

# Banner and Cognos TTF and Career Review Tracking

User Guide v. 2.0

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## Table of Contents

Overview .....	2
Support Contact.....	2
Banner Data Entry.....	2
Data Entry Expectations .....	2
Banner Access.....	3
Using PWAREVW .....	3
Entering a New Review .....	3
Editing or Deleting a Review .....	5
Marking a Review Complete – TTF Annual Reviews and Career Performance Reviews only .....	6
Review Type Conventions.....	6
Timing of Reviews.....	8
Data Validation .....	8
Special Situations.....	9
New faculty.....	9
Tenure credit.....	9
Tenure clock extensions .....	9
Post-Tenure clock extensions .....	9
Cognos Reporting .....	10
Cognos Access .....	10
Reports .....	10
TTF Review: Schedule by Review Type.....	10
TTF Review: Mismatched and Missing Data (run in Fall and Spring).....	11
Career Review: Schedule by Review Type .....	12

## Overview

In order to standardize and to improve visibility of career, tenure track, and tenured faculty review schedules, schools and colleges will enter and maintain review dates in the Banner screen PWAREVW. Schools/colleges are responsible for ensuring these dates accurately reflect the tenure and post-tenure plans of their faculty as well as the appropriate review schedule for career faculty; UO will use the dates in this system as the official data to anticipate and validate future faculty reviews.

The reviews we track in PWAREVW are:

- TTF annual review (pre-tenure)
- TTF midterm review (sometimes called “contract renewal” or “third year” review)
- Tenure decision expected
- Tenure decision required
- Third-year post-tenure review
- Sixth-year post-tenure review
- Career faculty performance reviews

This document describes how to track reviews in Banner and retrieve reports from Cognos to project reviews due in current and future academic years.

## Support Contact

Human Resources Operations; [hrops@uoregon.edu](mailto:hrops@uoregon.edu).

## Banner Data Entry

### Data Entry Expectations

The Office of the Provost (OtP) will use Cognos to run reports of tenure-related and career faculty reviews for the upcoming academic year and to confirm that planned reviews have been completed. For data update expectations, see <https://provost.uoregon.edu/ttf-evaluation> and <https://provost.uoregon.edu/career-faculty-evaluation#contractrenewal>. We recommend making updates throughout the year, as part of your regular workflow when you process changes to a faculty member’s review timelines.

### *Initial Data Uploads – Summer 2018 and Fall 2022*

*Initial TTF data entry for each school and college was performed via spreadsheet upload to Banner.*

***Tracking for most schools and colleges began with reviews due in 2019 (i.e., the 2018-19 academic year).<sup>1</sup>***

*Initial career data entry was performed via spreadsheet upload in Fall 2022. School and college tracking and maintenance of career reviews began in AY 2022-23.*

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<sup>1</sup> CAS began entering data for reviews due in 2017-18, so CAS data begin with 2018.

## Banner Access

Here are the steps for requesting access to Banner page PWAREVW, where you will maintain the review dates information. For security reasons, we expect that a minimal number of people in each school/college/division will have access to this form (e.g., you along with one other person who will handle data entry or serve as backup). If you complete the steps below and don't hear back in two weeks, please follow up as indicated in the form (likely with [baosecurity@uoregon.edu](mailto:baosecurity@uoregon.edu)).

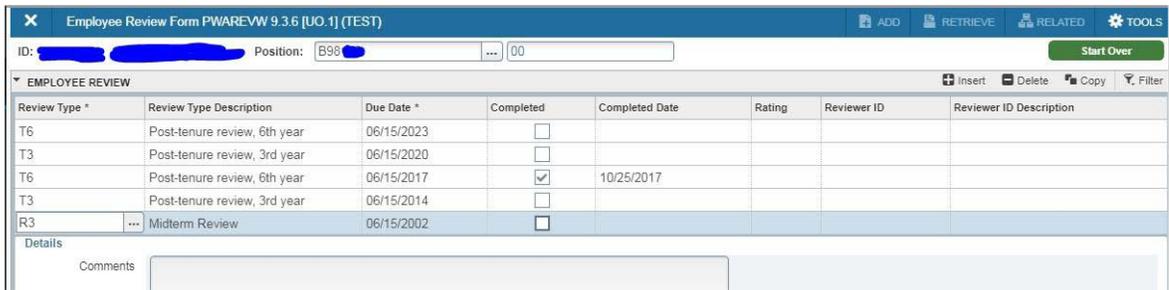
1. Go to <https://forms.uoregon.edu/> (you'll need to log in)
2. Scroll down to the "Banner" subsection of the Business Affairs forms section (or select it in the "Choose a Category" dropdown)
3. Open and complete the "FIS/HRIS/AR User Profile" form:
  - Fill out the appropriate fields:
    - **Purpose:** Select "Add FIS/HR/AR job functions"
    - Fill out the **Employee Info** section
    - Under **HRIS Job Functions** select "Other HR Job Function" and type 'PWAREVW' in the text box
    - Click **SAVE**
  - On the **Signature Block:** Edit the Dean/Director and add the appropriate approver.
  - Click **Send Document**
  - **Sign** document; it will then be sent to the approver.
  - The form is fully submitted when the "Signature Complete" message appears at the top of the screen.
4. When your approver signs off, you will get a "Signing complete" email from [forms@uoregon.edu](mailto:forms@uoregon.edu).
5. The form will route to Banner Security, who will confirm with HR that your access should be granted.

