

eRPT: Electronic Reappointment, Promotion, and Tenure

Users Guide for version 2.
6/2/2011 – Alexander Marciniak – initial draft

Overview

The CLAS Electronic Reappointment Promotion and Tenure (eRPT) project includes a system of online tools that will allow RPT participants, both applicants and reviewers, to securely post and review documents related to the RPT process. This document will provide a basic overview of its use.

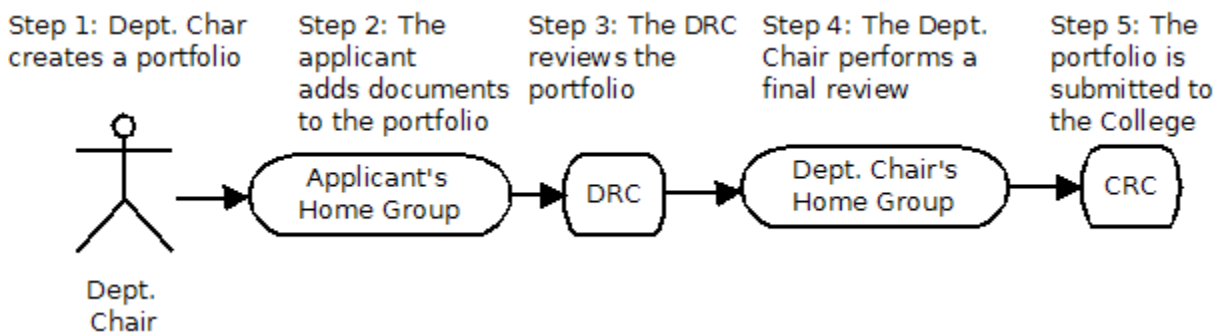
In version 2 of eRPT we have added drag and drop document sorting and a special screen for department chairs who wish to take a more active role in portfolio management.

Basic Terminology

- **User:** Any user of the system (including applicants, reviewers, or administrators).
- **Portfolio:** A collection of individual electronic documents in portable document format (PDF).
- **Group:** A destination for the portfolio where one or more users can interact with a portfolio.

Process Overview

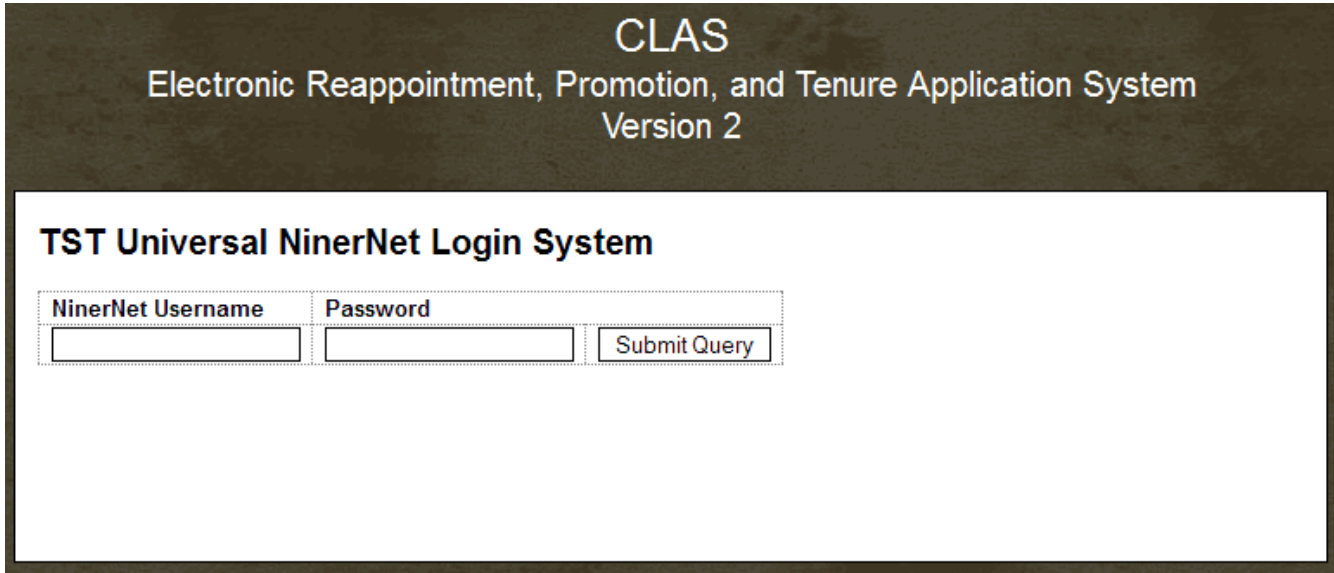
1. A department chair sets up an applicant's portfolio.
2. An applicant logs into the system and adds the appropriate documents to their portfolio. The applicant can log in as many times as is necessary to complete their portfolio. Once they have finished adding all desired documents to their portfolio, they indicate so in the system, sending it to their department's review committee.
3. A review committee member logs into the system and, once each applicant has submitted their portfolio, sees a listing of documents related to that applicant. They can log in as many times as necessary to review all documents in the portfolio. When they have completed their review, they indicate so in the system.
4. The department chair reviews the documents for each portfolio and also has the ability to add documents (letters from the committee and/or chair) to each portfolio. Once they have finished, they indicate so in the system.
5. Once all reviewers in a given group have indicated that they are finished, the portfolio will be sent to the College Review Committee.



