

SharePoint Online Communications Sites for RTP – Resource Sheet

Accessing the Communication Site

1. Login to your Office 365 account: <https://www.office.com/>
2. From the apps, select “SharePoint”
3. Select your RTP site from the Following list in the sidebar

Manage Group Permissions

1. Navigate to Site Contents > Site Settings > People and Groups
2. Select the group whose permissions you’d like to modify from the left sidebar

Add a User

1. To add a user, click New > Add Users
2. Enter the NetID or email address of the user(s) you’d like to add to the group
3. Click “Show Options”
4. If you would like to send an email invitation, leave “Send an email invitation” enabled and add a personal message; otherwise uncheck “Send an email invitation” and click “Share”

Remove a User

1. To delete a user, select the checkbox next to the users you’d like to remove from the group
2. Click Actions > Remove Users from Group

Modify the group name/settings

1. Click Settings > Group Settings
2. Make the desired changes to the group and click OK

Delete a group

1. Click Settings > Group Settings
2. Click “Delete”
3. You will be prompted to verify that you want to delete the group. If you are sure, click OK.

See also:

- **Customize SharePoint site permissions tutorial:** <https://docs.microsoft.com/en-us/sharepoint/customize-sharepoint-site-permissions>

Create a Folder

1. Navigate to Documents
2. From the drop-down, click “New” > “Folder”
3. Enter the Folder name
4. Click “Create”

See also:

- **Create a folder in a document library tutorial:** <https://support.office.com/en-us/article/create-a-folder-in-a-document-library-3d6a8c11-2490-4d6b-8837-f25649a69c56>

Upload a File

1. Navigate to the folder where you’d like to upload a file
2. Click “Upload” > “Files”
3. Use the file explorer to locate the file for upload and double click (or click “Open”) to add

See also:

- **Upload files to a library tutorial:** <https://support.office.com/en-us/article/upload-files-to-a-library-da549fb1-1fcb-4167-87d0-4693e93cb7a0>

Share a Folder/File with an Individual User

1. Select the Folder/File that you’d like to share
2. Click “Share”
3. Click “People you can specify can view” to view the settings
4. When sharing with individual users, particularly for external users, the recommendation is to use the option to share with specific people. This will create a link that only users that you specify can use to access to file. If you use the “Anyone with the link” option, ALWAYS add a password to it, as otherwise anyone could find the link and access the document. You can use this option to share with users who are internal and external to Queen’s
5. When sharing with external users:
 - a. If they have a Microsoft account, they will be prompted to login using those credentials and they will be able to access the document
 - b. If they do not have a Microsoft account, they will be prompted to request a verification code. The verification code will be sent to them via email and they will have to enter the code to access the email. Be sure to tell external users to check their Spam folder if they are prompted to request a verification code
6. Ensure that the “Allow editing” button IS NOT CHECKED if you would like to grant read-only access
7. You can optionally block users from downloading the document. This will not stop them from printing a copy of the document
8. Click Apply
9. Enter the email address(es) of the users you’d like to share with. If you are adding internal users, you can also search via NetID.
10. If you would like to send a generic notification including the link to the document, click “Send”. We always encourage adding a personal message to avoid the appearance of a phishing

attempt. You can also click “Copy link”. The users will be granted access but you will need to send them the link to the document

See also:

- **Share SharePoint files or folders tutorial:** <https://support.office.com/en-us/article/share-sharepoint-files-or-folders-1fe37332-0f9a-4719-970e-d2578da4941c>

Share a Folder/File with a Group

1. Select the Folder/File that you’d like to share
2. If the Details pane doesn’t open automatically, click the “i” icon
3. Select “Manage access”
4. Click the “Grant Access” tab
5. Search for the name of the group that you’d like to share the folder/file with
6. Specify whether their access should be read-only or if they can edit the document
7. If you would like to send users a link to the file/folder click “Notify People”; otherwise, uncheck this option. Recommend that if they are going to send a notification, that they add a personal message
8. Click the “Grant Access” button

Check Access to a Folder/File

1. Select the Folder/File that you’d like to check permissions for
2. If the Details pane doesn’t open automatically, click the “i” icon
3. Select “Manage access”
4. This will show you the list of individuals with access to the file/folder, as well as any groups that have access to the file/folder

Remove Folder/File Access from an Individual User

1. Select the Folder/File that you’d like to check permissions for
2. If the Details pane doesn’t open automatically, click the “i” icon
3. Select “Manage access”
4. Click the drop-down arrow next to the list of users who are listed as having access to the file/folder
5. To remove individual users, click the “x” next to their name.
6. If you would like to cut off access for the entire list of users, you can click the ellipsis next to the link, then click the “x” next to the link.

