

# Step-by-Step Instructions

## For Reviewers and Committee Members using Academic Portfolio

### 1. Access documentation

Committees meeting as part of the **Merit, Tenure & Promotion**, or **Research & Scholarship Leave** processes can have a variety of members including, but not limited to: Deans and Department Heads, as well as different types of representation from academic staff members or students. How these various roles use the software to review academic staff members' documentation, however, is almost the same. Please note:

- Not all reviewers are part of a committee. Deans play an individual review role in **Tenure & Promotion** and **Research & Scholarship Leave**.
- Committees with a smaller number of **Tenure & Promotion** cases to review may have received automated notifications with a link to access each case.

Most committee members receive an email advising them to **access the documentation in one of two ways**:

#### 1. All COMMITTEE MEMBERS are able to access log in through Interfolio

1. Type "home.ca1.interfolio.com" into a web browser.
2. Click the **Sign in with Partner Institution** button under Other Sign In Options.
3. Start typing "University of Calgary" into the *Search for your institution* field until the selection appears. Click to select **University of Calgary**.
4. Click the **Sign In** button.

Sign In

Sign in with email

Email \*

Enter Email

Password \*

Enter Password

Sign In

Forgot your password?

Other Sign In Options

Sign in with Partner Institution

Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

Search for your institution

Sign In

Sign in with an Interfolio account >

### 2. Perform the review

#### 2. UCALGARY EMPLOYEES may also use the MyUCalgary portal.

1. Navigate to **MyUCalgary**.
2. Enter your UCalgary username and password.
3. Navigate to **All about me** → **My job** → **Academic Portfolio**.

ucalgary.ca

University of Calgary in Alb...

MyUCalgary

Central Service

Username

Your Credentials

Password

Sign In

Contact IT Support

Dashboard All about me My work

My info

Name

Phone

Address

Email address

Emergency contacts

My job

My onboarding

Report time

Get logos & templates

Order business cards

Recognize a colleague

Training & Development

Performance Management

Academic Portfolio

Careers on campus

**BOTH methods lead to UCalgary's Central Authorization Service (CAS) login. All users will enter (or re-enter) their UCalgary username and password.**

To access software support for Academic Portfolio, call Institutional Support @ 833-844-2118 or email [Interfolio-support@elsevier.com](mailto:Interfolio-support@elsevier.com).

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Use filtering, sort, and search features to find a specific case.

