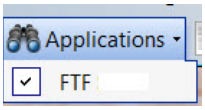
Faculty Coordinator Process

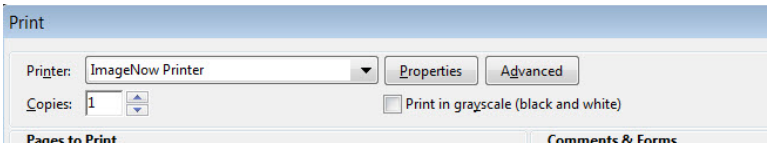
Faculty Transaction Form Process

Printing the FTF into the system

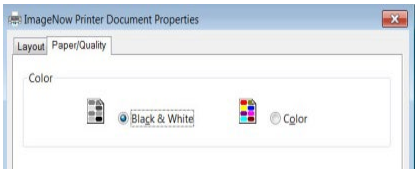
1. Log into Perceptive Content using CORE ID and password.
2. Verify that your *Applications* settings are set to FTF *(School Name)*



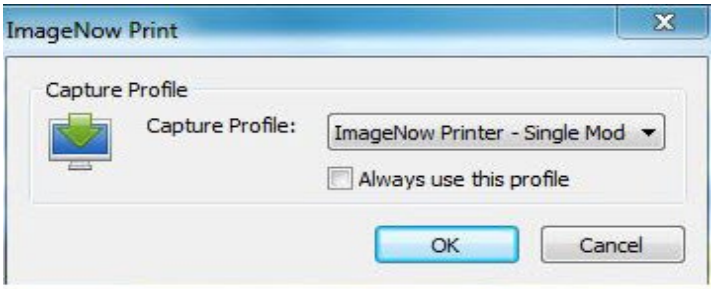
3. Open an FTF document in Adobe PDF format.
4. In Adobe, select the drop down for **File** and select **Print.**



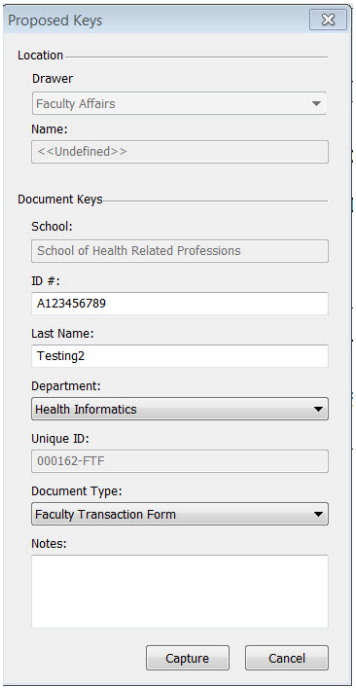
5. For "Printer", select *ImageNow Printer*, then press the **Properties** button. Select **Paper/Quality** and press the **Black & White** radio button. *Note: user must select Black and White due to image distortion created in upload*.



6. To exit, press the OK button.
7. Press the Print button
8. Once you print, a Capture Profile box may appear. Press **OK.**

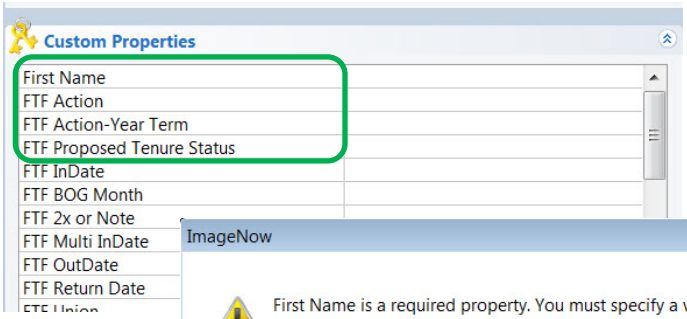


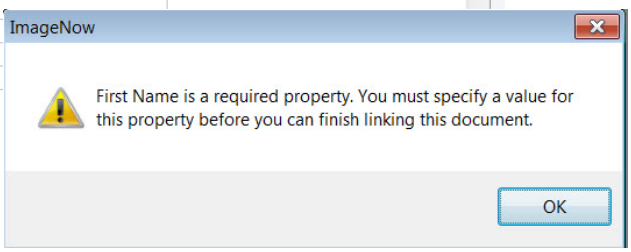
9. Perceptive Content *Proposed Keys* block will open.
    a. The user must fill in the ID#; Last Name and select the appropriate *Department (SN use Division Name)* from the drop down.
    b. The *Document Type* should always be set to **Faculty Transaction Form.**