See also:

- **Stop sharing OneDrive or SharePoint files or folders, or change permissions tutorial:** <https://support.office.com/en-us/article/stop-sharing-onedrive-or-sharepoint-files-or-folders-or-change-permissions-0a36470f-d7fe-40a0-bd74-0ac6c1e13323>

Remove Folder/File Access from a Group

1. Select the Folder/File that you’d like to check permissions for
2. If the Details pane doesn’t open automatically, click the “i” icon

3. Select “Manage access”
4. Locate the group that you’d like to remove access from
5. Click the drop-down next to it and click “Stop sharing”. The group will no longer have access to the file/folder

See also:

- **Stop sharing OneDrive or SharePoint files or folders, or change permissions tutorial:**
<https://support.office.com/en-us/article/stop-sharing-onedrive-or-sharepoint-files-or-folders-or-change-permissions-0a36470f-d7fe-40a0-bd74-0ac6c1e13323>

Creating a new Document Library

1. Navigate to Site Contents
2. Click “New” > “Document Library”
3. Include a name and description (recommended to keep it short due to character limits in the URL)
4. You can optionally leave “Show in site navigation” enabled; this will add a link along the main navigation for the site. This can be useful for a small number of links but not if you’re creating many links

Granting a Group Access to a Document Library

1. Navigate to Site Contents and select the document library you’d like to share with a group
2. Click the gear icon and select Library Settings
3. Select “Permissions for this document library”
4. Click “Stop Inheriting Permissions” – you will be prompted to verify that this document library should have unique permissions. Click OK.
5. Click ‘Grant Permissions’ and search for the group you’d like to grant access to
6. Leave the “Share everything in this folder, even items with unique permissions enabled”
7. Include a personal message if you’d like to send an email notification
8. Click ‘Show Options’
9. Select the permission level that users should be granted access to
10. Click “Share”

Change a group’s access to the document library

1. Navigate to Site Contents and go to the applicable document library
2. Click the gear icon and click Library Settings
3. Select “Permissions for this document library”
4. Check the box next to the applicable group and click Edit User Permissions
5. Change the level of access as desired and click OK

Removing Group Access to a Document Library

1. Navigate to Site Contents and select the document library you’d like to remove access from
2. Click the gear icon and select Library Settings
3. Select “Permissions for this document library”
4. Click the check box next to the group you’d like to remove access from
5. Select “Remove User Permissions”
6. The group will no longer have access to the library

Sync Account to a Work Computer

1. Navigate to Site Contents and select the document library that you'd like to sync to your work computer
2. Click the "Sync" button
3. You will be prompted to open Microsoft OneDrive > click Open and log in using your email credentials
4. Now when you navigate in your file explorer, under 'Queen's University' you will see the name of your site and the name of the document library. If you drag-and drop documents to this folder, they will automatically sync with the document library

See also:

- **Sync SharePoint files with the new OneDrive sync client tutorial:** <https://support.office.com/en-us/article/sync-sharepoint-files-with-the-new-onedrive-sync-client-6de9ede8-5b6e-4503-80b2-6190f3354a88>

Other Opportunities

1. Editing the look and feel of the site
 - a. A communication site is more than just a document library. It is also a collection of pages that can be customized or created to improve the user experience
 - i. You could add a title to the Home page such as "Welcome to the [Faculty/Department] Site for Renewal, Tenure & Promotion".
 - ii. You could add a web part that displays the document library, for easy access to folders.
 - iii. You could include guidance documents and embed them on the page for easy accessibility. **Note:** due to the permissions structure of the site, if you would like to take advantage of this feature, some modifications will be required.
 - iv. You could create and display news articles to provide information or guidance on the RTP process.

See also:

- **Create and use modern pages on a SharePoint site tutorial:** <https://support.office.com/en-us/article/create-and-use-modern-pages-on-a-sharepoint-site-b3d46deb-27a6-4b1e-87b8-df851e503dec>
- **Change the look of your SharePoint site tutorial:** <https://support.office.com/en-us/article/change-the-look-of-your-sharepoint-site-06bbadc3-6b04-4a60-9d14-894f6a170818>

2. Taking advantage of Flow
 - a. Flow allows you to automate workflows, which helps improve the efficiency

See also:

- **Microsoft Flow:** <https://us.flow.microsoft.com/en-us/>
- **ITS Microsoft Flow Resources:** <https://www.queensu.ca/its/microsoft-office-365/flow>

Recommended Electronic Renewal, Tenure and Promotion (RTP) File Process using Microsoft SharePoint Online Communication Sites

