Overview:

Interfolio Review, Promotion & Tenure (RPT) is the system CCSU has selected to assist in the review of promotion, tenure and professional assessment (sexennial) portfolios. It helps make sure that faculty portfolios are in a consistent location for the DEC, deans, P&T Committee and Provost and has been tailored to CCSU's process as outlined in the CSU-AAUP contract and Faculty Senate Guidelines.

Login:

To access Interfolio, click on the link below, then follow the instructions:
- Interfolio login page
- Select "Sign in with Partner Institution"
- Search for "Central Connecticut State University"
- Log in with CCSU email and password

Need Help?

For additional support using Interfolio:

- Contact the CCSU Interfolio Team: interfolio@ccsu.edu
- Online: https://product-help.interfolio.com/
- Support: https://product-help.interfolio.com/contact-us
- Interfolio Instructional Video: Interfolio Candidate Workshop Recording

Table of Contents:

Using OneDrive to Manage Your Materials:

The instructions below outline a method of organizing OneDrive folders holding candidate files for renewal, promotion, tenure, and/or sexennial review. We recommend that you use OneDrive to organize your files and to maintain a coherent folder structure, a more reliable process than uploading folders and documents directly into Interfolio.

Using OneDrive also allows you to begin uploading and organizing your folders and documents before you receive your Interfolio "case" (described below). After you organize and fill your folders on OneDrive, you will add **OneDrive links to Interfolio**. In that way, **Interfolio will serve as the system for submitting and tracking your file through the renewal, tenure, promotion, and/or sexennial process**.

Because your file will ultimately flow to your school's dean, the university-wide Promotion and Tenure Committee (P&T), and the provost, you should follow the standard organizational structure that uses a separate folder for each evaluation area: Load Credit, Creative Activity, Productive Service, and Professional Activity. (Be certain to create these folders on OneDrive with non-editable sharing permissions.)

You should, however, organize the sub-folders within these evaluation categories in whatever way you see fit. For example, you might organize "Load Credit" sub-folders by course or by semester, and you might organize your "Creative Activity" with sub-folders for articles or conference presentations. Whatever organizational method you use, reviewers should be able to track the evidence supporting the arguments made in your narratives.

Accessing OneDrive:

You can access OneDrive using the desktop app or your browser. These instructions are for the browser version:

1) Open your web browser and navigate to https://webmail.ccsu.edu. Log in with your CCSU email address and BlueNet password.

2) Click the App Launcher in the upper left (9 dots), then choose OneDrive:
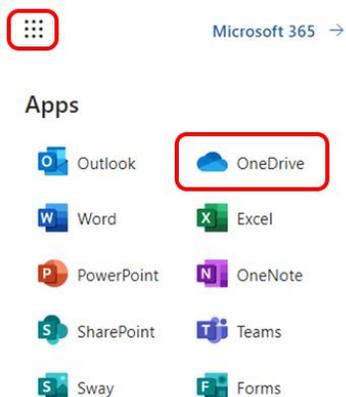
Creating New Folders in OneDrive:

1) After opening OneDrive, you should be brought to the Files section. If not, click on Files from the menu on the left. From the Files screen, click on "New" then choose "Folder" as shown on the right.


2) Name the folder using this preferred format:
   a. **What you are applying for** (<u>R</u>enewal, <u>P</u>romotion, <u>T</u>enure, <u>P</u>and<u>T</u> (if both), or <u>S</u>exennial) **– *Your Name – Your Department***

