USER GUIDES

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Administrator's Guide to Interfolio Faculty Search

Your Interfolio Account Dashboard and Account Settings

This article explains how your Interfolio account dashboard is configured, some basics on what you can do once you're there, and how you can access your account settings to change basic user information.

After signing in, you will see your account page. From here you can access all of the accounts you have with Interfolio and your Interfolio Account Settings.

Your Institution account page

You will find links to the Interfolio products to which you have access on the Interfolio account screen.

1. If your institution uses Review, Promotion & Tenure, Faculty Search, and Faculty180, than relevant pages will be displayed here.
2. You can also access your Dossier account (personally or institutionally created). If you have access to one, you can access it by the user menu in the top right corner.

Institutional Branding

[Read about how to brand institutional products here.](#)

The Faculty Search Navigation Bar

> ℹ️ Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Evaluators or Committee Managers in the program.

Click "View Positions" to view your active searches

Faculty Search

Positions

Administration

Reports

Users & Groups

The Review, Promotion, and Tenure dashboard:

> ℹ️ Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Committee Managers or committee members in the program.

Click "View Cases" to access the cases you are managing or evaluating

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

The Faculty180 Navigation Bar

💡 Users will only see the relevant pages, depending on institutional settlings.

All administrative settings are in the Administration section

Home

Faculty 180

Announcements & Help

Profile

Activities

Evaluations

Forms & Reports

Vitas & Biosketches

Find Colleagues

Account Access

Administration ⌄

To access the settings for your account:

Click your name in the upper right hand corner of the screen and select "Account Settings" from the drop down menu.

The Account Settings page:

> ℹ️ The tabs below appear if you have a Dossier and Interfolio account.

Personal Information

From the "Basic information" tab of "Account Settings," you can access and manage personal information such as your career details, and also contain information like your address and degree. In other tabs you can find your email and notification settings, and any delivery ID numbers associated with your account, as well as some other settings.

Settings

Basic Information ›
Email & Communications
ID Numbers
Subscription & Billing
Signing in & Password

Personal Information

First Name *
Scott

Last Name *
Harris

Status (Pick the option that best describes you) *
Tenure-track ⌄

Position Title
Assistant Professor

Organization
NYU School of Business ⌄

Scholarly Discipline *
Business ⌄

I am or would use Dossier to ... *
☐ Apply to jobs in higher education
☑ Apply to alternative academic jobs
☑ Apply to grants
☐ Apply to graduate degree programs

Communications

From the "Communications" tab, you can manage communication settings including how and when you receive email from Interfolio

Basic Information ›
Email & Communications ›
ID Numbers
Subscription & Billing
Signing in & Password

Email   ➕ **Add Email**

Email notifications related to your Dossier account (such as renewal notices) will only be sent to your primary email address.

Primary   scott.harris@interfolio.com

If you have another account under a different email address you can merge the accounts to access all the information in one place. Learn more about merging accounts

Merge Accounts

Additional Email Addresses
You can sign in with these email addresses and your Dossier password.

scott.harris@sharklasers.com   **Make Primary**   ✖

Communications

Note: you will always receive important messages and notifications about your account, such as when you reset your password, or when a requested letter or evaluation arrives.

☐ Keep me informed about product updates, best practices, and promotions

ID numbers

Need to add ID numbers regularly to your deliveries? If so, than you can use the Interfolio ID storage tool to be able to easily store and attach it to your deliveries.

Subscription & Billing

From the "Subscription & Billing" tab, you can renew your account, add deivery credits, view your remaining deliveries, download all data and documents in your account, manage payment info, and view and download a record of your transactions.

From the "Password" tab, you can change the password for your account

Notifications:

Users will receive alerts and notifications on the homepage in the to-do action items, urgent items with deadlines and mandatory response will appear at the top and the rest will overflow to a searchable table at the bottom.

Welcome back, Scott Harris

Your Action Items

Associate Professor, Intercultural Studies
Department of Sociology | Faculty | Faculty Search

Assistant Professor of Landscape Architecture
Department of Architectural History | Faculty | Faculty Search

Assign Activity Classifications for Imported Scholarly Works
Activity Input | Faculty 180

Review Possible Duplicates from Activity Imports
Activity Input | Faculty 180

You have been named by a faculty member within your institution as a contributor to an intellectual or creative contribution. Please verify.
Activity Input | Faculty 180

Additional Assigned Items

Search by keyword

User Roles in Interfolio's Faculty Search

A user's role determines their capabilities in Interfolio Faculty Search. There are a few different types of users in the program: Institutional Administrators, Administrators, Committee Managers, Evaluators, and EEO Officers. Administrators can also be given EEO access.

Evaluators are assigned to one or more search committees or reviews by an Administrator or Committee Manager. Evaluators can view applications, add labels to applications, and if permissions allow, can add ratings and comments on applications.

Committee Managers supervise searches at the department level. Committee Managers can edit settings and statuses (if permissions allow), view reports, communicate with applicants, and evaluate applications.

Administrators can create, manage, and monitor searches at their assigned institutional level, or at units in the hierarchy below the unit they administer. They can also control settings and permissions for the units administer.

Institutional Administrators can control settings and view positions, applications, and reports across an entire institution. They can also set up workflows in the program for approving new positions, and approving new hires.

Equal Employment Opportunity Officers are usually staff from Human Resources, Institutional Diversity, or another campus office who are responsible for EEO standards and practices at an institution. EEO officers monitor and run EEO reports on positions to which they have access. They can also flag positions that may not meet an institution's diversity requirements.

See below for an overview of the functions of each role.

Interfolio Faculty Search User Role Capabilities					
	Institutional Administrator (w/EEO access)	Administrator	Committee Manager	Evaluator	EEO Officer
User Management and Administrative Settings					
Add/edit and manage organizational units	TRUE	TRUE	FALSE	FALSE	FALSE
Add/edit and manage users	TRUE	TRUE	TRUE	FALSE	FALSE
Set user roles and permissions including granting user titles	TRUE	TRUE	FALSE	FALSE	FALSE
Add custom logo to the landing page of a position	TRUE	TRUE	FALSE	FALSE	FALSE
Add custom branding for an institution	TRUE	FALSE	FALSE	FALSE	FALSE
Positions					
View list of positions	TRUE	TRUE	TRUE	TRUE	TRUE
Create new positions from scratch	TRUE	TRUE	TRUE	FALSE	FALSE
Create new positions based on a previously created position	TRUE	TRUE	TRUE	FALSE	FALSE
Create an open rank search	TRUE	TRUE	TRUE	FALSE	FALSE

Set position to an active and open status	TRUE	TRUE	TRUE	FALSE	FALSE
Close a position	TRUE	TRUE	TRUE	FALSE	FALSE
Record the outcome of a search	TRUE	TRUE	TRUE	FALSE	FALSE
Indicate if positions need to be approved before posting	TRUE	TRUE	FALSE	FALSE	FALSE
Approve positions for posting (IF assigned as the approver)	TRUE	TRUE	FALSE	FALSE	FALSE
Publish the landing page for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Create and manage EEO statements	TRUE	TRUE	TRUE	FALSE	FALSE
Create evaluation criteria for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Set up a search as a blind review	TRUE	TRUE	TRUE	FALSE	FALSE
Create/edit document requirements for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Create form requirements for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Assign/Unassign committee members to search committee	TRUE	TRUE	TRUE	FALSE	FALSE

Set default, institution-wide position statuses	TRUE	TRUE	FALSE	FALSE	FALSE
Edit and assign position statuses	TRUE	TRUE	TRUE	FALSE	FALSE
Create/edit and manage custom application forms	TRUE	TRUE	TRUE	FALSE	FALSE
Create and manage EEO forms	TRUE	TRUE	FALSE	FALSE	FALSE
Set position change notifications	TRUE	TRUE	TRUE	FALSE	FALSE
Create and manage automated notifications (messaging templates)	TRUE	TRUE	TRUE	FALSE	FALSE
View notifications	TRUE	TRUE	TRUE	TRUE	TRUE
View referral sources for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Applications					
View list of applicants for a position	TRUE	TRUE	TRUE	TRUE	TRUE
Customize the list view by adding custom columns to the list	TRUE	TRUE	TRUE	TRUE	TRUE
Create new columns using the answers to custom form questions (excluding EEO)	TRUE	TRUE	TRUE	TRUE	TRUE
Filter the list of applicants by	TRUE	TRUE	TRUE	TRUE	TRUE

degree, application status, rating, tags, and completion					
Save and restore customized views of the list including applied filters, keyword searches, columns, sort order, and pagination	TRUE	TRUE	TRUE	TRUE	TRUE
View applications	TRUE	TRUE	TRUE	TRUE	TRUE
Download applicant materials	TRUE	TRUE	TRUE	TRUE	TRUE
Set default, institution-wide application statuses	TRUE	TRUE	FALSE	FALSE	FALSE
Enable/disable comments and tagging on applications	TRUE	TRUE	FALSE	FALSE	FALSE
Send email messages to applicants	TRUE	TRUE	TRUE	FALSE	FALSE
Share applications by email	TRUE	TRUE	TRUE	FALSE	FALSE
Assign/change application statuses	TRUE	TRUE	TRUE	FALSE	FALSE
Archive/ unarchive applicant records	TRUE	TRUE	TRUE	FALSE	FALSE
Add new applicant records to the system (create an	TRUE	TRUE	TRUE	FALSE	FALSE

application on behalf of an applicant)					
Add materials to an application on behalf of an applicant	TRUE	TRUE	TRUE	FALSE	FALSE
Create and apply tags to applications	TRUE	TRUE	TRUE	TRUE	FALSE
Rate and comment on applications	TRUE	TRUE	TRUE	TRUE	FALSE
Annotate (add notes) to application materials and export your annotations	TRUE	TRUE	TRUE	TRUE	FALSE
Reports & Logs					
Run standard reports	TRUE	TRUE	TRUE	FALSE	TRUE
Run EEO reports that include detailed and individual responses	TRUE	FALSE	FALSE	FALSE	TRUE
Run EEO reports including only response summaries, no individual responses	TRUE	TRUE	TRUE	FALSE	TRUE
Download Reports	TRUE	TRUE	TRUE	FALSE	TRUE
View / download summary of EEO responses	TRUE	TRUE	TRUE	FALSE	TRUE

Flag Positions for Potential EEO Issues	TRUE	FALSE	FALSE	FALSE	TRUE
View / download detailed EEO responses	TRUE	FALSE	FALSE	FALSE	TRUE
Report on the outcome of a search	TRUE	TRUE	TRUE	FALSE	FALSE
View System Logs	TRUE	TRUE	TRUE	FALSE	FALSE

User Titles in Faculty Search

Users with the role of "Administrator" in Faculty Search can also be assigned a title such as Dean, or Department Chair, in the unit they administer and all units below. This title will allow them to approve positions created by all units they administer before they can be posted.

In this article:

- [About User Titles](#)
- [Creating User Titles](#)
- [Assign Titles to an Administrator From Users & Groups](#)
- [Select a user to administer a position based on unit and title](#)
- [Add additional administrators as approvers](#)
- [Units without approvers](#)

About User Titles

Users with the role of "Administrator" in Faculty Search can also be assigned a title such as Dean, or Department Chair, in the unit they administer and all units below. This title will allow them to approve positions created by all units they administer before they can be posted.

Titles are created on the "Titles" tab of the Users & Groups page of Faculty Search.

Titles are then assigned to administrators when editing the user's permissions.

During the process of creating approval templates, the titles created here become available when selecting an administrator to fill a given title for a given unit.

The administrator creating the approval template has the option to name an administrator as the approver of the position at that step based on unit and title.

The administrator selects the title from a dropdown menu.

The administrator(s) who hold the title selected will automatically be appointed to approve the position at the current step for the unit in which the position was created.

Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Department Chair

Please review this list, and select one or more approvers for each unit, or the highest unit.

Units without Approvers	All Units

Search by unit or approver name

Unit	Approver(s)	Action
Department of Civil Engineering	Pamela Barnes Scott Harris Scott Harris Festus Clamper	**Add Approver**

Creating User Titles

Institutional Administrators can create, edit, and delete titles if they are not linked to an active position or workflow template. Titles are created from the Users & Groups section of Faculty Search.

Select "Users & Groups" from the left hand navigation bar under Faculty Search
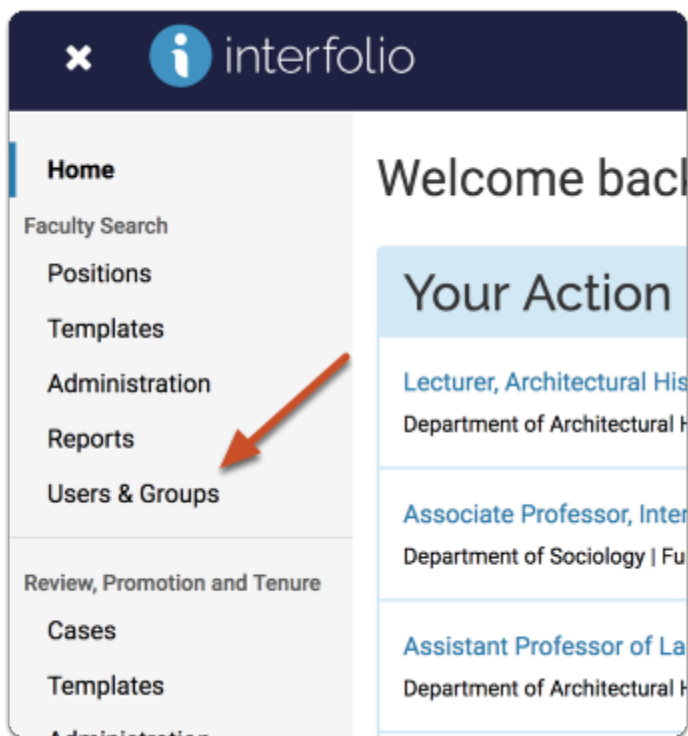
Open the "Titles" tab
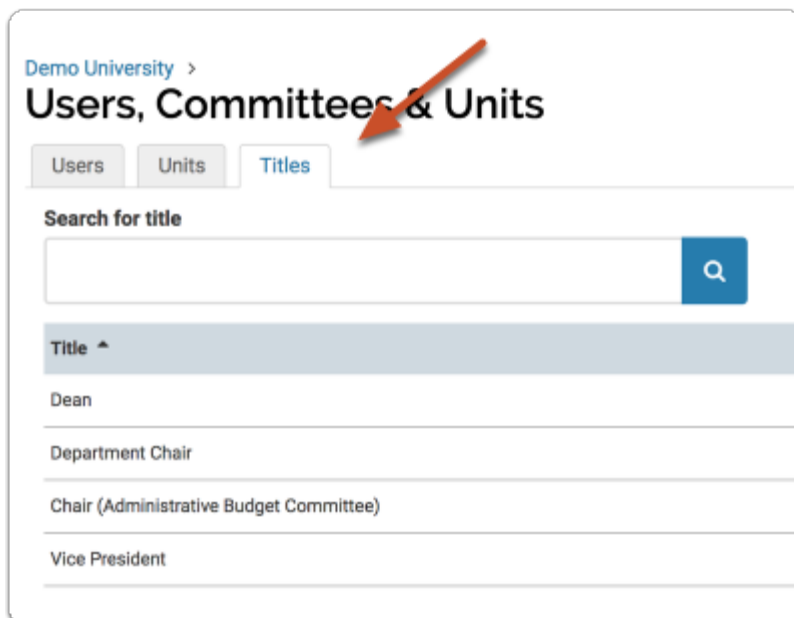
Click "Add Title"

Enter the title and click "Save"

Assign Titles to an Administrator From Users & Groups

Titles are assigned to administrators when editing the user's permissions. A title can be assigned to the unit of the administrator's current role or a unit below.

Open the "Users" tab and select a user with the user role of "administrator"

In the "Edit User" window, scroll all the way down and click "Add Title"

Select a unit and title and click "Save"

Permissions

Title

A title can be assigned to the unit of the administrator's current role or a unit

more about titles.

Select Unit

College of Arts and Sciences

Select Title

Vice President for Administration and Finance

[Save] [Cancel]

Users can be assigned multiple titles at their unit and below it. Click "Remove" to remove a title

Title

A title can be assigned to the unit of the administrator's current role or a unit below. Learn more about titles. Learn more about titles.

Title	Unit	Actions
Vice President for Administration and Finance	College of Arts and Sciences	Remove
Department Chair	Department of Biology	Remove
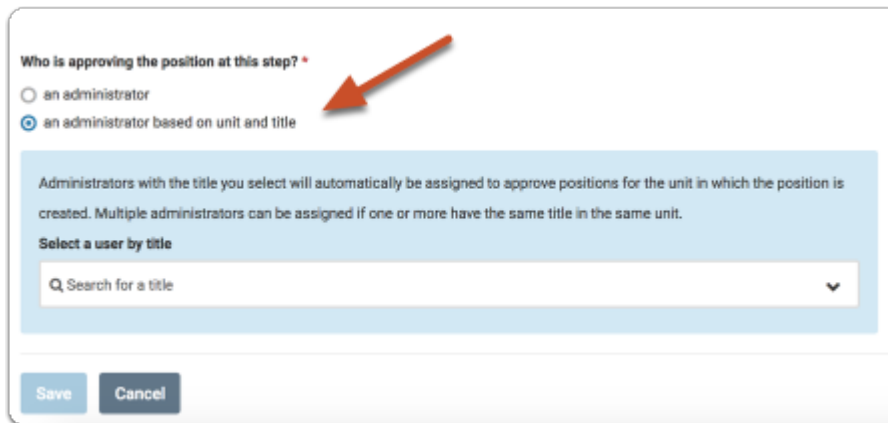
[+ Add Title]

[Options ∨]

Select an administrator to approve a position based on unit and title

During the process of creating approval templates, an administrator has the option to name another administrator as the approver of a particular position type at the given step based on unit and title.

When indicating who will approve a position at a given step, select "an administrator based on unit and title"

Select the title from the dropdown list

The administrator(s) who hold the title selected will automatically be appointed to approve the position at the current step for the unit in which the position was created.

Add additional administrators as approvers

If necessary, add additional administrators as approvers by selecting an administrator to fill the title designated to approve the position at the current step.

Click "Add Approver"

Search for and select an administrator to fill the title for the unit

Units without approvers

If a unit at or below the unit in which the template is being created does not have one or more approvers with the title selected, the administrator creating the template will see a list of units without approvers, and must choose one or more administrators to fill the selected title for each unit without an approver.

Administration Settings Page in Interfolio Faculty Search

From the "Administration" page of Faculty Search, Administrators can control settings for their assigned unit(s), and Committee Managers can control settings and permissions for the positions they manage.

Depending on their administrative privileges, from the "Administration" page, users can:

- Create and edit position and application statuses
- Create message templates to send to applicants when the status of a position or application changes
- Create and and manage EEO statements
- Create and manage application forms (including EEO forms)
- Set communication settings to enable or disable comments and tags

ℹ The tabs that appear on the "Administation" page are determined by your level of access in the program. Not all tabs listed below will appear for all users.