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SECTION A. SETTING UP THE RTP COMMUNICATION SITE

Note: Keep this communication site reserved for the RTP process (do not use it for other faculty-related purposes)

Step 1. Faculty Office accesses the SharePoint Online Communication Sites for the RTP process:

1. A SharePoint Online Communication Site will be provisioned for each Faculty or Department (for departmentalized faculties). To access a site, use the URL provided to you by IT Services/the Provost's Office.
2. Once logged in to the site, click the "Following" option in the top right corner of the site. Now, you will be able to access the site by:
 - i. Logging in to <https://www.office.com> OR <https://office365.queensu.ca>
 - ii. Selecting "SharePoint" from the list of apps
 - iii. The site will now appear in your list of Frequent Sites
 - iv. You can also bookmark this site URL to your browser
3. **As a precaution**, we are recommending that the permissions for the <site name> - Members group be changed to "Read"
 - i. In your site, click "Site Contents" > "Site Settings" > "Site Permissions"
 - ii. Check the box next to the "<Site Name> - Members" group
 - iii. Select "Edit User Permissions"
 - iv. In the "Choose Permissions" section, de-select "Edit" and select "Read"
 - v. Click OK
4. **As a precaution**, we are also recommending turning off requests to be granted access to default groups. To turn off this setting:
 - i. In your site, click "Site Contents" > "Site Settings" > "Site Permissions"
 - ii. Click the "Access Request Settings"
 - iii. Uncheck the "Allow members to share the site and individual files and folders" option
 - iv. Uncheck the "Allow access requests" option
5. Click "Save". For departmentalized faculties, repeat these steps for each departmental site

Note: Each site must have at least two designated site collection administrators listed for the site. **If you are the site collection administrator**, you will be responsible for permission management of the site.

Step 2. Departmental Administrators Access Departmental Sites (*Departmentalized Faculties only*)

1. Faculty Staffing Officers will grant the Departmental Administrators full access to the site:
 - a) In the site, go to 'Site Contents' > 'Site Settings' > 'Site Permissions'
 - b) Click on the "RTP-<faculty>-<dept> Owners" group
 - c) Click "New" > "Add Users"
 - d) Enter the netID or email addresses of the departmental admins that you'd like to add as administrators for the site
 - e) Expand "Show options"
 - f) If you would like the users to receive a notification that they have been added to the group, leave the "Send an email invitation" option enabled. If you are sending an email

invitation, include a personal message. This will help distinguish the notification from a phishing email

- g) Click Share
 - h) The departmental admins will now have full access to the site
2. For departmental admins to access the site:
- a) Click the link in the Email notification (if sent) or provided by your Faculty Staffing Officer
 - b) Once logged in, click the “Following” option in the top right corner of the site. Now you will be able to access the site by:
 - i. Logging in to <https://www.office.com> OR <https://office365.queensu.ca>
 - ii. Selecting “SharePoint” from the list of apps
 - iii. The site will now appear in your list of Frequent Sites
 - iv. You can also bookmark this site URL to your browser

Note: You can verify the permissions of a user to this library at any point by navigating to Library Settings > Permissions for this document library and selecting “Check Permissions”

- Use the search bar to search for a specific user or group and click “Check Now”. If you’re searching for a user, it will return any groups that they are a part of that have access to the library

Step 3. Creating Groups

Recommendation: Use groups for managing access as much as possible. If a group of users will require access to a specific file or folder at the same time and will have their access removed at the same time, using groups can help simplify permissions management. Since permissions for different groups are granted at certain points in the RTP process, the following steps are recommended for creating these groups.

In the site, click the gear icon in the top right corner of the screen and click “Site permissions”

1. Click “Advanced permissions settings”
2. In the Permissions tab, click “Create Group”
 - a) Add the name of the group using the following naming convention: “<Site name>-group” (ex. FAS_RTP_CHEM-Colleagues) Note: It is recommended that you use a standard naming convention that includes your site’s unique name)
 - b) Leave the Owner, Group Settings and Membership Requests sections defaulted. The default settings are as follows:
 - v. **Owner:** There can only be one owner for a group; by default, this will be the site administrator creating the group. To ensure that all site owners can manage membership to the group, click the “x” next to your name. Search for the site owners group (i.e., RTP-<faculty>-<dept>-owners). Select the group to add it as the owner.
 - vi. **Group Settings:**
 1. **Who can view the membership of the group?** By default, only group members will be able to view the members of the group

2. Who can edit the membership of the group? By default, only the group owner will be able to add or remove users from the group

vii. Membership Requests

1. Allow requests to join/leave this group: By default, users will not be allowed to request access to the group or request to leave the group. Leave this set to “No”. This will automatically restrict Auto-accepting requests.

c) DO NOT SET THE PERMISSION LEVEL. Setting a permission level will grant members of the group that level of access for the entire site.