   b. Example: "**PandT – John Smith – English**" for English Department faculty member John Smith's review for <u>both</u> promotion and tenure. (If only applying for one, list only one.)
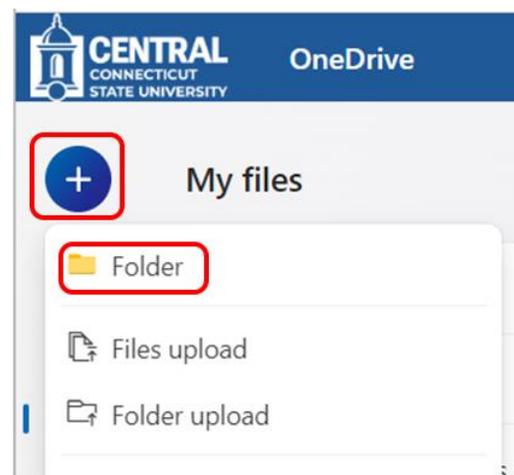
3) Then click Create, and the new folder will appear in the Files list with blue lines to indicate it is a new folder. If you name the folder incorrectly or if you are updating the name for a new year, your folder can be renamed by right-clicking the name and choosing "Rename" from the dropdown menu.
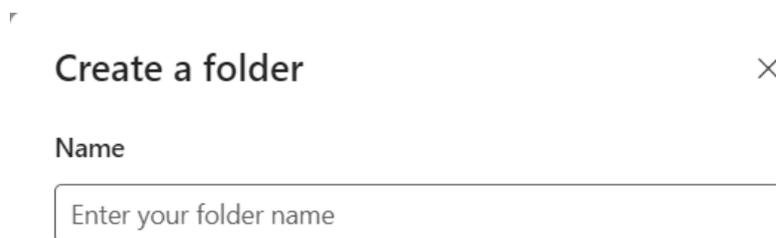
4) To open the folder you created, click on it. From within the folder, repeat the folder creation steps to create 7 folders for the summary documents and evaluation categories.

   a. Adding numbers to the name as shown will keep the folders in order, rather than defaulting to alphabetical order, as shown below:

1. Summary Documents/Dossier
2. Load Credit Activity
3. Creative Activity
4. Productive Service
5. Professional Activity
6. Years in Rank
7. Disciplinary Action

The folder structure for your materials has now been created, and you can begin adding files to the folders, using subfolders as appropriate for your field (similar to how you would use dividers to make sections within a physical binder).

If you encounter errors when naming or adding files, it may be due to restricted file names, types, or sizes. Please review this Microsoft article for information on those restrictions.

Setting Sharing Permissions:

Once you have completed creating your folders and organized your evidence within them, you need to follow these three steps to set up sharing permissions in OneDrive:

1) Select the file or folder you want to share and click on the circle on the left, which will appear highlighted in blue. Then click on the 3 dots on the right then click on "Share".
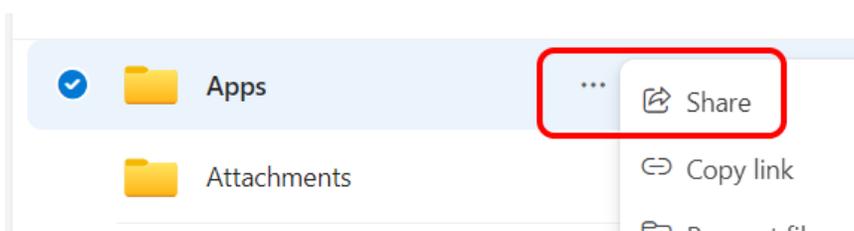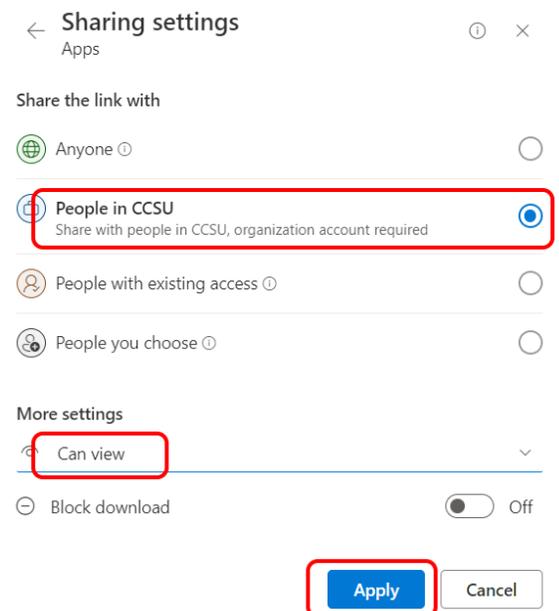
2) BEFORE sharing, change the permissions from "edit" to "view" by clicking on "People in CCSU with the link can edit".

