# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table of Contents</td>
<td>1</td>
</tr>
<tr>
<td>AAUP Portfolio Manual</td>
<td>2</td>
</tr>
<tr>
<td>Candidates</td>
<td>3</td>
</tr>
<tr>
<td>Submitting a Portfolio to Interfolio</td>
<td>4</td>
</tr>
<tr>
<td>Combining, Modifying and Bookmarking PDFs - Adobe Acrobat Tutorials</td>
<td>14</td>
</tr>
<tr>
<td>Reviewers</td>
<td>15</td>
</tr>
<tr>
<td>Reviewing a Portfolio Submission in Interfolio</td>
<td>16</td>
</tr>
<tr>
<td>Committee Chairs, Deans or Provost</td>
<td>25</td>
</tr>
<tr>
<td>Interfolio Instructions for Committee Chairs, Deans, and the Provost</td>
<td>26</td>
</tr>
</tbody>
</table>
Submitting a Portfolio to Interfolio

Interfolio is a secure, user-friendly interface that allows candidates to quickly and easily assemble a packet of materials for their review and submit these materials online. This article explains what to expect as the candidate of a review conducted using Interfolio's Review, Promotion & Tenure service.

Please refer to the SB: 1415-9 Revisions to Senate Bill03/04-1 Bill Clarifying the Criterion and Procedures for Renewal, Tenure, and Promotion Evaluation and Professional Assessment of AAUP Bargaining Unit Members located in the University Senate SharePoint site.


Interfolio support is available at help@interfolio.com or by calling (877) 997-8807 (press option 2), Monday - Friday, 9 am - 8 pm Eastern Time.

The Basics

- Key Terms within Review, Promotion, and Tenure
- Signing in to Interfolio
- Dashboard overview

Case preparation and submission

- Dossier Overview and Collections
- When and How Is My Case Created?
- Using Guidelines and Collections
- View your packet instructions and requirements
- Accepting Your Active Packets
- View Your Case
- Creating Your Portfolio
- Previewing Your Portfolio
- Organizing Your Portfolio
- Submitting Your Candidate Packets

For additional information regarding:

- Accepted file types and document types, please visit the Interfolio Help Center
- Your Dossier, please visit Interfolio’s Help for Your Dossier
- Interfolio Review, Promotion & Tenure, please visit Interfolio’s Help for Interfolio Review, Promotion & Tenure

Key Terms within Review, Promotion, and Tenure

- **Review, Promotion & Tenure (RPT)**
  Interfolio Review, Promotion & Tenure is an online platform for carrying out formal faculty reviews in a shared governance context, built to help academic institutions ensure that these processes are transparent, equitable, efficient, and well-documented.

- **Cases**
  The building blocks of the RPT module that allow administrators to create standardized, repeatable processes for all review types at their institution, colleges, schools, and departments. Templates can be created centrally or copied down to specific unit for customization.

- **Packet**
  The collection of materials by which a candidate is being reviewed (documents and other files). The packet is divided into sections which can be worked on and submitted independently of one another. All materials submitted in the packet will be copied to the candidate’s Dossier for record keeping.

- **Dossier**
  A tool for all faculty to store and manage job, fellowship, and promotion or review documents in one place. The Dossier will act as the central archiving tool for your candidate’s materials. All information submitted for a review will be copied into the faculty Dossier for archiving or reusability purposes. You Dossier is private and portable, meaning it cannot be seen by your institution and it is yours to keep even if you change employment.

Signing in to Interfolio

All full-time faculty members may access their account by logging into Eastern’s Office 365 portal page or you can also go to www.interfolio.com.

From **Office 365 portal page**:

Log into Eastern's Office 365 portal page (https://www.office.com/apps?auth=2&home=1) and search for Interfolio in the search bar at the top of the screen. Once found, click on the icon.

From **Interfolio.com**: 
1. Click on Partner Institution.

![Partner Institution](image)

2. Start typing Eastern Connecticut in the search field and choose Eastern Connecticut State University from the list.

![Sign in through your institution](image)

3. Once Eastern Connecticut State University is selected click Sign In.

![Sign in through your institution](image)

Note: You have both an institutional account and a personal Dossier account. Your Eastern institutional account is where your case resides and where you submit your portfolio for review. Your Dossier acts as the central archiving tool for your candidate's materials.