To navigate to the Administration page:

Click "Manage" on you Faculty Search dashboard and select "Administration"
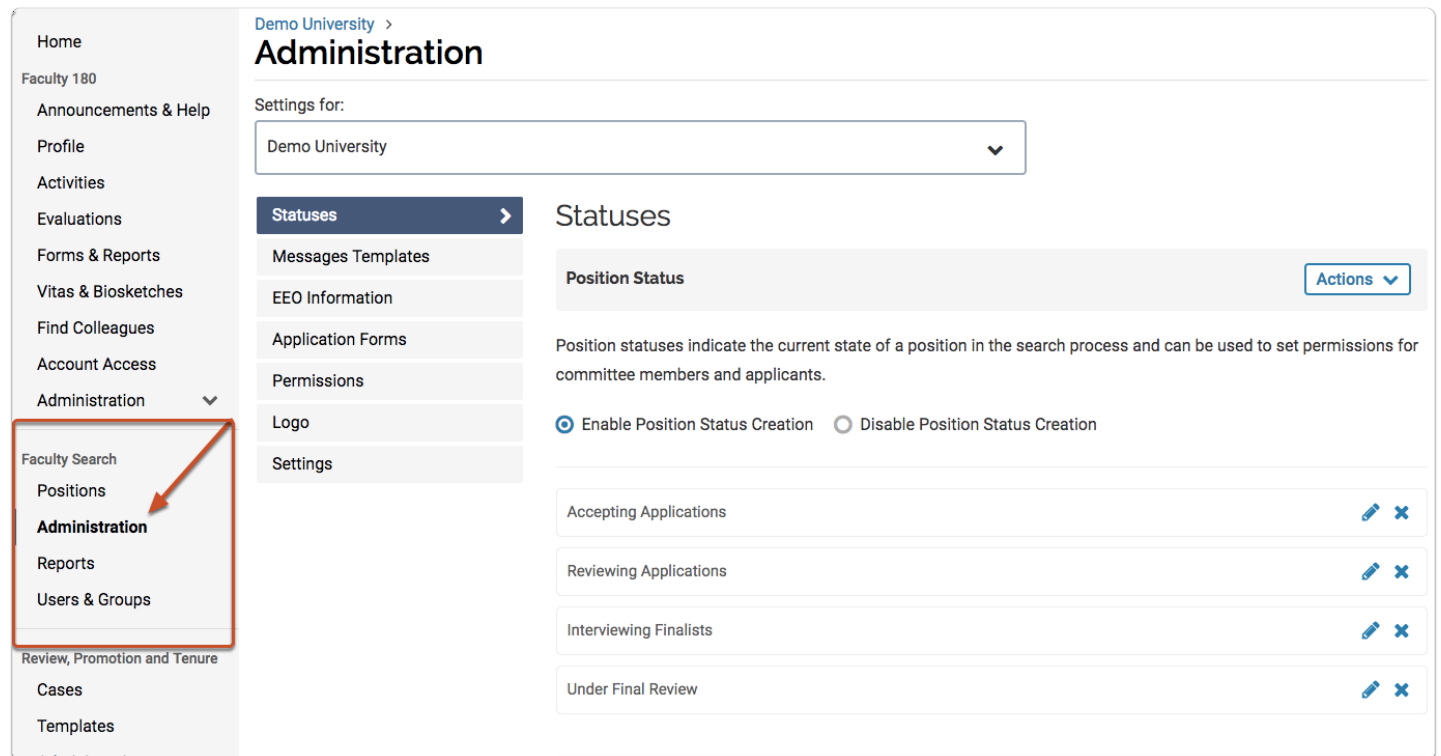
Always make sure you are viewing settings for the correct unit or position

The name of the unit or position you are viewing is displayed at the top left of the page.

> ❗ Any changes you make to the settings on the "Administration" page will be applied to the unit or position listed here.
>
> Click the drop-down if you need to view and control settings for a different unit or position.

Statuses:

From the "Statuses" tab of the Administration page, you can create and manage:

1. **Position Statuses:** Labels that describe the current state of the selection process, for example, "Accepting Applications"
2. **Application Statuses:** Labels that describe the current state of the applicant in the review process, for example, "Longlist" or "No Further Consideration"

> 💡 See here for more information on how to create a position status, and how to create an application status.

Message Templates:

From the "Message Templates" tab you can create and manage message templates to send customized messages to applicants when the status of a position or application changes. You can set the conditions when the message will be sent, and you can edit and confirm messages before sending them.

> ♀ See here for more information on how to set up applicant notification message templates.

EEO Statement:

From the "EEO Statement" tab, administrative users can create, edit, and set the EEO statement for positions created in a unit.

> 💡 See here for more information on managing EEO statements.

Application Forms:

From the "Application Forms" tab, Administrators can create application forms to collect information from applicants. Administrators can also create EEO forms and designate forms as default for a unit.

> ♀ See here for more information on creating application forms, and EEO forms.

Application Forms

Statuses				
Messages Templates				
EEO Information				
Application Forms >				
Permissions				
Logo				
Settings				

Application Forms   [+] Add

Search by form or unit name
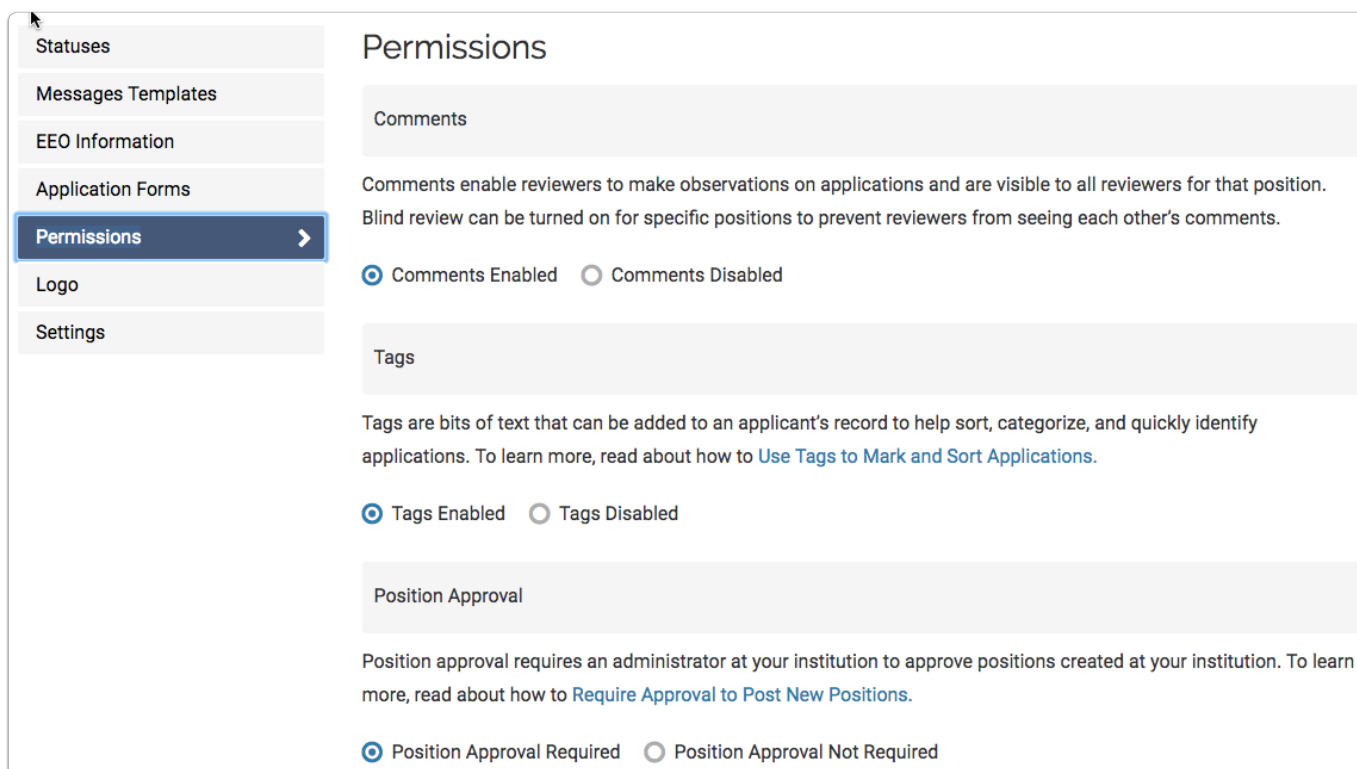
🔍 Search forms

Form Name ▲	Created at ⇕			
Additional Information	Department of Geriatric Nursing	Required	✏	✖
Another test form	Demo University		✏	✖
EEO	College of Arts and Sciences	Required	✏	✖
Test	Demo University	Required	✏	✖

Permissions:

From the "Permission" tab, Administrators can set whether or not reviewers can comment and assign tags to applications. Administrators can require approval for new positions, set who to notify when a position changes, and set the sender name and "reply-to" address for email messages.

💡   See here for more information on <u>requiring approval to post new positions.</u>

Logo:

From the "Logo" tab, administrative users can upload and change the logo that will display on positions created by a unit or set the logo for a particular position.

> 💡   See here for more information on **add a logo to the landing page of a position.**

Administration

Settings for:

Demo University ⌄

Statuses	
Messages Templates	
EEO Information	
Application Forms	
Permissions	
Logo ❯	
Settings	

Logo

Logo	Change

This logo will be displayed on any position published by this unit. For best results, use a logo with a white or transparent background, maximum file size of 20KB, and in one of the following formats: PNG, JPEG, JPG or GIF.

Settings

The Settings page allows an institution to create and use a public positions list.

Statuses	
Messages Templates	
EEO Information	
Application Forms	
Permissions	
Logo	
Settings ❯	

Settings

Public Position List

Interfolio provides a public link to a list of all the published positions available at your institution. You can use this link to advertise the positions available on your institutional website or other places where you provide a list of available positions.

List Name
Demo University Open Positions   Edit

URL
https://apply-alpha.interfolio.com/10207/positions   **Copy URL**

Equal Employment Opportunity Statement
This page displays the EEO statement for your institution. Manage EEO Statement

Demo University shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

Communication in Interfolio Faculty Search

Interfolio Faculty Search includes numerous methods for users to communicate with each other. Administrators and Committee Managers have the ability to email applicants individually or in groups, as well as create automated email notifications (which can trigger automated letters of rejection, for instance).

Comments and "Tags" are tools that help Evaluators and Committee Managers communicate with one another about specific candidates, and are also used to organize and sort applications.

Administrators and Committee Managers can enable or disable comments and labels from the Administration page.

Email

Committee Managers and Administrators can email applicants individually or in groups, as well as create automated email notifications in Interfolio Faculty Search.

Comments

- Comments appear on the Applicant Profile page and in the Document Viewer
- If permissions allow, Evaluators can both leave comments on an application, and view previously entered comments
- Establishing a "blind review" prevents Evaluators from viewing one another's comments

Tags

If allowed, Evaluators can add tags to an applicant record. These are custom tags to help sort, categorize, and quickly identify applications. Tags are useful, for example, for quickly noting qualifications ("PhD", "Wrong Degree") or noting when they have been reviewed by an Evaluator ("Reviewed by Mark").

Tags are also useful for sorting purposes. For example, if a Committee Manager uses a tag to assign each applicant to an Evaluator, then Evaluators can filter by their label and view only those applications they are assigned to review.

> ⓘ Keep in mind that tags are viewable by anyone that has access to the search at your institution. We strongly recommend that Administrators discuss a standard nomenclature to use for labels before beginning the process of evaluation.

Blind Review

When setting up or editing a position, Administrators or Committee Managers can elect to use a blind review policy. With a blind review, Evaluators cannot see one another's comments and ratings. You can, however, start with a blind review, and then un-toggle the feature later for group discussion/collaboration. For more information see this article: Establish Custom Ratings Criteria and/or Set Up a Blind Review.

Notifications

Users will receive alerts and notifications when certain actions need to be completed. Here is more information on the To-Dos.

Position and Application Statuses

Position and Application Statuses are tags you can use to mark the stages of a search and track the progression of an applicant. Statuses are useful for sorting positions or applications, and can be a very effective tool for managing search processes that involve several steps.

Statuses in Interfolio Faculty Search can also be tied to settings in the product that control the levels of access Evaluators and applicants have to materials. For example, depending on your settings, statuses can be used to determine when applicants can submit materials or when Evaluators can review applications.

Position Statuses

Position statuses indicate where a position is within the search process. Some common position statuses are "Accepting Applications," and "Reviewing Applications." These statuses are useful for viewing or sorting a list of open positions.

In addition, each position status can carry its own set of rules that impact permissions in the program. When creating a position status, you have the option of choosing whether:

1. Evaluators can review applications while this status is active
2. Applicants can update their application materials while this status is active
3. Applicants can see this status when it is active.

So, for example, when changing a status from "Accepting Applications" to "Reviewing Applications," you can set the program so that Evaluators can review application materials, but applicants can no longer submit or update application materials.

Application Statuses

Application statuses are applied to individual applicants to indicate where their application is within the search process; for instance, you might use "Rejected," "Longlist," or "Shortlist" as possible application statuses. This feature is particularly useful for sorting applicants and controlling when subsets of applicants can and cannot update their applications.

When creating an application status, you can control whether:

1. Applicants can update their application materials while this status is active.
2. Applicants can see this status.

If a search process requires applicants to add additional documents at a later time, application statuses are the best way to accomplish that process. For instance, you might want to see

another letter of recommendation just from the top candidates halfway through your search. By creating a "Shortlist" application status, you can allow just those applicants to submit more materials. Application statuses are also beneficial because they help organize and narrow down large lists of applicants.

Useful Articles for Getting Started

[Create a Position Status](#)

[Assign or Change a Position Status](#)

[Create an Application Status](#)

[Assign or Change an Application Status](#)

Custom Application Forms

A standard faculty search will collect personal information from applicants, such as names, emails, and contact information, along with typical documents such as cover letters, C.V.s, and letters of recommendation. If you need to collect additional information specific to your institution or individual search, you can create a custom application form that will appear as a requirement in your institution's online application.

For example, some institutions like to collect information about their advertisements with a form asking "Where did you hear about this position?" Other institutions might require forms that allow candidates to specify their strengths or preferences that apply specifically to the position.

All administrators and committee managers can create forms. Forms can be specific to the institution, college, department or position. Once a form has been created at a specific tier, any position that falls under that tier will have access to the form in Step 4 of the position creation process, or when editing a position.

Note that creating forms and adding them to your application are two separate processes. Forms are created from the Administration page, but are added to your online application requirements either at Step 4 of creating a position, or from the Edit Position screen.

Faculty Search's form editor can also be used to collect Equal Employment Opportunity data, and comes pre-loaded with a VEVRAA/503-compliant Standard EEO form. EEO forms can be required by institutional or unit administrators. If a form is marked as an EEO form, only EEO officers and Administrators with EEO access may view the data it collects. Responses are not available to committee members without EEO access.

Useful Articles for Getting Started

Create a Custom Form to Collect Applicant Information

Create an EEO Form

Customizing the Standard VEVRAA/503-compliant EEO Form

Reporting In Faculty Search

Interfolio Faculty Search includes many options for finding and documenting information about applicants and the results and details of searches and decisions at your institution. Reporting includes four main areas: system logs, application reports, EEO/custom form reports, and position reports. Every report can be displayed online or downloaded as a .CSV file.

System Logs

System logs allow you to track changes and updates in your institution's use of Interfolio, including:

- Changes made to questions or descriptions included in application forms
- All outbound messages sent to your applications in a specific position
- Changes to assigned application and position statuses
- Changes to information about the position, including the position description, start/end date, auto-acknowledgment email, and application instructions

Applications Report

Applications Reports are created by applying a customizable set of filters to sort applications along many possible data points. Users can pick and choose from an extensive list of applicant data fields to create a customized report, which can be viewed onscreen, saved and recalled, and downloaded as a CSV file. This allows Administrators to run detailed and customized reports on the data involved in faculty hiring across an institution.

Forms Report

An EEO and custom forms report pulls data from a form that was included as a requirement with a position. With a forms report, whatever question that you have posed to an applicant during the hiring process can turn into reportable data. Information from this report can be presented in raw data format, showing individual responses, or in a response summary, showing totals and percentages.

Positions Report

The Positions Report tool allows administrators to generate a table of information about positions (searches) created by one or more units, such as a school or department, based on

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one or more criteria such as the results of a search (hires made, or notes indicating why a hire was not made etc.) position details, dates, description, application requirements, evaluation (criteria and labels), search committee members, and internal notes (such as Funding Sources, Salary Range etc.).

More Useful Articles for Getting Started with Reports

[View System Logs](#)

[View Report of Emails and Notifications](#)

[Run an EEO or Custom Form Report](#)

[Run a Combined Report](#)

[Close a Position and Indicate the Outcome of a Search](#)

[Run a Report on the Results of an Interfolio Faculty Search](#)

Closing Positions

Committee Managers and Administrators can close a position when applications are no longer being considered, either because a hire has been made or for some other reason.

When closing a position, Committee Managers or Administrators can indicate which applicants were selected to fill the position, and if no applicants were selected, can leave an optional note to document why no selection was made. The user is also asked to set a final closed status for the position and has the option to send a message to all applicants based on the status they have chosen.

In addition, Administrators can run reports that clearly document who was hired for every search in the system. For more information see this article on [how to run a report on hired applicants](#).

Guides for Faculty Search Job Applicants and Evaluators

Committee Manager's Guide to Interfolio Faculty Search

Welcome to Faculty Search! Faculty Search allows you to both collect applicant materials and make collaborative, committee-based decisions with your colleagues, all in one secure and easy location. You can easily adapt your existing hiring process into Faculty Search to make the experience more efficient and paperless for yourself, your colleagues, and your applicants.

As a Committee Manager, you have many more responsibilities and privileges in the product than the average committee member; at the same time, you are slightly limited within your organization when it comes to certain aspects of the product, such as creating institutional settings. The following articles will assist you in your role by showing how you cover every step of your workflow in , from creating a search committee, to creating and managing a new position, and communicating with your applicants. And remember: every action within Faculty Search is documented with a step-by-step guide in our **online help center**.

Click here to download and print a PDF of the complete **Committee Manager's Guide to Faculty Search**.

Useful Articles for Getting Started

Basics

[Users in Faculty Search](#)

[Your Faculty Search Account Dashboard](#)

Creating a Search Committee

[Add or Remove Members to/from a Search Committee](#)

[Add Users](#)

[Change a User's Role](#)

Creating Positons

[Create a Position](#)

Establish Ratings Criteria

Submit a New Position for Approval

Approve a Position or Send It Back for Changes

Managing Positions

Best Practices for Managing a Search

Edit an Existing Position

Enable or Disable Reviewer Comments and Labels

Close a Position and Indicate the Outcome of a Search

View Referral Sources to See Where People are Finding Your Position

Statuses

Position and Application Statuses

Create a Position Status

Create an Application Status

Managing Applications

Add Documents on Behalf of an Applicant

Request a Letter of Recommendation on Behalf of an Applicant

Create an Application on Behalf of an Applicant

Communicating

Email Applicants

Set Up Automated Email Notifications

Job Applicant's Guide to Interfolio Faculty Search

When you apply to an Interfolio-hosted position, you will be given a free Interfolio Dossier account that you can use to collect and submit your materials, including confidential letters of recommendation, all for free. Using our convenient, easy to undertand online application process, you can fulfill specific requirements set by the institution, complete any forms they have requested, and review your completed application at any time.

When you've completed applying for your Interfolio-hosted position, you'll still have your free Dossier account for collecting and storing materials. You can also **search for more opportunities from directly within our program.**

Applying and sending materials to Interfolio-hosted positions is always free, but we encourage you to consider signing up for our premium service, Dossier Deliver, so you can send the materials in your Dossier wherever you need them to go! Click here to **learn more about the advantages of Dossier Deliver.**

Click "Apply Now" on a position announcement

If an institution is using Faculty Search to run a search, you will be able to apply online just by clicking the "Apply Now" button in the position announcement.

Sign in if you already have an account with us, or click to "create an account"

ℹ Note that you can sign in with your institutional ID if you have a Dossier account through your institution, or sign in using your Google account.

If you need to create an account:

> ℹ️ Fill out the account info, create a password, agree to our terms of service and click "Sign Up."

Complete your profile in order to start your application

Complete your profile to get started. We will provide this information to the institution to which you are applying.

> Applying to an Interfolio-hosted position is a guided step-by-step process. An overview of the application steps are listed to the right of the screen.
>
> Steps that still need completion will be marked by a red exclamation point.