Share "Apps"

Add a name, group, or email

Add a message

People in CCSU with the link can edit.

Copy link   Send
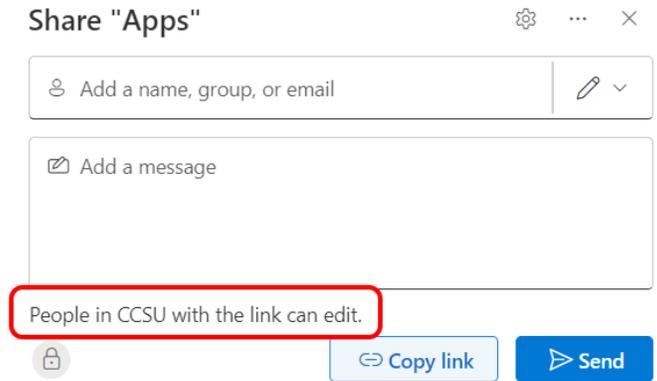
3) Select "People in CCSU"
4) Click on "Can Edit" under More Settings (near the bottom) and select "Can View"
5) Click the "Apply" button.
   These settings allow you to specify who can read your materials but that they **cannot** make any changes. You are choosing that people at CCSU with the link to view your materials, but the link will only be sent to the necessary individuals via Interfolio, so your materials will remain private.

Sharing settings
Apps

Share the link with

Anyone ⓘ

People in CCSU
Share with people in CCSU, organization account required

People with existing access ⓘ

People you choose ⓘ

More settings

Can view

Block download   Off

Apply   Cancel

6) Next, click on "Copy Link" and the link will be copied to your clipboard, ready to be pasted into Interfolio (see "Adding Your OneDrive Links to Interfolio" below)

   NOTE: You should **NOT** send OneDrive links directly to the DEC, Chair, Dean, P&T Committee, or Provost. Instead, follow the instructions below to share the links to the relevant folders via Interfolio.

Share "Apps"

Add a name, group, or email

Add a message

People in CCSU with the link can view.

Copy link   Send
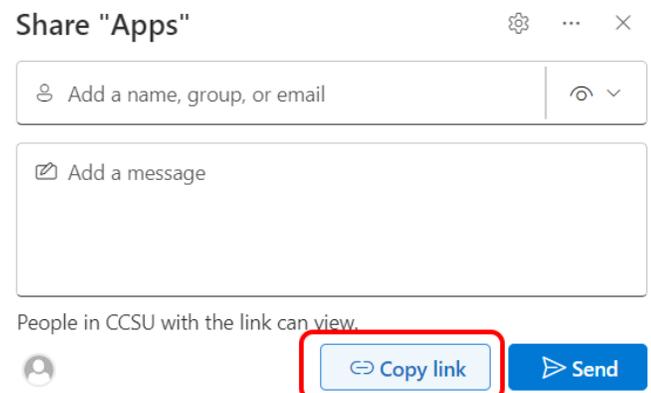
Accessing Your Case in Interfolio:

- If you are submitting a **renewal** or **sexennial** file, you **do _not_ need to request** an Interfolio case. The Provost's Office will automatically create one for you.
- If, however, you are submitting a file for **promotion and/or tenure**, you **need to use** this online P&T Interfolio Request Form to notify the Provost's Office that you need an Interfolio case created.
- Once your case has been created by the Provost's Office, you will receive an email from, sent from "noreply@Interfolio.com." If you have not received the case link, notify your DEC, and they can follow-up with the Provost's Office.

