

eFaculty QuickTip How to Preview and Submit a Packet

This QuickTip covers the final stages of preparing the packet, previewing and submitting. It provides some "how to" tips for end-stage preparation for review of any material being submitted for evaluation in eFaculty.

Previewing Materials for Review

For Faculty 180 Submissions, start with A and proceed through B. Others (e.g., sabbatical), skip A and proceed through B.

A. Previewing Materials in Faculty Activity Reporting (F180)

Faculty are able to preview their FAR packets from a reviewer's perspective at any time. To do so:

1. Click on *Vitas and Biosketches* in the F180 sidebar (Warning: familiar academic idioms often carry different meanings in eFaculty. Here, "vita" is a technical term for the Interfolio summary document scraped from FAR, minus attachments.)
2. Select *Legacy Vitas*.
3. Select the correct review type (see Figure 1; sabbatical is not in F180 any more):
 - a. Annual and Cumulative Evaluation of Lecturers
 - b. Lecturer Range Elevation
 - c. Periodic Evaluation of Probationary Faculty - Mini Review
 - d. Post Tenure Review
 - e. Retention, Tenure, Promotion Dossier
4. Select the start date (semester of hire OR start of service credit at hire OR the fall dossier submit semester of last successful promotion OR start semester of current Lecturer Range); and end date, typically current semester (e.g., Fall 2020) corresponding to your period of review.
5. Click "Refresh Vita"

B. Previewing After Packet is Generated

After an eFaculty administrator has created a case for review (i.e., generated a "packet") you will have access to the reviewer's interface until the packet is locked (i.e., submission deadline, dossier closing date).

1. Choose "Your Packets" in the upper left sidebar.
2. Click the link to view the packet. (Figure 2)
3. Click "Preview Packet." (Figure 3)
4. Your dossier, complete with any attachments pulled in from Faculty180, will be viewable from reviewers' perspective in the RPT (PDF) reader.

To return from the reviewer's perspective attained in "B" above, look for the giant "X" in the RPT reader (see Figure 4).

When you see things you want to change, you should go back and revise accordingly. Upon making changes to the material, you will need to "regenerate" the "vita" in order to transfer the new material to the RPT reader--it does not update automatically. If your "vita" is marked as "Unlocked," you should see an option to regenerate the vita. Click "Regenerate." See Figure 5.