Upload required materials to the application

> ⓘ You will see a list of required materials along with the number required.
>
> You will need to satisfy all document requirements before submitting your application.

Click "Add File" to add required materials

Open the "Add New File" tab to upload materials from your computer to the application

You can add files from a few different sources, but if this is your first time using Interfolio's Dossier to apply for a position, open the "Add New File" tab to begin adding materials to the application.

> 💡 All materials you add here will automatically appear in your Dossier account where you can use them for other purposes such as future reviews or applying for other opportunities.
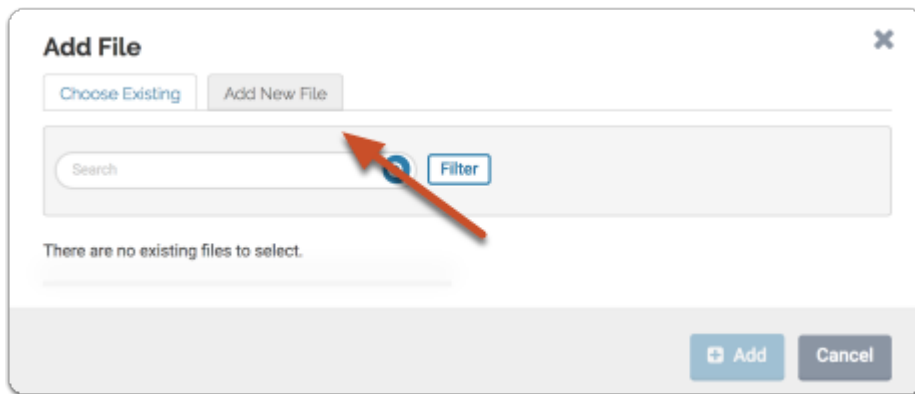
From here, you can drag & drop, or browse for files to upload. You can also add links to videos and webpages if necessary.

See here for more information on how to [link to webpages in your Dossier](#) and how to [add Youtube and Vimeo videos to your Dossier.](#)
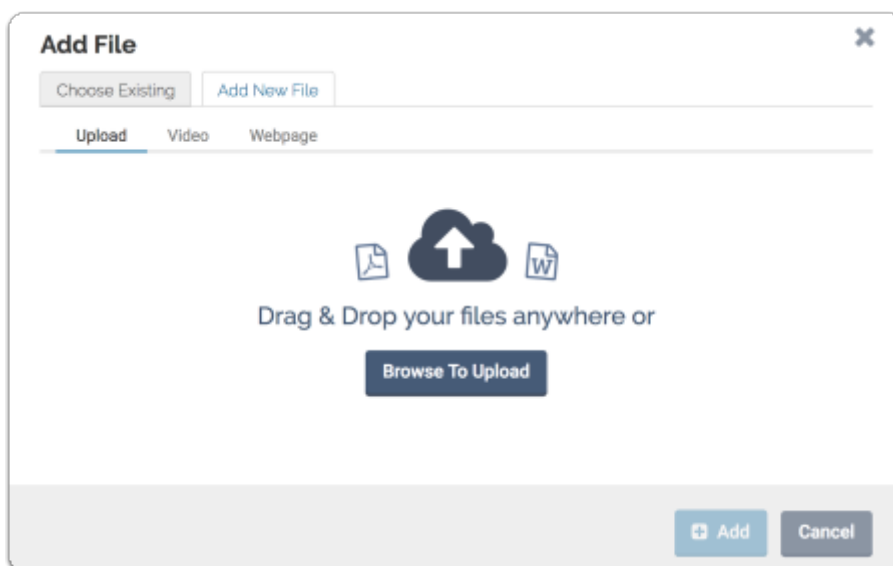
Once you have selected a file to upload, select the type of materials you are uploading from the dropdown menu

"Type" describes the material and indicates which requirement it satisfies such as; C.V., cover letter, research statement, etc.

Click to "Add"

A green check mark indicates when you have satisfied a requirement
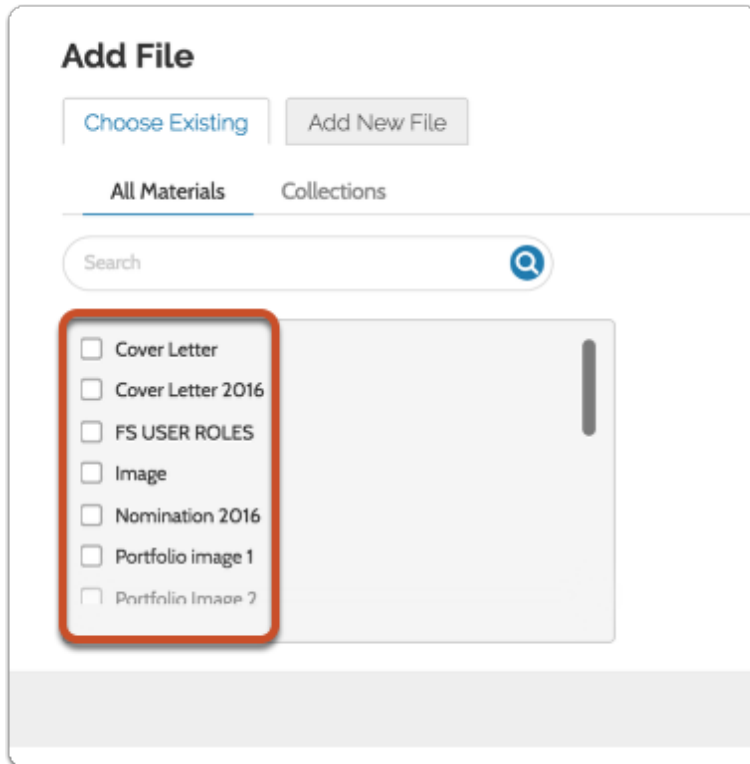
You can also add files that you've previously uploaded to your Dossier:
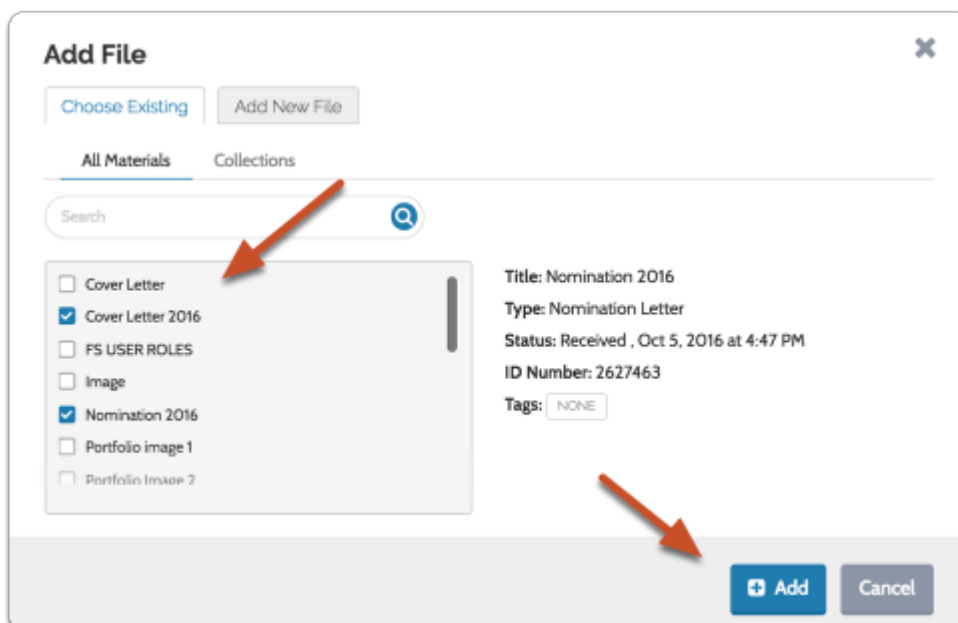
If you have already uploaded materials to your Dossier account they will show up in the dropdown list on the tab labeled "Choose Existing."

Select all the materials to include and click "Add"
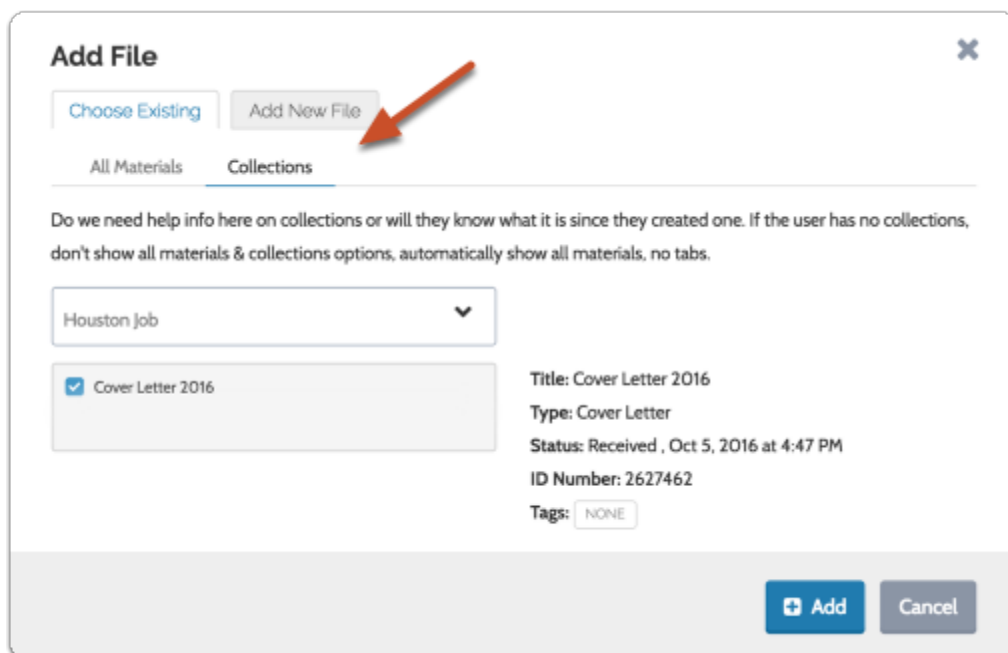
-or- click "Collections" to open a tab where you can select materials from your saved collections

Use Dossier to request and add confidential letters of recommendation:

If your application requires a confidential letter of recommendation, you can request that letter through Dossier. We will automatically attach the letter of recommendation to your application when we receive it from your letter writer.

Click "Add File" under the requirement for confidential letters of recommendation

You can choose to use a letter you already have in your Dossier, or request a new recommendation

Note that you can filter the list by keyword to quickly find particular letters. Simply enter your keywords and select "Filter."

To use existing recommendations" Select "All" to add all letters of recommendation in your account to the application, or select the individual letters you want to include, and click "Add"

Add File

Choose Existing | Request a Recommendation

All Materials | Collections
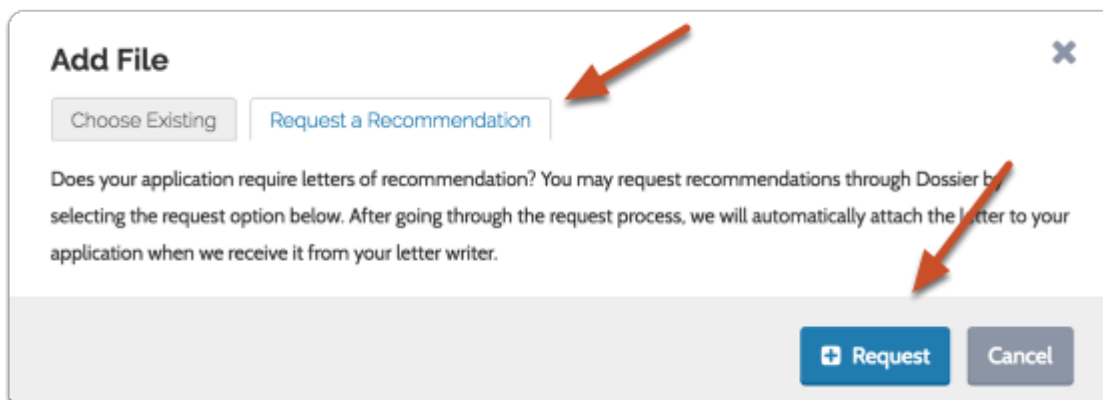
Search | Filter

☐ All
☐ Recommendation from E. Grangerford for Associate Professor of Orthodontic Dentistry
☐ Recommendation from E. Munchausen
☐ Recommendation from F. Doolittle

Title: Recommendation from E. Grangerford for Associate Professor of Orthodontic Dentistry

Type: Confidential Letter of Recommendation or Evaluation

Status: Requested , Oct 17, 2017 at 2:30 PM

ID Number: DA1D9C1E4D

Tags: None

Add | Cancel

To request a new recommendation, open the "Request a Recommendation" tab, and click the "Request" button to begin the process

Add File

Choose Existing | Request a Recommendation

Does your application require letters of recommendation? You may request recommendations through Dossier by selecting the request option below. After going through the request process, we will automatically attach the letter to your application when we receive it from your letter writer.

Request | Cancel

Fill out the recommendation request form and hit the "Send Request' button

New Recommendation Request
from Samantha Reeves

General Information

Please include the name and email address of your recommender so we can verify the document when it is received.

Recommender Title

Prof. ▾

Recommender First Name *

Randall

Recommender Last Name *

Quinn

Recommender Email Address *

rquinn@demo.edu

Document Title *

Recommendation from R. Quinn for Associate Professor of Orthodontic Dentistry

Confidentiality ❓

☑ This request is for a confidential letter or evaluation.

Request Method

⦿ Email   ○ Print Request Form

You will receive an email notification that your letter request has been sent.

interfolio

Your request for a Confidential Letter of Recommendation or Evaluation has been sent to Randall Quinn (rquinn@demo.edu).

Hi Samantha Reeves,

Now that your request has been sent, the next step is for Randall Quinn to upload the document. When they do, you'll get a confirmation email.

If necessary, you can easily resend your request to your letter writer from your Dossier account.

If your letter writer gets in touch with questions, feel free to refer them to us so we can assist them; or, you can always direct them to our help for letter writers, which answers the most common user questions.

When we receive the recommendation from your letter writer, we will automatically attach it to the application, and add the letter to your Dossier materials

Your request will appear with the status "Requested" until the letter writer accepts or denies the request. If they accept, the status will be listed as "Pending" until we receive the letter. Note that to complete the requirement, you only need to have requested the letter. The requirement is considered complete when all required letters have been requested and have a status of added.

As you add required materials, you can preview how they will appear to the recipient or reviewer
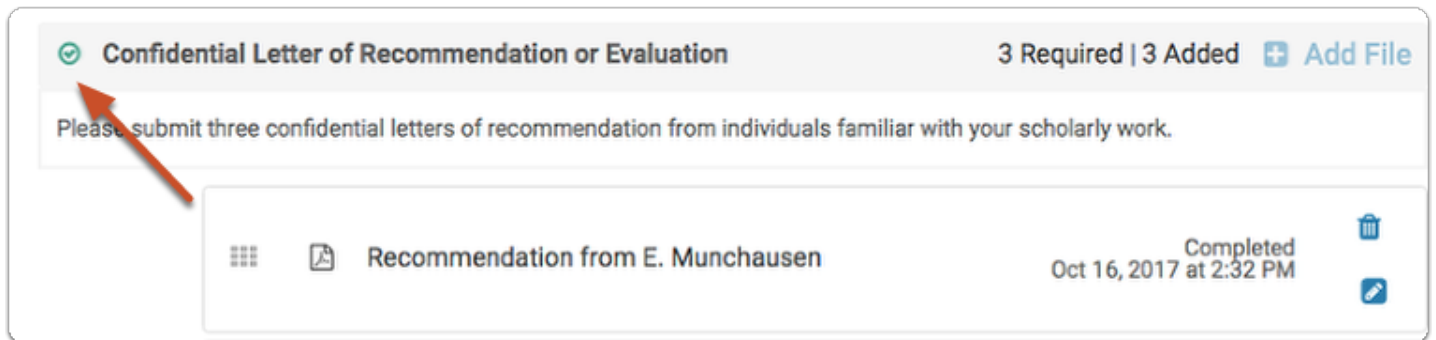
After uploading a document or other material, and once the material is marked "Received," click the name of the document to preview how it will appear to the recipient reviewing your application
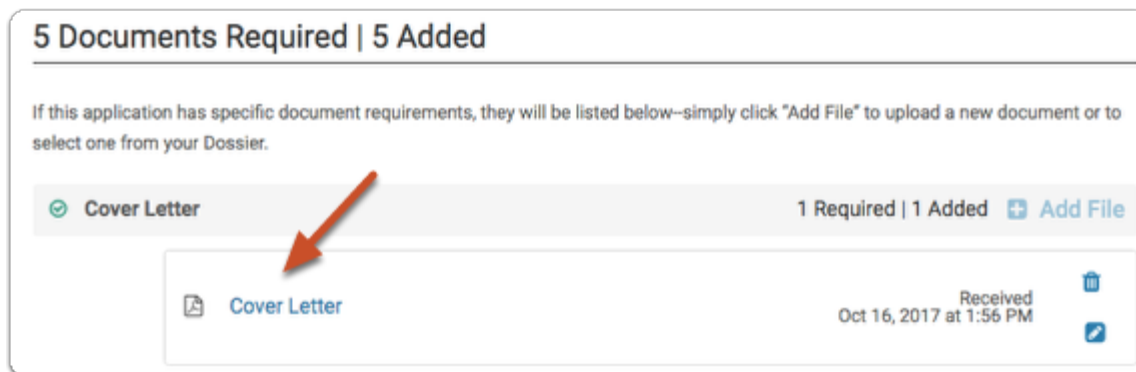
This opens a preview of the file
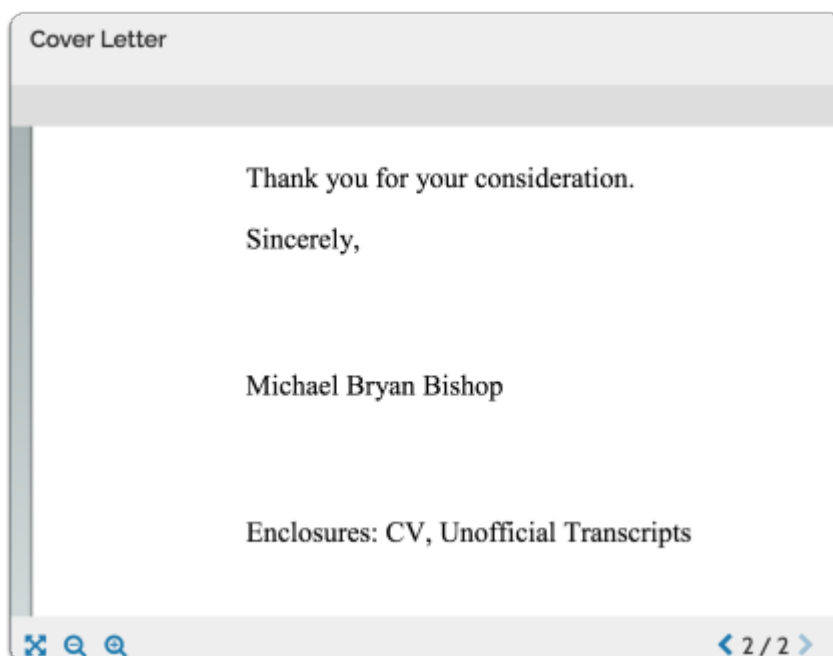
When enough documents have been added to satisfy a requirement, a green check will display for the entire section

If you need to edit, delete, or replace an uploaded document, you can do so from the documents page of the application. Click the edit pencil

This will allow you to change the title and type of the document, or to replace it with a new document

Click the trash icon to delete a document from the application

Confirm that you want to remove the document from the application

Are you sure you wish to remove Cover Letter 2016? This will remove it from your application, but a copy will remain stored in your Dossier account.