![Hi Jane, Where do you want to go?](image)

Dashboard

A. Navigation Menu: Expand or collapse the menu.
B. Packets: View active and completed packets here.
C. Cases: If you are on a committee, the cases you are assigned will appear here.
D. Account Options: Access your dossier or RPT account Complete your user profile find our help site or sign out of your account
E. Action Items: This is when your packet is due you must submit before this date
F. Account Options: Access your dossier or RPT account Complete your user profile find our help site or sign out of your account
Under your Account Options you can:
- Access your dossier or Eastern's RPT account
- Complete your user profile
- Find Interfolio's help site
- Sign out of your account

Dossier Overview and Collections

Your Personal Dossier

Interfolio Dossier is an online platform for scholars to collect and curate scholarly materials, request and receive confidential letters of recommendation, and prepare for upcoming evaluations. You can also share your Dossier materials (with the exception of the letter of recommendation) and your collections of materials with other users at your institution. Your Dossier never expires and Interfolio will store your documents indefinitely.

Note: Your Dossier is private and cannot be seen by your institution.

To Access Your Dossier

Select your name at the top right hand corner of the screen and then select "Interfolio Dossier."

Your browser doesn't support video. Please download the file:

The Dossier Dashboard

A. Navigation Menu: Expand or collapse the menu.
B. Deliveries: If you have used your dossier to send materials to external applications or have used Interfolio faculty search to apply to positions in the past those applications and records can be found here.
C. Letters: Letters of recommendation that you have asked others to write and requests for letters of recommendation that you have received from others will appear here.
D. Materials: You can store a variety of materials in your Dossier account including letters of recommendation, supporting documents such as CV's and cover letters and examples of your writing and research.
E. Collections: You can organize the material in your dossier by creating collections of related materials these collections can be shared with a mentor at your institution for feedback or use when populating a case for review.
F. Shared with me: Materials and collections that have been shared with you for review and feedback will appear here.
G. Account Switcher: Switch back and forth from your dossier to RPT from the account Switcher.
H. Profile: Complete your profile and upload your picture.
Collections

Collections are a way for you to organize your materials in your Dossier to help prepare for your upcoming reviews. You can also share your materials and collections with other users at your institution to review and provide feedback.

Select "Add Collection" to create a new collection of your materials. You can add existing materials or upload new ones from your computer. Once the collection is created you can choose to share it with other users at your institution.

Further Dossier Help Articles

For more information regarding your Dossier, click here.

To learn more about creating a collection of your materials, click here.

When and How Is My Case Created?

Since Eastern uses Interfolio Review, Promotion, & Tenure to conduct reviews online, you will be asked to submit a packet of review materials through Interfolio. Before you begin, an administrator will create a case for you that includes instructions for submitting your packet with all the required documents and forms. The cases are created according to the review cycle dates as noted in Eastern's AAUP contract agreement. You will be notified that your case is ready via email.

When you receive the notification email you can select "View Case" in your email.
When you select “View Case” in this email you will be taken to your Interfolio account which you will use to collect and submit materials for your packet. If you already have an Interfolio account, the “View Case” button will take you to your account dashboard. Note: Your Interfolio account uses O365 user Eastern credentials.

Preparing For Your Next Review using Guidelines and Collections

Guidelines Help Article

To learn more about using Guidelines to create a collection, click here.

View your packet instructions and requirements:

Accessing Your Active Packets

Once a case has been created for your review by an administrator, you will receive an email notification. Select “View Case” from the notification or log in to your Interfolio account to be taken to your active packet.

Access your case by clicking “View Case” in the email that was sent to notify you that your case was ready.

Or access your case by signing into your Interfolio Institutional account.
You might be presented with the options below: your institutional account, Eastern Connecticut State University, will bring you to your case and the Dossier is your personal online file repository.

You have both an institutional account and a personal Dossier account. Select your institutional account when prompted to access your case.

View Your Case

You should see an Action Item for this review appear on you Dashboard as well as within your Packets option on the navigation menu. Click the link to “Your Packets” from the navigation bar, or use the link in your homepage action items.

*Not seeing it? If you do not see this in your navigation bar, you might be on the Dossier page, switch accounts using the account menu at the top right of the page.