Figure 1. Screenshot of Vitas and Biosketches to select in "A. Previewing" Above

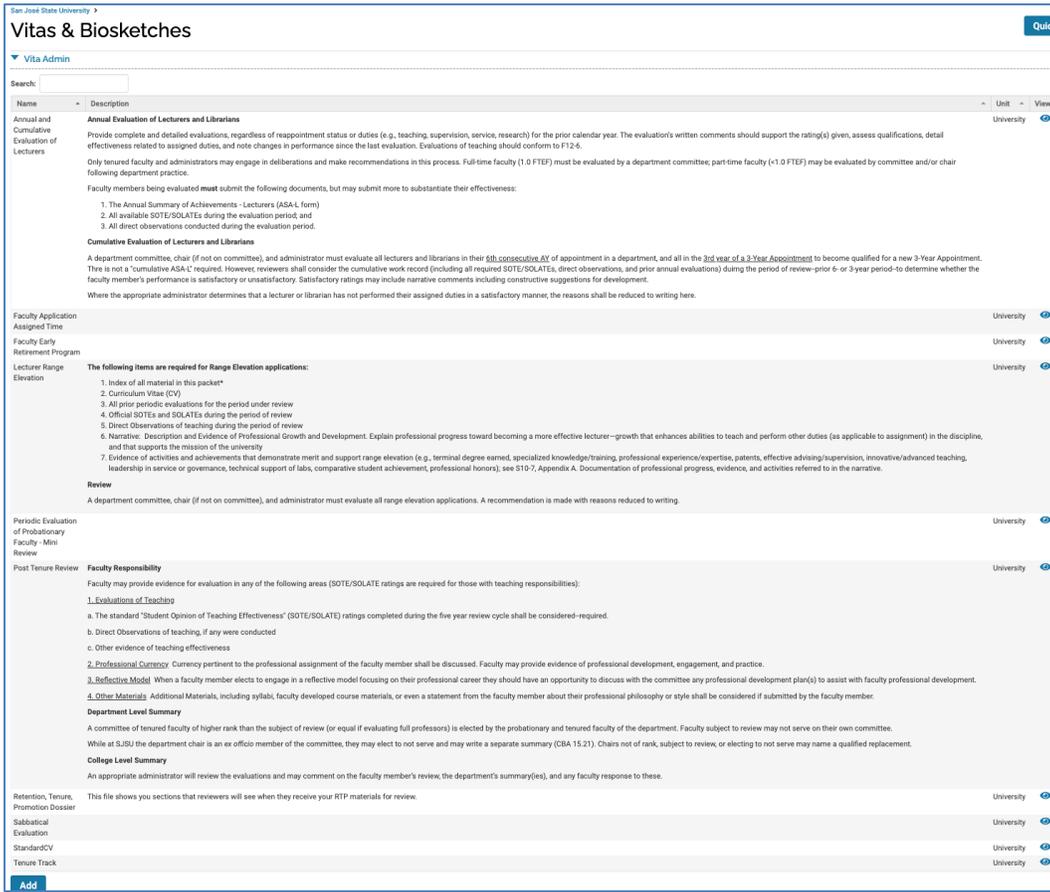


Figure 2. Screenshot of "Your Packets" section in eFaculty.

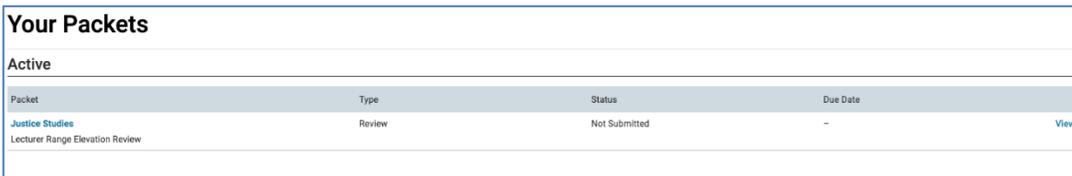


Figure 3. Packet Open, Preview Packet Appears

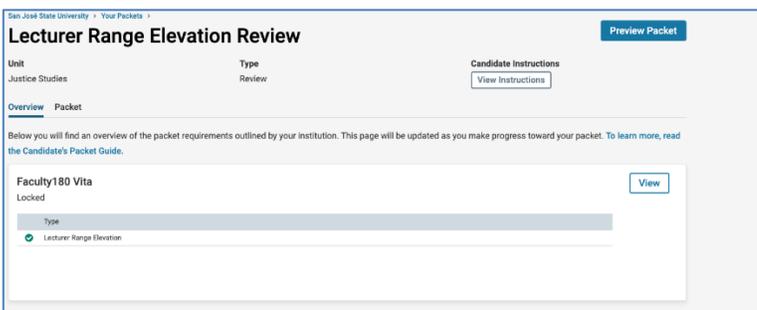


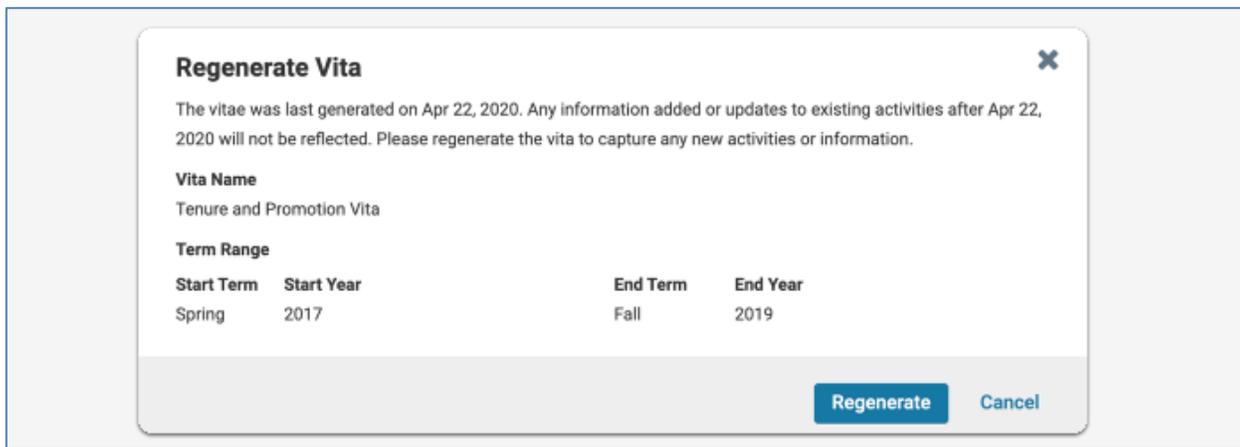
Figure 4. Exiting the RPT (PDF) Reader



Clicking “Regenerate” will open “Regenerate Vita” with information about when the vita was last generated and Vita Name and Term Range (see Figure 5). Any information added or updates to existing activities after the date of last regeneration will not be available to reviewers. Make sure your start term and year are correct. Notify UP - FA if it is not.

Clicking “Regenerate” will update that information and any attachments added or removed. After the deadline for review, packets will be locked. One cannot update or “Regenerate” the packet after that date.

