SAS Packet Depository System

Training Guide – Department View
April 2015

Overview

- Process online
  - Forms should be PDF'ed & uploaded into system
  - Flow of packet from department to central university
  - Supplemental materials can be embedded (URL in form) or scanned & uploaded

- Pro's
  - Greater Efficiency
  - Trees saved
  - Shared Accessibility
  - Secure
  - OCR functionality now available making packet searchable

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Pre-System Process - Overview

– Collect and organize all documents on your desktop.

– Convert or physically scan documents to PDF's as drafts become final.

• **Helpful Hints to upload smoothly:**

– Make sure all documents are converted to PDF. Please do not upload Word documents into the depository.

– Understand definition of scanned PDF vs. converted PDF

- **Converted = document modified from Word to Adobe PDF on your desktop**
- **Scanned with OCR = searchable PDF image captured from running the document through a scanner**

– Scanned PDF files (vs. those converted on your computer) take up more band width. Reduce size of files by scanning in black and white when you can.

Pre-System Process – Creating PDFs

- **How to create PDF?**

  - **Convert Word document to PDF:**

    » Open File and click on File and Save As.

    » After that, name your file and then under Save as type, select PDF (*.pdf) from the drop down box).

    » Once you have selected the PDF format, your file will automatically convert to a PDF file.

    OR

    » Use a program such as "Cute PDF Writer" found in your print options.

Pre-System Process – Creating PDFs

- **Scan Document with Optical Character Recognition (OCR)**

What is OCR technology? When a document is physically scanned using scanner that has technology that enables the scanned document to be searchable.

- **Directions below are for use with the RICOH SAS IT supported machines:**

1. Select the *Scanner* function
2. Select the *Scan to OCR* option
3. Next, place the document you wish to scan in the feeder and hit the *Start* button.
4. Hit the *Next* button – (*a message will appear stating that the machine is recognizing the document)*
5. After that, you will see a message: *Successfully Sent.* This means your document has been sent to the Scanned Document Retrieval System.
6. Hit the *Done* button

- **For technical difficulties:**

- departments supported by SAS IT – put in a work-order (http://sasit.rutgers.edu/submit-a-workorder)
- Departments not supported by SAS IT contact your IT help desk.

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Pre-System Process – Creating PDFs

How to Retrieve OCR document?

Sign into Scanned Document Retrieval System
https://secure.sas.rutgers.edu/apps/sdr/main)
using your Rutgers NetID and password

Click on your assigned Copier
(Ex: SAS Dean's Office Rm 301B
(Business Office) . Contact your IT support
staff for issues with you copier list.

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Pre-System Process – Creating PDFs

- Next, click on the document you scanned

- Once opened, save on computer in preparation to upload.

System Process – Packet Flow Overview
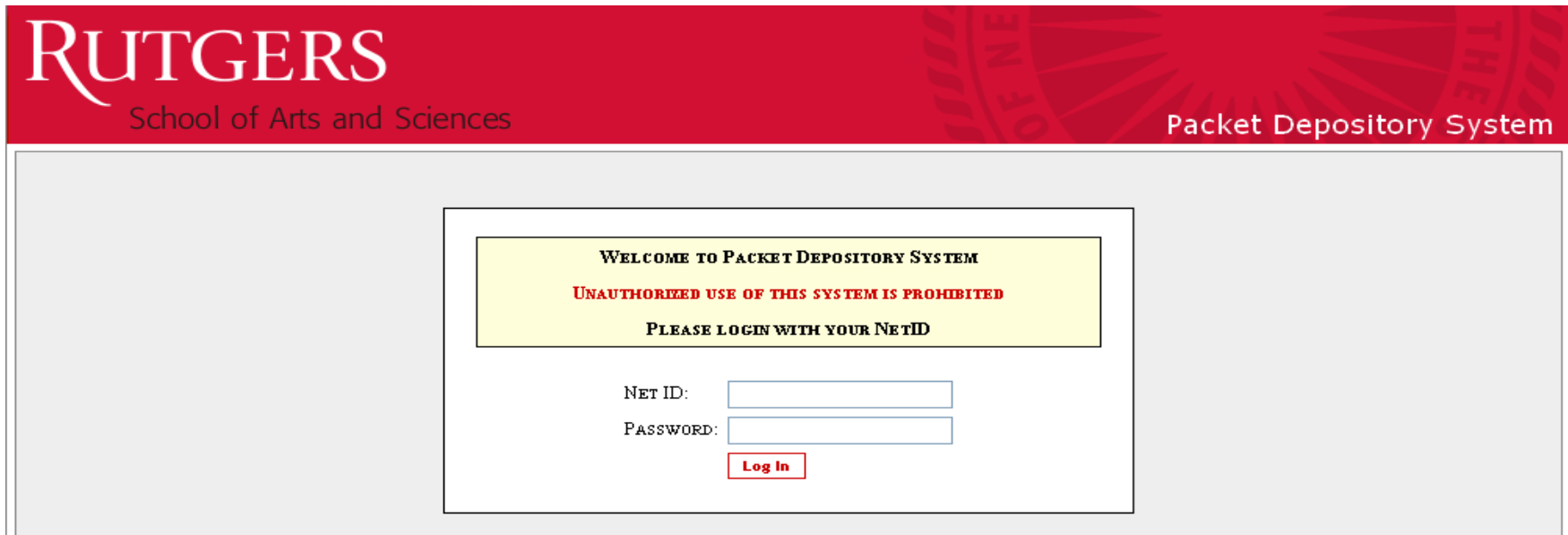
- **New Submission Packet Upload:**
  - Once all files have been converted to PDF format, upload PDF's; Can save your work as you go.
  - Can upload up to 10 MB in each attempt*. (Tip: breakup upload batches if files too large)*
  - Must hit "Final Submit" to move packet from "Upload More Files" status to "In Review" status

