

Promotion and Tenure Online Reviewing Platform (PTORP)

Manual for College Liaisons

Resources and Useful Information

- Office of the Vice Provost for Faculty Affairs, Promotion and Tenure Website: <http://vpaa.psu.edu/promotion-and-tenure/>
- **Promotion and Tenure Online Reviewing Platform Website:** https://app.ohr.psu.edu/promotion_tenure
- Within the platform, the **Resources** tab contains additional information.
- All content (candidates, template groups, and documents) is purged from the system on August 1 of each year.
- PTORP is compatible with all browsers EXCEPT versions of Internet Explorer older than 10.0

Responsibilities of the College Liaison

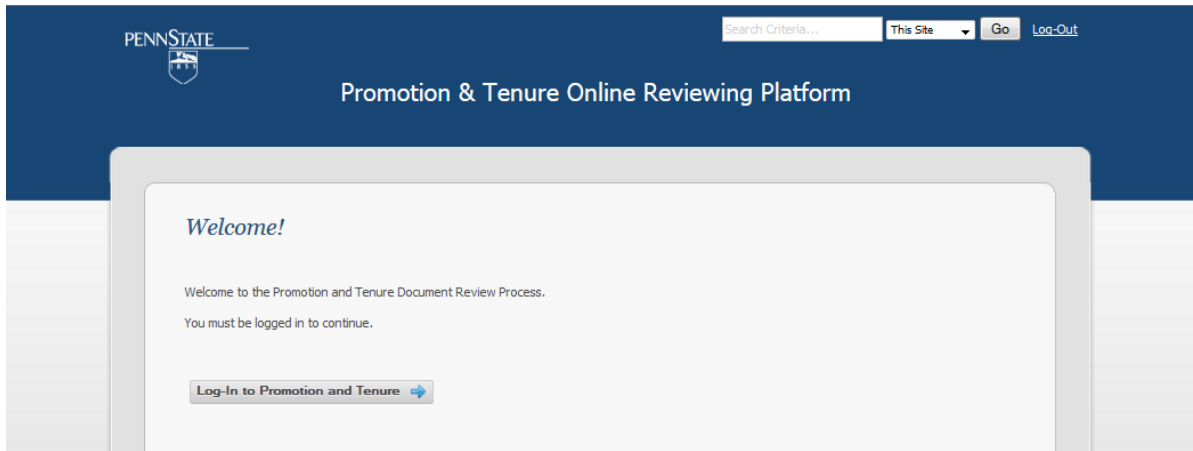
- Adds other College Liaisons as backups if necessary
- Adds additional College Liaisons temporarily if necessary
- Enters all the candidates and at least one department liaison for each department for their College or Campus at the beginning of each P&T cycle
- Opens and closes groups at the College/Campus/Dean/Chancellor levels as appropriate
- Once ALL the unit's Dossiers have been reviewed at ALL levels (College/Campus/Dean/Chancellor) as appropriate and ALL letters and documents have been uploaded, the College Liaison must do a final check of each dossier by clicking on **View Entire Dossier** to ensure it is ready to move to the University Committee. It must EXACTLY match the single paper version that is sent to Central OHR.
- The College Liaison then releases the unit's Dossiers to the University Committee by clicking the **Move Candidate to the University Committee** button on the **View Dossier** page. **IMPORTANT NOTE: Please release all the unit's dossiers to the University Committee AT THE SAME TIME (i.e. consecutively and within minutes of each other).**

Information to assemble before beginning

- A list of all the candidates, their review levels, and at least one department liaison for each department, including Penn State Access Account IDs (e.g., xyz123)