Figure 5. Regenerate Vita Interface in eFaculty



Regenerate and Submit the Dossier

When you are ready to **submit** the dossier, go to “Your Packets.” View the packet.

After reviewing the packet:

1. Click “Packet” or “Edit.” This takes you to the submit page (Figure 6).
2. Click “Expand All” or the “>” icon left of “Faculty180 Vita”.
3. Select “Regenerate” in the bottom right of the Faculty180 Vita field (under Actions) See Figure 7..
4. Finally, click “submit.”

Submitting the dossier will lock it, preventing further changes from taking place (unless an administrator unlocks the file).

Always “Regenerate” prior to submitting a dossier. You may want to go back to *B. Previewing After Packet is Generated*, above to ensure that your materials are correct. *Note: The system takes time to process so there will be a short delay before you can see changes.*

Figure 6. Submitting the Dossier

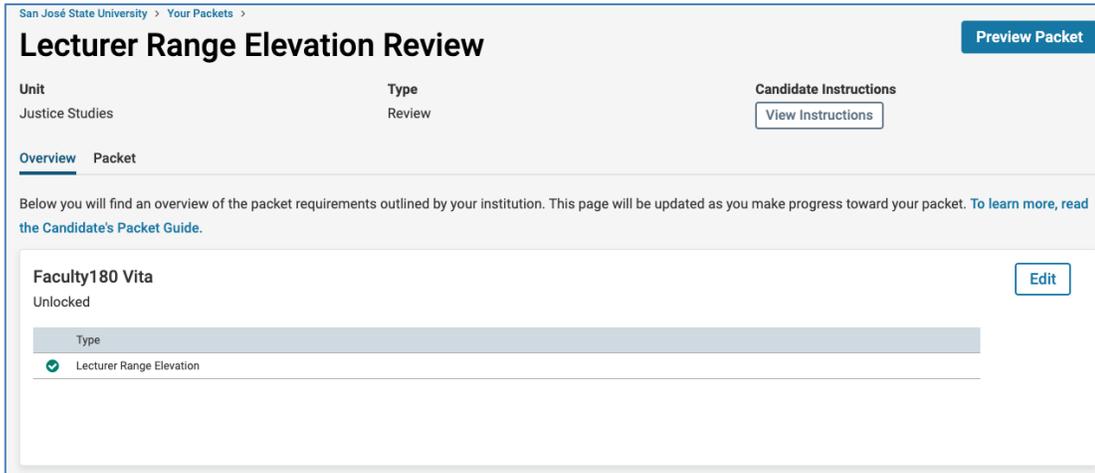
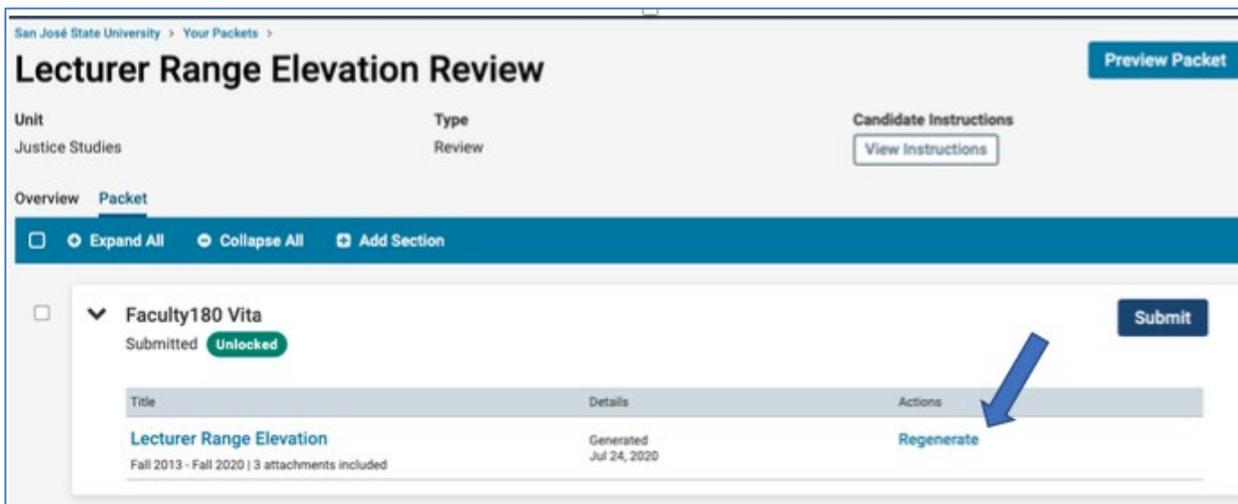


Figure 7. Regenerate



Communication about the dossier, recommendations, and the final decision, will arrive in your SJSU email inbox. The sender will be San José State University, as seen in Figure 8.

Figure 8. Email from eFaculty, noreply@interfolio.com