Creating your portfolio

1. Select the packet you want to work on

Tip: You can view past packets in the section below the Active Packets

2. You will see an “Overview” page listing the required materials and forms you will need to add to your packet. Click “View Instructions” to read instructions provided by your institution for assembling and submitting your packet

Your packet will likely be divided into sections, each with a list of materials you will need to upload in order to complete each section. If a due date has been set, you will also see the due date. Each section of the packet can be submitted once all requirements for the section have been met.
3. Add files to satisfy packet requirements:
   a. Click the "Edit" button for the section to which you want to add your files
   b. Click "Add" next to the requirement
   c. On the "Choose Existing" tab you can add existing files you have already uploaded to your Dossier
   d. Or you can add new files including video and webpages:
      When uploading files, make sure you give the materials in your packet a meaningful title because reviewers will see the titles you provide as bookmarks to the left of the page when reviewing your documents. By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.
You can add files from packets you have submitted for previous reviews run through RPT:

Or, you can add files from collections you have created in your Dossier:

If you need to edit or replace a document, click the "Edit" action.

You can edit the title of the file, or click "Replace" to choose a new file to replace it.

**Previewing Your Portfolio**

1. You can preview completed packet sections or your entire packet before submitting. You can preview how your packet will appear to reviewers. The preview shows exactly how the packet you are submitting will appear to your committee. Click "Preview Packet" at the top right of the page.

You can click to select multiple sections and preview the selected sections in the document reader.
You can also preview individual sections of the packet.

Organizing Your Material

Drag-n-drop required documents on the packet tab:

- You can move one or more fulfillments from one requirement to another
- You can reorder fulfillments within the same requirement
- However, you can't move or rearrange fulfillments in a locked requirement

Locked Sections

If a section is labeled as "Locked," this means your institution has opted to restrict editing after submission. Please contact an administrator at your institution if you have questions about a locked section.

Submitting Your Candidate Packets

It is possible to submit sections individually at different times, however, we suggest you wait to submit your portfolio until you have completed all the requirements in all the sections and then submit all the sections at once.

When you submitting your portfolio, if a section doesn't have the required number of materials, you will see a window with a message that about missing items needed to submit:

When submitting a single section that meets the required number of materials, you will see a confirmation message shown below:
After you successfully submit a section, you will see a confirmation notice in lower left corner of browser indicating that the section is now available to the appropriate committee members for review.

NOTE: Interfolio have also taken measures to prevent you from adding more than the required number of documents for a given document requirement before submitting your packet. When you add more documents than the required number, the number added changes color and is bolded to draw attention to the error.

If you try to submit a section with too few or too many materials for the given requirements, you will see a message indicating if the issue is too many or too few requirements. With the text: "You can submit the section once you have corrected any issues and added materials to meet the requirements for the section."

Further Candidate Experience Help Articles

- To learn more about your experience as a candidate and completing your packet, click here.
- For more help on using Collections from your Dossier to satisfy packet requirements, click here.
- For the full Candidate’s Guide to RPT, click here.
Combining, Modifying and Bookmarking PDFs - Adobe Acrobat Tutorials

The following link contains information from Adobe about modifying pdf files using Adobe Acrobat DC.

This article requires the full version of Adobe Acrobat DC (not Acrobat Reader). All university-owned Windows computers have the main Adobe Creative Cloud application installed, which manages the individual Adobe applications. If Acrobat DC is not on your machine, you may download and install it from the Adobe Creative Cloud Application using the steps in Article 467: Installing Adobe Creative Cloud Applications. Additionally, faculty and staff have home use rights and may install the applications on their personally owned machines. There is no cost, if at any point in the process, you are asked to pay, please review the steps and try again.

Adobe Acrobat DC

- Add, replace, rotate, delete, and move pages in a PDF using Adobe Acrobat DC

- Combine multiple files into a single PDF with Adobe Acrobat DC.
  You can combine multiple PDF documents or a wide variety of file types, including spreadsheets, images, and emails.

- Page thumbnails and bookmarks in PDFs with Adobe Acrobat DC.

- Extract a single page or multiple pages from a PDF file using Adobe Acrobat DC.

- Convert Microsoft Word, Microsoft Excel, and Microsoft PowerPoint documents to PDF.

- Acrobat DC tutorials: more how-to videos and instructions regarding Adobe Acrobat DC can be found at link below.
  https://helpx.adobe.com/acrobat/tutorials.html
Reviewing a Portfolio Submission in Interfolio

Interfolio is a secure, user-friendly interface that allows candidates to quickly and easily assemble a packet of materials for their review and submit these materials online. This article explains what to expect as a reviewer of a portfolio conducted using Interfolio’s Review, Promotion & Tenure service.

