

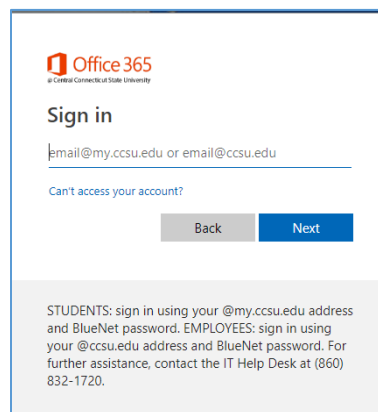
The instructions below outline a method of organizing OneDrive folders holding candidate files for renewal, promotion, tenure, and/or sexennial review. We recommend that you use OneDrive to organize your files and to maintain a coherent folder structure, a more reliable process than uploading folders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

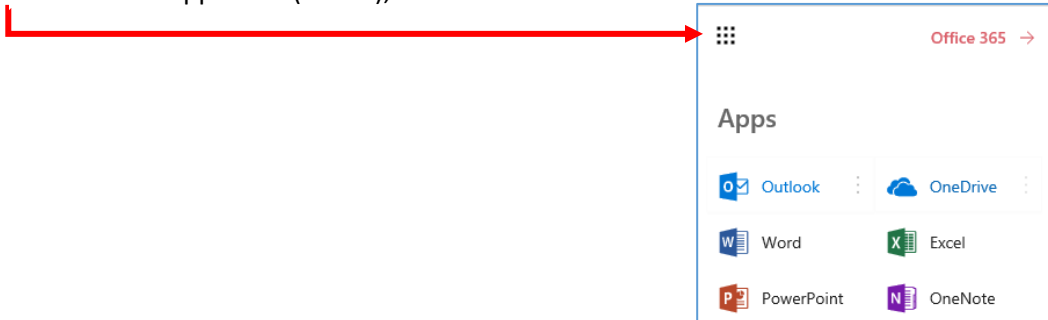
Accessing OneDrive

You can create folders and move materials on your desktop rather than in a browser. All tasks, including sharing, can be completed via the desktop app or in the browser. Consequently, if you already have OneDrive installed on your computer, you may skip this first section and create folders as usual on the desktop.

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.

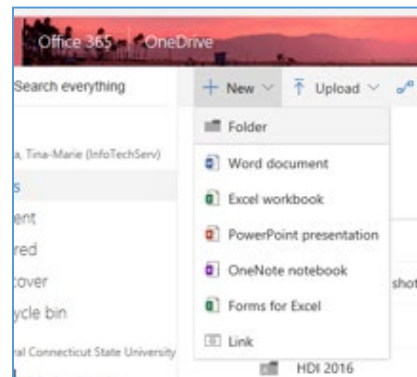


Creating New Folders in OneDrive

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.”

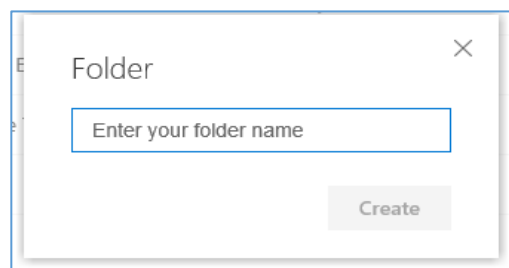
2. Name the folder using this preferred format:
What you are applying for (Renewal, Promotion, Tenure, PandT (if both), or Sexennial) – **Your Name** – **Your Department**

Example: “**PandT – John Smith – English**” for English Department faculty member John Smith’s review for both 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 (see list at right). Adding numbers to the name as shown will keep the folders in order, rather than defaulting to alphabetical order. The folders should end up looking exactly as pictured below.