Yes   No
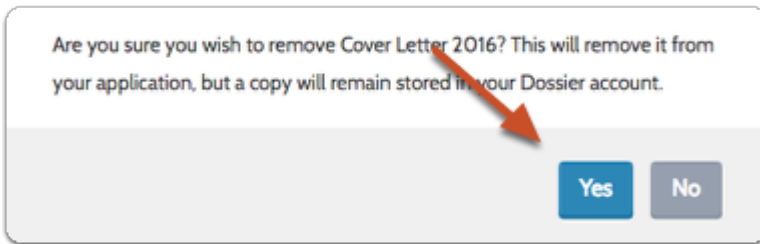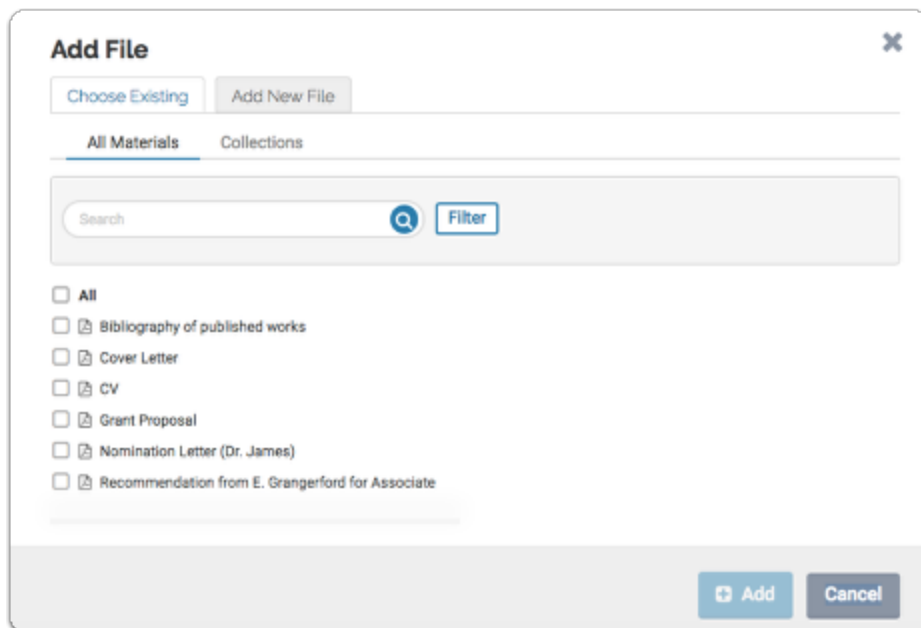
To replace a document, click "Replace" in the bottom right corner of the window

⊘ Cover Letter   1 Required | 1 Added ⊞ Add File

📄 Cover Letter   Received
                                                  Oct 16, 2017 at 1:56 PM

Title ❓ *

Cover Letter

Type ❓

Cover Letter   ⌄

✓ Update   Cancel   ⟳ Replace
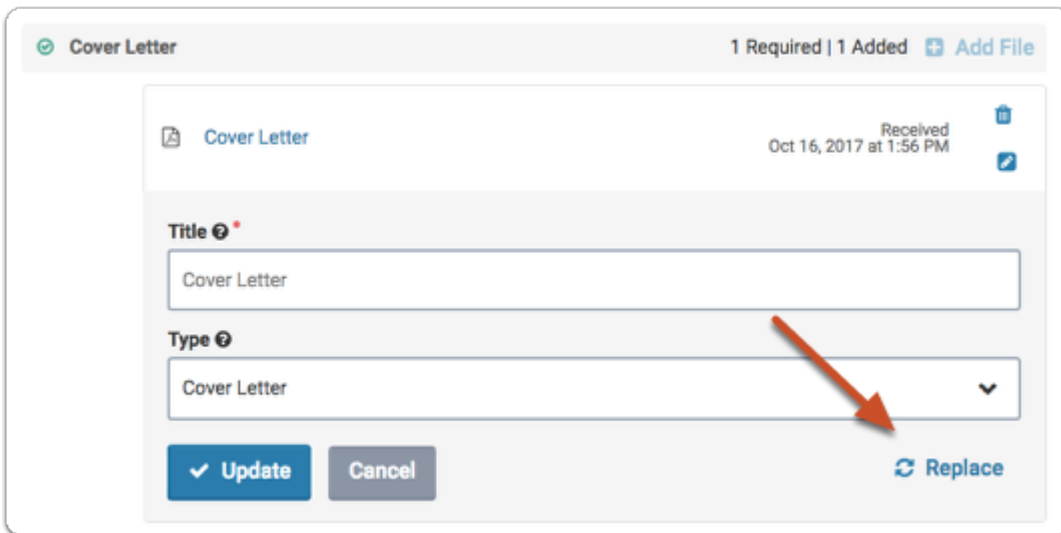
Select a replacement document and click "Add," or click "Add New File" to upload a new document

💡   Note that you can select from collections of materials, and filter the list of materials to find particular materials quickly.
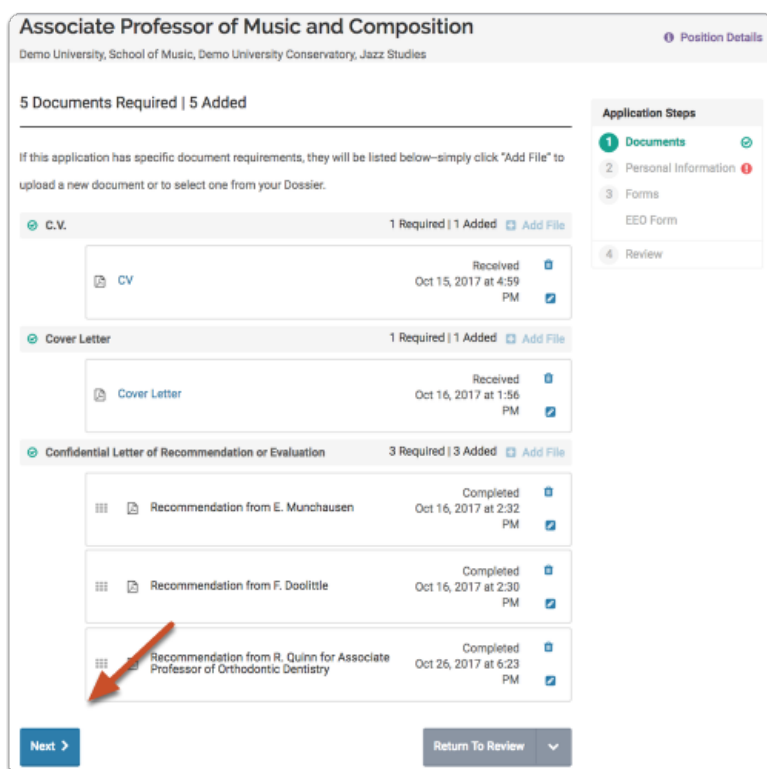
Click "Next" when you are finished adding required documents

Enter your personal information

Verify your name and address, select the highest degree you have earned, enter where and when you earned the degree. Note that you can choose not to disclose your education information. Click "Next" when you are finished.

You may need to complete forms required for the application

ℹ️ Simply fill out all forms and click "Next" when you are finished.

Review, confirm, and submit your delivery (application)

This page gives an overview of your progress toward completing the application.

Manage your applications from the "Deliveries" section of your Dossier account

You may review, edit, and track your Interfolio-hosted positions by navigating to "Deliveries."

Click "Deliveries" on the navigation bar
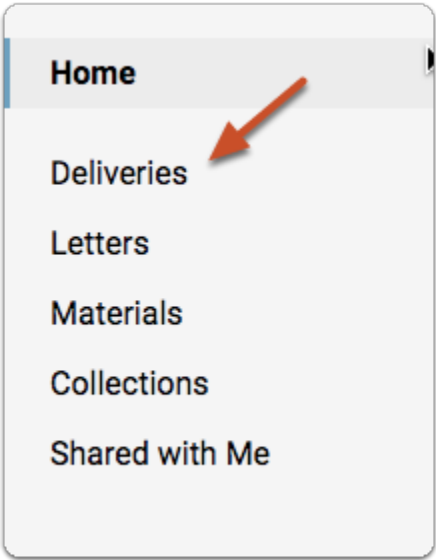
You will see in-progress and sent deliveries listed with status, notes, delivery type and actions. Click to edit, withdraw, or submit deliveries

Manage your materials through Interfolio

Remember, we keep the materials you use for Interfolio-hosted applications in your Dossier, and with your free account you can use Interfolio to manage all of your supporting materials for

academic opportunities. With an upgrade to Dossier Deliver, you can [create and send deliveries of your Dossier materials](#) to the places you need them to go!

> 💡 See here for more information on how to use your account to [manage your Dossier materials.](#)

Searching for opportunities through Interfolio:

You can search for interfolio-hosted positions, and include results matching your keywords on the job boards of Inside Higher Ed, HigherEd Jobs, and HERC (Higher Education Recruitment Consortium

Click "New Delivery"

Enter search terms under "Find an Opportunity"

> 💡 Try searching for the name of an institution, a position title, or position type.

A list of open Interfolio-hosted positions matching your search terms will appear. Click the title to view position details such as description, qualifications, etc.

Click "Start Application" to apply

You can also click to include results for your search from Inside Higer Ed, HigherEdJobs, and HERC

This will open a page with results from your search on the selected site.

Evaluator's Guide to Faculty Search

Interfolio Faculty Search provides faculty members and staff with a set of tools specifically designed to facilitate academic committee work. When its time to hire faculty or consider fellowship applications, evaluators can easily access and review applicant materials and participate in committee activities on-line with Faculty Search.

💡 You can generate and download a PDF version of this article from the left sidebar of this page.

Getting started:

If you do not already have an Interfolio account, you will get an email inviting you to activate your free account

Click "Activate Now" in the invitation email.

Set your password, agree to our terms of service and click "Activate Account" to access Faculty Search

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If you already have an account with us, your invitation email will take you to your account to sign in

Sign into your account

You can sign in to the program with your email and password, your Google account, or using your institutional ID.

Viewing the list of positions:

Click "Positions" in the left hand menu to see a list of positions you have been assigned to evaluate

Alternatively, you can click the name of a particular position in your list of action items to open it.
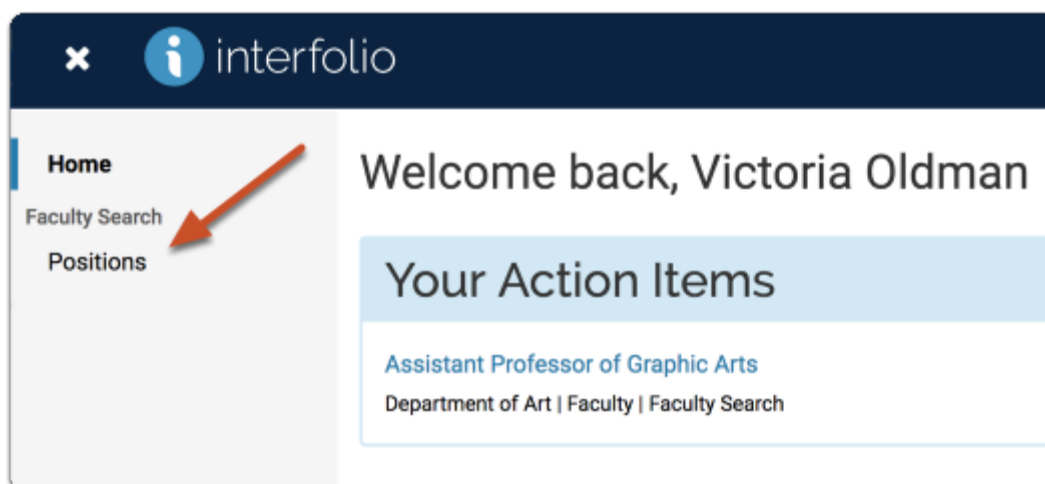
Positions are listed in a table that displays the position name, status, type, and open and close dates

The positions to which you have access will display in a table that lists:

- **Position:** The name or title of the position you are trying to fill such as "Associate Professor..."
  - Beneath the position title you will see the department, position type (faculty, fellowship, staff, etc), and position ID number

- **Status:** The position status describes the current state of the search, such as; "Accepting Applications," "Under Review", etc.
- **Application Information:** The number of applications for the position and the open and close dates indicating when a position is open or closed to new applications
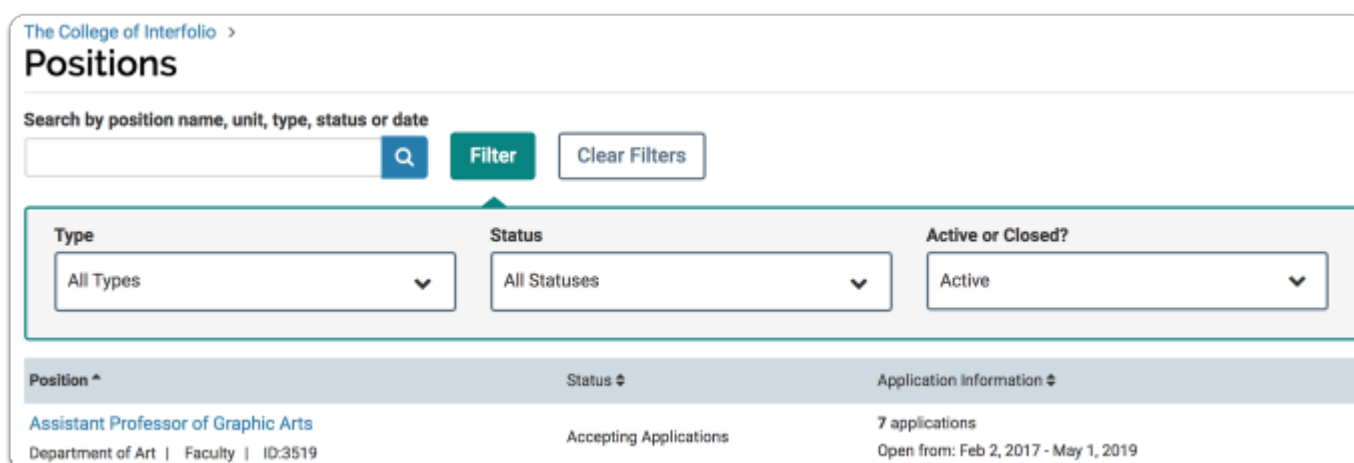
Position list management:

We have features to help you search, sort, and organize the list of positions you have been assigned to evaluate.

- **Search:** You can search for a particular position by name, unit, position type, status or date
- **Filter:** You can also filter the list to only display positions of a particular type, status, or limit the display to either active or closed positions

Viewing the list of applicants:

Click the position title to access the applications for a position

Applications are listed in a table that displays the applicant name, the date the application was last updated, the applicant status, and if permissions allow; tags and a rating summary

At the top of the page you will see the unit where the position is posted, the current position status and open and close dates.

The applications display in a table that lists:

- **Applicant name:** click the applicant's name to open their application and view their application materials, or check the box next to the name to select more than one applicant.
- **Application Status:** The application status describes the place of the applicant in the search process, such as; "Add to Shortlist," "Not Competitive," "Invited for Interview," etc.
- **Tags:** Tags are short bits of text tags that can be used to sort or mark applications for a variety of purposes. If permissions allow you can create tags and view tags added by others to applications.
- **Rating:** If permissions allow you can rate applicants on custom criteria using a five star scale. Depending on the settings for the position, you may be able to see your overall rating listed here.

> 💡 The applicant list can get quite long. For more information on the features we have for managing a large applicant pool see below Organizing the Applicant List.

Reviewing application materials on-line:

Check the name of one or more applicants in the list to review their submitted materials

ℹ️   Selecting a name or names from the list opens a new set of buttons on the page.

Click "Read" in the upper right corner of the page to view selected applications in your browser

Review applications on-line using our materials viewer

Application materials open in Interfolio's materials viewer within your broswer. You can scroll through the applications, search for terms in .pdf documents that are part of the application,

and if permissions allow, you can leave comments, tags, and give applicants a rating on pre-defined criteria.
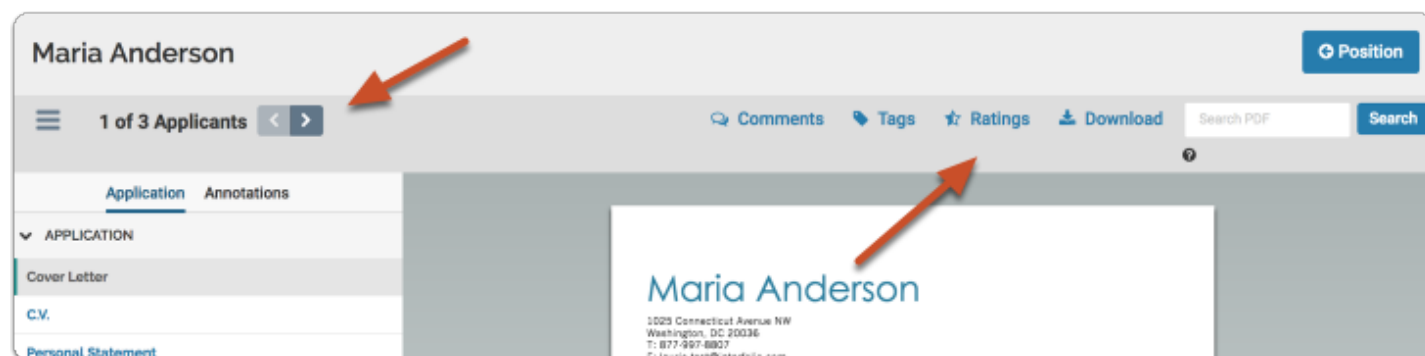
Materials submitted by the applicant appear bookmarked as application materials. If internal documents have been added to the application by the committee, these are are bookmarked in the viewer as well.
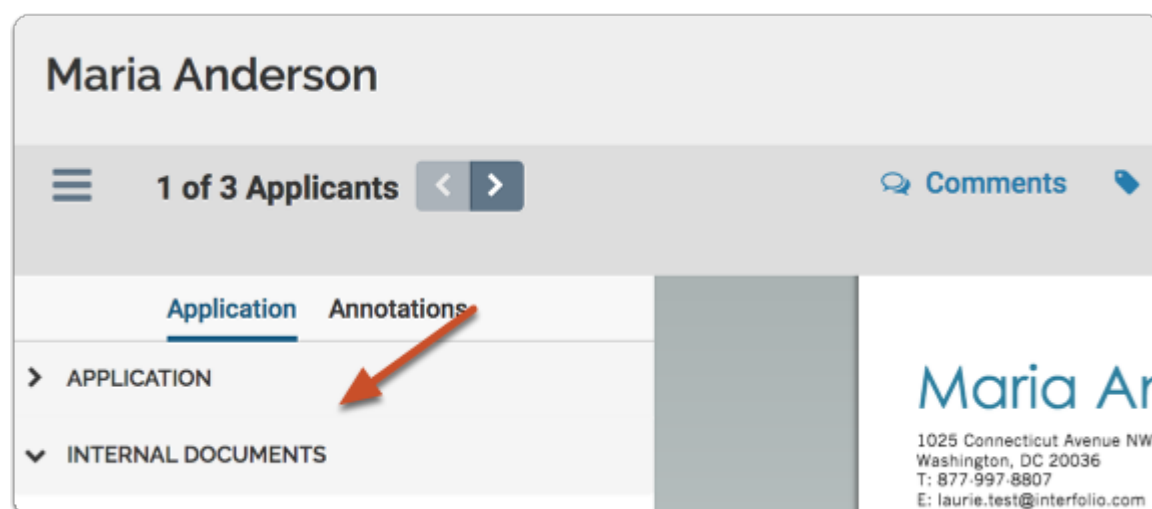
You can leave notes/annotations on the material from the lower right of the viewer

ⓘ Only you can view the notes you leave on an application.