## Using PWAREVW

### Entering a New Review

Here are the steps for adding and maintaining reviews in Banner:

1. Log in to Banner.
2. Navigate to the PWAREVW page.
3. In the **ID** field, enter the 95# of the faculty member whose record you are updating. If you do not know the 95#, you can search for it from the **ID** field, as in other Banner screens.
4. The primary position will default into the Position and Suffix fields. Make sure this is the correct position number for the faculty position, and not an admin position, etc.
5. Click Go. Here, you'll enter and maintain review due dates based on the University's [professional evaluation schedule for TTF \(https://provost.uoregon.edu/ttf-evaluation\)](https://provost.uoregon.edu/ttf-evaluation), or the [review guidelines applicable to career faculty \(https://provost.uoregon.edu/career-faculty-evaluation#contractrenewal\)](https://provost.uoregon.edu/career-faculty-evaluation#contractrenewal) taking into account any variations due to tenure credit in the offer letter or other approved variations from the standard review schedule.



Banner screen PWAREVW

6. To enter a new review, click “Insert,” and select a review type from the menu in the Review Type field.
7. You can also type the review type code directly in the field, if you know it. The review types we use are:

Code	Definition
R1	Annual Review
R3	Midterm Review
TE	Tenure Expected Date
TR	Tenure Required Date
TF	Promotion to Full Professor
T3	Post-tenure review, 3 <sup>rd</sup> year
TO	Post-tenure review 3 <sup>rd</sup> Year Formal Review
T6	Post-tenure review, 6 <sup>th</sup> -year
C1	Annual review, career faculty first three years
C3	3 <sup>rd</sup> -year review, career faculty
CP	Career Promotion Review
CE	Career Continuous Employment Review

**Note that there are many more codes available in Banner; be careful to use only codes from the table above. In particular, make sure you’re using TE for Tenure Expected and TR for Tenure Required, rather than a similar-sounding option.**

See the section below titled “Review Type Conventions” for more information on when and how to use each review type.

8. In the **Due Date** field, enter the date 15-JUN-20XX<sup>2</sup>, with 20XX being the year in which the review is due (i.e., 2023 for 2022-23). The June 15 date does not appear in reports, but is used as our data entry convention.
9. You may use the **Comments** field to note the circumstances around a non-standard review schedule, or to store other information that might be useful. For example, for a Tenure Expected Date, you might write “Has x years of tenure credit.”

<sup>2</sup> For the School of Law, which runs on the semester system, this date will be 15-MAY-20XX.

- a. Note that the Comments field may eventually appear in Cognos reports. Please keep comments clear, concise, and appropriate for a general audience. **Do not use the Comments field to record results of a review.**
  - b. It's helpful if you put your DuckID and the date you've entered a comment, for example, "No annual review in 2019 due to leave without pay. –jsmith 8/14/18".
10. **Do not use** the Rating or Review ID fields.
  11. Repeat these steps for all reviews you're entering for this faculty member.
  12. Save your changes with the F10 key or the Save button in the lower right corner of the screen.

### Editing or Deleting a Review

Follow these steps as you become aware of approved changes to a faculty member's review schedule, or if you need to make corrections.