Files > PandT - John Smith - English					
Name	Modified	Modified By	File size	Sharing	
1. Summary Dossier	About a minute ago	Meyer, Kimberly (Criminol	0 items	Private	
2. Load Credit Activity	About a minute ago	Meyer, Kimberly (Criminol	0 items	Private	
3. Creative Activity	About a minute ago	Meyer, Kimberly (Criminol	0 items	Private	
4. Productive Service	About a minute ago	Meyer, Kimberly (Criminol	0 items	Private	
5. Professional Activity	About a minute ago	Meyer, Kimberly (Criminol	0 items	Private	
6. Years in Rank	About a minute ago	Meyer, Kimberly (Criminol	0 items	Private	
7. Disciplinary Action	A few seconds ago	Meyer, Kimberly (Criminol	0 items	Private	

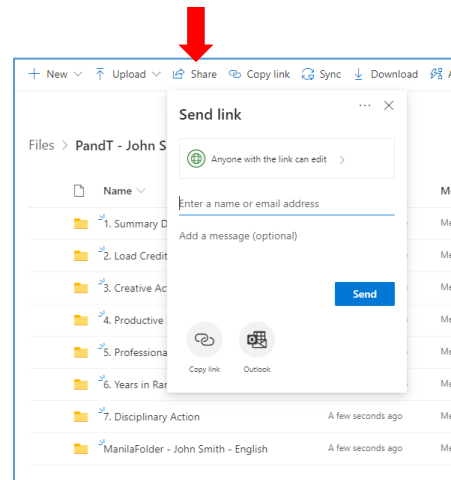
1. Summary Documents/Dossier
2. Load Credit Activity
3. Creative Activity
4. Productive Service
5. Professional Activity
6. Years in Rank
7. Disciplinary Action

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 – see p. 1, paragraph 2 for guidance on these subfolders). 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.

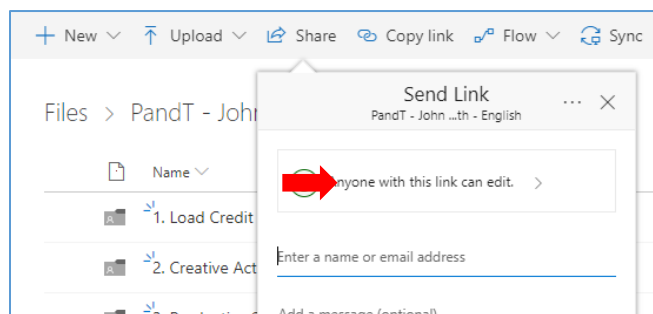
Using Interfolio with OneDrive

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

1. From within your main portfolio folder (“PandT – John Smith – English” from the example above), click the “Share” button. If you are working with OneDrive installed on your computer, right-click your main portfolio folder and choose “Share.” If you are working in the browser, go into the folder you want to share, then click the “Share” button at the top of the screen (see arrow at right).

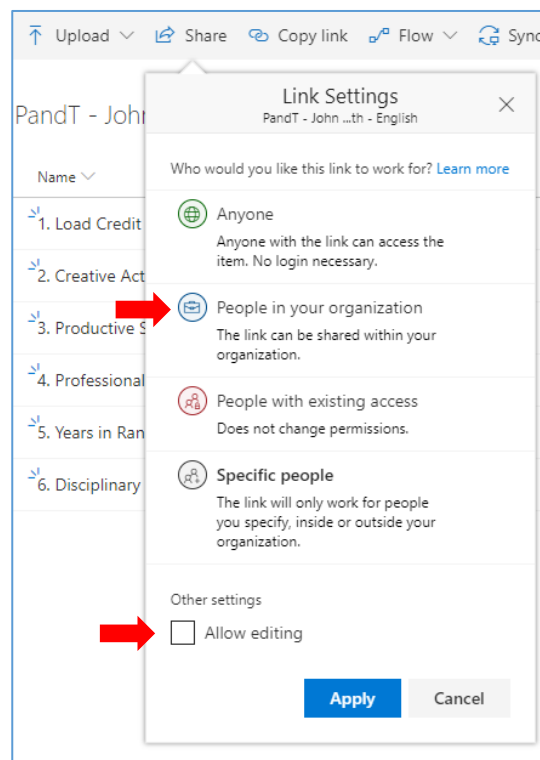


2. Click on the “Anyone with the link can edit” line to update the editing permissions.



3. **Uncheck** “Allow Editing.” Then choose “People in your organization” and 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 can view your materials, but the link will only be sent to the necessary individuals via Interfolio, so your materials will remain private.

You should **NOT** send this OneDrive link 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.