Please refer to the SB: 1415-9 Revisions to Senate Bill 03/04-1 Bill Clarifying theCriterion and Procedures for Renewal, Tenure, and Promotion Evaluation and Professional Assessment of AAUP Bargaining Unit Members located in the University Senate SharePoint site: https://myeasternct.sharepoint.com/Senate/Shared%20Documents/Commonly%20used%20documents/SB-1415-9.pdf?search-teaching%3Dand%3Dteach

Interfolio support is available at help@interfolio.com or by calling (877) 997-8807 (press option 2), Monday - Friday, 9 am - 8 pm Eastern Time.

The Basics
- Key Terms within Review, Promotion, and Tenure
- Signing in to Interfolio
- Dashboard overview

Case Review
- View and Manage Your Case List
- Filter the list
- Read and Evaluate Case Packet Materials Using the Document Reader
- How to navigate in the viewer

For information regarding accepted file types and document types, please visit the Interfolio Help Center.

Key Terms within Review, Promotion, and Tenure (RPT)

Review, Promotion & Tenure (RPT)
Interfolio Review, Promotion & Tenure is an online platform for carrying out formal faculty reviews in a shared governance context, built to help academic institutions ensure that these processes are transparent, equitable, efficient, and well-documented.

Units
A digital representation of your institutional hierarchy. Within the hierarchy, the different tiers will determine scope. Administrators can be assigned to any given unit. Ex. Institution > School > Department.

Templates
The building blocks of the RPT module that allow administrators to create standardized, repeatable processes for all review types at their institution, colleges, schools, and departments. Templates can be created centrally or copied down to specific unit for customization.

Cases
The lifecycle of a candidate as they progress through a standardized review cycle. You might think of this as a virtual 3-ring binder used to hold both candidate and committee materials for a review.

Packet
The collection of materials by which a candidate is being reviewed (documents and other files). The packet is divided into sections which can be worked on and submitted independently of one another. All materials submitted in the packet will be copied to the candidate’s Dossier for record keeping.

Committees
Groups of users that can review the candidates’ case at a given step of the review process. Committees can be:
- Standing (managed from the central committee tab)
- Ad Hoc (case specific)
- Individual assignment (committee of one).

Dossier
A tool for all faculty to store and manage job, fellowship, and promotion or review documents in one place. The Dossier will act as the central archiving tool for your candidate’s materials. All information submitted for a review will be copied into the faculty Dossier for archiving or reusability purposes. You Dossier is private and portable, meaning it cannot be seen by your institution and it is yours to keep even if you change employment.

User Roles within RPT

Institutional Administrators
Institutional Administrators are the users granted the highest permissions in RPT. Not only can they act as an Administrator for any template or case at the institution (except where recused), but also they are the only users able to control the institutional branding, enable/disable comments and downloads, create a default list of case statuses as well as the voting options for committees.

Administrators
Administrators can access documents, e-mail candidates and committees, and move a case forward or backward. Administrators are the only users who can create templates, forms, and cases for the units to which they have access.

Committee Managers
Committee Managers have the power to move a case either backward or forward after a committee has finished reviewing. In addition, Committee Managers have communication powers within
Committee Members

Committee Members have the most basic permissions within the system. They can view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to.

Signing in to Interfolio

All full-time faculty members may access their account by logging into Eastern's Office 365 portal page (https://www.office.com/apps?auth=2&home=1) and searching for Interfolio in the search bar at the top of the screen or you can also go to www.interfolio.com. Select Log in in the upper right-hand corner.

From Office 365 portal page:

From Interfolio.com:

Start typing Eastern Connecticut in the search field and choose Eastern Connecticut State University from the list.
Once Eastern Connecticut State University is selected click Sign In.

Note: You have both an institutional account and a personal Dossier account. Your Eastern institutional account is where your case resides and where you submit your portfolio for review. Your Dossier acts as the central archiving tool for your candidate’s materials.

Dashboard

A. **Navigation Menu**: Expand or collapse the menu.
B. **Cases**: If you are on a committee, the cases you are assigned will appear here.
C. **Action Items**: Items that are waiting for your participation will appear here.
D. **Packet due date**: This is when your packet is due you must submit before this date the menu
E. **Account Options**: Access your dossier or RPT account Complete your user profile find our help site or sign out of your account
Under your **Account Options** you can:
- Access your dossier or Eastern’s RPT account
- Complete your user profile
- Find Interfolio’s help site
- Sign out of your account

**View and Manage Your Case List**

You will find the list of cases you are evaluating, managing, or administering on the Case List page.

