

Promotion and Tenure Online Reviewing Platform (PTORP)

Manual for Department 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 Department Liaison

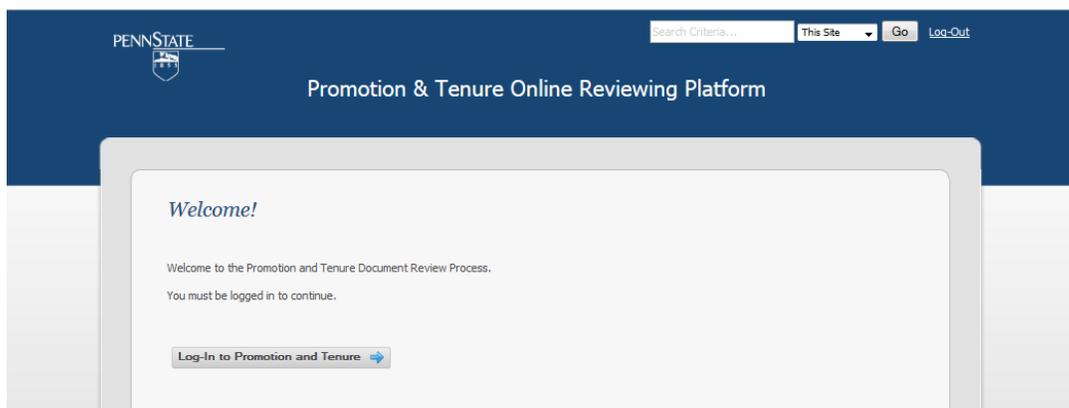
- Adds other Department Liaisons as backups if necessary
- Adds additional Department Liaisons temporarily if necessary
- Enters the members of every review group at each level for each departmental P&T candidate at the beginning of each P&T cycle. Ensures these groups are correctly populated
- Opens and closes the groups able to view each candidate's dossier as appropriate and as directed by the College Liaison
- Ensures the dossier is correct for each review group to view

Information to assemble before beginning

- A list, including Penn State Access Account IDs (e.g., xyz123), of all review group members for each departmental candidate
- Documents for all candidates converted into pdf files with appropriate titles. Note that you need to upload documents in separate sections as directed below

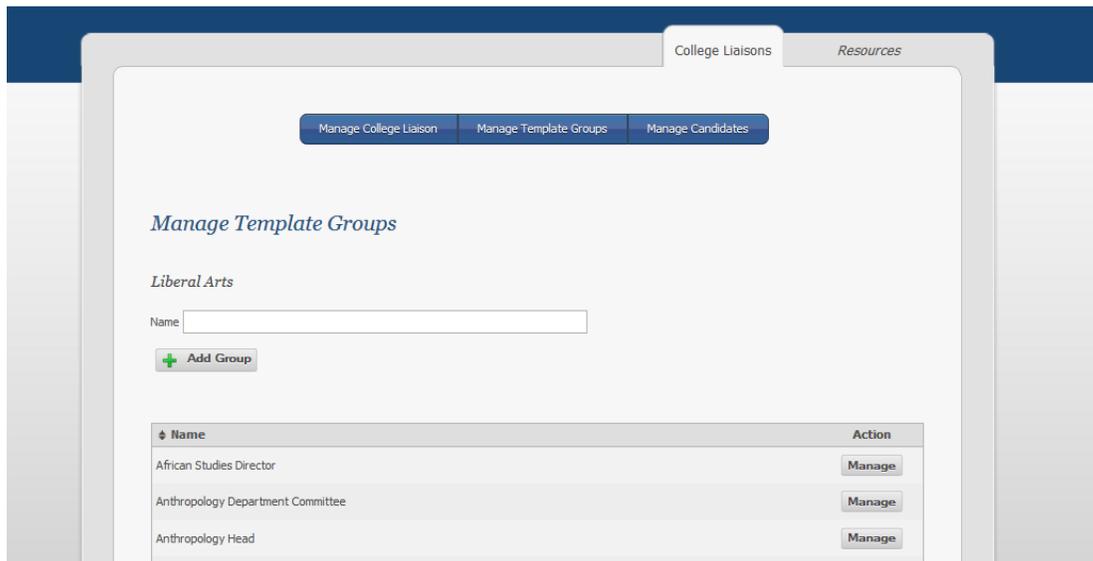
Log In to the Promotion and Tenure Online Reviewing Platform

- 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 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, to change the group membership, to remove the group, or to update the name of the group



Manage Candidates

1. Click the **Manage Candidates** button – all the candidates you have access to 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. 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 (fim2)	<input type="button" value="Manage Dossier"/>	6th Year and Promotion to Associate	<input type="button" value="Manage Path"/>	None	<input type="button" value="Manage Liaisons"/>	Dean's Office