- **Department Edits after Submission - If Needed:**
  - SAS Academic Personnel may "unlock" specific forms if revisions are needed.
  - Must re-upload any forms you revise as PDF.
  - Once all edits are done, click the "Final Submit" button on the last page to move from "Dept. Unlocked" status to Dean's Office status.

System Process – Access

- Directly – https://secure.sas.rutgers.edu/apps/packet/
- SAS Office of Administration webpage – http://sas.rutgers.edu/organizational-research-and-data-management
- Sign in – NetID and Password
  - If you need access, fill out access form available at http://sas.rutgers.edu/organizational-research-and-data-management

System Process - Packet Main Listing – Department View

System Process - Individual Packet Page – Dept View

Back To List   Go To Packet View   ← *Use to go to Packet Main Listing OR Packet List of Documents view*

Upload Promotion/Appointment with Tenure/Reappointment Packet

Please enter the information on this page for the candidate, and use the file upload boxes to select files for uploading. NOTE: All new files uploaded from this section of the upload form must have a total combined size of 10 MB or less. Please make sure all PDFs are saved in black and white or greyscale to ensure they are not too big.

Candidate's Last Name: Case
Candidate's First Name: Test
Proposed Rank: Assistant Professor
Candidate's Department: SAS - Chemistry and Chemical Biology
Secondary Department: No Secondary Department
Proposed Action: Promotion with tenure

Remand Instructions [Scanned With OCR]
Scan remand instructions and upload to depository.
Browse...   No file selected.

Form 1-a/II-1 (minus signature page) [Converted]
Convert Form 1-a/II-1 to PDF on your computer and upload to depository.
Browse...   No file selected.

Form 1-a/II-1 (signature page) [Scanned With OCR]
Scan signature page ONLY of Form 1-a/II-1 and upload to depository.
Browse...   No file selected.

Form 2 [Scanned With OCR]
Scan signed Form 2 and upload to depository.
Browse...   No file selected.

Save and Return to Later   Next Page

- *Use to upload PDFs in the appropriate spots.*
- *Once a packet is submitted to the Dean's office the "browse" and upload functionality will be replaced be a the following statement "This form has been locked and is under review.*
- *If parts or all of the packet forms are returned to the department for editing after initial submission, depts will be able to view, edit and delete forms that have been unlocked.*

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School of Arts and Sciences

System Process - List of Documents - Department View

Back To Packet Main Listing | **Upload More Files**

List of Documents

Packet Name: V_____   **Cycle:** Current
Primary Dept.: SAS - Chemistry and Chemical Biology   **Secondary Dept.:** (None)
Proposed Rank: Professor I   **Proposed Action:** Promotion