10. Press the Capture button.

11. The Perceptive Content viewer will open.
    a. Review the *Custom Properties* fields in the right bottom corner of the screen: ID#, Last Name, Department (SN Division) and document type.
    Note: If you do not see the properties fields on the right select the F7 key



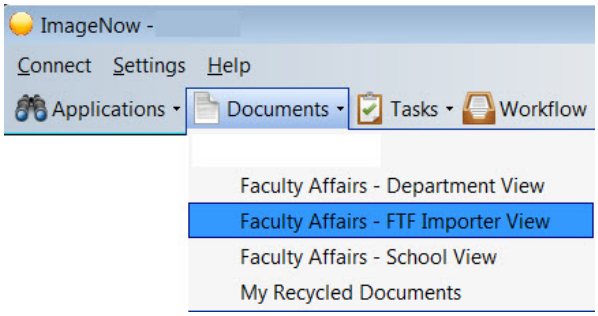


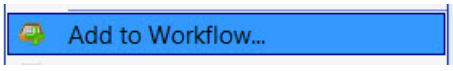
    b. Fill in the first 4 *Custom Properties* fields: First Name, FTF Action, FTF Action-Year Term (use "N/A" if not applicable) and FTF Proposed Tenure Status. *Please use drop-down where available to select options. If option is not in view, press the "More" link at the bottom of the list to view all options.*

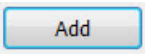
NOTE: If these fields are missing, the FTF will not save, and an error message will appear.

    c. Select icon.
    d. The user can now close the FTF in Adobe.

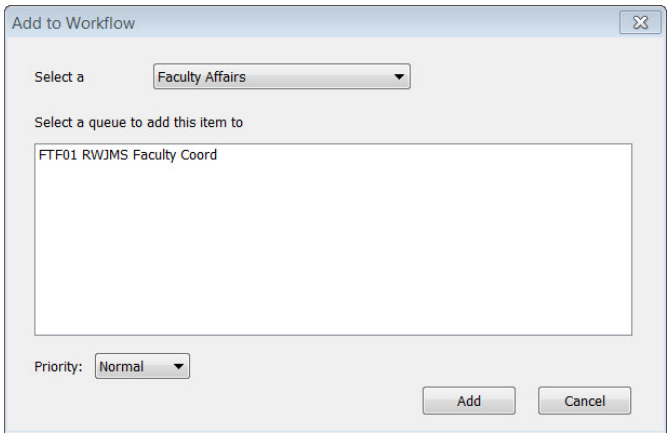
Adding the FTF to the Workflow



1. On the Perceptive Content toolbar, select the drop down for *Documents* and select **Faculty Affairs – FTF Importer View.**
   NOTE: This view will have the items the user has printed into the Perceptive Content system. The user will not see items that another user has printed in this view. Select **Faculty Affairs-School View** to see all items imported.
2. Right click on the item that was just saved to the system.
3. Select 

.
4. Select *FTF01- SCHOOL Faculty Coordinators*
5. Press 

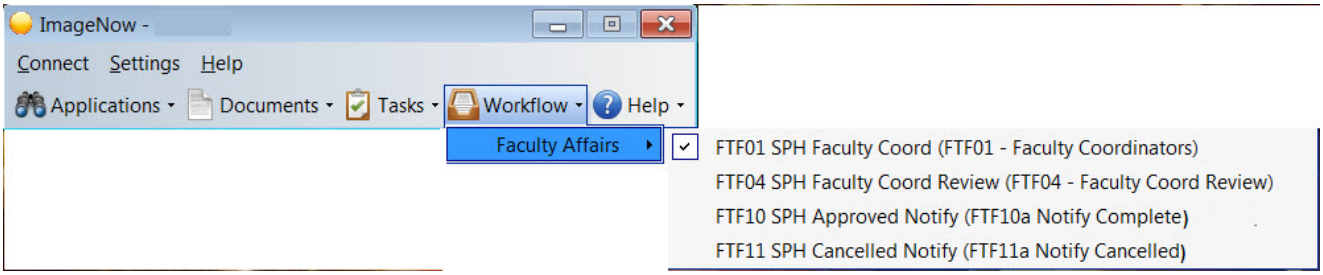
button.



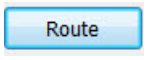
Faculty Coordinator Workflow (FTF01-{School} Faculty Coord)

An email will be sent all users that are in the School Faculty Coordinators group when a FTF is moved to the queue.

1. Log into Perceptive Content using user CORE ID and password.
2. On the Perceptive Content toolbar, select the drop down for **Workflow,** select Faculty Affairs, then *FTF01 {School} Faculty Coord (FTF01 – {School} Faculty Coord*).