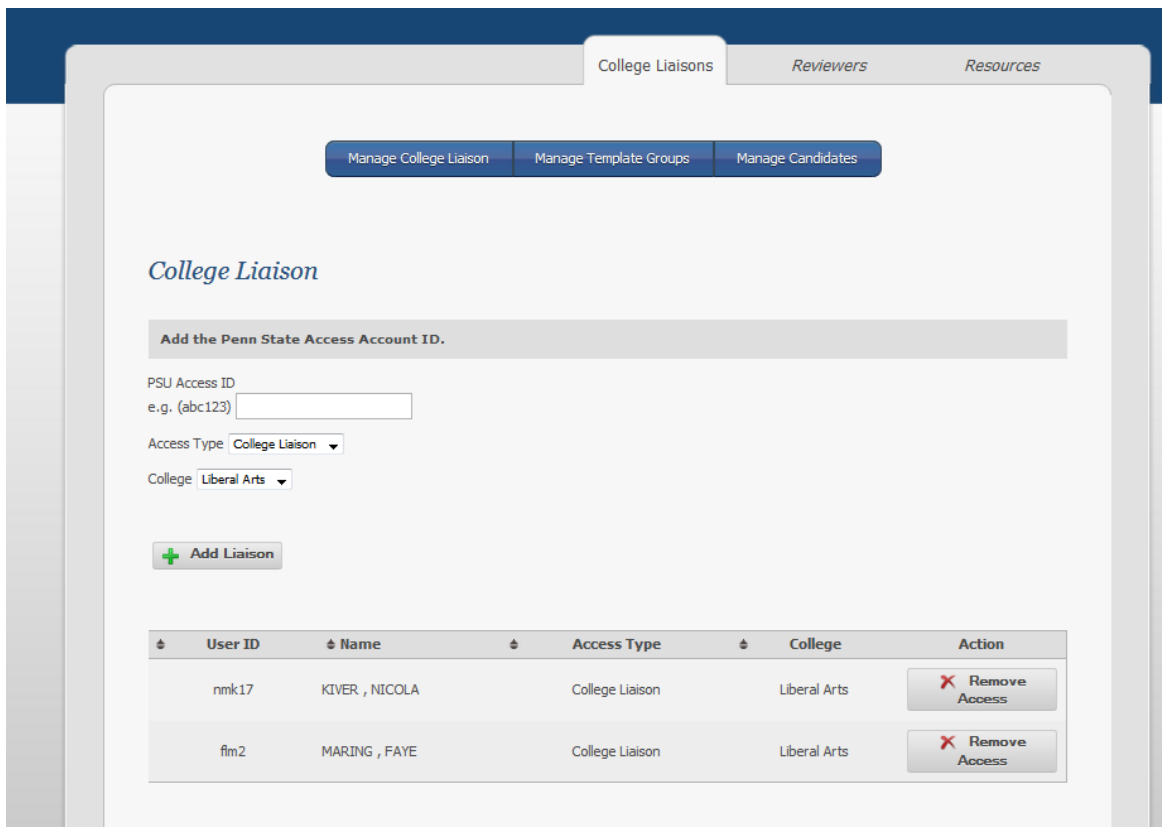
Log In to the Promotion and Tenure Online Reviewing Platform

- Launch a web browser and navigate to https://app.ohr.psu.edu/promotion_tenure.
- Click the **Log-In to Promotion and Tenure** button and login using your Web Access ID and Two-Factor Authentication.



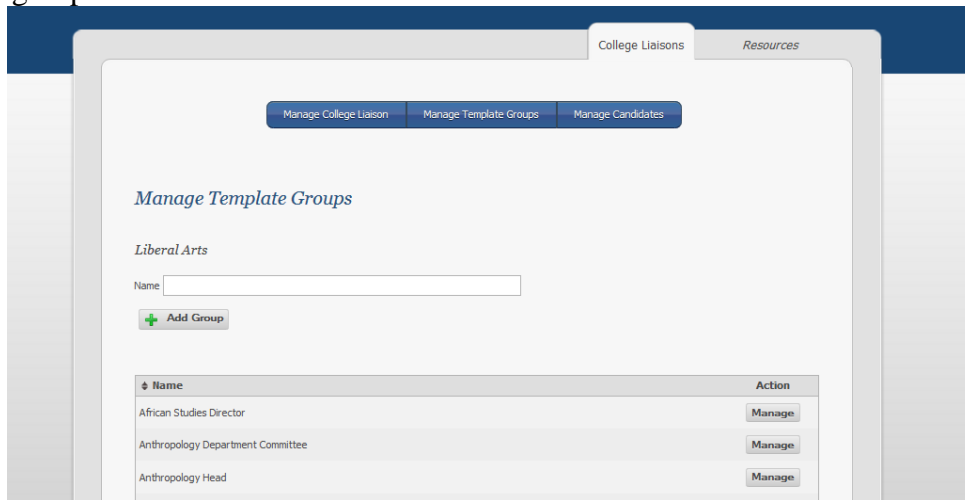
Add a College Liaison

1. Click the **Manage College Liaisons** tab
2. Enter the Penn State Access Account ID of the college or campus liaison you wish to add and click the **Add Liaison** button. The new college liaison will display in the list at the bottom of the screen. You will need to scroll down to see the list