- **Point** notes are virtual stickies that point to something in the document
- **Area** notes allow you to select a section of text in a document
- **Text** notes highlight passages of selected text
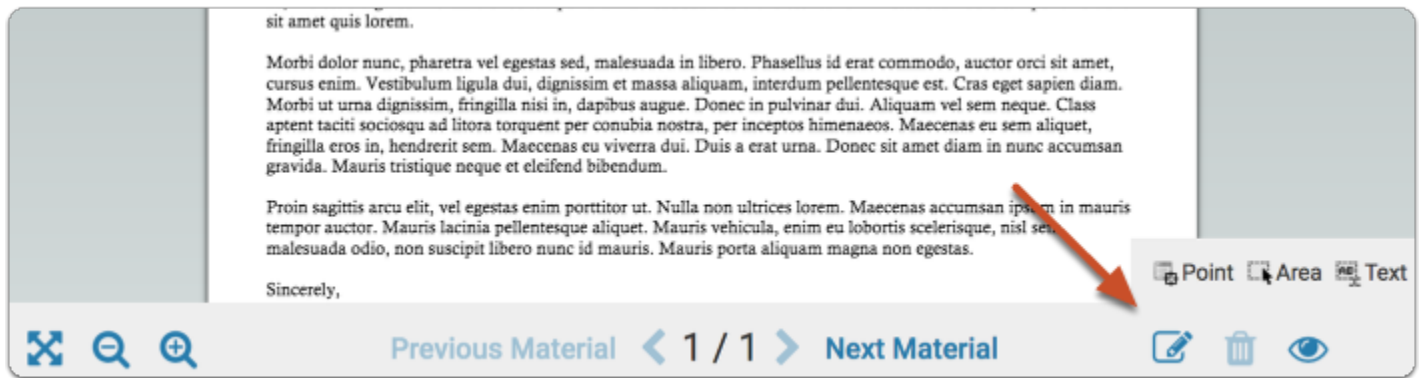
Click the "More Options" icon and select "Download" to save PDF copies of all selected applications
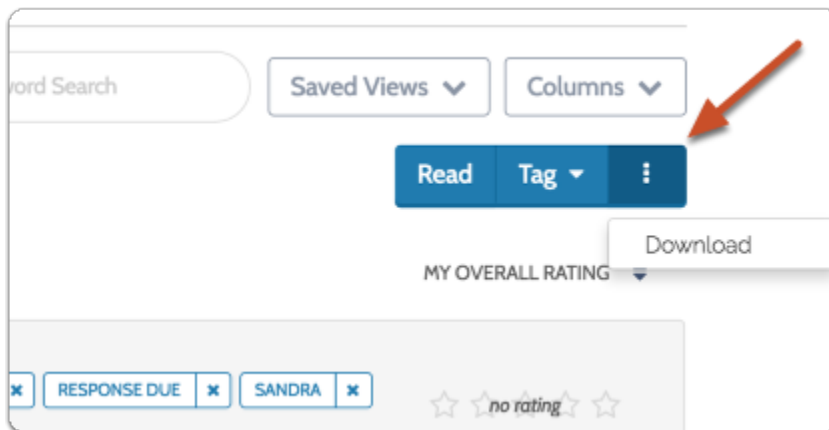
Application list management:

The list of applications for a position is often very long. We have features to help you search, sort, organize, and customize the list of applicants. We also allow you to save your views of the list so you can recall your work when going through applications.

- **Search:** You can search for a particular position by name, unit, position type, status or date
- **Filter:** You can also filter the list to only display positions of a particular type, status, or limit the display to either active or closed positions

The Applicant Profile:

Click the name of an applicant to view that applicant's profile page

From the profile page you can view and add tags to the application (if enabled), and access application materials (click the name of a file to open it, or click to download the material)

If enabled, you may be able to rate the applicant, and leave comments and notes on the application

You can click "Read" to open the application in our materials viewer, or "Download" to save the application materials

Organizing the Applicant List:

Tagging Applications

If your institution allows it, you can add and create tags to attach to an application. Tags are bits of text you can use to help identify, sort, and mark applications.

---

1. With one or more applicants selected in the list, click the "Tag" button and select an existing tag or create a new one
2. By default, tags will appear listed in the applicant table (See below for instructions on configuring the columns displayed in the list)

Filtering the list of applicants

Click the "Filter" button at the top of the list to open a set of options for filtering the list. You can filter the list of applications by data points including highest degree earned, application status, tags, ratings, or completion status.

ℹ️   The list will be filtered according to your settings and the filters will appear above the list.

💡   Note that you can easily remove the filters you add either one at a time, or by hitting the button taged "Clear Filters."

Saving views of the Applicant list

Click "Save"

Enter a name and click the check mark

Click "Saved Views" (to the right of the page) to recall the view of the list using the filters you have set
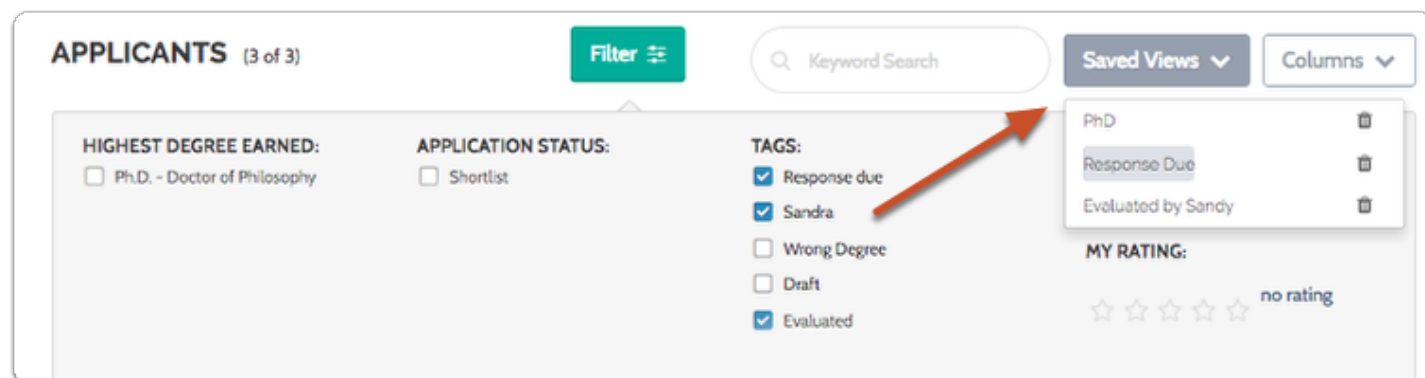
Customizing the columns of information that display on your view of the applicant list:

Click the "Columns" button to the right of the page and select the columns of information you want to display

The default columns that will display are applicant name, date updated, tags, and overall average rating (if enabled). You can add columns for complete status, date submitted, highes degree earned and highest degree date, and your overall ratings. Note that you can restore the default columns at any time.

> You can also add answers to custom form questions as column headers in the display.
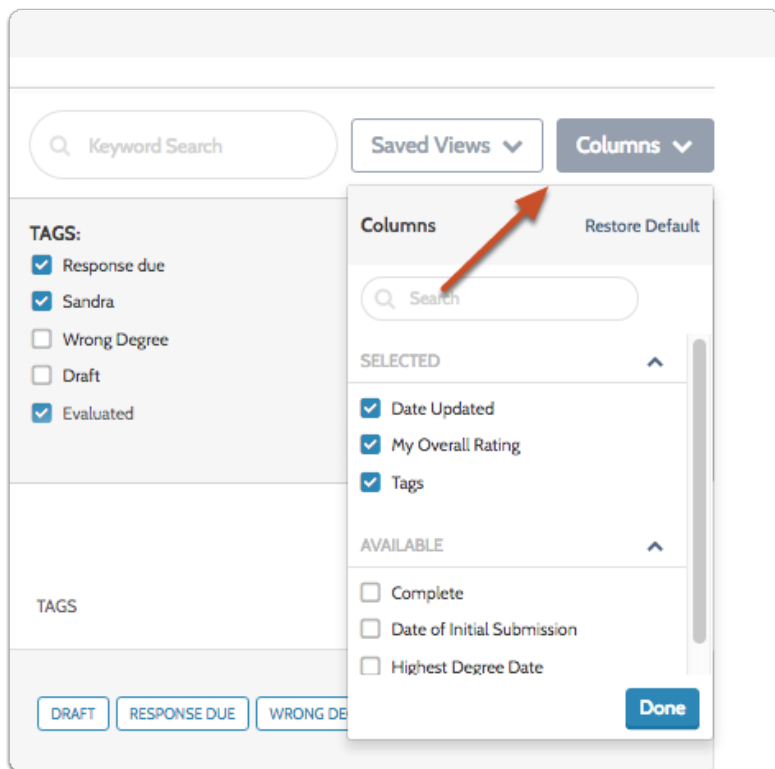
Searching the Applicant list and saving searches:

Enter a keyword in the box to search the list.
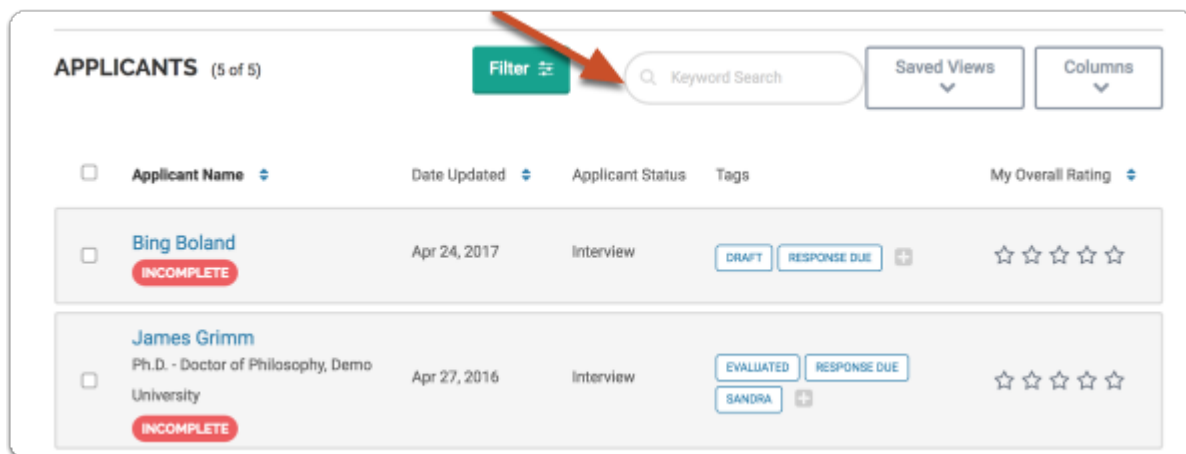
The results display and the search term appears above the list
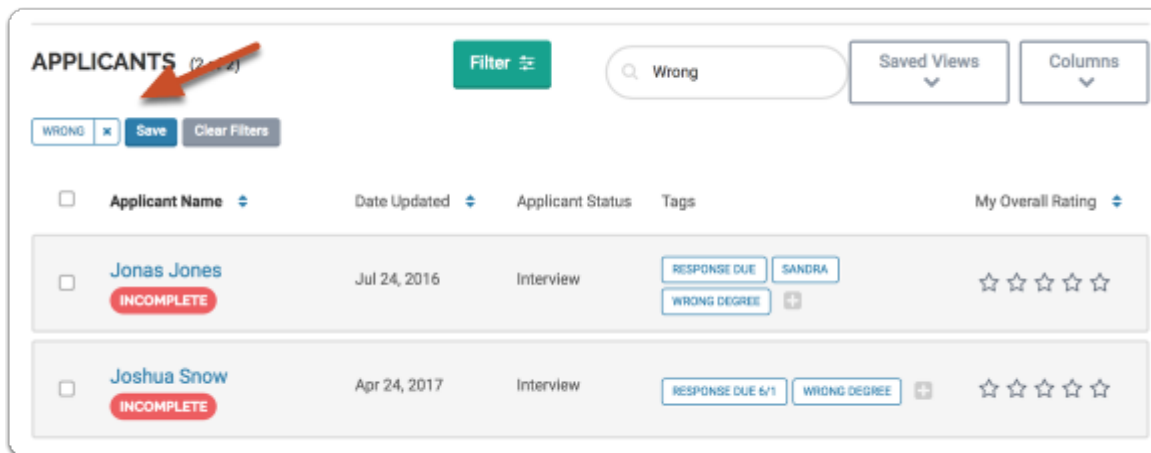
Click "Save" to save and name the view of the list filtered according to your search results
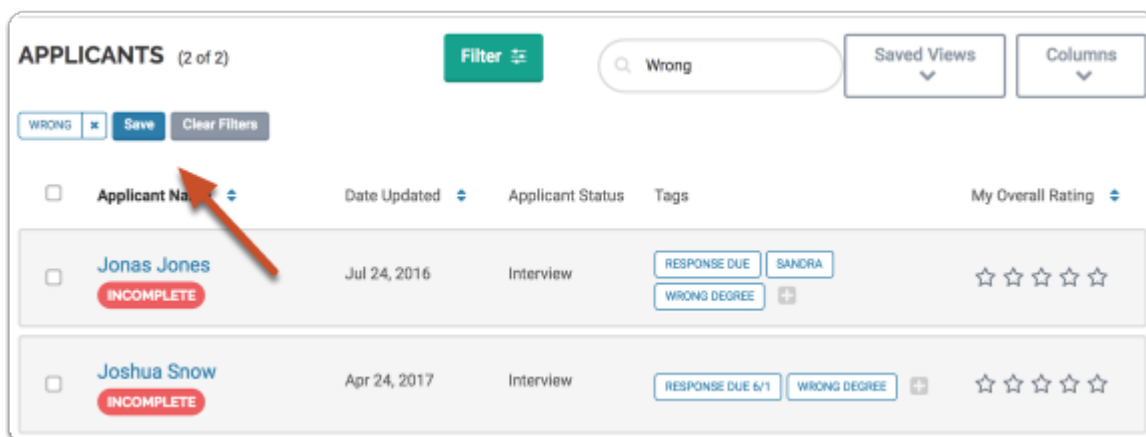
Enter a name for your view and click the check to save it
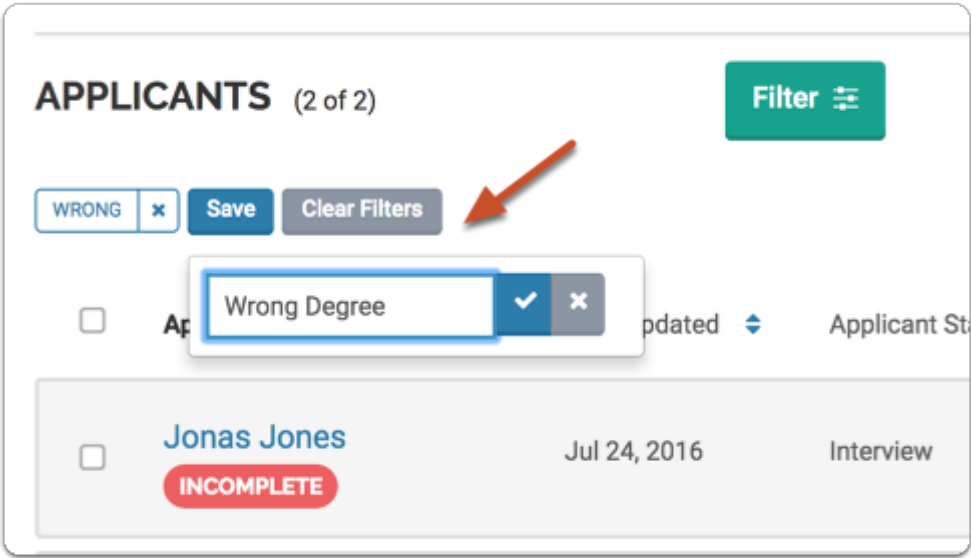
Click "Saved Views" to the right of the page to recall the saved view of the list
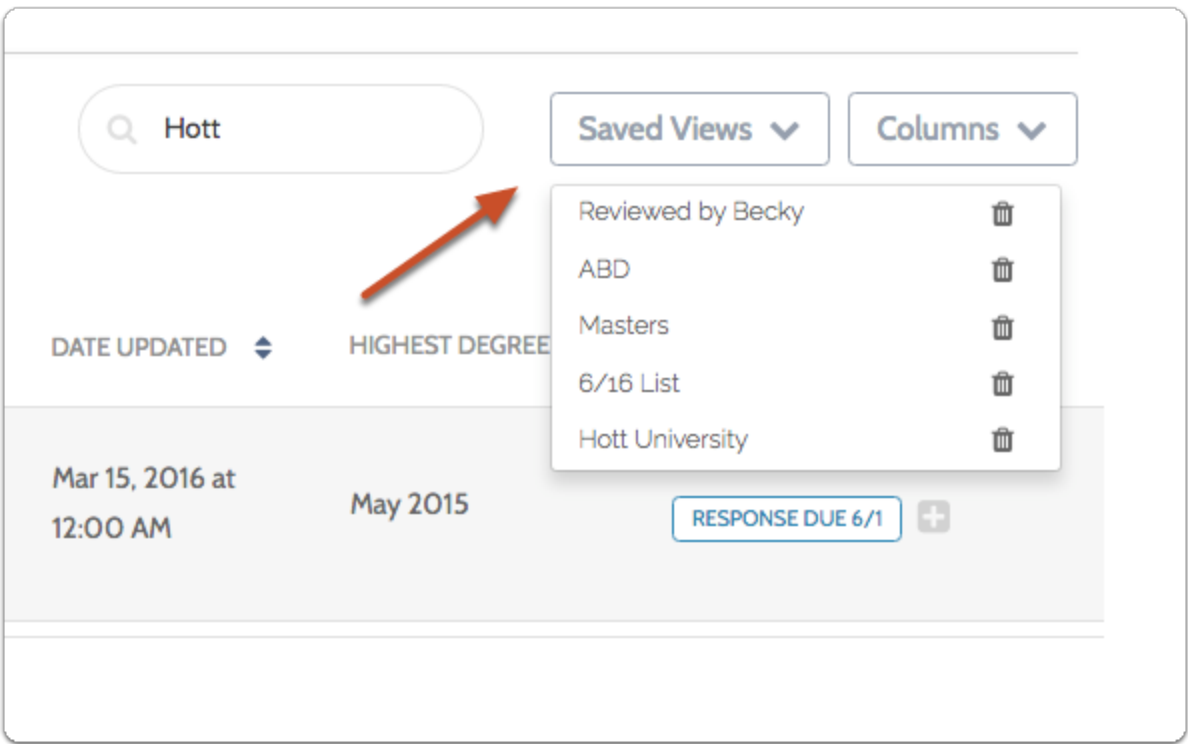
Setting the pagination of the applicant list

ℹ️ By default the list displays 25 applications at a time, but you can set the pagination to display 50, 100, 200, or all applications. Look to the bottom left of the page to set the number of applicants displayed at one time.

💡 Remember that changes you make to the filters, columns, searches and pagination will be remembered during your session. To save the searches and filtered views of the list, click the "Save" button and give the current view a name.

Administrator's Guide to Interfolio Review, Promotion, and Tenure

Your Interfolio Account Dashboard and Account Settings

This article explains how your Interfolio account dashboard is configured, some basics on what you can do once you're there, and how you can access your account settings to change basic user information.

After signing in, you will see your account page. From here you can access all of the accounts you have with Interfolio and your Interfolio Account Settings.

Your Institution account page

You will find links to the Interfolio products to which you have access on the Interfolio account screen.

1. If your institution uses Review, Promotion & Tenure, Faculty Search, and Faculty180, than relevant pages will be displayed here.
2. You can also access your Dossier account (personally or institutionally created). If you have access to one, you can access it by the user menu in the top right corner.