3. Double click on the item that you want to open that is listed in the workflow.
4. Review the information [**Note:** ***USER CANNOT CHANGE THE SCHOOL NAME***].
5. On the menu toolbar select **Workflow**.
6. Select

7. Select FTF02 *Route to School Budget* under **Automatic.**
8. Press 

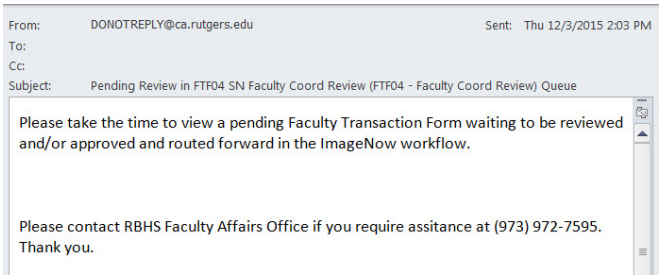
button.
NOTE: If another FTF is waiting in this queue, it will automatically open.

Faculty Coordinator Review Workflow (FTF04-{School} Faculty Coord Review)

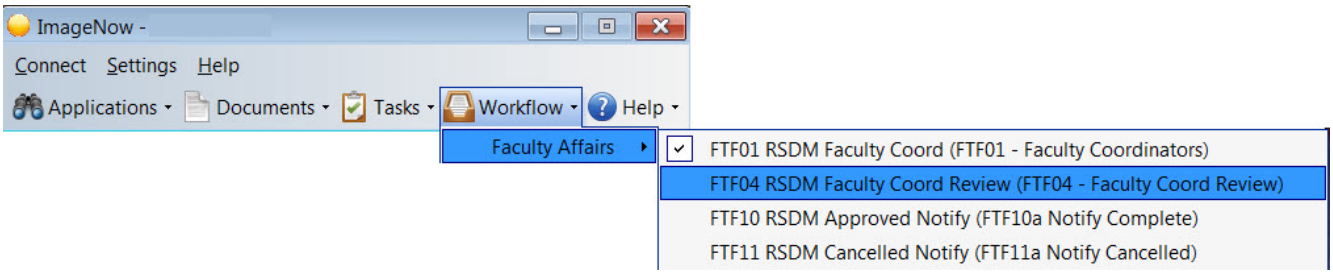
Faculty Coordinator Review Workflow - FTF04

After the FTF has gone through Budget and Dean Approvals the form will be routed to the Faculty Coordinator Review queue to review and add any documentation that is missing. Directions on how to add and / or delete supporting documentation before routing to the Faculty Affairs Office starts on page 13.

An email will be sent to everyone that is in the School Faculty Coordinators group when a FTF is in the queue.



1. Log into Perceptive Content
2. On the Perceptive Content toolbar, select the drop down for Workflow and select *FTF04 – School Faculty Coord Review*

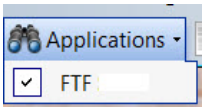


3. Double click on the item that is listed in the workflow.
4. Review the information [**Note: DO NOT CHANGE THE SCHOOL'S NAME AT ALL**]
5. Confirm all approvals were received. Per pages above, add and/or delete documents required for RBHS Faculty Affairs. Please make sure documents are in order per the Appendix below.

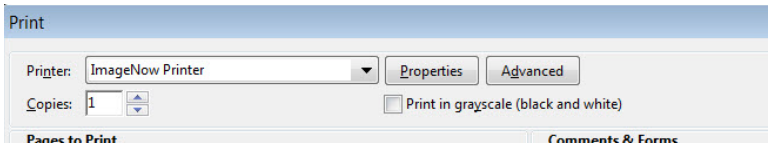
Adding Supporting Documentation

This process is for the user that may need to add materials to the initial FTF documentation.

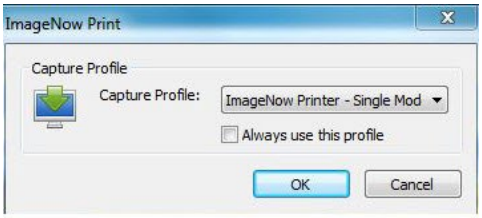
1. Scan the supporting documentation into Adobe PDF format.
2. Log into Perceptive Content.
3. Verify that the *Applications* is set to FTF *(School Name)*



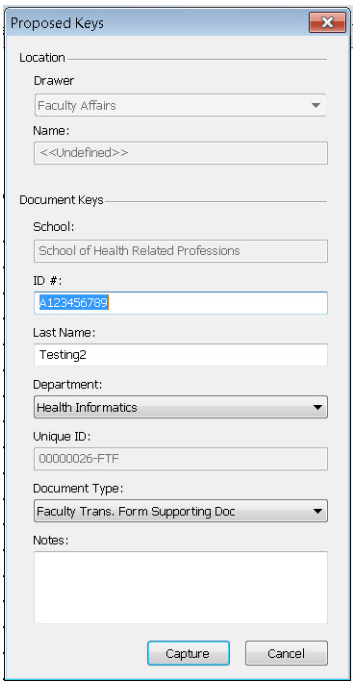
4. Go back to the Adobe file and select **File**, then **Print.**
5. For "Printer", select *ImageNow Printer*, then press the **Properties** button. Select **Paper/Quality** and press the **Black & White** radio button.