Login Screen

The login screen is the first page you will need to go to when you need to work on your portfolio. It can be accessed at: <http://clas-erpt.uncc.edu> You can login using your Ninernet username and password. (This is the same account that you would use to check your email.)

It may take a few moments for CLAS's secure server to check your password, after the login is successful you will be taken to the Your Groups screen.



CLAS
Electronic Reappointment, Promotion, and Tenure Application System
Version 2

TST Universal NinerNet Login System

NinerNet Username	Password	Submit Query

Your Groups Screen

The groups screen displays a list of all the groups you are a member of. Most applicants will only have a home group but review committee members will also belong to the department review group (DRC) or college review group (CRC).

Selecting *Review Portfolios* will take you to the group screen.

CLAS

Electronic Reappointment, Promotion, and Tenure Application System
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Main Menu: | [Users Guide](#) | [Logout](#)

Your Groups

Group	Description	Options
DRC - Religious Studies	DRC for Religious Studies	Nothing to review here right now.
Home - Marciniak, Alexander	Home Group for Mr. Alexander Marciniak	Review Portfolios

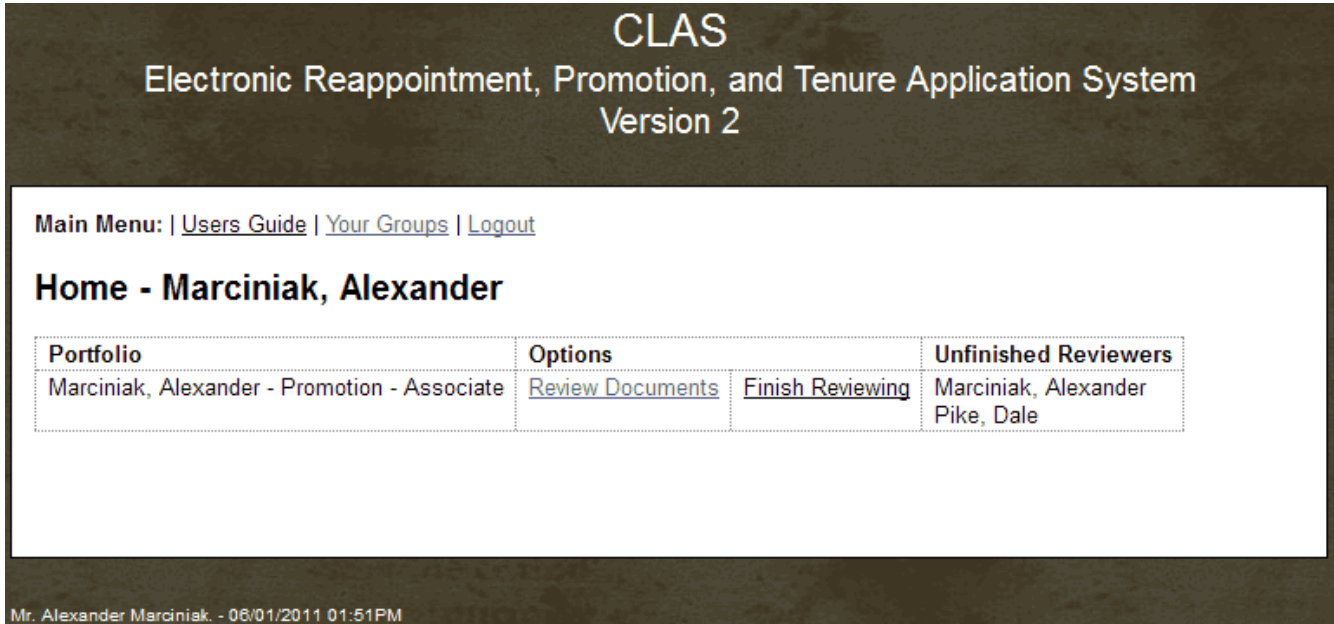
Mr. Alexander Marciniak. - 06/01/2011 01:43PM

Group Screen

The Group screen displays a list of portfolios that are currently in your group. Most applicants will only have one but reviews may be able to see many at a time.

- Selecting *Review Documents* will take you into the portfolio so that you can add or read documents.
- Selecting *Finish Reviewing* will indicate that you are ready to send it to its next destination, once all the unfinished reviewers do this the portfolio is automatically move to it's next group and you will no longer be able to access it.

In the example below Dale Pike was added to my home group so he could help me create my portfolio. If you are going to have someone else form your department (other than the chair) assist you please contact us so we can add them to your home group.