Choose the permission level group members get on this site: <https://queensuca.sharepoint.com/sites/OPVPA-RTPResourceRepository>

- Full Control - Has full control.
- Design - Can view, add, update, delete, approve, and customize the look of the site.
- Edit - Can add, edit and delete lists; can view, add, update and delete list items and documents.
- Contribute - Can view, add, update, and delete list items and documents.
- Read - Can view pages and list items and download documents.
- Restricted View - Can view pages, list items, and documents. Documents can be viewed in the browser but not downloaded.

d) Click “Create”

3. Add the users to the group

a) Click “New” > “Add Users”

b) Add the names or email addresses of the users you’d like to add to the group.
Note: by default, an email invitation will be sent to any users you add to the group. You can personalize this message, if desired; you can also turn off this feature by expanding “Show options” and unchecking “Send an email invitation”

c) Click Save

d) Leave the group unassigned to any document library or folder until the appropriate time in the process

SECTION B. THE RTP PROCESS

1) Departmental Admins access the departmental communication site and create folders for each RTP applicant

- 1.1 Login to <https://www.office.com> OR <https://office365.queensu.ca>
- 1.2 Select “SharePoint” from the list of apps
- 1.3 Select the RTP Departmental Site from your Frequent Sites list
- 1.4 Once in the site, click “Documents”
- 1.5 Click “New” > “Folder”
- 1.6 Add the RTP applicant name using the standard naming convention and click “Create”:
Last Name, First Name_Dept_application type (Smith, Joe_HIST_Renewal)

***Efficiency Tip:** You can sync your communication site to your work computer to avoid logging in through the web interface; this also allows you to save the email attachment directly from Outlook. To sync:

- i. Login to the communication site and go to Documents. Click ‘Sync’
- ii. You will be prompted to open OneDrive. Click “Open Microsoft OneDrive” and login to your account
- iii. Once logged in, when using your file browser, under Queen’s University, you should see a folder [communication site name] – Documents. It will contain the same folder structure as your site. Any documents saved to this location from your file browser will sync with your communication site

2) Faculty Members application submission (Deadline: August 15)

- 2.1. Faculty Members should submit their RTP application (materials as per Article 30.9.1) by electronic copy using OneDrive/SharePoint, USB drive, secure attachments to emails or another form of electronic submission. Note that regardless of the method of submission, files will be distributed by Communication Sites.
- 2.2. If the applicant is unable to provide the documents electronically, the Department/Faculty Office shall provide assistance and scan the required documents
- 2.3. It is preferred that documents are submitted as Adobe (pdf) and/or Word files. Files must be contained in one folder per person and follow the order and naming convention outlined in the *RTP Checklist for QUFA Faculty Members*
- 2.4. To upload the application file, navigate to the communication site and go to the applicant’s folder
- 2.5. Click “Upload” > “Files”
- 2.6. Locate the file on your computer and double click to upload

3) Sending the file to Referees (Deadline: August 15 or as soon as possible)

- 3.1. Go to the folder or document that you’d like to share and select it
- 3.2. Click “Share”

- 3.3. By default, the sharing option will be set to “People you specify can view”; for now, this is the recommended setting. This access must be set to read-only by clicking this option and ensuring that “Allow editing” is not checked. Click Apply.
- 3.4. Specify the NetID (if internal to Queen’s) or email address of the user you’d like to share the file with
 - a. You can either send an email directly, which will send a link to the person that they can use to access the document, or you can copy the link and include it in your own email to the user
 - b. When sharing with users external to the University, there are a few things to be aware of:
 - i. If they have an active Microsoft account, they’ll be able to log in and access the files. (**Note:** If ever a user has been granted guest access to a resource, such as a Team or Outlook group, they may have created a Microsoft account associated with another email address (e.g., @gmail.com); if this is the case, they will be prompted to login using that account information)
 - ii. If they do not have an active Microsoft account, after they click the link they’ll be sent another email and asked to confirm their identity by adding the verification code that they’ve been sent (**Note:** they should be advised to check their spam in case the code is sent there)
 - iii. For additional tips when sharing with external users, see the following article: <https://techcommunity.microsoft.com/t5/SharePoint-Support-Blog/Coaching-your-guest-users-through-the-External-Sharing/ba-p/182739>
- 3.5. Once the referees should no longer have access:
 - a. Select the document and ensure that the details pane is open (if not, select the ‘i’ icon on the right side of the page)
 - b. Click “Manage access”
 - c. In the “Links Giving Access” section:
 - i. If you’d like to remove access for a specific user, click the X next to their name
 - ii. If you’d like to remove access for all users with access to the link, click the (...) next to the link, followed by the X next to the link

