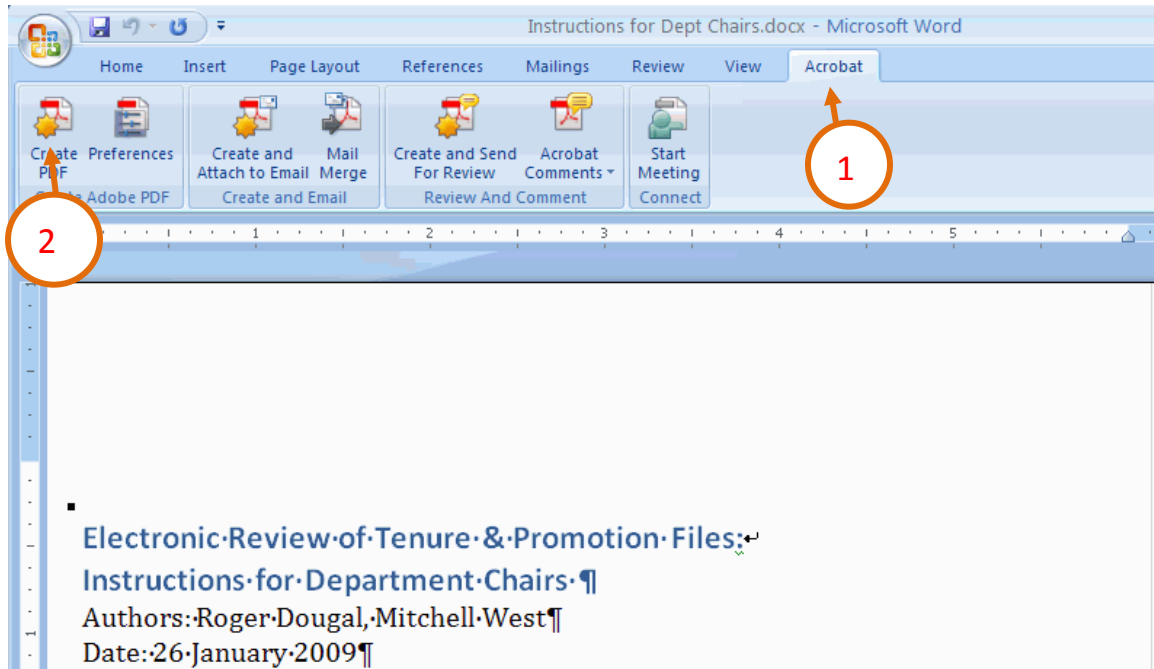
Your name appears in the header of each page. Enter your name in the header by right clicking in the header area and selecting “edit header”, or from the toolbar select Insert/Header/Edit Header. You only need to do this once; the header is automatically inserted on every new page.

Using the Predefined Tables

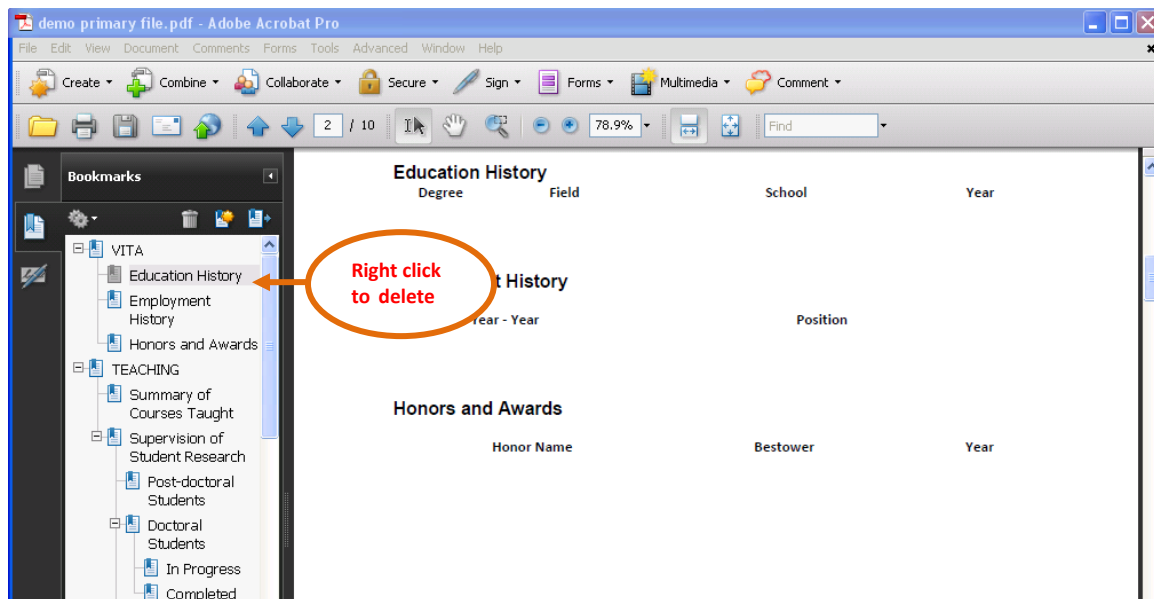
At the beginning of Teaching, Scholarship, and Service sections you will find tables that should contain summary data. You may need to change the years in column headers. To insert new rows in the table, left-click to left of a row to select it, then right click and select “insert row”. There are table templates for other sections as well (e.g., “Supervision of Student Research”).