6. Press Print button.
7. Once you print, a Capture Profile box may appear. Press **OK.**



8. Perceptive Content *Proposed Keys* block will open.
   a. Fill in the exact information that was on the original FTF - ID#; Last Name and select the appropriate *Department* from the drop down.
   b. Select the drop down for *Document Type* select **Faculty Trans. Form Supporting Doc.**



9. Press Capture button.
10. The Perceptive Content viewer will open.
11. Select icon (close the supporting document pdf).
12. Select the drop down for *Documents* and select **Faculty Affairs – FTF Importer View**

    Note: Importer View only shows the items that you have printed into Perceptive Content. If you need to find a FTF that another Faculty Coordinator printed, use the ***Faculty Affairs - School View.*** To look up the documents for a person by last name please follow the directions in the Appendix.

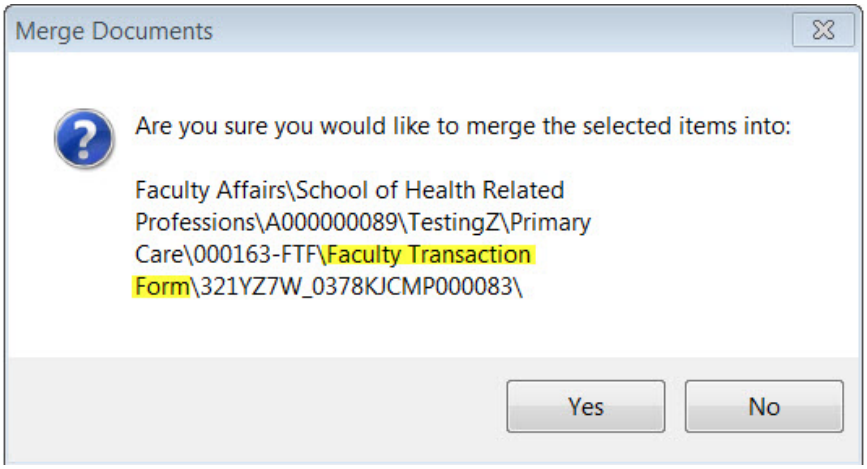
1. This view will have the items you have printed to the system.

Merge Faculty Transaction Form with Faculty Trans Form Supporting Doc

1. Locate the doc type - Faculty *Transaction Form* and locate the doc type - Faculty *Trans Form Supporting Doc* that needs to be merge together.

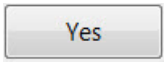
Last Name	FTF Action	Department	Type
TestingZ	Across-the ...	Primary Care	Faculty Transaction Form
TestingZ		Primary Care	Faculty Trans. Form Supporting Doc

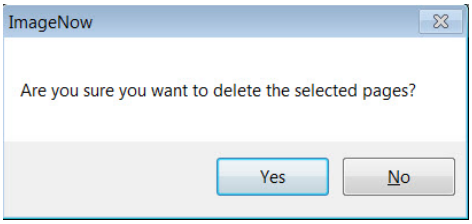
2. Both items must be selected to merge them together.
   a. Select the **Faculty Transaction Form** doc type.
   b. Then on the keyboard hold down the **Ctrl** key.
   c. Then with the mouse select (left click) the **Faculty Trans. Form Supporting Doc** (this will highlight both forms – then you can release the ctrl key).
3. Right click on the **Faculty Transaction Form.**
4. Select *Merge.*
5. A *Merge Documents* box will appear. Read the box and verify that it states…. merge the selected items into: …..Faculty Transaction Form…..



6. Press Yes button.

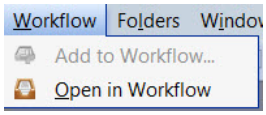
Deleting Pages

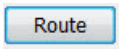
1. Open up the FTF so you can see all the pages in the packet.
    a. At the bottom if you do not see *Thumbnails* area then select the **F9** key on the keyboard
    b. In the *Thumbnails* area you will be able to review all the pages in the packet by double clicking on the page or using the button
2. Locate the page that need to be deleted from the packet.
3. Select the button.
    a. A dialog box will appear to confirm the delete
    b. Select the  button.
4. Select the button.