To access your case in Interfolio, click on the link below, then follow the instructions:
- Interfolio login page
- Select "Sign in with Partner Institution"
- Search for "Central Connecticut State University"
- Log in with CCSU email and password
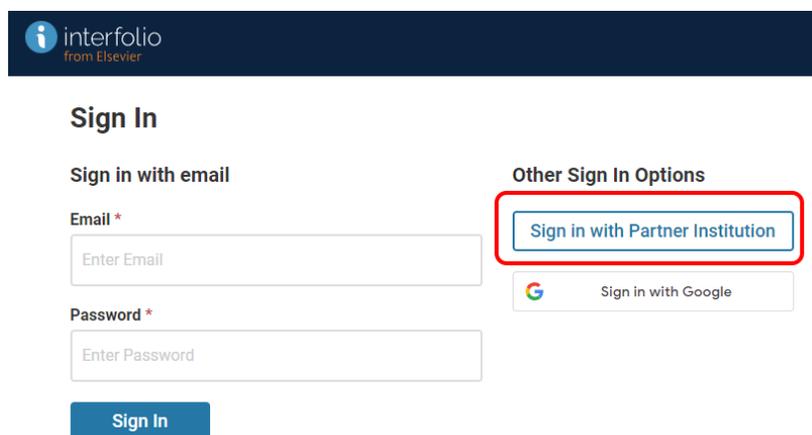
Once you are signed in, select the Central icon:
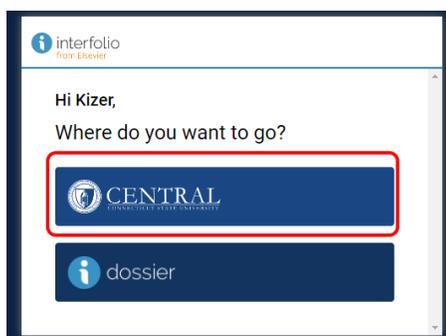
On the Interfolio home screen, you will see your case under "My Tasks." In the example below, there is a promotion packet available for Dr. Burkholder in the Department of Criminology & Criminal Justice:
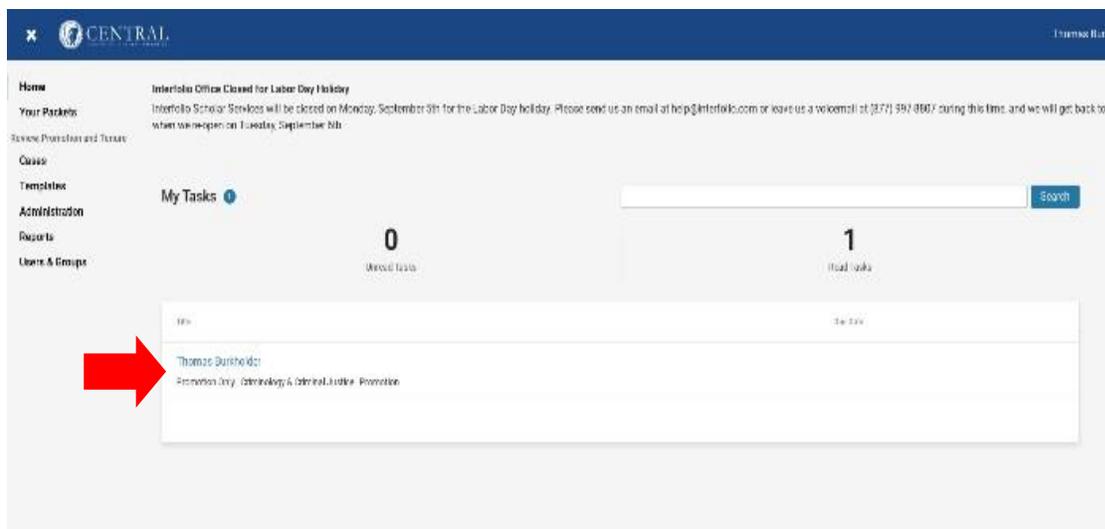
Adding Your OneDrive Links to Interfolio:

You can now **share links to your files and folders via Interfolio**. The following steps will show you how to place links to your OneDrive materials into Interfolio.