1. Log in to Banner.
2. Navigate to the PWAREVW page.
3. In the **ID** field, enter the 95# of the faculty member whose record you are updating. If you do not know the 95#, you can search for it from the **ID** field, as in other Banner screens.
4. The primary position will default into the Position and Suffix fields. Make sure this is the correct position number for the TTF position, and not an admin position, etc.
5. Click Go.
6. To delete a review, click in the row and delete the record.
7. To edit the due date for a review, you can edit the **Due Date** field without deleting it.
8. Update the Comments field as useful.
  - a. Note that the Comments field may eventually appear in Cognos reports. Please keep comments clear and appropriate for a general audience. **Do not use the Comments field to record results of a review, or personal information.**
    - i. Appropriate example: "Tenure clock extension to 2023 approved 5/12/19. –jsmith"
    - ii. Inappropriate example: "Extension due to childbirth approved 5/12/19."
    - iii. Inappropriate example: "Negative annual review; instructed to increase research productivity to be viable for tenure."
  - b. It's helpful if you put your DuckID and the date you've entered a comment, for example, "No annual review in 2019 due to leave without pay. –jsmith 8/14/18".
9. **Do not use** the Rating or Review ID fields.
10. If a review has been marked Complete, **do not change** the date in the Completed Date field or uncheck the Completed box unless all stakeholders are aware of the change, and OtP has approved the change if appropriate.
11. Save your changes with the F10 key or the Save button in the lower right corner of the screen.

## Marking a Review Complete – TTF Annual Reviews and Career Performance Reviews only

### *Responsibility for marking complete*

**The Office of the Provost assumes primary responsibility for marking some reviews as complete. Schools and colleges are responsible for making sure all types review types are marked complete, and in particular are tasked with marking TTF annual reviews and most types of career performance reviews as complete.** See Review Type Conventions below for more information.

### *Instructions*

1. Check the “Completed” box to indicate that a review is complete. The Completed Date field will autofill with the current date. You may change this to a different date (i.e. the date the review was submitted).
2. **Do not use** the Rating or Review ID fields.
3. Save your entry with the F10 key or the Save button in the lower right corner of the screen.

### Review Type Conventions

The table below contains notes on when and how to use each review type.

Code	Definition	Conventions for Use & Notes	Data Entry Responsibility
R1	Annual Review (pre-tenure; see below for career annual reviews)	Include all pre-tenure annual reviews when adding new non-tenured professors in PWAREVW.	Entry and update: Unit Mark complete: Units
R3	Midterm Review (pre-tenure)	Include the midterm/contract renewal review when adding new non-tenured professors in PWAREVW.	Entry and update: Unit Mark complete: OtP/Unit
TE	Tenure Expected Date	Do not use this review type unless the tenure decision is expected to happen earlier than it is required.  Initially, Tenure Expected is the tenure review required date minus years of tenure credit. You should update this as you find out that a faculty member is taking fewer years of credit than allowed in their offer letter.	Entry and update: Unit Mark complete: OtP/Unit

Code	Definition	Conventions for Use & Notes	Data Entry Responsibility
TR	Tenure Required Date	<p>This is the year the faculty member's contract and offer letter state the tenure decision is <b>required</b>. It does not take years of tenure credit into account. Adjustments to this date should only be made after a request has been formally approved via the Office of the Provost/HR.</p> <p>In addition to unit and OtP validation, HR may periodically validate this field against their data and work with schools and colleges to resolve any discrepancies.</p>	<p>Entry and update (only changes when formally approved by OtP/HR): Unit</p> <p>Mark complete: OtP/Unit</p>
TF	Promotion to Full Professor	<p>Use this field as Associate Professors decide to come up for promotion to full Professor.</p> <p>Do not enter this code until faculty member confirms when they will come up for promotion.</p>	<p>Entry and update: Unit (will likely know the year before)</p> <p>Mark complete: OtP/Unit</p>
T3	Post-tenure review, 3 <sup>rd</sup> -year (informal and Full Professors)	<p>Include only the <i>next</i> third-year post-tenure review in the initial upload and when updating PWAREVW following promotion and tenure or promotion to Professor.</p> <p>Do not include the projected date of a third-year post-tenure review for non-tenured faculty. You'll add it after their promotion and tenure decision.</p>	<p>Entry and update: Unit</p> <p>Mark complete: Unit</p>
TO	Post-tenure review 3 <sup>rd</sup> Year Formal Review	<p>If a 3<sup>rd</sup> year post-tenure review is required, update PWAREVW to reflect that it was a formal review at the time it is converted or upon completion.</p>	<p>Entry and update: Unit</p> <p>Mark complete: Unit</p>
T6	Post-tenure review, 6 <sup>th</sup> -year	<p>Include only the <i>next</i> sixth-year post-tenure review in the initial upload and when updating PWAREVW following a promotion and tenure or promotion to Full Professor.</p> <p>Do not include the projected date of a sixth-year post-tenure review for non-tenured faculty. You'll add it after their promotion and tenure decision.</p>	<p>Entry and update: Unit</p> <p>Mark complete: OtP/Unit</p>