Type	Filename
Remand Instructions	None
Form 1-a/II-1 (minus signature page)	...s - Chemistry and Chemical Biology_1A.pdf
Form 1-a/II-1 (signature page)	...s - Chemistry and Chemical Biology_1A_SignPg.pdf
Form 2	...s - Chemistry and Chemical Biology_2.pdf
Form 3	...s - Chemistry and Chemical Biology_3.pdf
Sample Letter	...s - Chemistry and Chemical Biology_SampleLetter.pdf
Form 3-a / Letters	#... SAS - Chemistry and Chemical Biology_3a_LW_1.pdf
	#... SAS - Chemistry and Chemical Biology_3a_LW_2.pdf
Department Narrative	...s - Chemistry and Chemical Biology_4.pdf
Reading Committee Report	N...
Secondary Department Report	None
Liberal Arts College Dean Report	None
Addtl	None
Personal Statement	...s - Chemistry and Chemical Biology_PersStatmt.pdf
CV	...s - Chemistry and Chemical Biology_CV.pdf
Inventory Listing of Supplemental Materials (without signatures)	...s - Chemistry and Chemical Biology_Inventory.pdf
Inventory Listing of Supplemental Materials (with signatures)	...s - Chemistry and Chemical Biology_Inventory_SignPg.pdf
Supplemental Materials	#... SAS - Chemistry and Chemical Biology_Support_1.pdf
	#... SAS - Chemistry and Chemical Biology_Support_2.pdf
	#... SAS - Chemistry and Chemical Biology_Support_3.pdf
	#... SAS - Chemistry and Chemical Biology_Support_4.pdf
	#... SAS - Chemistry and Chemical Biology_Support_5.pdf
	#... SAS - Chemistry and Chemical Biology_Support_6.pdf
	#... SAS - Chemistry and Chemical Biology_Support_7.pdf
	#... SAS - Chemistry and Chemical Biology_Support_8.pdf
	#... SAS - Chemistry and Chemical Biology_Support_9.pdf
	#... SAS - Chemistry and Chemical Biology_Support_10.pdf

To view entire packet in one PDF

Download All Packet Files (Single PDF File)

Packet Review Comments Form

NOTE: Please make sure that, when entering a comment in this form, that you click the button to submit no later than 1 hour after when you came to this page. After that time your login will "timeout" and submitting will take you back to the login screen, and you will lose your entered comment.

Comments:

Depts can now communicate with the Dean's Office within the system.

Submit Comment

Email notification when comments are entered by Dean's office to dept users. Comments from and to the Dean's office will appear here.

Narrative Review Comments

Name	Entry Time	Comments/Document Link
Sunita Jagtiani	2013-08-15 11:41:43	dept
Sunita Jagtiani	2013-08-14 16:37:54	Dept level comment 2
Sunita Jagtiani	2013-08-14 16:34:43	Department level comment

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System Process - Create New Submission
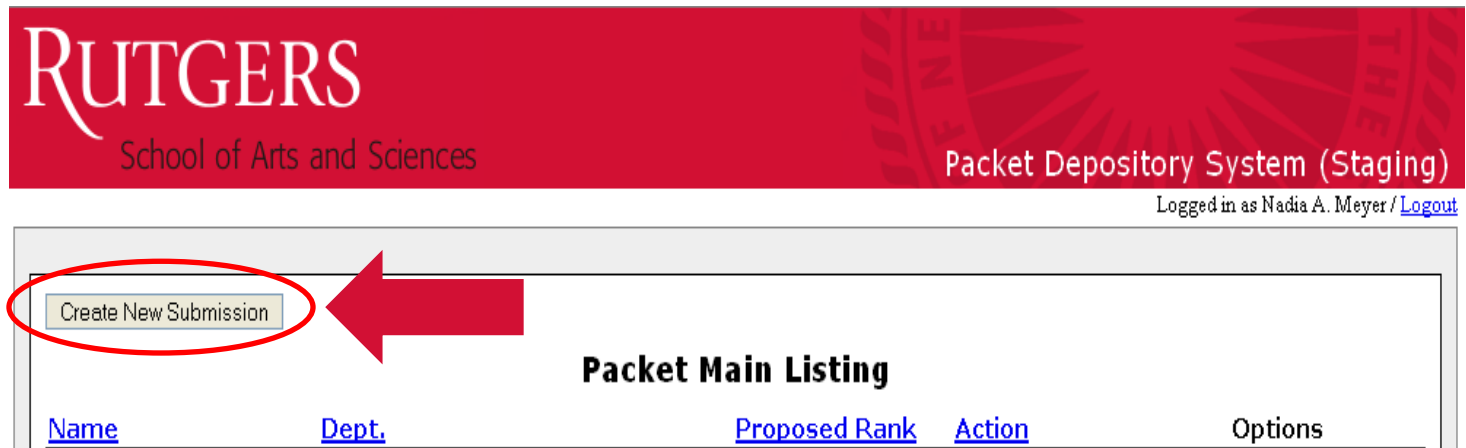
– To enter a new Candidate in the system:

• Click on "Create New Submission" Button on Main Packet Listing page.

System Process - Create New Submission

- Enter Candidate's Last and First Name in the box

- Choose candidate's Proposed Rank:
  - Assistant Professor
  - Associate Professor
  - Professor I
  - Distinguished Professor
  - Associate Research Professor
  - Research Professor I
  - Distinguished Research Professor

- Select Candidate's Department and Secondary Department, if needed from drop down box.

- Select a Proposed Action:
  - Promotion with Tenure
  - Promotion
  - Appointment with tenure
  - Reappointment
  - Tenure Only
  - Grant-Funded Promotion

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System Process - Create New Submission

- System guides you if a document is to be converted or scanned in the title.

- Remand Instructions [Scanned with OCR] – only needs upload if this is a remanded packet. You will have special Instructions from Academic Personnel if your packet fits this category.

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System Process - Create New Submission

- Special Note for Form 1-a/II-1
  - You must upload the form and the signature pages separately.
  - The word document provided by your candidate must be separated into 2 parts.
  - Form 1-a/II-1 (minus signature page) should be converted to a PDF. Converting to PDF will keep URL's in the form clickable for future levels of review.
  - Form 1-a/II-1 (signature page) should be scanned with OCR through printer as a separate PDF as it has a signature.

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System Process - Create New Submission

- Form 2 should be physically scanned with OCR and uploaded to the depository.

- To move from this page to the next use "Next Page" button.

- "Save and Return to Later" allows you to save you work for a later time. You can logout of the system and pick up where you left off.

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System Process - Create New Submission

- Continue to upload documents to the system
  - Form 3 [Converted]
  - Sample Letter [Converted]
  - Form 3-a/Letters [Scanned with OCR]
  - *Please note that the order in which you list people is the order in which you should upload; Must match!*
- If need to input more letters, click on the Click to Input More Letters
- You can now move to the Previous Page or Next Page as needed
- Or "Save and Return to Later"

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System Process - Create New Submission

- Continue to upload documents to the system
  - Department Narrative [Scanned with OCR]
  - Reading Committee Report [Scanned with OCR]
  - Secondary Department Report [Scanned with OCR]
  - Liberal Arts College Dean Report [Scanned with OCR]
  - Additional [Scanned with OCR]
- You can now move to the Previous Page or Next Page as needed
- Or "Save and Return to Later"

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System Process - Create New Submission

- Continue to upload documents to the system
  - Personnel Statement [Converted or Scanned with OCR]
  - CV [Converted or Scanned with OCR]
  - Inventory Listing of Supplementary Materials
    - Special Note: You must upload twice.
    - First Inventory Listing of Supplementary Materials (without signatures) should be converted to a PDF. Converting to PDF will keep URL's in the form clickable for future levels of review.
    - Second Inventory Listing of Supplementary Materials (with signatures) should be scanned through printer as a separate PDF with the signatures.

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System Process - Create New Submission

- Continue to upload documents to the system
  - Supplemental Materials
  - Can be submitted in hardcopy or uploaded
  - *Please note that the order in which you upload supplemental materials must match the order on the Inventory Listing!*
- If need to input more Support Documents, click on the Click to Input More Support Documents
- Can upload up to 50 Support documents

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System Process - Final Check

- Before submitting the online packet to SAS Dean's Office, make sure that the following forms have been uploaded in the depository:

Mandatory:

- Form 1-a/II-1 (minus signature page)
    - Form 1-a/II-1 (signature page)
        - Form 2
        - Form 3
    - Sample Letter
- All Form 3As/Letters – (minimum 7)
    - Department Narrative
        - CV
- Inventory Listing of Supplemental Materials (without signatures)
    - Inventory Listing of Supplemental Materials (with signatures)

System Process - New Submission – Submit to Dean's Office

- You can now move to the Previous Page as needed
- Or "Save and Return to Later"
- When you are ready to submit the online packet to Academic Personnel click "FINAL: Submit to SAS Dean's Office

Back To List

Update Successful

Upload Promotion/Appointment with Tenure/Reappointment Packet

Please enter the information on this page for the candidate, and use the file upload boxes to select files for uploading. NOTE: All new files uploaded from this section of the upload form must have a total combined size of 10 MB or less. Please make sure all PDFs are saved in black and white or greyscale to ensure they are not too big.