Note: Microsoft Communication Sites also provide an option for sending anonymous links that can be accessed using a password. This is not the recommended option, however, in the case of external Microsoft users, **may** be used using the following instructions:

1. Go to the folder or document that you’d like to share and select it
2. Click “Share”
3. By default, the sharing option will be set to “People you specify can view”. Click to view the additional sharing options
4. Select “Anyone with the link”
5. **IMPORTANT:** near the bottom of the pop-up window, you can set an expiration date and password. When using this option **ALWAYS** add a password; otherwise, anyone who gains access to the link will be able to access the document
6. If you would like to grant read-only access, ensure “Allow editing” is **NOT** selected
7. Click Apply

8. Click “Copy Link” and send to the appropriate users as needed. **Note:** always send your password in a separate communication from the link to the document.

4) Sending File to Colleagues (Deadline: September 15)

If a group has been set up for colleagues (as per the instructions in Section A. Step 3), follow the instructions below (recommended). Otherwise, if individual users will be granted access, follow instructions for sharing file with referees (Section B. Step 3)

Files sent to colleagues **must be encrypted PDF document(s)**. Please note that only the files sent to colleagues will require this encryption (see document *How to encrypt PDF files*).

- 4.1. Navigate to the file/folder in the departmental library and select it
 - a. Ensure the details pane is open on the right side of the page (if not, click the ‘i’ icon)
 - b. Select “Manage access” > “Grant Access”
 - c. Type in the name of the group of colleagues; once you’ve located the correct group, select it. **As you will have access to multiple groups, it’s crucial that you ensure you are selecting the correct group**
 - d. Use the drop-down to select **read-only access**
 - e. If you’d like an email to be sent to the users notifying them that they’ve been granted access to the file/folder, leave “Notify People” selected
 - f. **Type an email advising colleagues** that they will require a **second password** to open the files – colleagues should email the Departmental Administrator to request the second password. **Colleagues are to be provided with the password that opens the document, but not the password that restricts editing and printing**
 - g. Click Grant Access
 - h. If applicable, also share the file with colleagues of the Members cross/joint appointed departments
- 4.2. Once colleagues should no longer have access to the file/folder
 - a. Select the file/folder in the document library and ensure that the details pane is open (if not, click the “i” icon on the right side of the page)
 - b. Click “Manage Access”
 - c. In the Direct Access section, identify the colleague group that you’d like to remove access from
 - d. Select the drop-down arrow and choose “Stop Sharing”. You will be asked to confirm your selection. Click Remove (**Note:** The group will still exist; however, they will no longer have access to the file/folder)

EFFICIENCY TIP: Using Adobe Acrobat Pro, combine a member’s entire application file into **one** PDF document. Use bookmarks to separate each item, and encrypt the full PDF, rather than encrypting each document separately. Consider using separate document libraries to send the appropriate documents to referees and colleagues.

5) Requesting Student letters

- 5.1. Request letters from current and former students
- 5.2. Students are not provided with the applicants RTP file
- 5.3. Student letters shall be received electronically, **masked**, and uploaded to the electronic file

6) Compiling the RTP file – Additional material from the Official File (Deadline: October 15)

*If you have been using QShare for the RTP file, this is the point in the process that all files/documents **must** be transferred over to a Communication Site*

Migrating Content from QShare to your Communication Site:

6.1. To export QShare files:

- a) For small folders (i.e., less than 1GB and less than 15,000 files and folders), QShare allows you to export the folder as a zip. You can then upload the file and unzip it in appropriate document library of the communication site
- b) For large folders you can use Xythos Drive Client. If you don't have the Drive Client, we're recommending that you contact the IT Support Centre and they will provide guidance on installing the software and using it to export your files. Again, you can then upload the files to your communication site
- c) To upload the application file:
 - i. Navigate to the appropriate folder within the document library of your communication site
 - ii. Click Upload > Folder
 - iii. Select the folder you'd like to upload from your computer (for those who've been using QShare, **upload the entire RTP file**)

6.2. To upload material from the Official File:

- iv. Click Upload > File
- v. Select the files you'd like to upload from your computer (material from the Official File (30.12.1) shall be added to the electronic file)

If at any point in the process the applicant or Dean adds sufficiently significant additional/new material, this material must be added to the electronic file and the faculty member must be notified and given access if requested (Article 30.13.4 & 30.13.5)

6.3. Referee letters, colleague letters, and **masked** student letters should be added to the electronic file (if they have not already been uploaded)