Code	Definition	Conventions for Use & Notes	Data Entry Responsibility
C1	Annual Review (career faculty)	Use to schedule and record the annual reviews due during the first three years of career faculty employment.	Entry and update: Unit Mark complete: Unit
C3	3 <sup>rd</sup> -year review (career faculty)	Use to schedule and record the 3 <sup>rd</sup> -year reviews due after the first three years of career faculty employment.	Entry and update: Unit Mark complete: Unit
CP	Career Promotion Review	Use this field as a career faculty member decides to come up for promotion per the policy. Do not estimate, base only on requests from faculty members.	Entry and update: Unit Mark complete: OtP/Unit
CE	Career Continuous Employment Review	Use this field as a promoted career faculty member decides to come up for a continuous employment review per the policy. Do not estimate, base only on requests from faculty members.	Entry and update: Unit Mark complete: OTP/Unit

### Timing of Reviews

See <https://provost.uoregon.edu/ttf-evaluation> and <https://provost.uoregon.edu/career-faculty-evaluation#contractrenewal> for more information on the process and timing for each type of review. If you have specific questions about the timing of reviews, email OtP at [otp@uoregon.edu](mailto:otp@uoregon.edu).

### Data Validation

It is the responsibility of the schools and colleges to validate data in PWAREVW. The Cognos report “**TTF Review: Mismatched & Missing Data**” will help you validate tenure dates against HR’s records. We suggest you run this report after any major data update (adding a batch of new faculty, making yearly updates, etc.). See the Cognos Reporting section below for detailed instructions.

Email [HRops@uoregon.edu](mailto:HRops@uoregon.edu) with any mismatches.

Note: HR does not track expected promotion dates for Career faculty, so there isn’t a data validation report to run for Career at this time.

## Special Situations

Please consult the latest CBA and any MOUs, and see the OtP website for more information on special situations. If you have specific questions, contact [otp@uoregon.edu](mailto:otp@uoregon.edu).

### New faculty

You will not be able to enter review data in PWAREVW for your newly hired faculty until their position numbers have been entered in Banner. Sometimes this doesn't happen until late September, so please make sure you're checking for position numbers and adding reviews as you're able, in order to meet the September 30 deadline.

For new tenure-track and tenured faculty, you'll enter and maintain review due dates based on the University's professional evaluation schedule for TTF (<https://provost.uoregon.edu/ttf-evaluation>), taking into account any variations due to tenure credit in the offer letter or other approved variations from the standard review schedule.

For new career faculty, you'll enter and maintain review due dates based on the 2019 Memorandum of Understanding between the University and United Academics, taking into account variations agreed upon at hire, if any. See <https://provost.uoregon.edu/career-faculty-evaluation#contractrenewal>.

### Tenure credit

When a new TTF's offer letter specifies years of credit toward the promotion and tenure decision, you will enter both the TE (tenure expected) review type and the TR (tenure required) review type, with TE equal to TR minus years of credit.

### Tenure clock extensions

A fully approved tenure clock extension moves the TR (tenure required) date. Units will enter this date upon approval of the tenure clock extension.

### Post-Tenure clock extensions

Exceptions or extensions to post-tenure review schedules must be approved by OtP. Post-tenure review dates (T3, T6) should be adjusted after approval.

## Cognos Reporting

### Cognos Access

If you don't already have Cognos access, you'll need to request access and training to run the reports.

The access process is documented at <https://idr.uoregon.edu/getting-access>. The access form is:

<https://service.uoregon.edu/TDClient/Requests/TicketRequests/NewForm?ID=gpA1hTeuztQ>

For these purposes, you will request "IDR (Cognos) Core Data Report User" access.

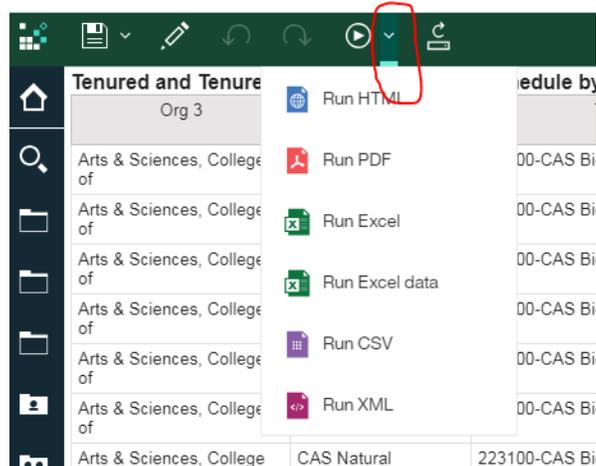
### Reports

There are three Cognos reports that use PWAREVW data: TTF Review: Schedule by Review Type; and TTF Review: Mismatched & Missing Data and for career the Career Review Schedule by Review Type.