Candidate's Last Name: Simpson
Candidate's First Name: Bart
Proposed Rank: Assistant Professor
Candidate's Department: SAS - Africana Studies
Secondary Department: No Secondary Department
Proposed Action: Promotion with tenure

Personal Statement [Converted or Scanned]
Scan/convert personal statement as appropriate and upload to depository. Converted files are preferred.
C:\Documents and Settings\nmeyer\My Documents\personal sta | Browse...

CV [Converted or Scanned]
Scan/convert CV as appropriate and upload to depository. Converted files are preferred.
C:\Documents and Settings\nmeyer\My Documents\CV- Bart Sim | Browse...

Inventory Listing of Supplemental Materials (without signatures) [Converted]
Convert Inventory Listing and upload to depository.
C:\Documents and Settings\nmeyer\My Documents\Inventory Lis | Browse...

Inventory Listing of Supplemental Materials (with signatures) [Scanned]
Scan Inventory Listing and upload to depository.
C:\Documents and Settings\nmeyer\My Documents\Inventory Lis | Browse...

Supplemental Materials [Converted or Scanned]
Scan/convert support documents, if you wish. Converted files are preferred.
#1: C:\Documents and Settings\nmeyer\My Documents\Supplement | Browse...
#2: | Browse...
#3: | Browse...
#4: | Browse...
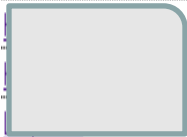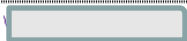#5: | Browse...

Click to Input More Support Documents

Save and Return to Later | Previous Page

FINAL: Submit to SAS Dean's Office

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System Process – Edits after Submission to Dean's Office

Packet Main Listing

Name	Dept.	Proposed Rank	Action	Options
Case, Test	SAS - Chemistry and Chemical Biology	Assistant Professor	Promotion with tenure	Upload More Files
	SAS - Chemistry and Chemical Biology	Associate Professor	Promotion with tenure	In Review
	SAS - Chemistry and Chemical Biology	Professor I	Promotion	In Review
	SAS - Chemistry and Chemical Biology	Assistant Professor	Reappointment	In Review
Simpson, Bart	SAS - Chemistry and Chemical Biology	Assistant Professor	Promotion with tenure	Upload More Files
Simpson, Bart	SAS - Chemistry and Chemical Biology	Assistant Professor	Promotion with tenure	Upload More Files
	SAS - Chemistry and Chemical Biology	Professor I	Promotion	Upload More Files
Austen, Jane	SAS - English	Professor II	Promotion with tenure	In Review
Case, Test	SAS - English	Assistant Professor	Reappointment	Upload More Files
Meyer, Oscar	SAS - English	Professor I	Promotion	Upload More Files
Simpson, Bart	SAS - English	Associate Professor	Appointment with tenure	In Review
Summer, Happy	SAS - English	Professor I	Promotion	In Review
	SAS - Chemistry and Chemical Biology	Professor I	Appointment with tenure	In Review

- In some cases Academic Personnel may "unlock" parts of a packet to be edited after an initial dean's office review.

- Packets in department queue that have "Upload More Files" indicated in the Options column are either initial submissions or those that have been "unlocked" for changes.

- To access files to make edits:
  1. Click on Person's Name.
  2. This take you to the "List of Documents"
  3. You will find dean's office comments of items that need editing.

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System Process – Edits after Submission to Dean's Office

- Making Edits cont'd
  - In this example, the Dean's office has "unlocked" Form 3-a/Letters for editing. Departments can browse to upload corrected versions.
  - MUST SCROLL TO THE FINAL PAGE once all edits have been made to re-submit the packet to the Dean's office for Review.

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Questions?

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