6.4. Applicant is granted access to view their RTP file.

- i. Go to the folder containing the complete RTP file and select it
- ii. Click "Share"
- iii. By default, the sharing option will be set to "People you specify can view"; for now, this is the recommended setting. **This access must be set to read-only** by clicking this option and ensuring that "Allow editing" is not checked. Click Apply.
- iv. Specify the NetID or email address of the Member
- v. You can either send an email directly, which will send a link to the person that they can use to access the document, or you can copy the link and include it in your own email to the Member

6.5. Once the Member should no longer have access:

- a. Select the document and ensure that the details pane is open (if not, select the 'i' icon on the right side of the page)
- b. Click "Manage access"

- c. In the “Links Giving Access” section:
 - i. Select the Members specific user access, click the X next to their name

The electronic file will need to be compiled in the same order as the *RTP Checklist for QUFA Faculty Members* (items 1-3 noted in checklist will not have been received yet). **Ensure that the file is complete. All documents required in sections 4-12 of the checklist should be in the file at this point**

***Efficiency Tip:** You can sync your communication site’s document library to your computer to avoid logging in through the web interface; this also allows you to save email attachments directly from Outlook and copy/paste documents from other locations on your computer (i.e. QShare file drive). Follow instructions in Section B. Step 1) on page 5 to sync your document library.

7) File to the RTP committee (Deadline: November 15)

- 7.1. The RTP Committee will be given access to review the electronic RTP file via Group access (see instructions for sharing with colleagues (Section B. Step 4)) OR the Share option (see instructions for sharing file with referees (Section B. Step 3))
- 7.2. Once the RTP Committee meets and formulates their recommendation, the RTP Committee’s recommendation will be added to the electronic file
- 7.3. Applicant is granted access to view their RTP file via the Share option (repeat instructions from Step 6.4 and 6.5) and given the opportunity to respond. **Ensure Read-Only access is selected**

8) File to the Department Head (if applicable – Deadline: December 15)

- 8.1. The Department Head will be given access to review the electronic RTP file, via the Share option (see instructions for sharing file with referees (Section B. Step 3))
- 8.2. The Department Head will formulate their recommendation and it will be added to the electronic file
- 8.3. Applicant is granted access to view their RTP file via the Share option (repeat instructions from Step 6.4 and 6.5) and given the opportunity to respond. **Ensure Read-Only access is selected**

9) File to the Dean (Deadline: December 15/January 15)

- 9.1. The RTP Committee Assistant will inform the Faculty Office that the file is ready for review by the Dean
- 9.2. The Staffing Officer will remove Departmental Administrator access to the site at this point (remove from communicate site owners group)
- 9.3. The Dean (or Associate/Vice Dean as appropriate) will be given access via the Share option (see instructions for sharing file with referees (Section B. Step 3)) to review the electronic RTP file and their recommendation letter will be added to the file
- 9.4. Applicant is granted access to view their RTP file via the Share option (repeat instructions from Step 6.4 and 6.5) and given the option to respond. **Ensure Read-Only access is selected**

10) File to the Provost Office (Deadline: March 1)

Staffing Officers will give the Provost Office full access to the RTP Communication Site on March 1st:

- 10.1. In the site, go to “Site Contents” > “Site Settings” > “Site Permissions”
- 10.2. Click on the “RTP-<faculty>-<dept> Owners” group
- 10.3. Click “New” > “Add Users”
- 10.4. Enter the netID or email addresses of the Provost’s Office contact (Amanda LaRose)
- 10.5. Expand “Show options”

- 10.6. If you would like the user to receive a notification that they have been added to the group, leave the “Send an email invitation” option enabled. If you are sending an email invitation, include a personal message. This will help distinguish the notification from a phishing email.
- 10.7. Click Share

*At this point, the **RTP Checklist for QUFA Faculty Members** must also be included in the file*

- 10.8. The Provost Office will copy the files from the departmental Communication Site into a new Provost Office Communication Site

11) UPAC Committee

The promotion to Professor files will be shared with the University Promotion Advisory Committee (UPAC) via Group access (See Section A. Step 3 & Section B. Step 4)

12) Final Decision

The Provost will issue letters rendering the decision on all applications by the following deadlines

1. April 1 for Renewal
2. April 15 for Tenure and Promotion to Associate Professor
3. May 15 for Promotion to Professor

13) Transferring of file

Communication sites are used for the sharing of the RTP file during the assessment process. They should not be used for long-term storage of the electronic file.