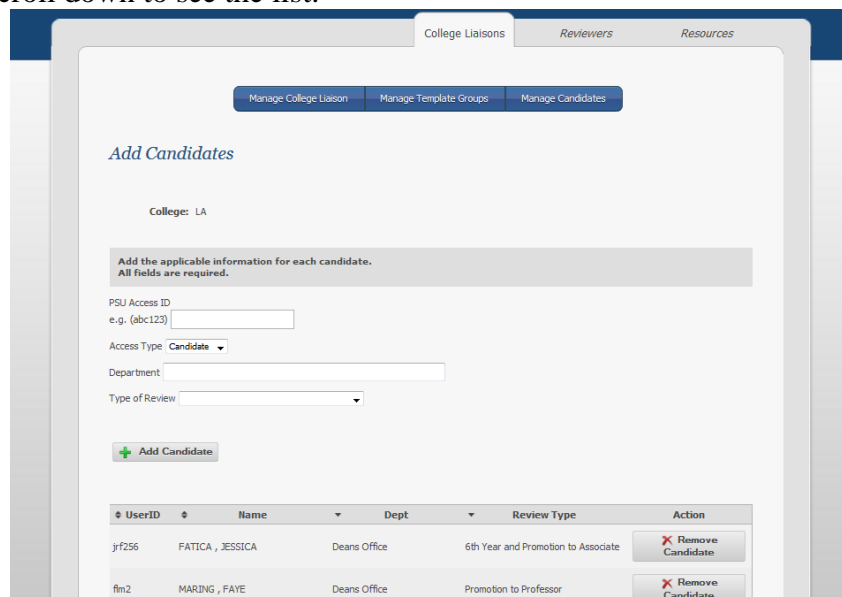
Add Template Groups

1. Click the **Manage Template Groups** button
2. Enter a name for the group
3. Name the group and click **Add Group**
4. The group will appear in the list
5. Click on **Manage** to populate the group with members or to update the name of the group



Add Candidates

1. Click the **Manage Candidates** button
2. Click **Add/Edit/Remove Candidate(s)**
3. Enter the Penn State Access Account ID of the candidate you wish to add, the Access Type, the Department, and the Type of Review and click the **Add Candidate** button. The new candidate will display in the list at the bottom of the screen. You will need to scroll down to see the list.



Manage Candidates

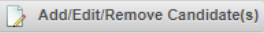
1. Click the **Manage Candidates** button – all the candidates you have added will be appear in the list. You will need to scroll down to see the list. You can sort your candidates in any column where there are arrows. Use ‘shift’ to sort on multiple columns.
2. Click on the **Manage Dossier** button to add or delete documents from the candidate’s Dossier
3. Click on the **Manage Path** button to add or delete review groups, to update the membership of review groups, and to open or close access for review groups to view the candidate’s dossier. If the closed button is dark blue (which it is by default) then the members of that group cannot view the dossier.
 - a. Click on the **Manage Group** button to update group membership or the name of the group. This is also where you can give the group a level number so the groups can be sorted into the order of review
 - b. Notice that next to the **‘Review Path’** column there is a column that states which group (if any) the dossier is currently open to. If the dossier is not open to any groups it will say ‘None’ in this column. If the dossier is open to multiple groups it will state the group with the lowest level number the dossier is open to. This column is sortable to help you check access.
4. Click on the **Manage Liaisons** button to add a departmental liaison. A departmental liaison is a staff member with access to this particular candidate’s record. You must add at least one department liaison for each candidate. You can add multiple departmental liaisons.
5. Use the back arrow to go back to the previous screen at any time

Manage College Liaison | Manage Template Groups | Manage Candidates

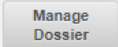

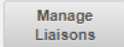
Manage Candidates

College: LA

Click on table column headings to sort. Use "shift" to sort on multiple columns.