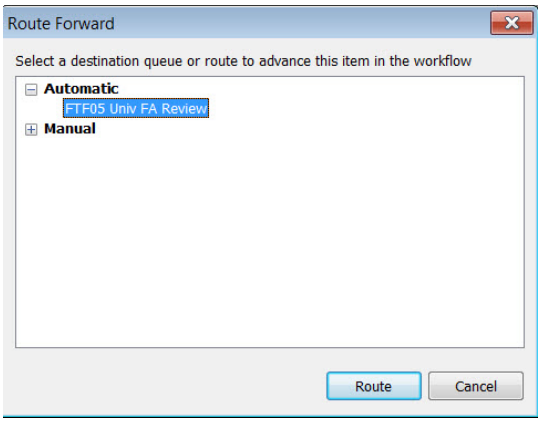


Routing to the RBHS Faculty Affairs Office

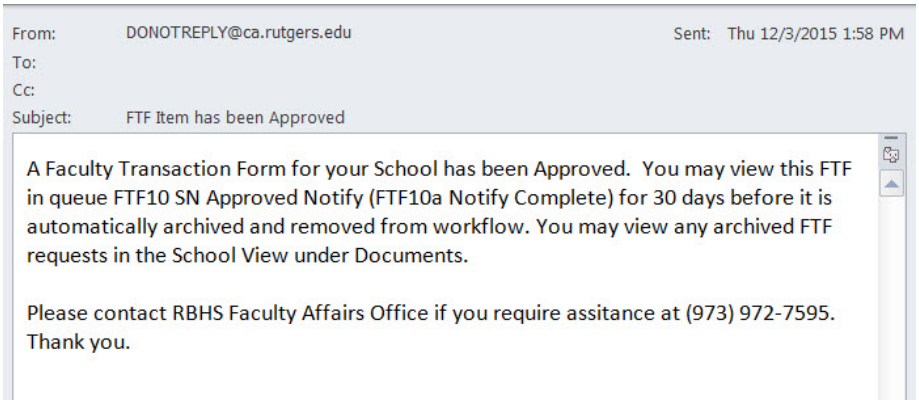
1. Verify that that the FTF that you are viewing is in the *Workflow* area.
    a. If you are viewing the item in the *Documents* area, then from menu toolbar
    b. Select *Workflow*
    c. Select *Open in Workflow*



2. On the menu toolbar select Workflow
3. Select
4. Select *FTF05 Univ FA Review*
5. Select the  button.

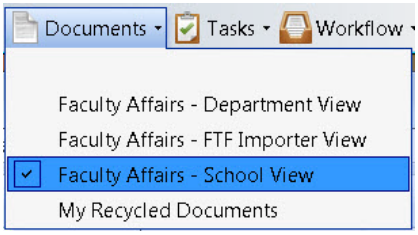


Once the FTF packet has moved through the approval process; the document will be sent to the Approve/Complete queue. An email will be sent when an item goes into that queue

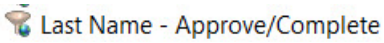


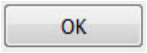
Printing the FTF into a PDF file

1. Log into Perceptive Content
2. Select the drop down for *Documents* and select *Faculty Affairs - School View*

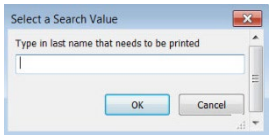


3. On the left-hand side in the *View* navigation under the **Faculty Affairs – School View** are three filters
   a. *Approved/Complete* – if select the documents (first 500) that have been approved will appear.
   b. *Cancelled* – if select the documents (first 500) that have been cancelled will appear
   c. *Last Name – Approve/Complete* – if select you will be prompted to enter a last name

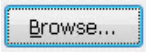
4. Select the 

filter
   a. Type in the last name in the dialog box that appears
   b. Select the 