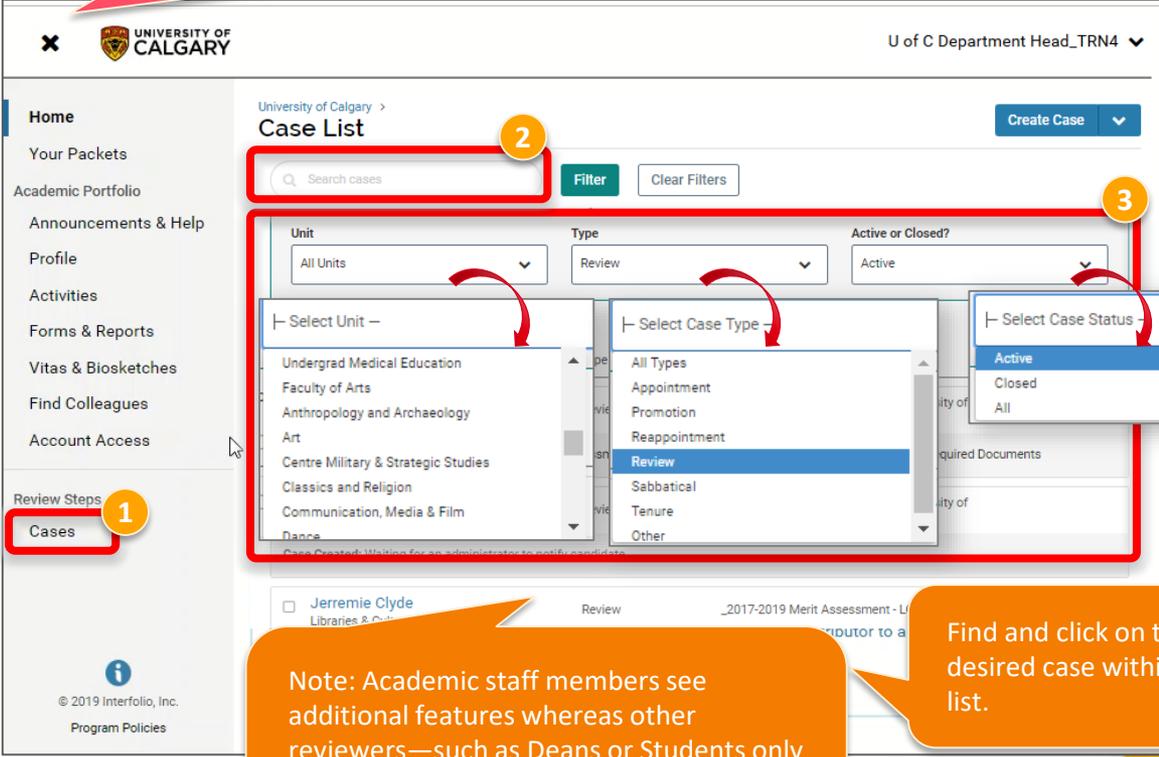
### Find the case

1. Click on **Cases** on the left-hand menu. The list of cases may include academic staff members' merit assessment reviews, tenure & promotion or research and scholarship leave applications.
2. Use the *Search* function to find a specific case.
3. Filter using your **Unit, Type** (e.g. "Review" or "Sabbatical"), and select *Active* to see your current cases.
4. Click on the desired case to view the details.

*Tip: If you wish to review by "Status," use the Sort feature. For example, sort and review all cases associated with statuses such as "Associate Professor" (Merit) or "Renewal" (Tenure & Promotion).*

### 2. Perform the review

TIP: Click the "X" to hide the menu and get more screen space—especially helpful on mobile devices!



The screenshot shows the 'Case List' interface. A red box highlights the search bar (2) and filter buttons (3). Three dropdown menus are shown: 'Unit' (1), 'Type' (2), and 'Active or Closed?' (3). The 'Unit' dropdown lists various units like 'Undergrad Medical Education' and 'Faculty of Arts'. The 'Type' dropdown lists 'Review', 'Sabbatical', etc. The 'Active or Closed?' dropdown lists 'Active', 'Closed', and 'All'. A red box highlights the 'Cases' menu item (1) in the left-hand navigation. An orange callout box (4) points to a case entry for 'Jerremie Clyde'.

Note: Academic staff members see additional features whereas other reviewers—such as Deans or Students only see the Home page, Review Steps, Announcements & Help, and Cases (\*).

Find and click on the desired case within the list.