Search:

Name	Dossier	Review Type	Review Path	Open to Group	Dept Liaisons	Department
Maring, Faye (flm2)		6th Year and Promotion to Associate		None		Dean's Office

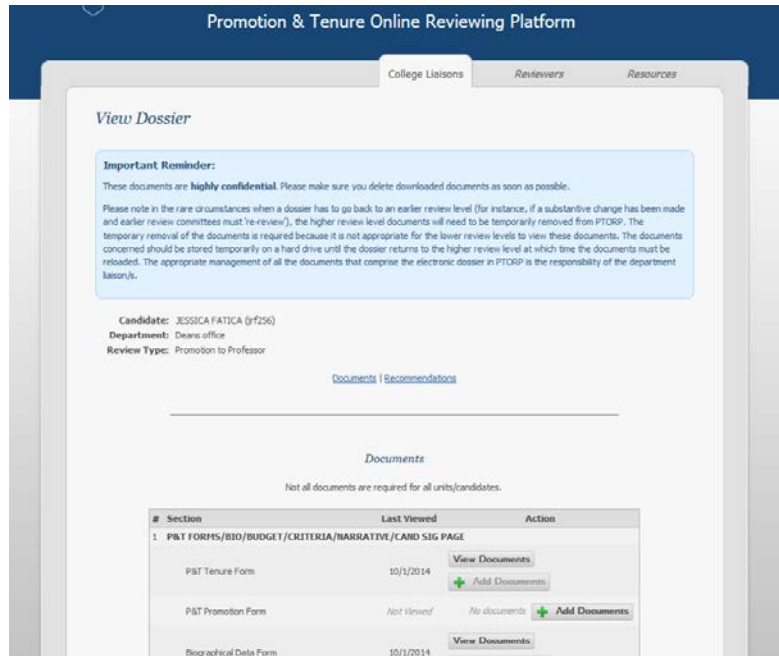
Manage Dossier

1. Click on the **Manage Dossier** button to add or delete documents from the candidate's Dossier
2. Click the **Add Documents** button in the appropriate section to enter the relevant documents under each individual document heading. This will ensure the dossier sorts correctly when it is run as an entire dossier. It also allows reviewers to drill into one section to review if they wish. To add a document:
 - a. Click the **Choose File** button to locate the document you wish to add. All documents must be pdfs
 - b. Browse to find the document
 - c. Click **Upload File**
 - d. **IMPORTANT NOTE** In the three sections that allow multiple documents to be added (Teaching and Learning, Research & Creative Accomplishments, New Factual Information) the documents will appear in alpha order in the dossier (rather than date uploaded order) so please name documents carefully so that they appear in the correct order when the dossier is electronically compiled.
3. Click the **View Documents** to see the specific document/s in that section
4. Click the **View Entire Section** to see all the document/s in that section sorted in the correct order
5. Click the **View Entire Dossier** to see the whole dossier sorted in the correct order
6. **Fixed Term Promotion** – use this section (and this section only) if you are using PTORP for Fixed Term Faculty (Non Tenure Track Faculty) promotions. Enter the whole Dossier as a single document under **Fixed Term Promotion**. Do NOT use this section for any other type of P&T Dossier.



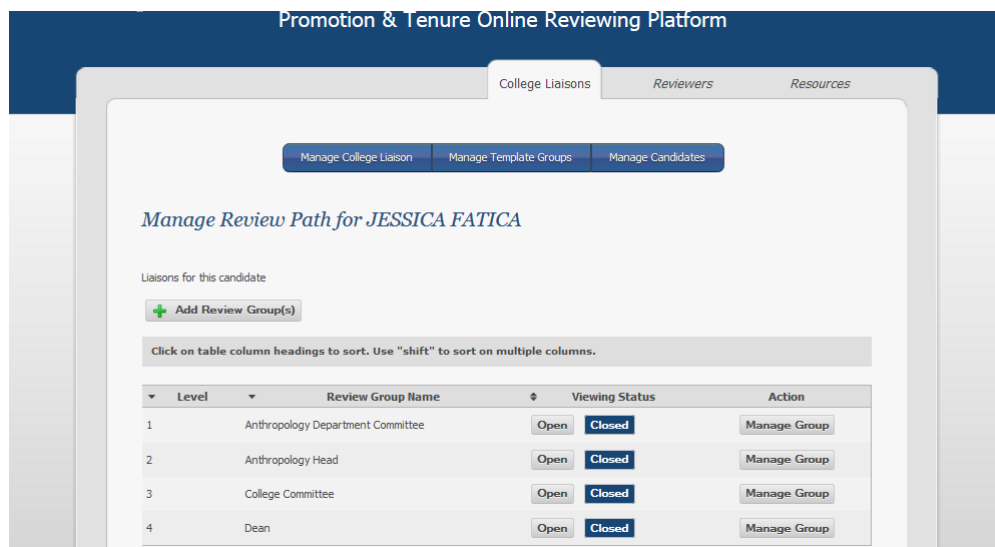
7. Notes:
 - a. if the **Add Documents** button is greyed out, you cannot add further documents to that section. This is because that section must only contain one document. If the document is incorrect and has to be updated, delete the incorrect document and upload the correct document
 - b. in **Sections D (External Letters) and E (Evaluative Statements/Internal Letters)** please be sure to upload the relevant divider page as the first page in the section (even if there are no documents to add). This ensures that the relevant divider page appears when 'View Entire Section' or 'View Entire Dossier' is selected.