1) Click on your name (as shown above) to access your case.
2) Then click on the "Packets" tab and you will see individual tasks to be completed:
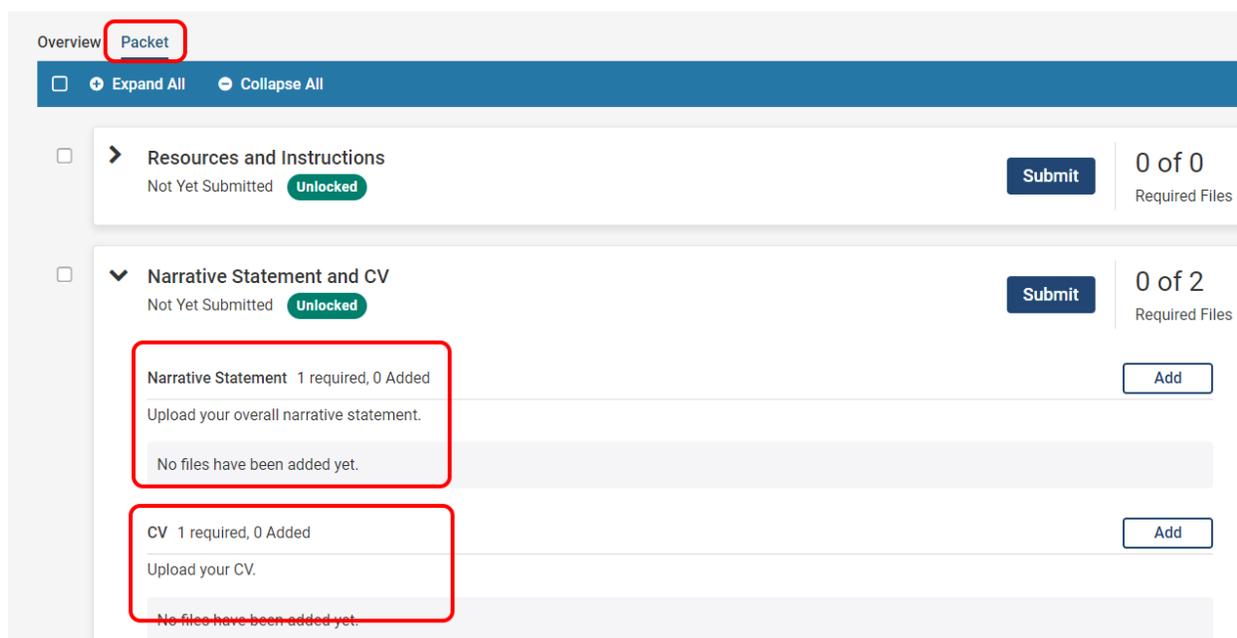
3) To add your materials, navigate to the appropriate section (for example Narrative Statement, shown below) then click on the Add button on the right:

4) Select Add New File, then Webpage. Enter a title, then paste the URL from OneDrive that was copied previously. When done, click Add on the bottom right:

5) The OneDrive link to your Narrative will now appear. You can Edit or Remove the link as desired, using the buttons on the right.

6) Repeat these steps to add the link for each OneDrive folder or file into the appropriate sections in Interfolio. The Supporting Documents area found within each section can be used to add links to any optional materials.

Submitting Your Interfolio Case to Your DEC:

Once you have added all of your OneDrive links to the appropriate sections in Interfolio, submit your Interfolio case using the instructions below.

- NOTE: Once you submit an Interfolio section, you can no longer edit any documents in that section, unless your DEC Chair unlocks it for you (e.g., if you link to the wrong folder/file).
- In addition, your DEC is notified of your submission when you submit the *first* section. Therefore, it is recommended that you wait to submit until ALL sections are complete and you are finished adding materials.
- When your DEC receives notice that your file has been submitted, they should compare your Table of Contents against the files available to them. You should be notified of any discrepancies.

To submit your materials, click on the Submit button on the right of each section:

Removing Sharing Permissions:

You may un-share your OneDrive materials after July 31st. To do so, press the "Share" button from within the main portfolio folder and turn off sharing.