# Step-by-Step Instructions

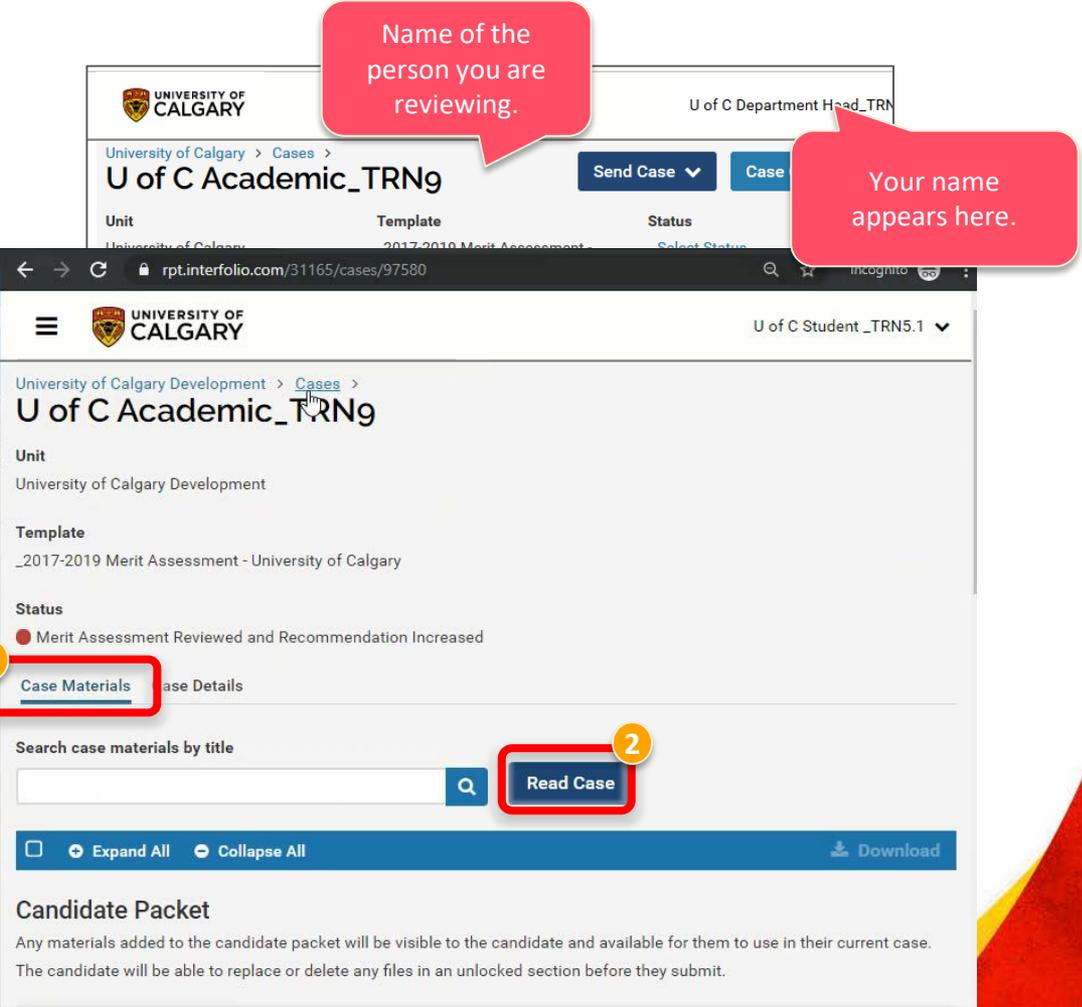
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## 2. Perform the review

### Read the case

1. Click the **Case Materials** tab.
2. Click the **Read Case** button to access the academic staff member's report and documents in a .pdf viewer.



U of C Department Head\_TRN

University of Calgary > Cases >  
**U of C Academic\_TRN9**

Send Case Case

Unit Template Status

University of Calgary 2017-2019 Merit Assessment Select Status

U of C Student\_TRN5.1

University of Calgary Development > Cases >  
**U of C Academic\_TRN9**

Unit  
University of Calgary Development

Template  
\_2017-2019 Merit Assessment - University of Calgary

Status  
● Merit Assessment Reviewed and Recommendation Increased

**1** Case Materials Case Details

Search case materials by title

**2** Read Case

Expand All Collapse All Download

**Candidate Packet**

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

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## Use the Materials Viewer

Options:

1. Navigate all documents and bookmarks in the menu on the left-hand side.
2. OPTIONAL: Download the document you are viewing or a packet of multiple documents.