Institutional Branding

[Read about how to brand institutional products here.](#)

The Faculty Search Navigation Bar

> ℹ️ Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Evaluators or Committee Managers in the program.

Click "View Positions" to view your active searches

Faculty Search

Positions

Administration

Reports

Users & Groups

The Review, Promotion, and Tenure dashboard:

> ℹ️ Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Committee Managers or committee members in the program.

Click "View Cases" to access the cases you are managing or evaluating

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

The Faculty180 Navigation Bar

💡 Users will only see the relevant pages, depending on institutional settlings.

All administrative settings are in the Administration section

Home

Faculty 180

Announcements & Help

Profile

Activities

Evaluations

Forms & Reports

Vitas & Biosketches

Find Colleagues

Account Access

Administration ⌄

To access the settings for your account:

Click your name in the upper right hand corner of the screen and select "Account Settings" from the drop down menu.

The Account Settings page:

> ℹ The tabs below appear if you have a Dossier and Interfolio account.

Personal Information

From the "Basic information" tab of "Account Settings," you can access and manage personal information such as your career details, and also contain information like your address and degree. In other tabs you can find your email and notification settings, and any delivery ID numbers associated with your account, as well as some other settings.

Communications

From the "Communications" tab, you can manage communication settings including how and when you receive email from Interfolio

ID numbers

Need to add ID numbers regularly to your deliveries? If so, than you can use the Interfolio ID storage tool to be able to easily store and attach it to your deliveries.

Subscription & Billing

From the "Subscription & Billing" tab, you can renew your account, add deivery credits, view your remaining deliveries, download all data and documents in your account, manage payment info, and view and download a record of your transactions.

From the "Password" tab, you can change the password for your account

Notifications:

Users will receive alerts and notifications on the homepage in the to-do action items, urgent items with deadlines and mandatory response will appear at the top and the rest will overflow to a searchable table at the bottom.

Welcome back, Scott Harris

Your Action Items

Associate Professor, Intercultural Studies
Department of Sociology | Faculty | Faculty Search

Assistant Professor of Landscape Architecture
Department of Architectural History | Faculty | Faculty Search

Assign Activity Classifications for Imported Scholarly Works
Activity Input | Faculty 180

Review Possible Duplicates from Activity Imports
Activity Input | Faculty 180

You have been named by a faculty member within your institution as a contributor to an intellectual or creative contribution. Please verify.
Activity Input | Faculty 180

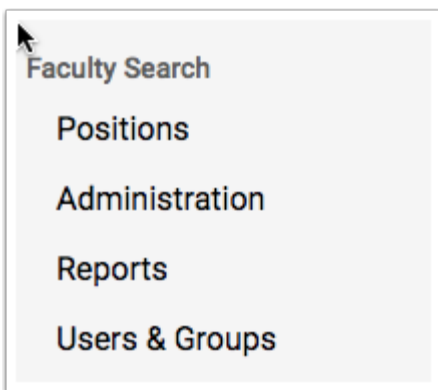## Additional Assigned Items

Search by keyword

Administration Settings Page in Interfolio Review, Promotion, and Tenure

From the Administration Settings page in Interfolio Review, Promotion, & Tenure administrative users can enable or disable file downloads, enable or disable comments, create and edit forms used to collect information from candidates, establish case statuses for an institution, and set up committee voting options.

The features and functions mentioned here are explained in more depth throughout this guide in various chapters, and where appropriate, information specific to your institution has been included.

Navigate to Administration Settings

Click "Manage" on your Promotion & Tenure account dashboard and select "Administration"
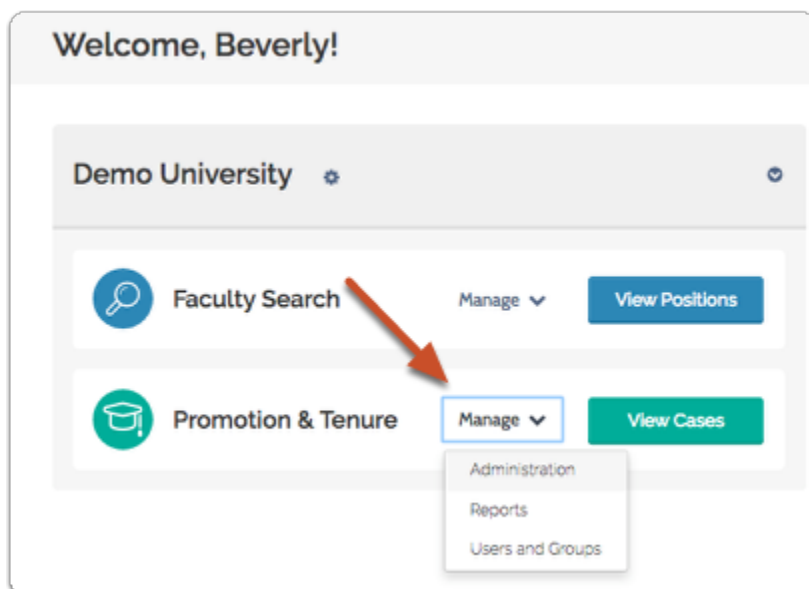
-or- Click on "Administration" from the navigation menu in the upper right of most screens in the program
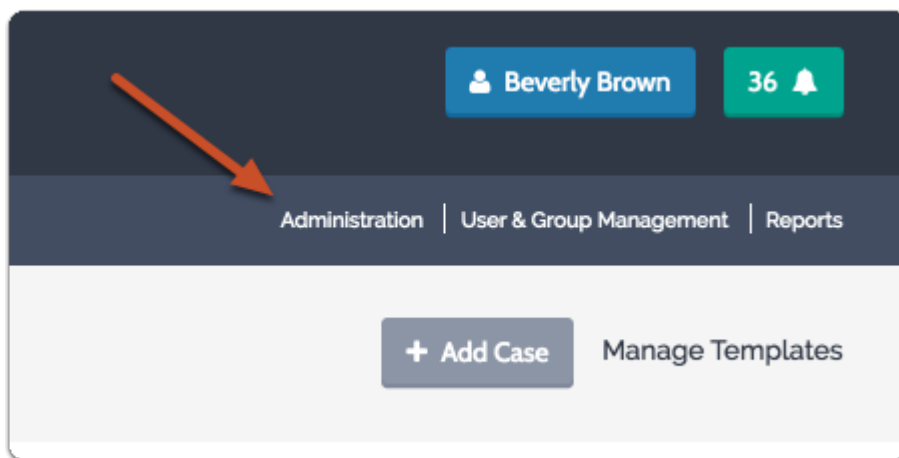
Administrative Settings:

The Administration Settings page appears as a tabbed interface. By default the page opens on the "Comments & Downloads" tab.
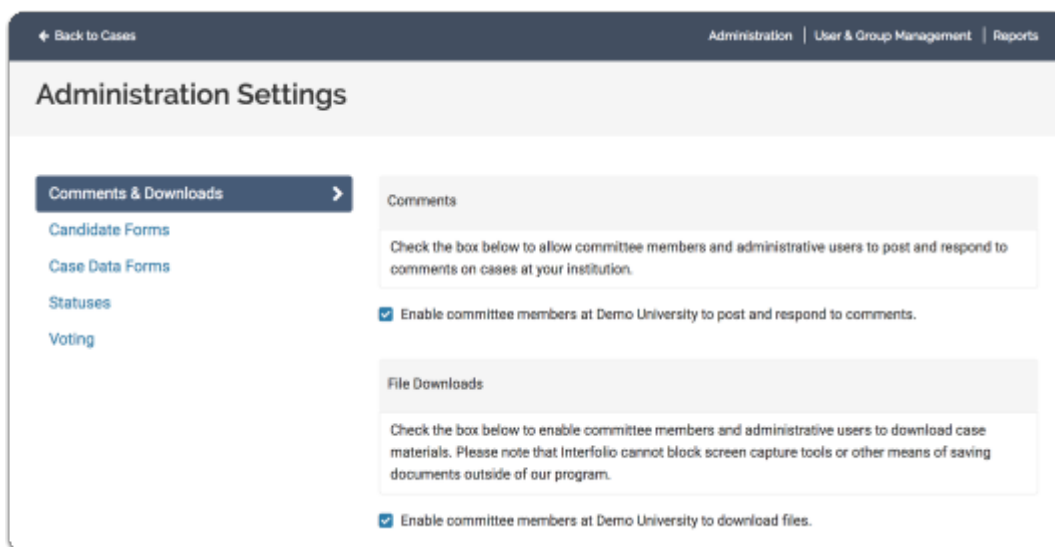
Comments & Downloads

From the "Comments & Downloads" tab you can manage commenting and downloading privileges across an institution

1. Check the box below to allow committee members and administrative users to post and respond to comments on cases at your institution.

2. Check the box below to enable committee members and administrative users to download case materials. Please note that Interfolio cannot block screen capture tools or other means of saving documents outside of our program.

Candidate Forms

From the "Candidate Forms" tab administrators can create, edit and manage candidate forms which are are used to collect information directly from candidates.

Candidate Forms can be used to collect additional information directly from candidates at your institution. Forms can be created at any unit in your institution and will be available for use at all units below it in your institutional hierarchy. Administrators can attach forms to cases or templates.

Case Data Forms

From the "Case Data Forms" tab administrators can create, edit and manage case data forms that can be used to include additional information about candidates at your institution.

Forms can be created at any unit in your institution and will be available for use at all units below it in your institutional hierarchy. Administrators can attach forms to cases or templates. Only Administrators can fill out Case Data forms - candidates will never have access to either the questions or responses.

Statuses

From the "Statuses" tab Administrators can create a list of statuses that can be applied to any case at the institution. These statuses are meant for organizational and reporting purposes, so you can easily see where individual cases currently are, along with their ultimate outcome. Committee Managers and Administrators are also able to add custom statuses at the individual case level.

Voting

From the "Voting" tab Administrators are able to collect the results of committee votes through Review, Promotion & Tenure. Admins or Committee Managers record the votes of a committee into RPT. These options are available to each committee at the institution and the results are tracked and reportable.

Set Up Your Institution's Hierarchy

Administrators can set up Interfolio Review, Promotion, & Tenure to exactly reflect the real-life organizational hierarchy of an institution by creating organizational units and adding lower organizational units beneath them. For example, a university might be the highest organizational unit, and that unit would in turn contain as many lower units as necessary, such as a colleges, schools, individual departments, divisions within departments, etc. Any structure is possible and can be easily created from within the program.

Committees, templates, users, and cases can be added to a specific unit when you create them. By associating aspects of the product with a unit, you will be able to control the level of access that is associated with that entity. In general, when a form, template, user, committee, or case is assigned to the institution-level unit, it will be available to all units the entire institution. When one of these items is assigned to a lower organizational unit it will be available to that unit and all units below it. For example, a college level unit might have committees, templates, users, and cases that are in turn available to all lower organizational units such as departments, and so on.

Articles in this guide provide more detailed information on how units and your institutional hierarchy relate to forms, templates, users, and committees.

Useful Articles for Getting Started

[Add a New Administrative Unit](#)

[Edit an Existing Administrative Unit](#)

User Roles in Interfolio Review, Promotion & Tenure

In Interfolio Review, Promotion & Tenure, there are four different user roles: Institutional Administrators, Administrators, Committee Managers, and Users/Committee Members. These roles have different levels of access to materials and actions within the system.

Institutional Administrators are administrators at the highest level of an institution. They have all the powers of administrators, but can also set whether or not comments and downloads are enabled for an institution, add custom branding to the appearance of Interfolio, establish case statuses that can be used across an institution, and set up and manage committee voting at an institution.

Administrators are the users with the most power within Interfolio RPT. They are the only users who can create templates, forms, and cases for the units to which they have access. Administrators can also create users and committees. Administrators can exist at any organizational level in RPT, and have the ability to perform administrative functions for all units within their administrative hierarchy. For example, an Administrator at a university will have access to settings, cases, and committees for all units at or beneath the university level, such as colleges, departments and so on. Administrators will lose such access only when "recused" from a case at a particular workflow step.

Committee Managers have the power to move a case either backward or forward after a committee has finished reviewing. In addition, Committee Managers have communication powers within the system; they can e-mail both the candidate and committee members from within the product, and can record committee votes in the program. In order to make a user a Committee Manager, an Administrator must manually select them to serve this role.

Committee Members have access to the materials of a case and, depending on settings, may have access to some communication tools in the program. Anyone added to Interfolio RPT is automatically called a "user." Users have the most basic and restricted access in the system. Once a user is added to a committee, they are often referred to in that context as a **Committee Member**. A user must be added to a committee in order to view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to..

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Administration				
Add/edit and manage organizational units	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Add/edit and manage users	TRUE	TRUE	FALSE	FALSE
Assign users to one or more units	TRUE	TRUE	FALSE	FALSE
Name users Administrators or Committee Managers	TRUE	TRUE	FALSE	FALSE
Assign users to a committee	TRUE	TRUE	FALSE	FALSE
Create and manage candidate forms (forms to filled out BY a candidate)	TRUE	TRUE	FALSE	FALSE
Create and manage case data forms (forms ABOUT a candidate or case)	TRUE	TRUE	FALSE	FALSE
Enable/disable comments for an institution	TRUE	FALSE	FALSE	FALSE
Enable/disable downloads for an institution	TRUE	FALSE	FALSE	FALSE
Add/ edit custom branding (logo and colors)	TRUE	FALSE	FALSE	FALSE
Create/edit institution-wide custom statuses	TRUE	FALSE	FALSE	FALSE
Set up committee voting (enable feature and add institution-wide voting options)	TRUE	FALSE	FALSE	FALSE
Committees				
Create/manage standing committees	TRUE	TRUE	FALSE	FALSE
Permanently Add/remove users to/from standing committees	TRUE	TRUE	FALSE	FALSE
Create/delete case-specific (ad-hoc) committee	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Add/remove case-specific (ad-hoc) committee to or from a case	TRUE	TRUE	FALSE	FALSE
Add single reviewer (committee of 1) to a case review step	TRUE	TRUE	FALSE	FALSE
Edit name, instructions due date of a case-specific committee	TRUE	TRUE	FALSE	FALSE
Add users to, or remove users from a case-specific committee	TRUE	TRUE	TRUE	FALSE
Assign temporary members to a standing committee	TRUE	TRUE	TRUE	FALSE
Temporarily remove (recuse) members from a standing committee	TRUE	TRUE	TRUE	FALSE
Set up committee document requirements	TRUE	TRUE	TRUE	FALSE
Upload documents to satisfy committee document requirements	TRUE	TRUE	TRUE	FALSE
Record the results of a committee vote	TRUE	TRUE	TRUE	FALSE
Templates & Cases				
Create/edit/delete a template	TRUE	TRUE	FALSE	FALSE
Create/edit/ a case	TRUE	TRUE	FALSE	FALSE
Create/edit candidate packet requirements for a case	TRUE	TRUE	FALSE	FALSE
Allow candidates to add packet sections	TRUE	TRUE	FALSE	FALSE
Set up a case workflow (series of case review steps)	TRUE	TRUE	FALSE	FALSE
Move a case forward or backward	TRUE	TRUE	TRUE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:

	Institutional Administrator	Administrator	Committee Manager	Committee Member
Close/reopen a case	TRUE	TRUE	FALSE	FALSE
Delete a case	TRUE	FALSE	FALSE	FALSE
Recuse (temporarily remove) a standing committee member from a case review step	TRUE	TRUE	TRUE	FALSE
Recuse an administrator from one or more case review steps	TRUE	TRUE	FALSE	FALSE
Recuse an administrator from one or more case review steps in a template	TRUE	TRUE	FALSE	FALSE
Apply and remove an existing status to a case	TRUE	TRUE	TRUE	FALSE
Create and apply a custom status for particular case	TRUE	TRUE	TRUE	FALSE
Communication				
Notify a candidate of their review	TRUE	TRUE	FALSE	FALSE
Email a candidate	TRUE	TRUE	TRUE	FALSE
Email committee members	TRUE	TRUE	TRUE	FALSE
Enable/disable comments for a case review steps	TRUE	TRUE	TRUE	FALSE
Leave comments on a case	TRUE	TRUE	TRUE	TRUE
View notifications	TRUE	TRUE	TRUE	TRUE
Share materials with candidate and allow response	TRUE	TRUE	TRUE	FALSE
Share materials with committee members from committees outside of workflow	TRUE	TRUE	TRUE	FALSE
Materials & Forms				

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Create/edit a candidate form	TRUE	TRUE	FALSE	FALSE
Add a candidate form requirement to a case (attach a candidate form to a case)	TRUE	TRUE	FALSE	FALSE
Create/edit a case data form	TRUE	TRUE	FALSE	FALSE
Add a case data form requirement to a case (attach a case data form to a case)	TRUE	TRUE	FALSE	FALSE
Upload new materials to a case	TRUE	TRUE	TRUE	FALSE
Add sections to a packet that are not visible to candidate (committee documents)	TRUE	TRUE	TRUE	FALSE
Reorder packet documents	TRUE	TRUE	TRUE	FALSE
Change the document group in which materials appears	TRUE	TRUE	TRUE	FALSE
Edit title and type of documents added to a case by a committee	TRUE	TRUE	TRUE	FALSE
Delete materials added to a case by a committee (note that Committee Managers can ONLY delete materials added by themselves, not documents added by another user)	TRUE	TRUE	TRUE	FALSE
Set download privileges	TRUE	TRUE	TRUE	FALSE
Set access to materials (including external evaluations)	TRUE	TRUE	TRUE	FALSE
Allow/disallow candidate editing of packet materials	TRUE	TRUE	TRUE	FALSE
Allow candidates to add packet sections	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Request/ edit/resend external evaluation requests	TRUE	TRUE	TRUE	FALSE
Access external evaluations (depending on settings for case)	TRUE	TRUE	TRUE	TRUE
Download print documents (depending on settings for institution or document)	TRUE	TRUE	TRUE	TRUE
Read case documents and forms (access of candidate, committee, and other docs are dependent doc permission settings)	TRUE	TRUE	TRUE	TRUE
Annotate (make notes) on documents in the document viewer, and export your annotations.	TRUE	TRUE	TRUE	TRUE
Reports & Logs				
Generate and download reports including case info, forms, and voting results reports	TRUE	TRUE	FALSE	FALSE
View Case Activity logs: case movement, changes in status, and messages sent	TRUE	TRUE	FALSE	FALSE

Useful Articles for Getting Started

Add New Users

Add Users in Bulk

Assign Units and Roles to a User

Recuse an Administrator

Committees and Individual Reviewers

Committees are groups of users that can review and assess the case of a candidate at a given step of the review process. Individual reviewers can also act as a committee at a given case review step. As an administrator, you can create committees made up of any of your institutional users (including single individuals) for each step of your workflow. You can then assign committees and individuals to review a case at a certain step.

There are two roles that a user can have on a committee: Committee Member (the most basic user in the program) and Committee Manager. Committee Members have fairly limited access that pertains to reviewing a case. Committee Managers can do all of those things, plus a lot more.

Committees or individual reviewers in Interfolio RPT are always assigned to a case review step in the workflow, and each case review step must include at least one committee or individual reviewer. Multiple committees (or reviewing individuals) can be added to a case review step if more than one committee or individual needs access to the case at the same time.