- 13.1. Once the RTP process is complete, transfer the electronic RTP file from the Communication Site onto your department/faculty Windows File Service for long term storage
- 13.2. Note that as per Article 34.4 of the Collective Agreement, the RTP assessment file is deemed to be an annex to the Official File

SECTION C. RESOURCES

Links to Technical Resources

[Communication Site Resource Sheet](#)

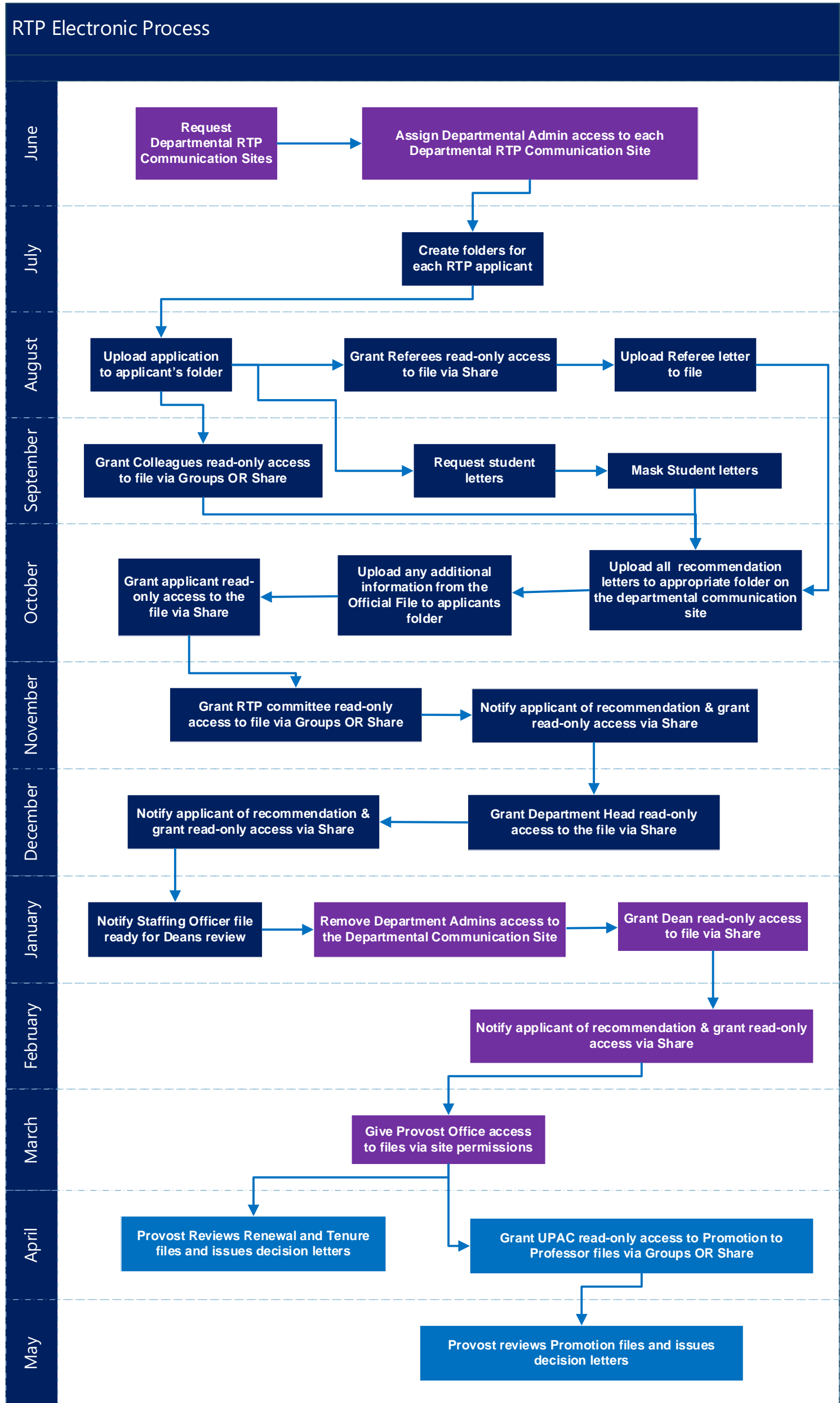
Instructions - [How to Encrypt PDF documents](#)

