PantherFolio RPT: Reviewing a Case

The Review Workflow

- a. The portfolio becomes available for review to the committee in PantherFolio
- b. The committee meets to discuss the portfolio, vote on a recommendation, and sign the recommendation report
- c. The committee chair uploads the signed recommendation report to PantherFolio
- d. Finally, the committee chair moves the portfolio forward to the next level of review, which terminates the committee's access to the portfolio (unless the portfolio is sent back by the department head, dean, or administrators).

Logging in to PantherFolio

1. Open an internet browser of choice (we recommend using Google Chrome) and navigate to https://www.pvamu.edu/academicaffairs/faculty/pantherfolio/ or

Navigate to the PAMU Academic Affairs PantherFolio page and click the

Login To PantherFolio

button

2. You will be taken to the PVAMU Single Sign-On page. Enter your **PVAMU** credentials (username and password) and click **Sign in**.



You are now taken to the PantherFolio dashboard.

×		Jane Doe 😽
Home Your Packets PantherFolio Announcements & Help	My Tasks 1	Contraction Search
Profile	Unread Tasks	Read Tasks
Activities	Title	Due Date
Forms & Reports	The	Due Dare
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Find Colleagues		

Accessing the Case (Portfolio)

Select **cases** from the left RPT navigation bar.

1

Review, Promotion and Tenure				
Cases				
Templates				
Administration				
Reports				
Users & Groups				

The Case List shows all cases that are available to you. Click on the name of the candidate to the case page.

Cases			Create Case 🗸
Search cases	Q Filter]	
3 of 3 cases Filtered By: Active Cases X			
Name 🗸	Туре 🗢	Template Name 🗢	Status 🗢
College of Business	Review	(Business) Mid-Tenure Review	,
Step 1 of 5: Department Review	Required Documents		

Viewing a Case

Committee members can access the portfolio materials via the case page. The case page is a tabbed interface, containing the **Case Materials** (candidate's Packet & Internal Sections) and **Case Details** (committee members, comments, committee voting results) tab.

Rahim Quazi		Send Case 🗸 🕻	Case Options 🗸
Unit College of Business Case Materials Case Details 1	Template (Business) Mid-Tenure Review	Status Select Status	
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Cover Letter Locked			

Reviewing the case

Click the **Read Case** button to load all case materials into the document viewer for online review (preferred option).

Case Materials Case Details	
Search case materials by title	Q Read Case
☐ ● Expand All ● Collapse All	📩 Download

			*	Dow	nloa	d Search
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Teaching						
Term	Course Prefix	Course Number	Section	Course Tit	ie	
Fall 2021	ECON	2301	Z01	Principles	of Macroed	conomics
Fall 2020	ECON	2123	Z01	Prin Macro	economic	5
Spring 2020	ECON	2123	Z01			
Fall 2019	ECON	2123	Z01			
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			201			nomics
			1.04			
Spring 2018	ECON	2003	P10			
Spring 2018	ECON	2123	Z01	Prin Macro	economic	5
Spring 2018	ECON	5313	Z01	Internation	al Trade	
Fall 2017	ECON	2003	P07	Fundamen	tals of Eco	nomics
Fall 2017	ECON	2123	P04	Prin Macro	economics	5
Summer 2017	EMGM	5903	Y01	Capstone P	Project	
Spring 2017	ECON	2003	P08			
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- i. All materials are organized by the case (portfolio) packet sections and are bookmarked in the column to the left
- ii. Reviewers should IGNORE Attachments from Curriculum Vitae
- iii. Pages in a document are also bookmarked, including section headers in a document
- iv. Links and videos display in the viewer
- v. Annotations appear on their own tab in the viewer (see "Making notes on case packet" for more details)

Downloading a case

We **do NOT recommend** downloading cases, as downloaded files are not in the case outline. If you must download, please use the **ZIP** option.

- i. select all sections from the list, then click the "Download" button toward the top right of the page
- ii. Choose the **ZIP** option
- iii. You will receive email notifications when the download files are ready
- iv. Click "Your Files Are Ready to Download" under My Tasks

Case Materials Case Details 1				
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Curriculum Vitae (Traditional Format)	Generated			
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Curriculum Vitae (Traditional Format) Spring 1992 - Fall 2021	Generated		Edit	Unlock Add File
Curriculum Vitae (Traditional Format) Spring 1992 - Fall 2021 Cover Letter	Generated		Edit	

You will receive **email notifications** to your **PVAMU Email** when the download files are ready.

You have	e documents available for download.
Please conto more informa	GET DOCUMENTS act our support team at help@interfolio.com for ation.
	Powered by Interfolio Support

Click "Your Files Are Ready to Download" under My Tasks

Your Files Are Ready to Download

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Next Material		/	V	
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Fundamentals of Economics	- 1			
Capstone Project				
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- a. Annotations are added from the lower right corner of the viewer
- b. Click the "Note" icon to add an annotation on the currently displayed document
- c. Click the "View" icon to toggle on or off the display of annotations
- d. After clicking the "Note" icon, select the type of annotation you want to create (Stickie, Point, Area, or Text)
- e. Once created, annotations appear on their own tab in the viewer
- f. You can click the "Export" icon to generate a PDF of your annotations that can be downloaded and printed
- g. Annotations are private notes and are only visible to the reviewer who adds them. However, much like paper notes, annotations may be "discoverable" as open records in case of litigation.

Submitting Recommendation Reports (Chairs, Department Heads, and Deans)

Case Materials Case Details							
Reviewing as Stephanie Holmes You are the only reviewer at this step. For details on best practices, read our G <mark>uide to Reviewing Case Materials</mark> .							
> Instructions							
 Required Items Required Items Imissing All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Departmental Recommendation Report Add 							
This report prepared by the committee chair shall summarize the rationale for the committee's recommendation and shall become part of the candidate's portfolio throughout the evaluation process. All members of the committee will be afforded the opportunity to review the report before forwarding it to the direct supervisor, and each member will sign indicating that the report is a fair representation of committee action. The recommendation report must be uploaded to this section by the chair of this committee.							
No files have been added to this section.							
Committee Members (1)							

- a. After navigating to the case page, click the Case Details button.
- b. Review the Instructions section, and required items as set from by the college.
- c. **Required Items** All required items must be completed before the case (portfolio) can be moved to the next step.
 - **Recommendation Report** (required for the committee chairs, department heads, and deans)

Accessing recommendations from previous step

Access the **case page** and scroll to the **Internal Sections.** Previous recommendations (committee documents) are located in the **Committee Documents** section.

Note: Committee documents can only be seen BEFORE your recommendation report is uploaded and the case is sent to the next step.

Internal Sections These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials ad be shared with the candidate by an administrator or committee manager.	ded to internal sections can
You are asked to submit required items as part of this case. View	
Materials	Edit Add File
No files have been added to this section.	

Moving the case to the next/previous step (Chairs, Department Heads, and Deans) The committee chairs, department heads, and deans can move cases forward or backward by clicking the "**Send Case**" button.

Click "Send Case" to the right of the page, and select "Forward to..."



You will see a list of all committees and reviewers gaining access at the next step, and can enter a message to the reviewers gaining access to the case.

Great job! You're sending the case forward to the next step, Department Review. Th access to the case:	e following reviewers will lose
Case is With Candidate 0 members	
The following reviewers will gain access to the case:	
2022-2023 Department Review Committee 0 members	
Send a message to the reviewers gaining access. If recipients respond to this message, their response will come directly to your	email inbox.
Subject *	
Test RPT Case	
Message *	
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