Using Interfolio

Having your “case” (where your materials are uploaded in Interfolio) created:

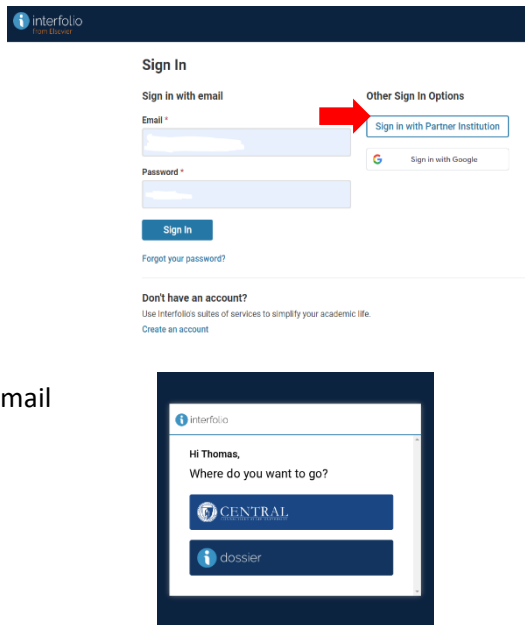
- If you are submitting a **renewal** or **sexennial** file, you **do not need to request** that an Interfolio case be made for you. The Provost’s Office will automatically create one for you.
- If, however, you are submitting a file for **promotion and/or tenure**, you **need to use** [this online P&T 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 Interfolio case link from “noreply@Interfolio.com.” If you have not received the case link, notify your DEC. They can follow-up with the Provost’s Office.

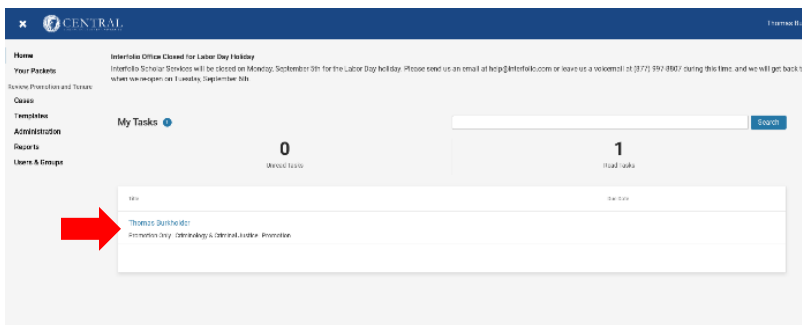
To access your Interfolio case, go to <https://account.interfolio.com/login> and select “Sign in with Partner Institution.”

Enter “Central” into the search bar, and pre-populated options will pop up. Select “Central Connecticut State University.”

- If you are signed into your Office365 account (that is, you signed in via Outlook Web Mail), you will be automatically directed to a screen with two buttons. Select the “Central” button to see the “case” created for you by the Provost’s Office.
- If you are not already signed into your Office365 account, you will need to log-in with your CCSU credentials (the same as your e-mail account).



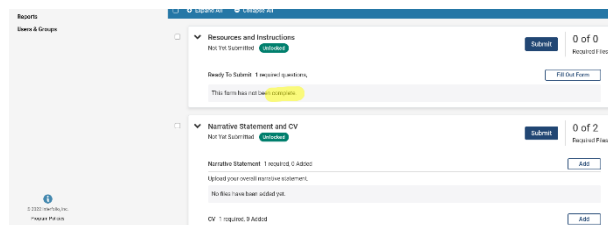
On the Interfolio home screen, you will see your case under “My Tasks.” In the example at right, there is a promotion packet available for Dr. Burkholder in the Department of Criminology & Criminal Justice.



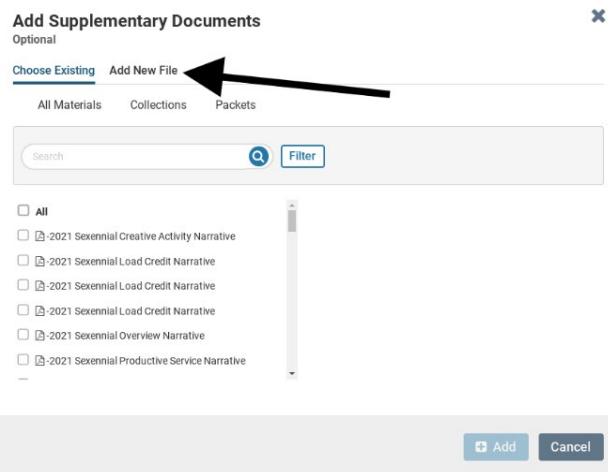
Using Interfolio and OneDrive for Promotion & Tenure Materials

You can now **share links to your folders and narratives via Interfolio**. The following steps will allow you to link your OneDrive materials into Interfolio.