Administrators in the program can also set up committee document requirements so that a committee must upload a particular document before the case can be moved forward.
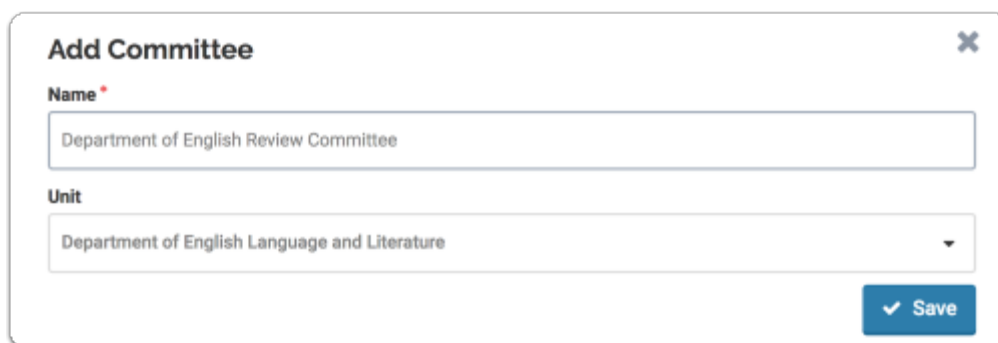
Committee Managers can record the vote of a committee at a particular workflow step and add it to the program. The results of committee voting can be viewed by members of the committee, and the voting data can be used for reporting.

There are three types of reviewing bodies that can be added to case review steps in the program; standing committees, ad-hoc committees, and individual reviewers.

Standing Committees

A standing committee is a permanent committee with a fixed annual membership that an administrator creates within Interfolio. Standing committees are a way to set up your committees once, save them to a unit, and have them available to use at any point within a workflow as a case review step. Only administrators can create a standing committee, which happens on the User & Group Management page.

When an administrator creates a new standing committee, they choose the unit at the institution that will house that committee--for instance, the "Department of English Review Committee" might be housed in the "College of Arts and Sciences" or the Department of English unit.

Ultimately, the unit determines where an administrator can use a standing committee for a template or case. For example; standing committees set at the institutional unit can be used for institution-, college-, and department-level templates. Standing committees set at the college unit can be used for college-, and department-level templates within that college. Standing committees set at the department unit can only be used for templates created in that department.

Ad hoc committees

Case-specific, ad hoc committees are committees created to be used on a case-by-case basis. Administrators are the only users allowed to create and edit case-specific committees.

Individual Reviewers

You can also assign an individual reviewer to consider a case at a given case review step. Individual reviewers can perform all the functions of a Committee Manager, including adding committee documents and moving the case foreward or backward.

Recusal (Committee Members and Administrators)

With the recusal feature, administrators can accommodate conflicts of interest or specific privacy concerns during reviews down to a granular level, and document it.

Administrators can recuse themselves or other Administrators from one or more steps in a case workflow. Once recused, Administrators will no longer see the case in their case list, and will be unable to access the case when it reaches a step from which they have been recused. The case will reappear in their case list when it moves backward or forward to a step where the Administrator again has access.

Templates and Cases

About Templates

Templates are the building blocks of the Interfolio Review, Promotion & Tenure program. They allow Administrators to create a standardized, repeatable process for all review cases in their institution, colleges, schools, and departments. Templates save details like packet requirements and steps of review for the entire faculty action process.

If your institution uses the Enterprise version of our Dossier product, you can establish guidelines when creating a template, and make those guidelines visible so that your faculty or staff can use them to prepare for future reviews.

A template is created and saved at a unit level (a college, school, or department), which limits where it can be later used. For example, when a template is assigned to the institution-level unit, it will be available to the entire institution. When a template is assigned to a college-level unit, it will be available to that college and the departments beneath it in the hierarchy. When a template is assigned to a department, it will only be available in that department.

Cases and Case Types

Once you create a template, you can use it to build individual cases without having to remember or repeat the standardized process at your institution, college, or department, however, because it is possible to modify any template to fit specific information for a candidate, you can think of a case as a customized template.

You can create multiple cases at one time, all based on a single template.

All of the components of a template can be changed or edited to fit the needs of a particular individual's review process when creating a case based on the template.

You can create 7 types of cases:

- Appointment
- Promotion
- Reappointment
- Review
- Sabbatical
- Tenure
- Other

Useful Articles for Getting Started

[Create Templates to Use as a Starting Point for New Cases](#)

[Recuse an Administrator in a Template](#)

[Create a Case Based on a Template](#)

[Set up Guidelines to Help Your Users Prepare for Upcoming Reviews](#)

Case Materials

We know reviews in higher education involve a large number of materials that have to be reviewed by different individuals and groups at different times. That's why we've made it easy to organize materials and control who can see what, at any given time.

Initially, all of the materials associated with a case are broken into four different categories: committee documents, candidate documents, external evaluations, and candidate forms. As an Administrator, you have the ability to rename the default packet sections, and add or remove sections to or from this list. You can also determine which materials are stored in which category and reorder materials within a material group.

For materials within one of those categories, you can control who can see and download each individual file. If you only want Administrators to be able to read evaluations from external scholars, but still want everyone on the committee to be able to see the candidate's publications then you can create those settings. Or maybe, you want to allow the entire committee to read just one specific external evaluation and not give them access to the other letters? That's possible, too. Users can also read and annotate materials from within the browser window. Annotations are private notes only visible to the user leaves them.

Administrators and Committee Managers can add packet sections and materials to the case that are not visible to the candidate. For instance, Admins and Committee Managers can add sections and upload materials for internal and/or committee use such as committee notes, meeting notes, final recommendations, or other materials being produced at the institution or received from outside sources. Changes made to the packet are saved and passed forward to the next committee, which has the same abilities to create and edit packet sections and materials. If a case gets sent back a step, it will retain any changes that have been made to the packet.

You can also share committee materials with candidates and allow them to submit a response or rebuttal to the shared material. This is especially useful when sharing the recommendation of a committee and allowing the candidate to respond or rebut the decision. It is also possible to share case materials with all of the members of other committees in the workflow of a case (besides the current committee), and with other P&T users.

Remember that anything uploaded by a committee is not seen by a candidate, and Committee Members are not able to add, reorder, or edit sections and materials.

Useful Articles for Getting Started

Enable or Disable File Downloads for an Institution

Adding and Managing Case Materials

Set Download Privileges and Access to Case Materials

Share Case Materials with a Candidate and Allow Candidate Response/Rebuttal

Share Case Materials with Committee Members

Workflow

In Interfolio Review, Promotion, & Tenure, each step in a workflow is called a "case review step." You can create case review steps when you're making a template or a case. At each case review step, different people or committees have access to the committee documents, candidate materials, evaluations, forms, and comments that make up the case. Multiple committees (or single individuals) can be added to a case review step and can access a case at the same time. Once a case is being reviewed, Administrators and Committee Managers of certain committees assigned to the case review step can move the case forward or backward to different stages of the case review workflow.

Administrators and Committee Managers can also set "committee document requirements" so that a committee must upload a certain document before the case can be moved forward t the next step.

As a case moves through the case review steps, some Administrators may need to manage only the components they should oversee--and nothing more. That's why "administrator recusal" is a particularly helpful component of Interfolio Review, Promotion, & Tenure: it allows administrative users to invite other Administrators into a case, or dismiss Administrators when their job is done, so you can be sure to designate the appropriate person to oversee each step at any stage of the workflow process.

Once a case has been moved backward or forward, Administrators and Committee Managers can also choose to send an optional email message to members of the committee to notify them that they will be gaining access with that move. At any moment during the review process, Administrators and Committee managers can also e-mail the Candidate to request any additional information or to update them on the status of the review. Throughout every stage of the review process, you can be sure everyone stays in the loop.

Useful Articles for Getting Started

[Move a Case Forward or Backward](#)

[Edit Review Steps for a Case](#)

[Recuse an Administrator](#)

[Set Up Committee Document Requirements](#)

Communication

Interfolio Promotion & Tenure includes features that allow Administrators to communicate with both candidate and committees at any point in the review process.

It's simple to communicate instructions to the candidate while creating a case. Each case includes a "Candidate Instructions" field where you can write notes on the submission process. If there are a standard set of instructions or guidelines that you typically provide each candidate with when they are up for review, you can pre-populate these instructions when you're creating a template; later, when you access the template for a particular case you can customize the instructions for the individual candidate.

As an Administrator or Committee Manager, if you need to communicate with your candidate prior to submission (for instance, to ask for an additional document), or your committee during review (for instance, to remind them of a deadline), you can do so from within the product by finding and clicking on the mail icon any time you're in a case.

You can share materials with the candidate, including committee documents, and allow the candidate to respond to the shared materials. You can also share case materials with all of the members of other committees in the workflow of a case (besides the current committee), and with other P&T users.

When sending an email from Interfolio Review, Promotion, & Tenure, you have the option of choosing the name of the sender and the "reply-to" address. You might choose to have the email come from your institution, for instance, and the "reply-to" address be your own, so that a Committee Member, candidate, or external evaluator who receives the email can simply reply back to you if they have a question. Once you've sent out messages to either your candidate or your committees, you'll be able to retrieve a log of all messages sent within the program.

Communication in the product does not just happen via email, however. A notification center (the bell icon in the upper right) shows when announcements are made, deadlines approach, candidates are notified, comments are made, and cases are made available for review.

Useful Articles for Getting Started

Notify a Candidate of Their Review

Email a Candidate

Email a Committee

 Enable or Disable Comments for an Institution

Enable or Disable Comments for a Case

Leave Comments on a Case

Reporting

Interfolio Promotion and Tenure allows users to build reports around activities like packet movement (what committees have seen a candidate's packet and who sent it for review?), messages (what communication has been sent to committees, candidates, and evaluators, when, and by whom?), and cases (what are all the committees or candidates that have participated in Review Promotion & Tenure cases this year?).

The reports section of Interfolio P&T is divided into three categories: "Case Info," "Forms," and "Voting Results." A "Case Info" report generates a report on all the information gathered at individual case levels; for instance, let's say you want to run a report that lists all the cases at your institution by name and the stage of review. A "Case Info" report will easily generate this report for you. Based on the custom forms you have created (questionnaires that are customizable at a departmental, college, or institutional level), you can also run a "Forms" report based on the answers to the questions you created.

In addition, Administrators can run a "Voting Results" report that lists the results for all committees voting on a particular case in a particular administrative unit such as a university, school or department.

Finally, all case activities are recorded in a case activity log for your review.

Whatever information you need, our reporting feature allows you to have analytical data and oversight about the review processes occurring at your institution.

Useful Articles for Getting Started

[Generate and Download Reports](#)

[Run a Report on the Voting Results of a Case](#)

[View the Case Activity Log](#)

Forms

There are two kinds of forms in Interfolio Promotion & Tenure; candidate forms, and case data forms. Candidate forms are designed to collect information from a candidate and are completed by the candidate in the process of completing their packet of materials. A Case data form is designed to attach pertinent information about the candidate to a case and can only be filled out by an Administrator in the program. Both types of forms are completely customizable and can be added to both a template or a case. The benefit of gathering data from or about the applicant on a custom form is that the information collected can easily be generated into a report which you can view in your browser and export as a CSV file for use in a spreadsheet program.

When creating a candidate form, you have the option to make a question required. That means that the candidate will not be able to submit his/her application without answering the question on the form. If the question is not required, the candidate *can* submit his/her case without answering the question. You can also require questions on case data forms, but these are accessed from the Case page of a candidate, and are not part of the candidate submitting their case. In fact, candidates will never see the questions or answers on a case data form.

When creating your form, you will be asked to house the form within a unit. Attaching a form to a unit controls which units can use those forms for their cases or templates. For instance, if you create a form at the institutional level, any unit below it (colleges or departments) can access that form while creating a case. If you create a form at the college level, only that college and the departments within that college can access that form. If you create a form at the departmental level, then the only unit that can access that form when creating a case is that department.

Useful Articles for Getting Started

Create a New Candidate Form

Create a New Case Data Form

Edit an Existing Form

Delete a Form Template

External Evaluations

External evaluations are an integral component of the review process, so we've incorporated tools that streamline this process and make it easy for Administrators to request evaluations from scholars that are outside of the committee, or even outside of your institution.

An Administrator or Committee Manager in Interfolio P&T can request evaluations from one or more external evaluators from the case page of a candidate. These requests comesin the form of an email; you'll be able to customize the subject and message of the email, set a due date and attach files from the case to help the evaluator complete their review.

Importantly, you can also set who from the committee (the Administrator only, the Committee Manager, or the entire committee) can see the evaluation once it is received.

Note that you can send requests to multiple evaluators using a single form (which will include a message, all attached files, and due dates etc.).

Also, if you'd like to use Interfolio P&T to solicit names of potential external evaluators from the candidate up for review, you can do so with a custom form that you create for the candidate to fill out, or with a required document that you ask the candidate to upload themselves. The candidate will never be notified or be able to see the external letter.

Useful Articles for Getting Started

Create a New External Evaluation Request

Edit & Resend an External Evaluation Request

Download PDF to Admin Guide to Interfolio Review, Promotion & Tenure

Click here to download and print a PDF of the [Administrator's Guide to Interfolio Promotion & Tenure](#).

Guides for Candidates, Committee Members, Committee Managers, and External Evaluators

Committee Manager's Guide to Interfolio Review, Promotion, and Tenure

Welcome to Interfolio Promotion and Tenure! Review, Promotion, & Tenure allows you and your committee to deliberate and make important decisions about promotions in one easy and secure location. You can easily adapt your existing promotion or tenure workflow into the application to make your experience more efficient and less paper-driven for yourself, your colleagues, and your candidates.

This is a guide to assist you in your role as a Committee Manager. As a Committee Manager, you have many more responsibilities and privileges in the product than the average committee member; at the same time, you are slightly limited within your organization when it comes to certain aspects of the product, such as creating institutional settings. Below, you'll find guidance for using Promotion and Tenure for every step of your review process including viewing a case, editing documents, communicating with your committee and candidate, and moving a case forward or backwards. And remember: every action within Promotion & Tenure is documented with a step-by-step guide in our **online help center**.

Useful Articles for Getting Started

Basics

[User Roles in Promotion & Tenure](#)

[Interfolio Review, Promotion, & Tenure Best Practices for Managing Reviews](#)

Reviewing and Managing Cases

[Access Your Case List](#)

[Access an Individual Case Page](#)

[Allow or Disallow Candidate Editing of Packet Materials](#)

[Move a Case Forward or Backward](#)

[Record the Results of a Committee Vote](#)

Communication

[Email a Candidate](#)

Documents

External Evaluations

Best Practices for Managing Reviews With Interfolio Review, Promotion, and Tenure

If you're managing a promotion, tenure, or review case this year, here are a few best practices to keep in mind:

1. **Creating committees and allowing them to review cases:** Committees are groups of users that can review and assess the case of a candidate at a given step of the review process. As an administrator, you can create committees made up of any of your institutional users for each step of your workflow. Remember, in order for your committee members to have access to a case, the committee must be assigned to a review step in the case workflow.

   Because we know that faculty promotion and tenure cases contain sensitive confidential information, we have deliberately designed Interfolio's workflow feature to ensure that a committee will only have access to the packet materials while a case is their specific workflow step.

2. **Communicating with your candidates:** When working with candidates, there are several ways to send messages and alert them of the review process. First, in order to get your case initiated and allow the candidate the opportunity to work on their packet materials, you'll need to notify the candidate. Then, at any point, if you need your candidates to make changes to their packet materials (ex: maybe you would like for them to update their CV), you can enable candidate editing per section of their packet and send emails to the candidate to let them know to make your requested updates.

3. **Communicating with your committees:** Committee Managers and Administrators can email a review committee and collaborate within a specific case. We keep a record of all communications to candidates and committee members and case movements so administrators will always have transparency while managing their cases.

4. **Requesting external evaluations:** We've incorporated tools that streamline the external evaluation process to make it easy for Administrators to request evaluations or resend previous requests from external scholars. Learn more about the external evaluator experience here. Remember if you add a due date to an external evaluation request, it will be a hard deadline and letter writers will not be able to submit a letter after that date. If necessary, you'll be able to clear or edit a due date while resending a request.

5. **Adding and managing committee documents:** After a candidate submits their packet and the packet is with one or more committees for review, Administrators and Committee Managers who have access to the case can add committee-specific sections and documents to the packet. Any document uploaded to a case by an Administrator or Committee Manager will be invisible to the candidate. These users will also have the opportunity to manage document permissions and add, reorder, or edit packet materials. Remember, only the candidate will have the opportunity to remove the materials that they uploaded and submitted to their case. In addition, Admins can require that a committee upload specific

documents before the case can be moved forward. See here for more information on [uploading required committee documents.](#)

Additionally, we have guide books for every user type where all relevant articles for your role are sourced for you:

1. [Committee Manager's Guide to Review, Promotion & Tenure](#)
2. [Committee Member's (Evaluator's) Guide to Interfolio Review, Promotion & Tenure](#)
3. [Candidate's Guide to Interfolio P&T](#)
4. [External Evaluator's Guide to Interfolio P&T](#)

Still Stuck?

We're here to help! Anyone can contact our Scholar Services team at help@interfolio.com or (877) 997-8807 Monday- Friday, 9:00-6:00 PM ET.

Committee Member's Guide to Interfolio Review, Promotion, and Tenure

If you have been added to a committee for promotion, tenure, or review at an institution that uses Interfolio Review, Promotion, & Tenure, you can securely and easily participate in the case review process online.

An Administrator at the institution conducting the review will manage the case and candidate packet. You will receive an email when the case is available for your committee to begin review.

Once you activate your free account and log in, you will be able to access any case to which you have been added as a committee member.

The video below will help you get started quickly. Check the article for more a detailed explanation on getting started and using RPT to evaluate cases.

Getting Started:

You will receive notification when you are added as a user to Review, Promotion & Tenure
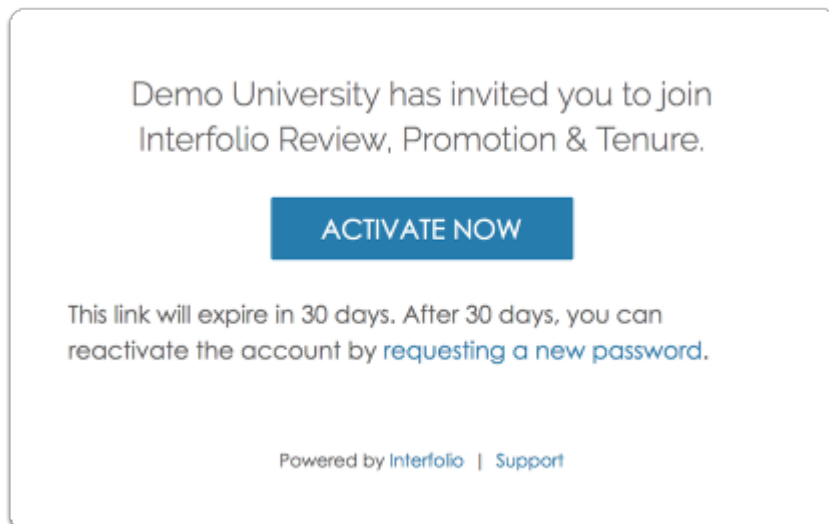
Log in and click "Cases" on your Review, Promotion & Tenure navigation bar
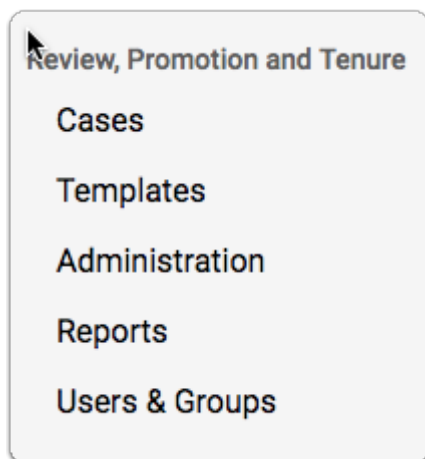
You will see a list of cases that are available to you:

Click the name of the candidate to view case materials

ℹ️ Clicking on the name of the candidate will direct you to the Case page, where you can access materials and forms only available to committee members, and view and download materials submitted by a candidate.

Navigate to the case you want to edit

You will see a tabbed interface:

Case Materials

The Case Materials tab is divided into sections, and from here you can access materials uploaded by committees as well as candidate materials. You may also see external evaluations if your institution is using our feature for requesting and collecting external evaluations.