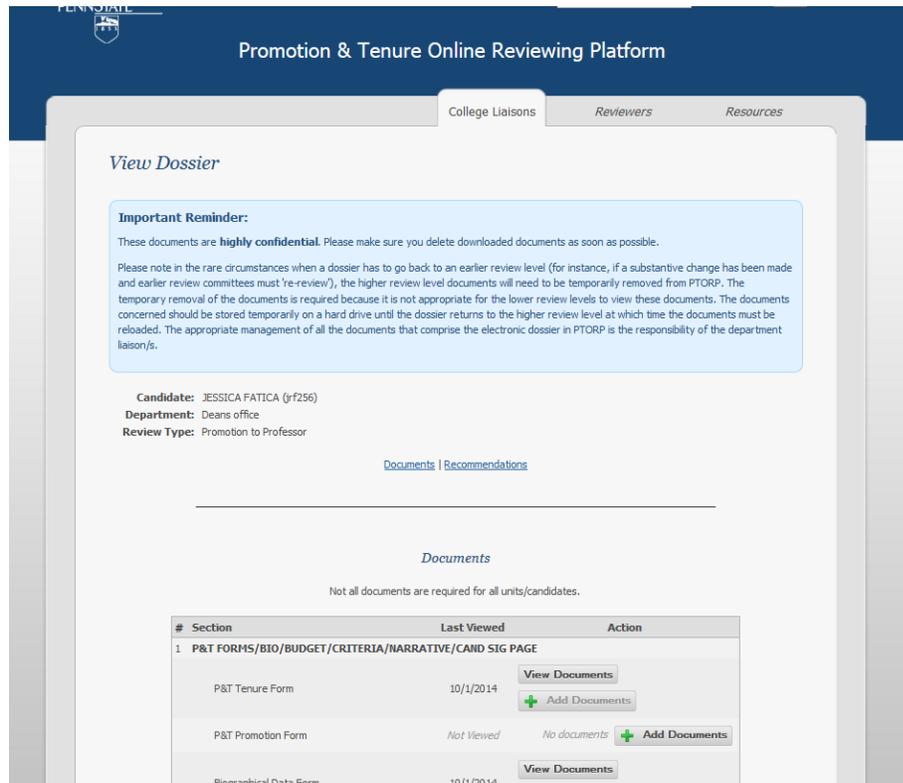
Manage Dossier

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 **FIXED TERM PROMOTION**

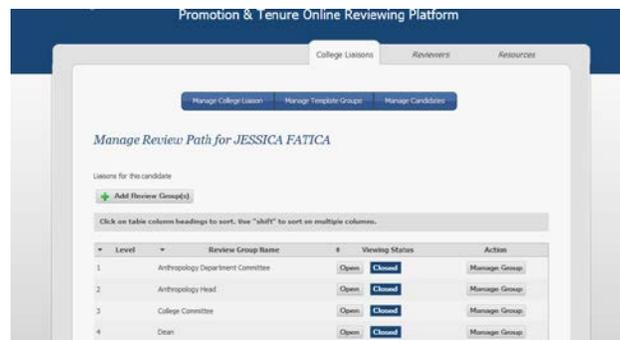
Fixed Term Faculty Dossier Not Viewed No documents

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, please 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.
8. Please note the information contained in the **Important Reminder** section at the top of the page in the blue box.



Manage Path

1. 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
2. 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

Documents

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	8/16/2018	View Documents + Add Documents
	P&T Promotion Form	Not Viewed	No documents + Add Documents
	Biographical Data Form	Not Viewed	No documents + Add Documents
	Budget	Not Viewed	No documents + Add Documents
	Criteria Statement - College	Not Viewed	No documents + Add Documents
	Criteria Statement - Department	Not Viewed	No documents + Add Documents
	Narrative Statement	Not Viewed	No documents + Add Documents
	Candidate Signature Page	Not Viewed	No documents + Add Documents
			View Entire Section
A	TEACHING & LEARNING/LIBRARIANSHIP/PATIENT CARE		
	Teaching and Learning	Not Viewed	No documents + Add Documents
	Librarianship	Not Viewed	No documents + Add Documents
	Patient Care	Not Viewed	No documents + Add Documents
			View Entire Section
B	RESEARCH & CREATIVE ACCOMPLISHMENTS		
	Research and Creative Accomplishments	Not Viewed	No documents + Add Documents
	New Factual Information	Not Viewed	No documents + Add Documents
			View Entire Section
C	SERVICE		
	Service	Not Viewed	No documents + Add Documents
			View Entire Section
D	EXTERNAL LETTERS		
	External Letters	Not Viewed	No documents + Add Documents
			View Entire Section
E	EVALUATIVE STATEMENTS/INTERNAL LETTERS		
	Prior Letters	Not Viewed	No documents + Add Documents
	Secondary Dept/Division/Campus Head Letter	Not Viewed	No documents + Add Documents
	Department/Division/Campus Committee Letter	Not Viewed	No documents + Add Documents
	Department Head/Division/Campus Head Letter	Not Viewed	No documents + Add Documents
	College Committee Letter	Not Viewed	No documents + Add Documents
	Dean/Chancellor Letter	Not Viewed	No documents + Add Documents
			View Entire Section
7	FIXED TERM PROMOTION		
	Fixed Term Faculty Dossier	Not Viewed	No documents + Add Documents
			View Entire Section

Manage Liaisons

1. 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
2. You can add multiple departmental liaisons. Enter the Penn State Access Account ID of the departmental liaison you wish to add and click the **Add Departmental Liaison** button. The new departmental liaison will display in the list at the bottom of the screen. You will need to scroll down to see the list

Add Departmental Liaison(s) for this candidate

Candidate: JESSICA FATICA (JRF256)
College: LA
Department: Deans Office
Review Type: 6th Year and Promotion to Associate

PSU Access ID
e.g. (abc123)



UserID	Name	Action
nmk17	KIVER , NICOLA	
flm2	MARING , FAYE	

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.