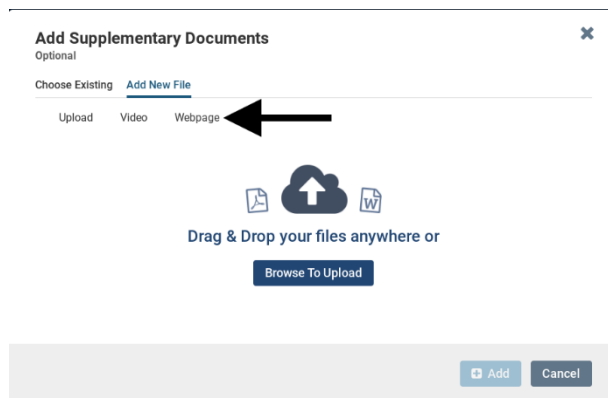
Click on the case, and you will see individual tasks to be completed.



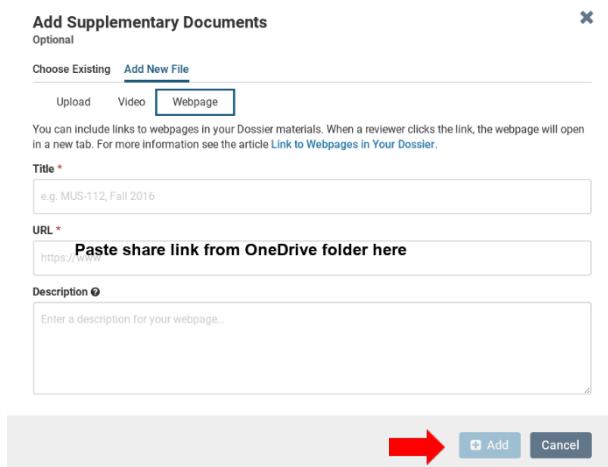
For example, at right, we are adding a link to the OneDrive folder for Creative Activity, which goes in the “Supplementary Documents” section of the Creative Activity task in Interfolio. Click on “Add New File” to add your link.



To add a link (as opposed to a file), click on “Webpage,” as shown at right.



Enter the required information and paste the link into the URL box. Then press “Add” at the bottom of the window.



Your link (or file, for narratives) will now appear under Supplementary Documents.

The screenshot shows the 'Creative Activity' section in Interfolio. At the top, it says 'Not Yet Submitted' and 'Unlocked'. There are 'Preview' and 'Submit' buttons, and a counter '0 of 1 Required Files'. Below this, there's a section for 'Narrative' with '1 required, 0 Added' and an 'Add' button. The text says: 'Upload your Creative Activity narrative document. You may choose to include your supporting information or artifacts within your narrative document (e.g., as one PDF for this section) or upload individual files as Supplementary Documents for this section.' Below that, it says 'No files have been added yet.' Then there's a section for 'Supplementary Documents' with '1 Added' and an 'Add' button. The text says: 'Upload any additional supporting documents related to the Creative Activity category.' Below this is a table with columns 'Title', 'Details', and 'Actions'. The table has one row: 'Link to Creative Activity Folder', 'Added Sep 5, 2022', and 'Edit | Remove'.

Repeat these steps to add the link for each folder or CV/narrative file into the appropriate spot in Interfolio. Generally, people will use:

1. In the Summary Dossier section with your Narrative Statement and CV:
 - a. A link to the Narrative Statement document on OneDrive
 - b. A link to the CV document on OneDrive
 - c. A link under “Other Documents” in Interfolio that goes to a folder containing a **Table of Contents** and any other materials you placed in the “Manila folder” in previous years (e.g., departmental guidelines)
2. In the Load Credit and other evaluation area sections:
 - a. A link to your Load Credit Narrative document on OneDrive
 - b. A link to a OneDrive folder containing ALL supporting documents for this section (e.g., syllabi, peer teaching observations)
 - c. A link to a OneDrive folder containing ALL of your Student Opinion Surveys

Once you have added all of your OneDrive links to the appropriate sections in Interfolio, submit your Interfolio case using the instructions within Interfolio. **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. For these reasons, **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.