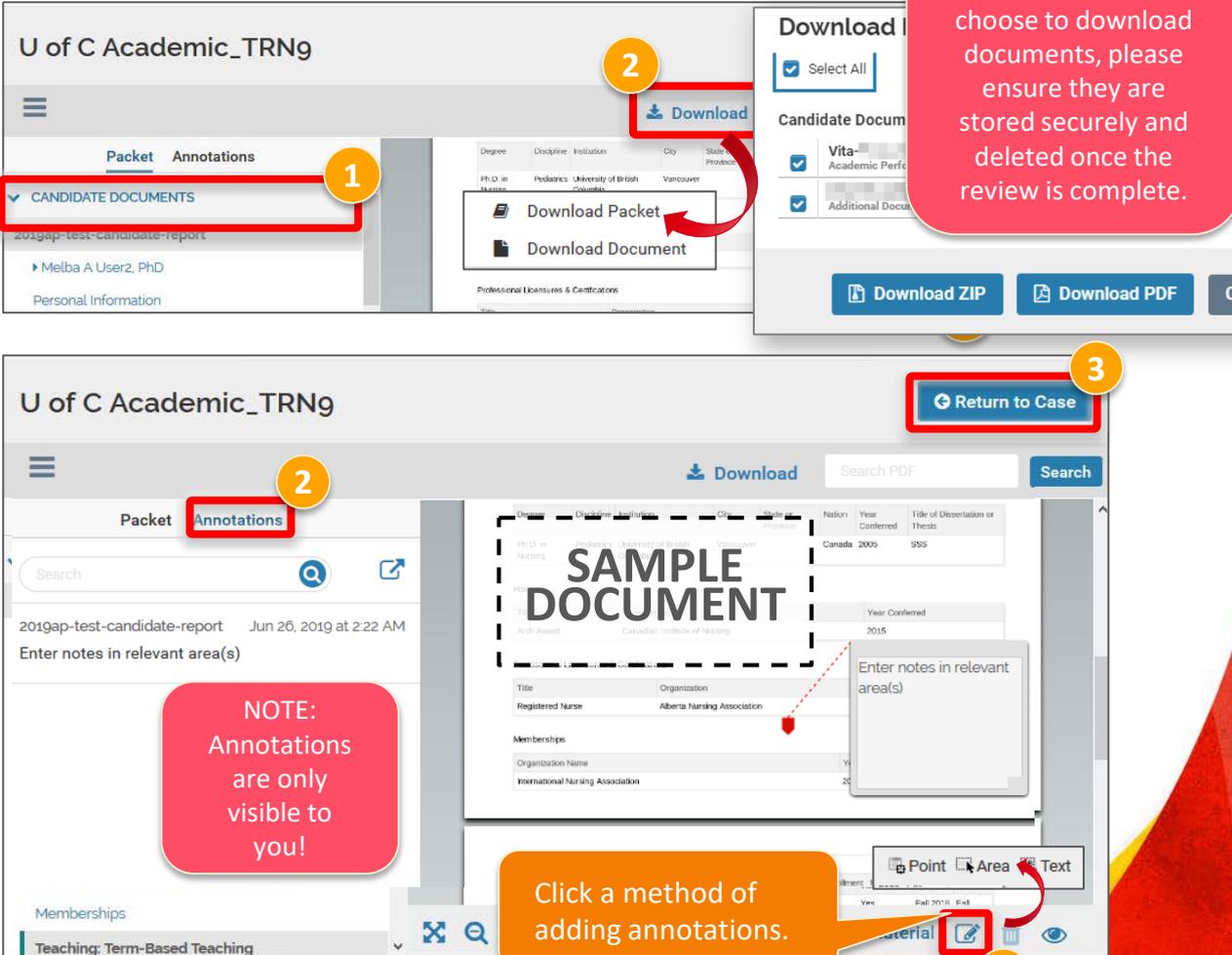
*NOTE: If you download the packet, the tool will email you to notify you when your ZIP or PDF files are ready to access.*

## Annotate within the Materials Viewer

1. Click to add annotations within the .pdf.
2. View your notes in the *Annotations* tab of the *Materials Viewer* bookmarks.
3. Click the **Return to Case** button when you are done.

*NOTE: Annotations are only visible to the author. These notes do not carry forward to the next reviewer(s) such as committees.*

### 2. Perform the review



The screenshot displays the 'U of C Academic\_TRNg' interface. It is divided into two main sections: 'Access documentation' and 'Perform the review'.

**Access documentation (Top):** The left sidebar shows a menu with 'CANDIDATE DOCUMENTS' highlighted (1). The main content area shows a document titled '2019gap-test-candidate-report' with a 'Download' button (2) and options to 'Download Packet' or 'Download Document'. A 'Download ZIP' and 'Download PDF' button are visible at the bottom right.

**Perform the review (Bottom):** The 'Annotations' tab is selected (2). The document content is visible, with a 'Return to Case' button (3) at the top right. A 'SAMPLE DOCUMENT' watermark is overlaid on the content. A note box indicates 'Annotations are only visible to you!'. An orange callout box says 'Click a method of adding annotations.' with a red box around the annotation tool icons (1).

**CAUTION:** If you choose to download documents, please ensure they are stored securely and deleted once the review is complete.