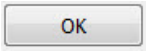
button



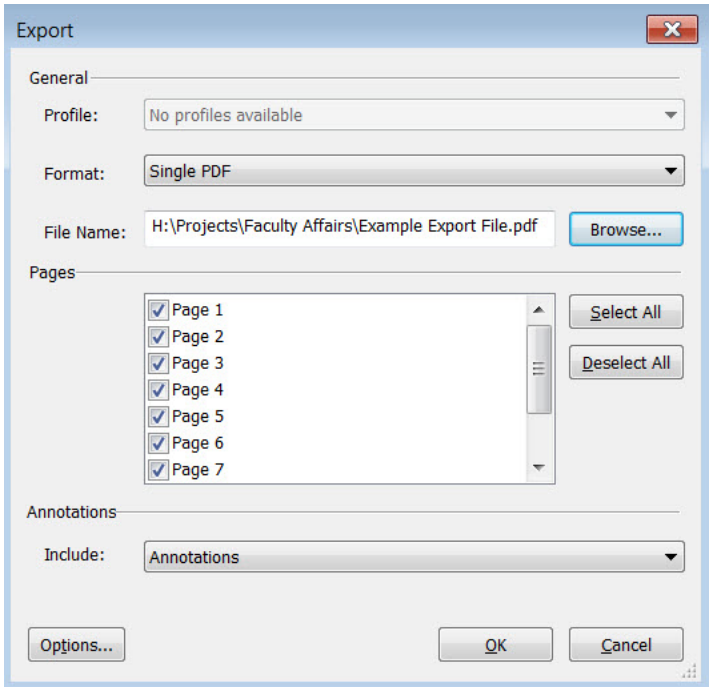
5. On the document that appears right click and select

6. An *Export* dialog box will appear.
   a. Select the drop down for the *Format* and select **Single Page PDF**
   b. Fill in the *Directory:* information.
      i. You can select 

button and go to the locations where you what the document saved
      ii. Type in a *File name:*
      iii. Select the

button
   c. Under *Annotations* select the drop down and Select **Annotations**
   d. Select the 

button

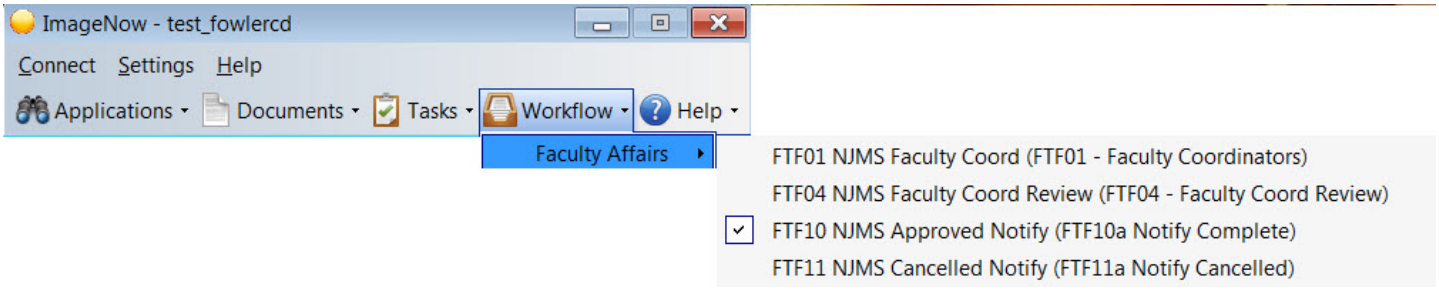


The file will be saved in the location that you have selected. If you have Perceptive Content running on startup you may get message when the system is converting the information to save.

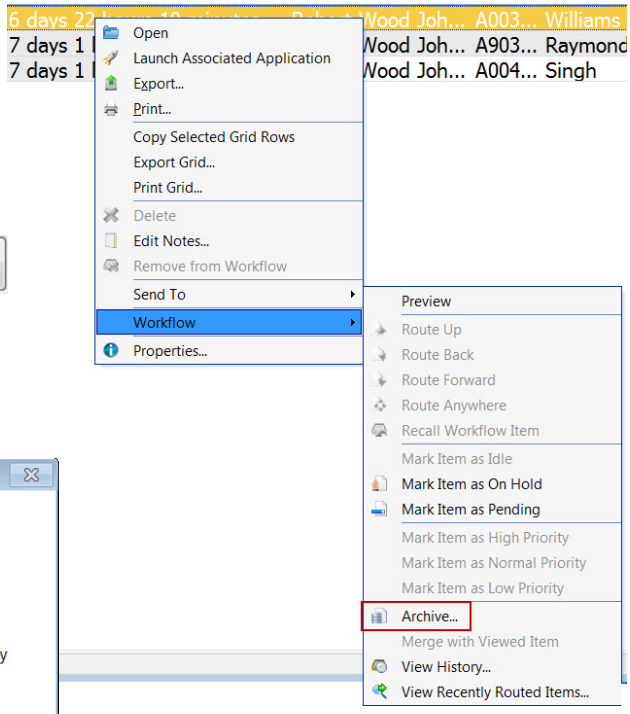
Archiving FTF Document

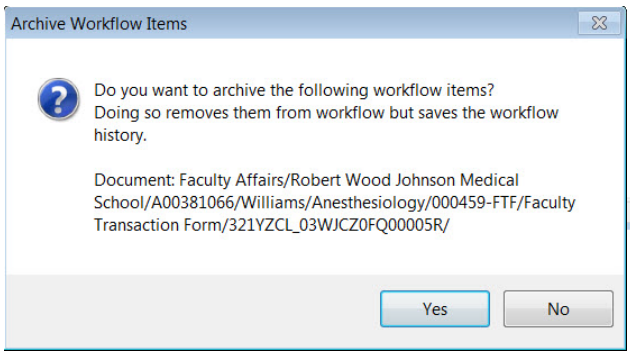
Once the FTF has been printed to PDF then you can archive the document; the documents will automatically be archived in 30 days. You will always be able to view the documents in the *School View.*