Removing Sharing Permissions

You may unshare your OneDrive materials after July 31st. To do so, press the “Share” button from within the main portfolio folder and turn off sharing via link.

Importing Files from a Previous Interfolio Case into a New Case

If you used Interfolio in a previous year, you may wish to copy materials from a previous year’s case into a new case. To do so, 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 the “Add” button on the right.

The screenshot shows the 'Creative Activity' section in Interfolio. At the top, it says 'Submitted' and 'Unlocked'. There is a 'Submit' button and a counter '0 of 1 Required Files'. Below this, there's a section for 'Narrative' with '1 required, 0 Added' and an 'Add' button. The text says: 'Upload your Creative Activity narrative document. You may choose to include your supporting information or artifacts within your narrative document (e.g., as one PDF for this section) or upload individual files as Supporting Documents for this section.' The 'Add' button is highlighted with a red box.

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

Add Narrative
1 Required

Choose Existing
Add New File

All Materials
Collections
Packets

Select a packet to view and add file(s) from that review.

Packet	Type	Completed
Central Connecticut State University Promotion Only	Promotion	Sep 12, 2022
College of Liberal Arts & Social Sciences Promotion Only	Promotion	Oct 21, 2022
Central Connecticut State University Promotion and Tenure	Other	Sep 12, 2023

Add
Cancel

3. Select the appropriate document, then "Add."

Add Narrative
1 Required

Choose Existing
Add New File

All Materials
Collections
Packets

Promotion and Tenure [Select a different review](#)

Central Connecticut State University
Type: Other
Completed: Sep 12, 2023

☐ All documents in this review in a single PDF

Narrative Statement and CV

☒ Kizer Blue Devil narrative

☐ Narrative Statement

☐ 2022 CV

☐ What it means to be a Blue Devil

Add
Cancel

- 4) The document will now appear in the desired location.

Creative Activity
Submitted
Unlocked

Preview
Submit

1 of 1
Required Files

Narrative 1 required, 1 Added [Add](#)

Upload your Creative Activity narrative document. You may choose to include your supporting information or artifacts within your narrative document (e.g., as one PDF for this section) or upload individual files as Supporting Documents for this section.

Title	Details	Actions
Kizer Blue Devil narrative	Added Sep 12, 2023	Edit Remove

5) You can edit or remove this document as desired, using the buttons at right.

▼ Creative Activity
Submitted **Unlocked** Preview Submit 1 of 1 Required Files

Narrative 1 required, 1 Added Add

Upload your Creative Activity narrative document. You may choose to include your supporting information or artifacts within your narrative document (e.g., as one PDF for this section) or upload individual files as Supporting Documents for this section.

Title	Details	Actions
Kizer Blue Devil narrative	Added Sep 12, 2023	Edit Remove

6) When all of your materials are ready for review, click "Submit."
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). Therefore, it is recommended that you wait to submit until ALL sections are complete and you are finished adding materials.

▼ Creative Activity
Submitted **Unlocked** Preview Submit 1 of 1 Required Files

Narrative 1 required, 1 Added Add

Upload your Creative Activity narrative document. You may choose to include your supporting information or artifacts within your narrative document (e.g., as one PDF for this section) or upload individual files as Supporting Documents for this section.

Title	Details	Actions
Kizer Blue Devil narrative	Added Sep 12, 2023	Edit Remove

Need Assistance?

For additional support using Interfolio, please contact the CCSU Interfolio Team at interfolio@ccsu.edu.

You may also wish to review the two webinars below:

1. Interfolio **candidate** packet webinar:
https://product-help.interfolio.com/en_US/review-promotion-tenure-videos/free-training-webinar-review-promotion-tenure-candidate-packet-training
2. Interfolio **reviewer** (DEC) webinar:
https://product-help.interfolio.com/en_US/review-promotion-tenure-videos/webinar-create-and-manage-a-case