Creating PDF files from the Word documents

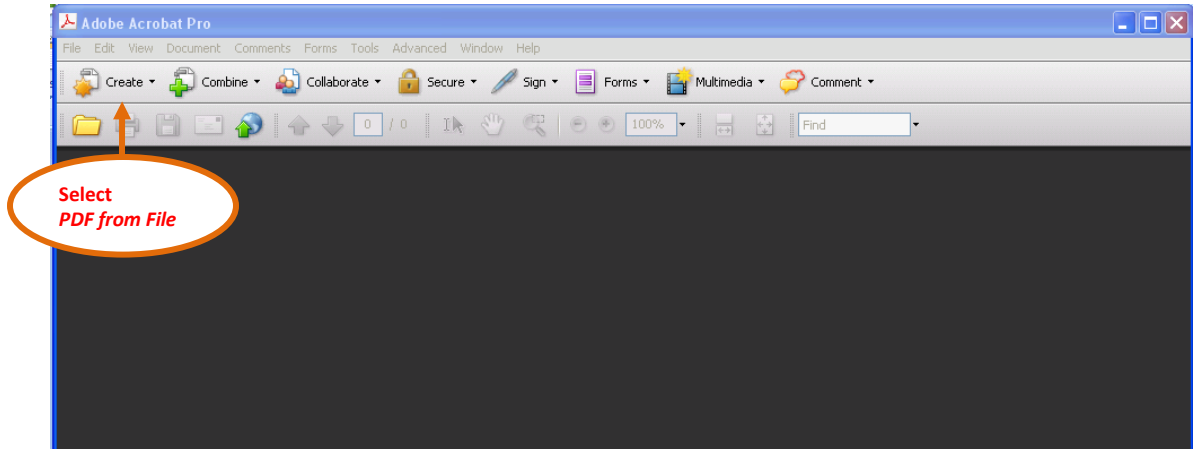
Note: Certain fonts that are not standard Windows fonts are substituted in the conversion from Word to PDF and may create unreadable text. If you have cut-and-pasted text into your file and it is in a non-standard font, be sure to change the font to a standard font such as Calibri, Arial, or Times New Roman. To create a PDF from Word 2007, if select the **Acrobat** tab, then select **Create PDF**.



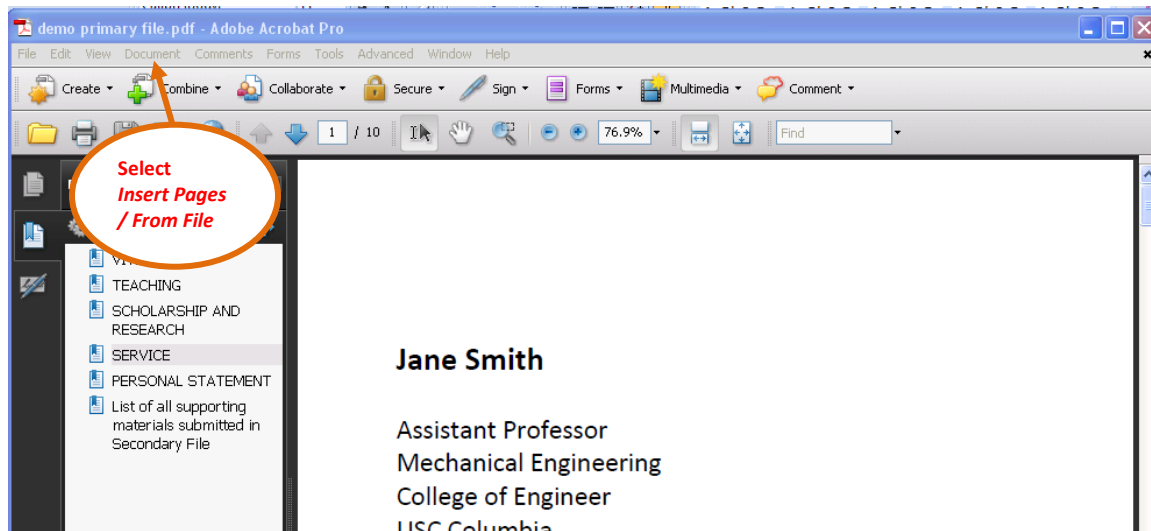
This produces a document with internal bookmarks. These bookmarks are the equivalent of the tabs used in the older, hard copy version of the primary file. Save the file with the name *Yourlastname-Yourfirstname*. With your file open in Acrobat, delete bookmarks that are below the sub-heading level. To delete a bookmark, right-click on the bookmark and select delete.



To create a PDF from Adobe Acrobat, select the command **Create** from the command ribbon and then select **PDF from file** option from the drop down menu. Select the Word template file you want to convert and save the document with the name *Yourlastname-Yourfirstname*.



You will have to insert your unit criteria into the document after the cover page. With your file open in Acrobat, select **Document/Insert Pages/From File**;



Select the Criteria file (it should be in PDF format already) and choose as the location **After Page 1**. Insert a corresponding bookmark for this page, "CRITERIA" by selecting **Document/Add Bookmark**.

In the end, the book marks should look like this:

- CRITERIA**
- VITA**
- TEACHING**
- SCHOLARSHIP AND RESEARCH**
- SERVICE**
- PESONAL STATEMENT**
- List of all supporting materials submitted in Secondary File**

Now submit the file to your Unit T&P Chair and rejoice that you are done!