1. Log into Perceptive Content
2. Select the drop down for *Workflow* and select *FTF10 – …Approved Notify (FTF10a Notify Complete)*



3. The queue will open; right click on the FTF
4. Select **Workflow**
5. Select **Archive**
6. A dialog box will appear to ensure that you do want to archive the item; Select Yes





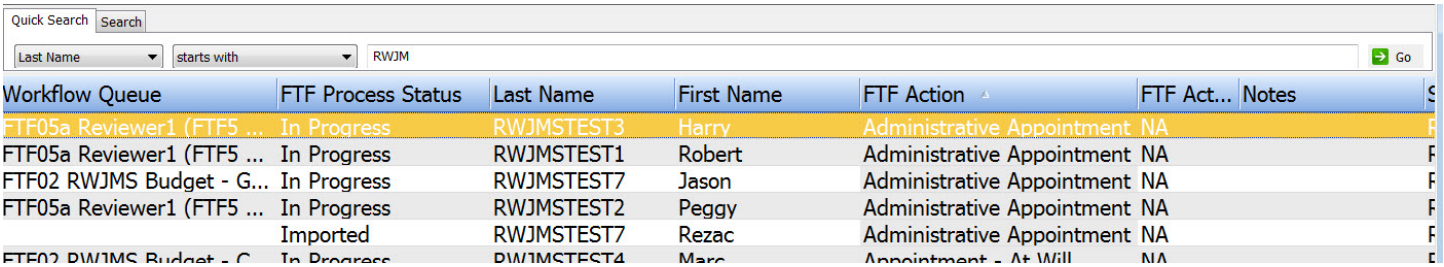
NOTE: The same process can be done for the Cancelled FTF Documents (FTF11a Notify Cancelled)

Appendix

Faculty Affairs – School View Quick Search

Once you have selected the *Faculty Affairs – School View* the information for the first 500 will appear. To look up one individual you can use the drop downs located on the *Quick Search* tab.

1. Select the drop down on the first box which usually defaults to **Name,**
    a. That Name is an internal code that is used.
2. Select ***Last Name***
3. In the second drop down, box **starts with** is defaulted in,
    a. You can select the drop down and use any of the options.
4. In the field type in the Last Name
5. Select Go



FTF Standard Support Documentation Order

In order to provide the reviewer a consistent overview, please upload all faculty action documentation in the following order. Note: some of the documents listed are not applicable to all actions.

1. FTF, including h-index (h-index is required for all actions except NTT-Professional Practice)

2. Review Sheet (which includes A&P vote, if applicable)

3. Offer Letter (place addendums first) OR Letter to/from Faculty Member

a. Restrictive Covenant (RWJMS and NJMS only, if applicable)

b. Job Description (for administrative appointments)

4. Letters of Evaluation

5. Dean and/or Chair Letter (whichever is applicable)

6. CV in RBHS Format

7. Provost Offer Letter Approval Email

8. Search Report Form

9. Liability Claims Clearance (clinical faculty only)

Supporting documentation order for Promotions, Reappointments and Tenure, please refer to the links below.

Promotions
Tenure Track
Non-Tenure Track Associate and above
Non-Tenure Track up to Assistant Professor

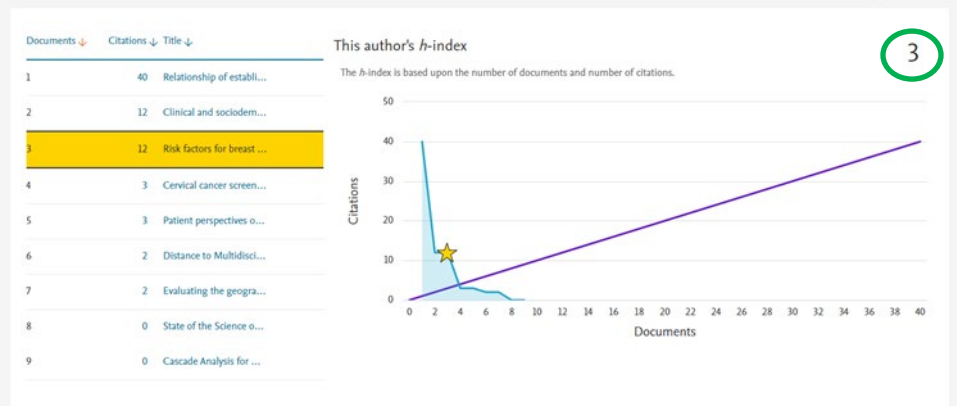
Reappointments
Tenure Track
Non-Tenure Track