Links for information on RTP Process

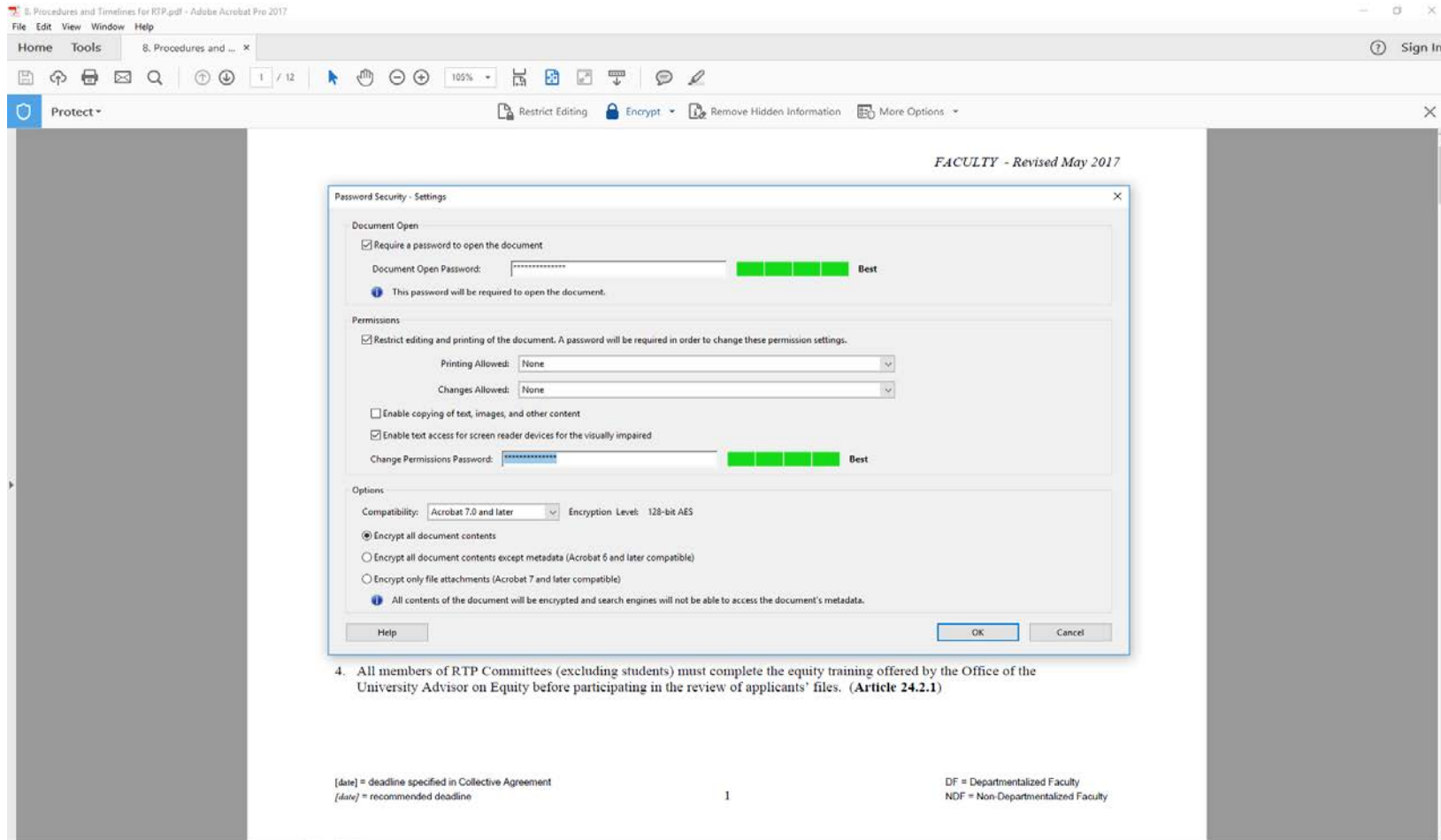
[RTP Resource Repository](#)

Faculty Relations website – [Collective Agreement](#)

Faculty Relations website – [RTP Resources](#)



How to Encrypt and Password Protect a PDF Document



Encrypting & password protecting a PDF Document

1. Open your PDF Document in Adobe Acrobat Professional
2. Ensure the *Tools* pane is in view (right side pane)
3. Select *Protect*
4. Select *Encrypt* from the top pane
5. Select Option# 2 ***Encrypt with password...***
6. Check box on “require a password to open the document” **and** “restrict editing and printing of the document” Put in a password for both of these requirements – passwords must be different. **Colleagues are to be provided with the password that opens the document, but not the password that restricts editing and printing.**
7. Click OK and save the document

Removing encryption & password

1. Open document and enter the 1st password to open the document
2. Ensure the *Tools* pane is in view (right side pane)
3. Select *Protect*
4. Select *Encrypt*
5. Select ***Remove security***
6. Enter the 2nd password and press OK
7. Click **OK** to “Are you sure you want to remove security from this document?”
8. Save the document

Where to Purchase Adobe Acrobat Professional:

Queen's preferred supplier is currently [SoftChoice](#)

- Email queensu@softchoice.com with your request
 - Or visit the [Procurement Website](#) for additional information
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