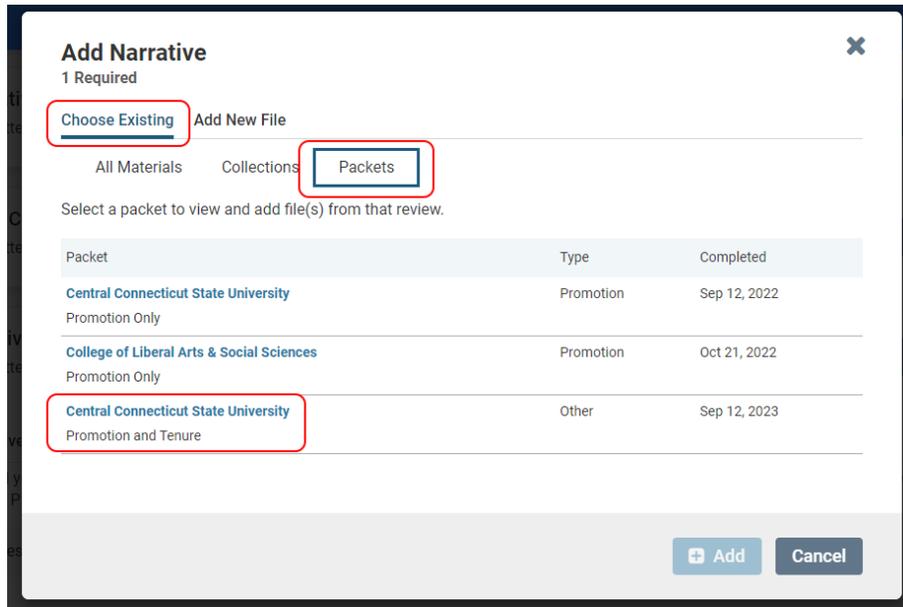## Copying Materials from a Previous Interfolio Case:

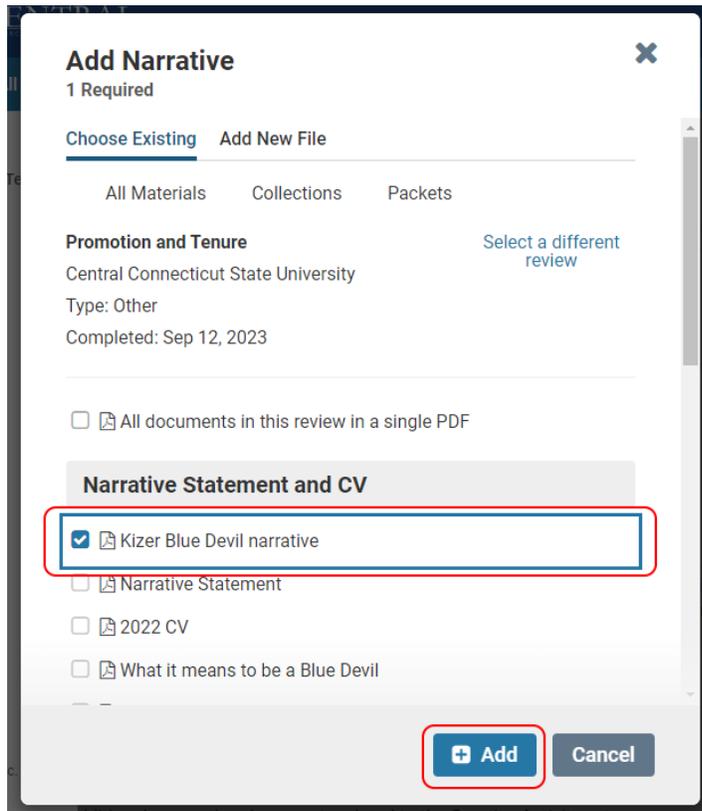To copy materials from a previous case into a new case, follow the steps below:

1) Go into the new case, scroll down to the desired section (for example Creative Activity, as shown below), then click Add on the right:

2) Select Choose Existing then Packets, and click on the packet you want to import from:

3) Select the appropriate document, then Add:

4) The document will now appear in the desired location:

5) You can edit or remove this document, as desired:

6) When ready click Submit:

NOTE: Once you submit, you can no longer edit any documents in this section. Therefore, it is recommended that you wait until ALL sections are populated BEFORE submitting.

Need Help?

For additional support using Interfolio:

- Contact the CCSU Interfolio Team: interfolio@ccsu.edu
- Online: https://product-help.interfolio.com/
- Support: https://product-help.interfolio.com/contact-us
- Interfolio Instructional Video: Interfolio Workshop Recording