What cases are visible to you: You see all the cases to which you currently have access on the Case List. When a case is moved to a committee you are not on, or workflow step that you have been recused from, the case will no longer appear in your list. Likewise, when a case moves to a committee or step you have access to, the case will become visible.

**Access your list of cases**

1. Select “Cases” from the left hand RPT navigation menu to view a list of all the cases to which you have access
Tip: You can also look for the name of the case you want to view in your list of Action Items. Clicking the name of the case here will take you directly to the case for that candidate.

2. This will open the Case List where the cases you can access will appear listed in a table:

3. To access cases in the list, click on the name of the case you want to view

Filter the list

Click the “Filter” button to open and closes a right-hand drawer where you can select to filter the list by unit, case type, status, and active or closed cases.

Important Note: The available options for filtering the case list are determined by your user role. The screenshots below depict the case list as seen by an Administrator.

- Administrators see filters for Unit, Type, Status, Active or Closed
- Committee Managers see Unit, Type, Status
- Evaluators see: Type, Status
Read and Evaluate Case Packet Materials Using the Document Reader

Interfolio Review, Promotion, & Tenure users can read and annotate case packet materials online using our built-in document reader. Promotion reviews can involve hundreds of pages of packet materials. Our viewer allows committee members to load these materials into their browser, making it convenient to access all materials in one centralized location with no paper involved (unless of course your institution allows downloading and you want to download and print documents). Committee members can also add annotations to materials in a candidate's file, and export those annotations in a PDF file for offline access. This makes it easy to highlight the most important parts of a packet and track and revisit thoughts when evaluating materials.

1. Navigate to your institutional account
2. Select "Cases" from the left-hand navigation menu

3. Click the name of the candidate to open the case page

On the "Case Materials" tab of the case page, click "Read Case" to load all accessible case materials into our document viewer where they can be viewed online. You can also click on the title of a document to open that specific document in the document viewer.

4. The document viewer displays all materials organized by sections. If the pdf contains readable text, you may be able to search it with the "Search PDF" tool.

Packet sections are bookmarked in the column to the left.
Pages in a document are also bookmarked, including section headers in a document.

Videos will also display in the viewer.

Links to Webpages appear in the viewer but open the webpage in a new browser tab.
How to navigate in the viewer

1. The icon below toggles on or off the header bar of the viewer

2. The zoom icons zoom in or out of the displayed document

3. Click the to move back and forth between pages and materials in the viewer

4. Zoom: Move back and forth between documents in the viewer
Interfolio Instructions for Committee Chairs, Deans, and the Provost

This article covers how to:

- Upload the required file (one letter from the DEC, Dean, P&T, or Provost).
- How to upload more than the single required letter file. Note: If you upload your letter via this function it is necessary to designate which file is the Official Letter in the Required Items area of the Case Details Page.

Upload the required file (one letter from the DEC, Dean, P&T, or Provost)

Log in to your Interfolio account. When asked, Where do you want to go? Click Eastern Connecticut State University.

1. From the dashboard click on the case for the individual you are evaluating.

2. On the resulting screen, click on the Case Details tab.

3. On the Case Details page, click on the add button under the Required Items section.

4. Click Browse To Upload.
5. Confirm and edit if necessary the name of the file you are uploading. It should describe what the item is. For example, the DEC letter should have “DEC letter” in its name.

6. Click Add. Note: you have the opportunity to edit the name of the document so that it is descriptive in nature. e.g., DEC-letter-FirstLastName.pdf.

7. When you’ve uploaded your letter, you should see a checkmark - complete designation next to the DEC Letter under the Required Item section.

How to upload more than the single required letter file

Log in to your Interfolio account. When asked Where do you want to go? Click Eastern Connecticut State University.

1. From the dashboard click on the case for the individual you are evaluating.
2. The resulting screen puts you on the Case Materials page, scroll down until you reach the Review, Promotion, and Tenure Documents section.

3. Under Case Materials, click on the chevron to the left of “Review, Promotion, and Tenure Documents” to expand the section if needed.
4. Click on Add File.

5. Upload documents into this section and Save.

Designating the Official Letter

If you have uploaded your letter directly to the Review, Promotion, and Tenure Documents under the Internal Section on the Case Material page, it is necessary to designate which file is the Official Letter in the Required Items area of the Case Details Page.

Further instructions can also be found on Interfolio’s support site: https://product-help.interfolio.com/m/33238