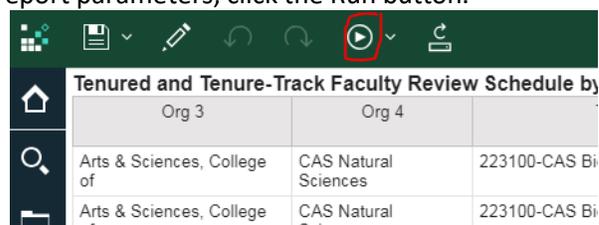
#### TTF Review: Schedule by Review Type

Use this report to see all tenure track faculty reviews due or expected in a selected year or years. To run the report:

1. Log in to Cognos.
2. Navigate to the report: HR Reports → TTF (or Career) Review: Schedule by Review Type
3. Select one or more **Academic Year of Review\***. Starting July 1, "Current Academic Year" is the academic year starting the upcoming fall.
4. Select one or multiple **Review Types\***, or choose "Select all" or "Deselect All."
5. Select the **Org Level 3\*** you would like to see. CAS and College of Design may also select an **Org Level 4**.
6. Enter a **Timesheet Org** (optional).
7. Select "Y" or "N" for Review Complete (optional).
8. Click Finish to view your data.
9. You can export the data to Excel or other formats using the Run drop-down menu.



10. To reset the report parameters, click the Run button.



### TTF Review: Mismatched and Missing Data (run in Fall and Spring)

This report is located in Cognos at Team Content → HR Reports → **TTF Review: Mismatched & Missing Data**. It compares TR (tenure required) dates units have entered in PWAREVW with the tenure date Human Resources maintains in the Banner faculty module.

We recommend you run this report 2-3 times per year, and after any large data update, to check for discrepancies with HR's data.

To run this report

1. Log in to Cognos.
2. Navigate to the report: HR Reports → TTF Review: Mismatched & Missing Data
3. Select your **Level 3 Org**, or you can enter a **Timesheet Org**.
4. Click Finish to view your data. Cognos will generate an Excel document with two worksheets:
  - a. The sheet called "Missing Dept Review Data" lists untenured TTF for whom you have not entered a TR (tenure required) date. Please resolve this list by entered a tenure required review for each faculty member.
  - b. The sheet called "Mismatched Dept Review Data" lists untenured TTF for whom the date TR (tenure required) date you entered in PWAREVW does not match HR's records. Please work with HR Operations ([hrops@uoregon.edu](mailto:hrops@uoregon.edu)) to resolve these discrepancies.

**Tenure Track Faculty: Tenure Review Mismatched and Missing Data from Department Tracking**

Runs to Excel - Results will display on two tabs

Select a Level 3 Org:

- 120000 - Office Provost and Academic Affairs
- 221000 - College of Design
- 222000 - Arts & Sciences, College of
- 224000 - Honors College
- 225000 - Business, College of
- 226000 - Education, College of
- 227000 - Journalism & Communicatn, School of
- 228000 - Law, School of
- 229000 - Music and Dance, School of

Enter a Timesheet Org (optional):

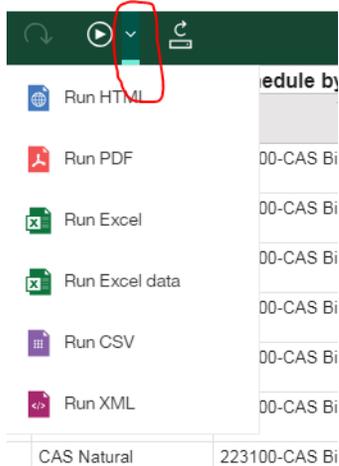
[Report Help](#)

*Mismatched & Missing Data report prompts*

### Career Review: Schedule by Review Type

Use this report to see all career faculty reviews due or expected in a selected year or years. To run the report:

11. Log in to Cognos.
12. Navigate to the report: HR Reports → Career Review: Schedule by Review Type
13. Select one or more **Academic Year of Review\***. Starting July 1, “Current Academic Year” is the academic year starting the upcoming fall.
14. Select one or multiple **Review Types\***, or choose “Select all” or “Deselect All.”
15. Select the **Org Level 3\*** you would like to see. CAS and College of Design may also select an **Org Level 4**.
16. Enter a **Timesheet Org** (optional).
17. Select “Y” or “N” for Review Complete (optional).
18. Click Finish to view your data.
19. You can export the data to Excel or other formats using the Run drop-down menu.



20. To reset the report parameters, click the Run button.