Promotion of Tenured Ranks and Award of Tenure

Process for finding h-Index for Faculty Actions

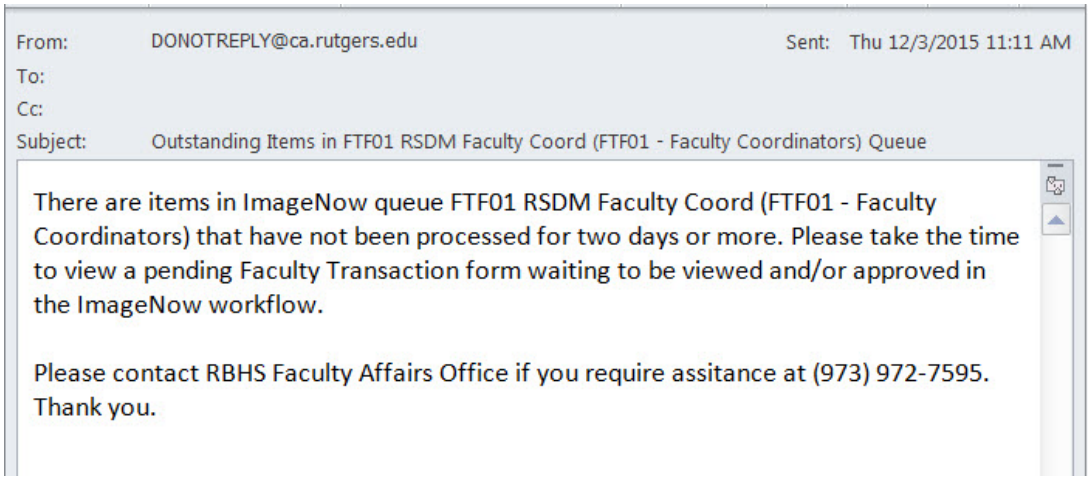
1. RBHS Chancellor requires an *h*-Index chart be included in the supporting documentation for appointments and promotions to Associate Professor, Professor and Distinguished Professor (50% FTE or greater), administrative appointments and faculty renewal leaves.

2. Please follow the steps below to determine an individual's *h*-Index,
   a. Go to https://www.scopus.com/search/form.uri?display=basic#author
   b. You will connect directly into Scopus if you are working from your office desktop, otherwise you will be prompted to log in with your NetID login information.
   c. Enter the individual's last name and first name, with or without a middle initial. It's best to type in the full name, as the name may not be unique enough for the search to pull up the right faculty member.
   d. Click the search button.
   e. When the search results populate, find the individual you are searching for and click the open circle to the left of the name to be selected.
      Note: Please be sure that you select the correct name by verifying the middle name and the institutions that the individual may have worked at in conjunction with the CV. Meaning, you may need to select more than one name based on including the middle name or initial and the number of institutions the individual may have worked at.
   f. If you do not locate the faculty member's name, check the CV for a maiden name or how the name is listed in the publication section of the CV in order to change your search criteria.
   g. In the next screen, click the "View *h*-graph" graph button above the citations graph and date range.
   h. In the final screen, you will see the individual's graph with a statement above the graph that says "The author's *h*-index is X". Once the *h*-index number is found, type the number in the "*h*-index" field on the FTF.



Outstanding Items in Queues FTF01 and FTF04

Once an item has been in the queue for two days or more an email will be sent to remind you that something hasn't been processed. The email will continue until the item has been cleared.



From: DONOTREPLY@ca.rutgers.edu Sent: Thu 12/3/2015 11:11 AM
To:
Cc:
Subject: Outstanding Items in FTF01 RSDM Faculty Coord (FTF01 - Faculty Coordinators) Queue

There are items in ImageNow queue FTF01 RSDM Faculty Coord (FTF01 - Faculty Coordinators) that have not been processed for two days or more. Please take the time to view a pending Faculty Transaction form waiting to be viewed and/or approved in the ImageNow workflow.

Please contact RBHS Faculty Affairs Office if you require assitance at (973) 972-7595. Thank you.