The screenshot displays the CLAS system interface. At the top, it reads "CLAS Electronic Reappointment, Promotion, and Tenure Application System Version 2". Below this is a navigation menu with links for "Users Guide", "Your Groups", and "Logout". The main heading is "Home - Marciniak, Alexander". A table lists a portfolio with options to "Review Documents" and "Finish Reviewing", and a list of "Unfinished Reviewers" including Marciniak, Alexander and Pike, Dale.

Portfolio	Options	Unfinished Reviewers
Marciniak, Alexander - Promotion - Associate	Review Documents Finish Reviewing	Marciniak, Alexander Pike, Dale

Mr. Alexander Marciniak. - 08/01/2011 01:51PM

Portfolio Screen

The portfolio screen is where you will add documents for your review. There is a lot on this screen:

























- The title of the portfolio.
- The name of the next group your portfolio will visit. In most cases it will be a DRC.
- A table of the documents in the portfolio. This table has some icons that allow you to interact with the documents.
 - The two leftmost icons work together to allow you to reorder the documents. Dragging one of the paper icons to the green arrows icon will move the document to that location.
 - The paper icon will let you view the documents.
 - The red circle will delete the document.
- The form under the table is used to upload documents. Newly added documents are automatically placed at the end of the list.
- Clicking the link at the bottom will indicate that you are ready to send it to its next destination. It operates the exact same way as the *Finished Reviewing* link on the Group screen.

Not all users have access to every option, reviewers may only be able to view documents.

Main Menu: | [Users Guide](#) | [Your Groups](#) | [Home - Marciniak, Alexander](#) | [Logout](#)

Marciniak, Alexander - Promotion - Associate

The next stop for this portfolio is DRC - Religious Studies

	Filename	File Info	History
  	dublin1.jpg	AA-20 (test file 1)	Uploaded by Alexander Marciniak at Home - Marciniak, Alexander on 03/07/2011 01:38 PM
  	history_facebook.jpg	AA-27 (test file 2)	Uploaded by Alexander Marciniak at Home - Marciniak, Alexander on 03/07/2011 01:47 PM
  	Iterative_development_model_V2.jpg	Annual Reviews (test file 3)	Uploaded by Alexander Marciniak at Home - Marciniak, Alexander on 03/07/2011 01:47 PM
  	Emma_Bianchi.jpg	DRC Letter	Uploaded by Alexander Marciniak at Home - Marciniak, Alexander on 03/22/2011 04:43 PM
  	editor.css	Chair Letter	Uploaded by Alexander Marciniak at Home - Marciniak, Alexander on 03/22/2011 04:43 PM
  	aboutme.htm	Narrative Statement	Uploaded by Alexander Marciniak at Home - Marciniak, Alexander on 03/22/2011 04:43 PM
  	become_your_future.jpg	Course Syllabi (Dispach upload test)	Uploaded by Alexander Marciniak on 03/25/2011 04:02 PM
  	app_tracker_export.pdf	AA-20 (app Tracker)	Uploaded by Alexander Marciniak at Home - Marciniak, Alexander on 04/20/2011 03:04 PM

Upload Document

Select File	File Type	Description (if needed)	
<input type="text"/> <input type="button" value="Browse_"/>	AA-20 <input type="button" value="v"/>	<input type="text"/>	<input type="button" value="Upload"/>

Done Reviewing Documents

The contents of the portfolio are automatically saved whenever a change is made. When you have finished uploading and ordering documents, please use the link below to indicate that you are ready to send it to its next destination:

[Please click here when you are finished uploading and/or reviewing documents.](#)

Departmental Control Panel

Department chairs have access to a special control panel that lets them manage all of their department's portfolios. They can access this area using the *Manage Your Department* link on the main menu.

Department chairs have the ability to:

- Create new portfolios.
 - Examine current portfolios (using the magnifying glass icon).
 - Add and remove professors from their Department Review Committee.
 - Set Document permissions for the DRC
- Chairs* have full access to view, add, and delete documents.
Members can only view documents.

Dept. Chair Menu: | [Departmental Control Panel](#) | [Return to eRPT](#) | [Logout](#)

Religious Studies Control Panel

Create New Portfolio

Applicant (1st stop)	DRC (2nd stop)	Chair (3rd stop)	CRC (final stop)
Brintnall, Kent	DRC - Religious Studies	Mr. Alexander Marciniak	CLAS CRC
Promotion - Associate	<input type="button" value="Create Portfolio"/>		

Current eRPT Portfolios

Applicant Name	Stop 1	Stop 2	Stop 3	Stop 4	Type	
Brintnall, Kent	Home - Brintnall, Kent	DRC - Religious Studies	Home - Marciniak, Alexander	CRC - College of Liberal Arts & Sciences	Promotion - Associate	

Departmental Review Committee Membership

Unassigned Users	Add	Remove	Review Committee Members	Document Permissions
Brintnall, Kent	→	←	Marciniak, Alexander	<input checked="" type="radio"/> Chair <input type="radio"/> Member <input type="button" value="Change Role"/>
Johnson, Kathryn	→	←	Tabor, James	<input checked="" type="radio"/> Chair <input type="radio"/> Member <input type="button" value="Change Role"/>
Katsanos, Fotini	→			
McCloud, Sean	→			