- Please note the information contained in the **Important Reminder** section at the top of the page in the blue box



Manage Path

- Click on the **Manage Path** button to add or delete review groups, to update the membership of review groups, and to open or close access for review groups to view the candidate's dossier. If the closed button is dark blue (which it is by default) then the members of that group CANNOT view the dossier.
- Click on the **Manage Group** button to update group membership or the name of the group. This is also where you can give the group a level number so the groups can be sorted into order of review.



Complete Dossier Entry Screen

Not all documents are required for all units/candidates.

#	Section	Last Viewed	Action	
1 P&T FORMS/ BIO/ BUDGET/ CRITERIA/ NARRATIVE/ CAND SIG PAGE				
	P&T Tenure Form	9/26/2016	View Documents	+ Add Documents
	P&T Promotion Form	<i>Not Viewed</i>	View Documents	+ Add Documents
	Biographical Data Form	9/26/2016	View Documents	+ Add Documents
	Budget	<i>Not Viewed</i>	<i>No documents</i>	+ Add Documents
	Criteria Statement - College	9/26/2016	View Documents	+ Add Documents
	Criteria Statement - Department	9/26/2016	View Documents	+ Add Documents
	Narrative Statement	9/26/2016	View Documents	+ Add Documents
	Candidate Signature Page	9/26/2016	View Documents	+ Add Documents
View Entire Section				
A TEACHING & LEARNING/ LIBRARIANSHIP/ PATIENT CARE				
	Teaching and Learning	9/26/2016	View Documents	+ Add Documents
	Librarianship	<i>Not Viewed</i>	<i>No documents</i>	+ Add Documents
	Patient Care	<i>Not Viewed</i>	<i>No documents</i>	+ Add Documents
View Entire Section				
B RESEARCH & CREATIVE ACCOMPLISHMENTS				
	Research and Creative Accomplishments	9/26/2016	View Documents	+ Add Documents
	New Factual Information	<i>Not Viewed</i>	<i>No documents</i>	+ Add Documents
View Entire Section				
C SERVICE				
	Service	9/26/2016	View Documents	+ Add Documents
View Entire Section				
D EXTERNAL LETTERS				
	External Letters	9/26/2016	View Documents	+ Add Documents
View Entire Section				
E EVALUATIVE STATEMENTS/ INTERNAL LETTERS				
	Prior Letters	9/26/2016	View Documents	+ Add Documents
	Secondary Dept/Division/Campus Head Letter	<i>Not Viewed</i>	<i>No documents</i>	+ Add Documents
	Department/Division/Campus Committee Letter	<i>Not Viewed</i>	View Documents	+ Add Documents
	Department Head/Division/Campus Head Letter	<i>Not Viewed</i>	View Documents	+ Add Documents
	College Committee Letter	<i>Not Viewed</i>	View Documents	+ Add Documents
	Dean/Chancellor Letter	<i>Not Viewed</i>	View Documents	+ Add Documents
View Entire Section				

General Information

Use the back arrow to go back to a previous screen at any time

Important Notes

1. When opening and reviewing documents, please be sure to follow best practices for the confidentiality of the documents. They are highly confidential. Please make sure you delete downloaded documents as soon as possible
2. Please note in the rare circumstances when a dossier has to go back to an earlier review level (for instance, if a substantive change has been made and earlier review committees must 're-review'), the higher review level documents will need to be temporarily removed from PTORP. The temporary removal of the documents is required because it is not appropriate for the lower review levels to view these documents. The documents concerned should be stored temporarily on a hard drive until the dossier returns to the higher review level at which time the documents must be reloaded. The appropriate management of all the documents that comprise the electronic dossier in PTORP is the responsibility of the department and college liaison/s.