Case Details

The Case Details tab is where you can view the other members of your committee, and if enabled, view comments from other committee members and leave comments on the case.

If a committee vote has taken place and the results have been recorded by the Committee Manager or Administrator, you can also see those results.

Accessing Materials:

ℹ️ On the individual case page, you can read or download documents that were submitted by the candidate, committee members, and external evaluators.

If the institution administering the case has elected not to allow downloading, the Download option will not be available. Some individual documents may also have downloading restricted.

Select the read button to view materials, or click the select button next to the relevant files to download

💡 Click "Select All" above the list to select all materials in the list.

You can choose to download a PDF or Zip file of all selected materials
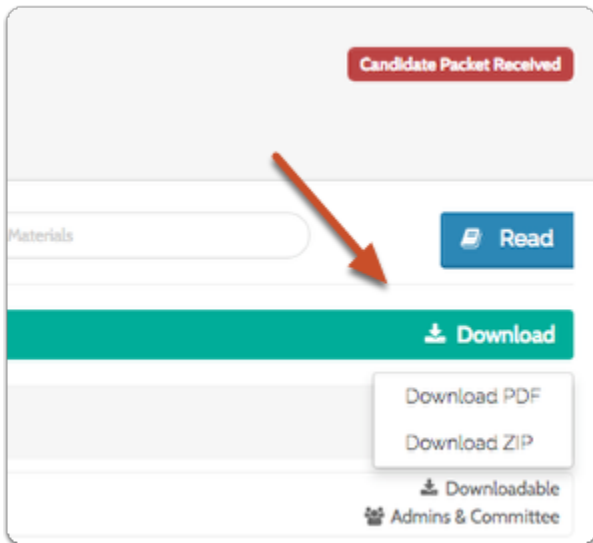
Clicking "Read" above the document list and to the right of the page will open all accessible case materials in the document viewer
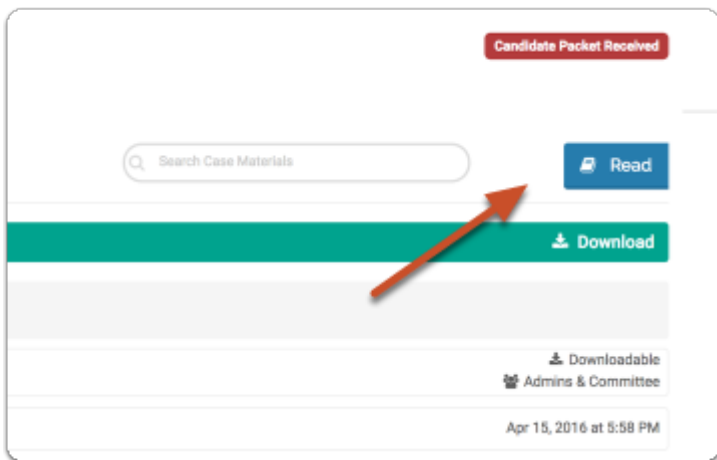
ℹ The document viewer will display the contents of the packet, organized by section. You can collapse and expand packet sections in the Case Documents list on the left.

💡 You can also click on the title of a document to open that specific document in the document viewer.

You can make notes on materials as you review. The annotations you make will appear on their own tab and can be exported.

> ℹ️   Annotations are private and can only be viewed by you.

Adding Annotations:

Annotations are added from the lower right corner of the viewer
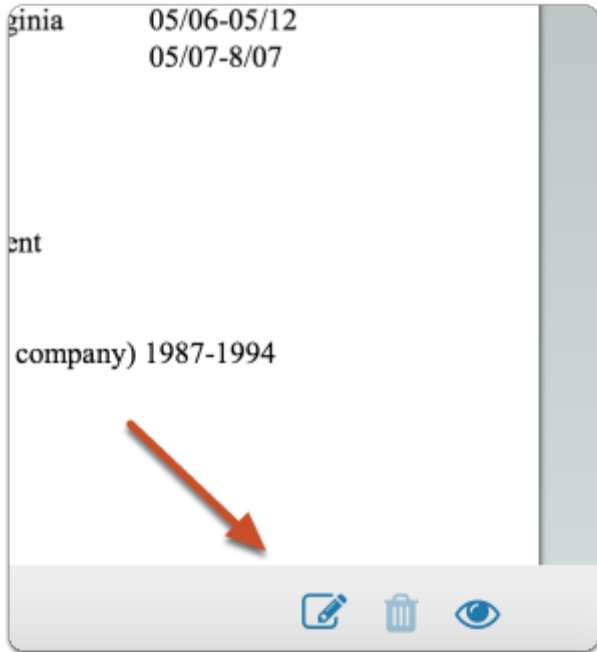
Click the "view" icon to toggle on or off the display of annotations

Click the "note" icon to add an annotation on the currently displayed document

After clicking the "note" icon, select the type of annotation you want to create:

- Make no selection to add a simple "stickie" note to the document
- "Point" adds a note with an arrow pointing to a particular point in the document
- "Area" adds a note about a selected area
- "Text" adds a note about highlighted
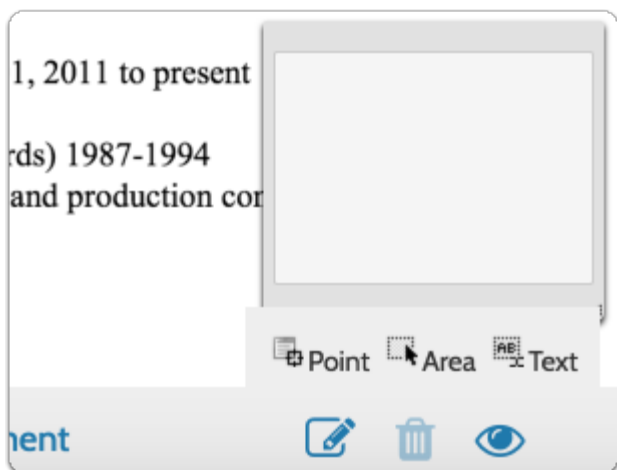
To edit a note you've added, simply click into the text field
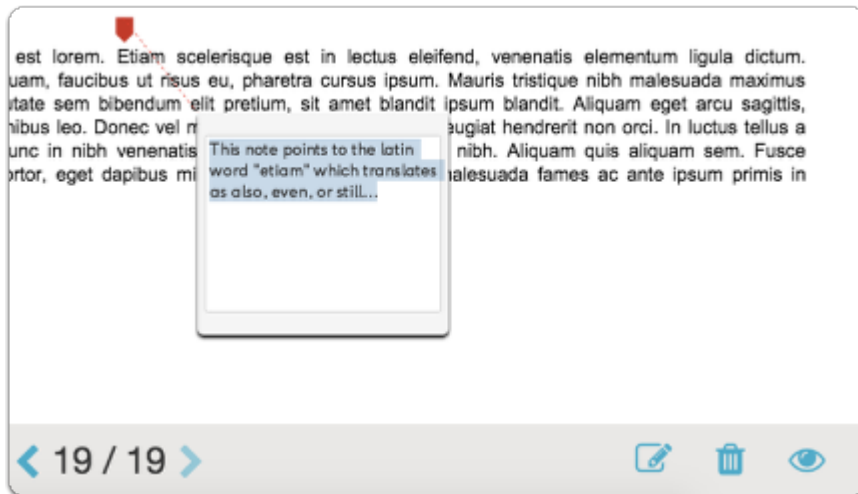
To delete a note, click into the text field and then click the trash icon
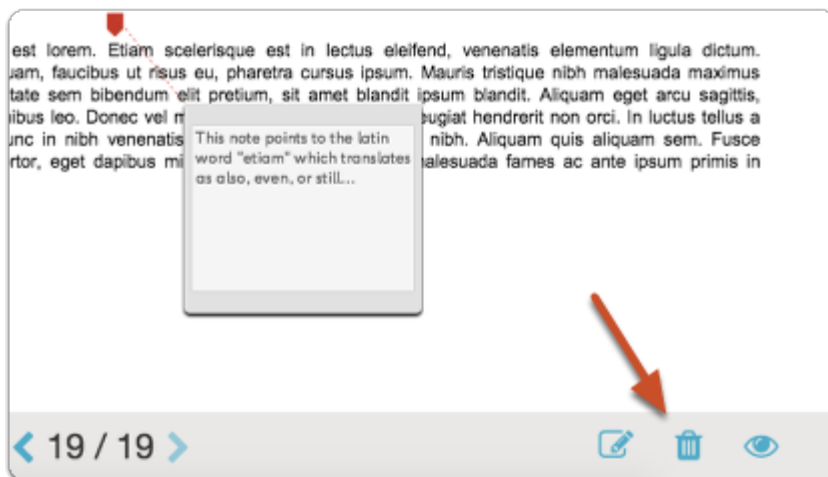
Committee Voting:

ℹ️ Administrators and Committee Managers can record committee votes into Interfolio P&T. Committee members can view the results of a committee vote from the "Committee Details" tab of the Case page.

Click "Voting" to see the results of a committee vote

> ⓘ Voting results are represented with a circle graph displaying the overall results and the number of each vote cast.
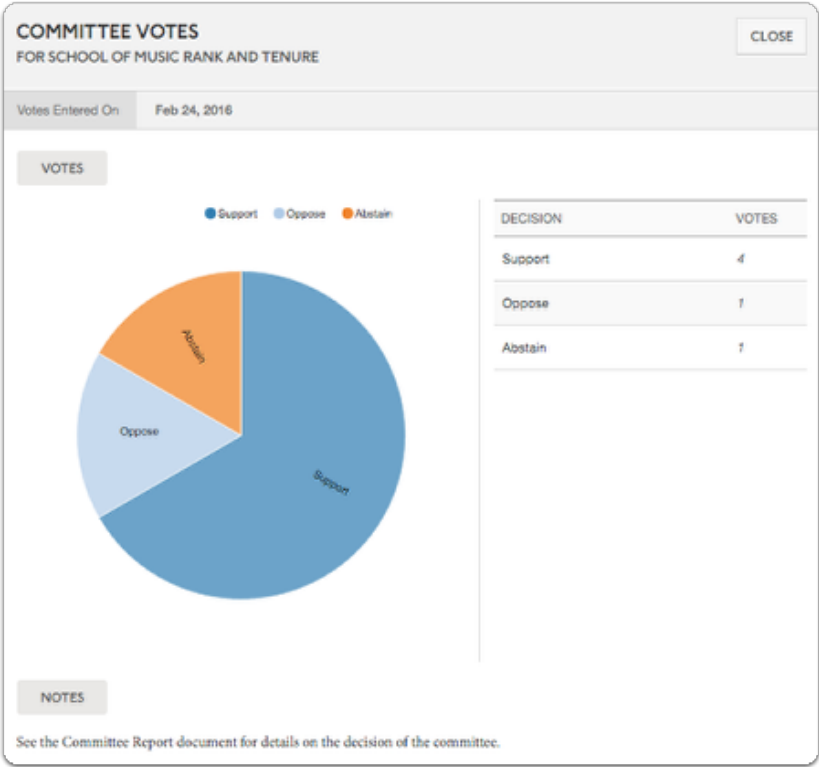
A Candidate's Guide to Interfolio Review, Promotion, and Tenure

We have created a secure, user-friendly interface that allows candidates to quickly and easily assemble a packet of materials for their review and submit these materials online.

This article explains what to expect as the candidate of a review conducted using Interfolio's Review, Promotion, and Tenure service.

💡 You can generate a PDF and print this article from the sidebar to the left of this page.

In this Article:

- [How do I activate my candidate account? What does the notification email look like?](#)
- [How to view past packets](#)
- [How to view packet requirements](#)
- [How to add files to your packet](#)
- [How to preview your packet before submitting](#)
- [How to view files that are shared with you by the committee in RPT](#)
- [How to respond to shared Files](#)

If your institution uses Interfolio Review, Promotion, & Tenure to conduct review processes online, you will be asked to submit a packet of review materials through Interfolio.

Before you begin, an administrator will create a case for you that includes instructions for submitting your packet with all the required documents and forms.

You will be notified that your case is ready via email.

Select "View Case" in the notification email

When you select "View Case" in this email you will be prompted to create a password that generates the Interfolio account you will use to collect and submit materials for your packet.

If you already have an Interfolio account, the "View Case" button will take you to your account dashboard.

Demo University has initiated a review on your
behalf.

VIEW CASE

This case link will be valid for 30 days and can only be used
once.

Viewing your case will allow you to view requirements, read
instructions, and submit your packet online.

Hi Samantha,

Good luck with your promotion review...

Powered by Interfolio's **ByCommittee** | **Interfolio Support**

Activate your account

ℹ️ You may need to enter a password to activate your Interfolio account.

Enter a password and accept our Terms of Service and click to activate your account

Activate Account

Your account is almost ready! Please enter a password to finish activating your account.

Email Address
mbrownie@mailinator.com

First Name *
Michael

Last Name *
Brown

Password *

Password is required.

☐ Show Password

☑ I agree to Interfolio's Terms of Service.

Activate Account

View your packet instructions and requirements:

Click the link to "Your Packets" from the institutional page's navigation bar, or use the link on your homepage in the To-Do's

⚠ **Not seeing it?**
If you do not see this in your navigation bar, you might be on the Dossier page, Switch accounts user the account menu in the top right.

Home

Your Packets

Review, Promotion and Tenure

Cases

Select the relevant packet

Your Packets

Active

Packet	Type	Status	Due Date	
English Department 3rd Year Review (Tenure Track)	Review	Not Submitted	–	View
English Department Tenure Review	Tenure	Not Submitted	–	View

Completed

Packet	Type	Responded	Completed	
Farragut Square State University		–	Jun 20, 2016	View
Farragut Square State University 3rd Year Review (Tenure Track)	Review	–	Aug 16, 2017	View
School of Business Tenure Review	Tenure	–	Aug 30, 2017	View

You will see an "Overview" page listing the required materials and forms you will need to add to your packet.

Click Edit Packet to view the instructions

Click "Instructions" in the upper right corner of the page to view any instructions provided by your institution for assembling your packet

Your packet will likely be divided into sections, each with a list of materials you will need to upload in order to complete each section.

If a due date has been set, you will also see the due date for each section. Each section of the packet can be submitted once all requirements for the section have been met.

> ⛔ Note that individual packet sections can have unique due dates.

If enabled by an administrator, you may also be able to add sections to your packet. If this feature is enabled, you will see an "Add Section" button.

Add files to satisfy packet requirements:

Click "Work on Packet"

This will open a page where you can upload files to satisfy packet requirements.

Click "Add File" to upload materials to your packet
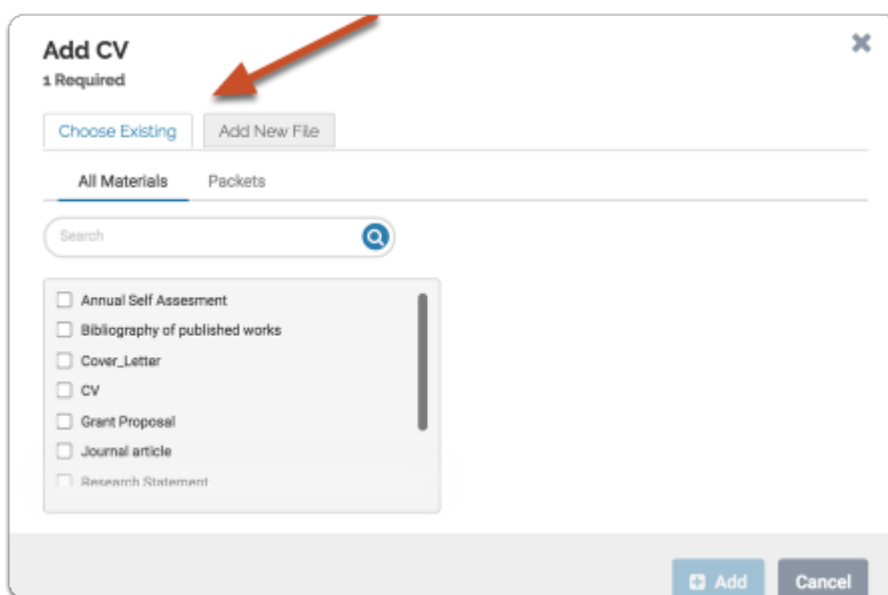
> ❗ When uploading files, make sure you give the materials in your packet a meaningful title because reviewers will see the titles you provide as bookmarks to the left of the page when reviewing your documents.
>
> By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.
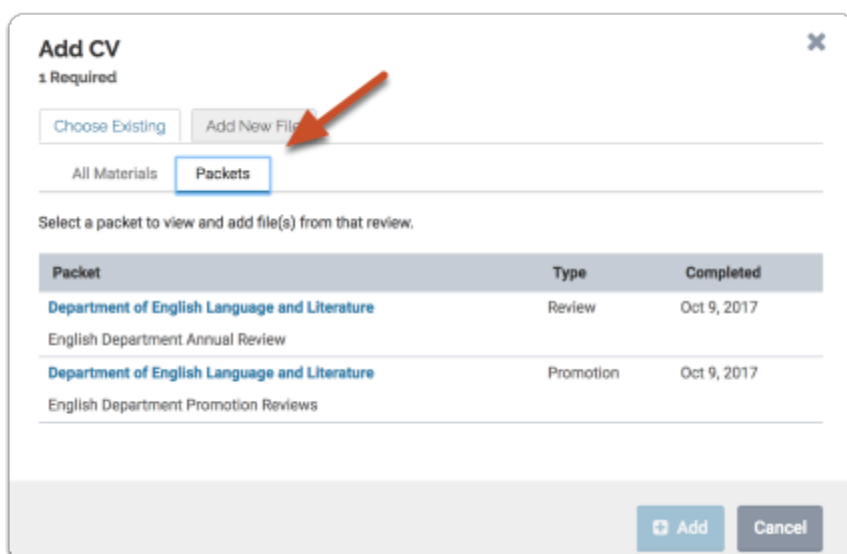
> 💡 You can upload multiple files at one time.

You can also add files from packets you have previously submitted:

Or you can add new files including video and webpages:
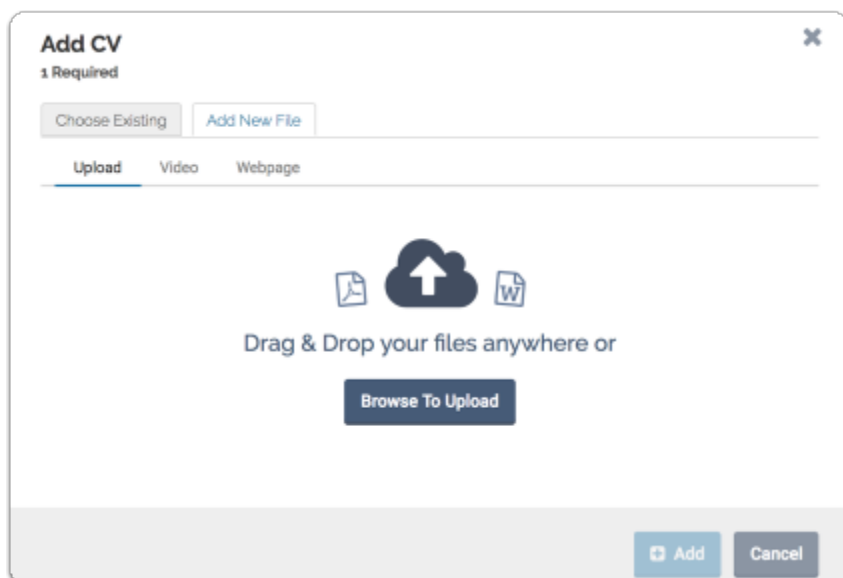
If your institution subscribes to the feature, you can also add files from collections, including collections you may have created when using Interfolio's "Guidelines" feature, as shown in the two images below.
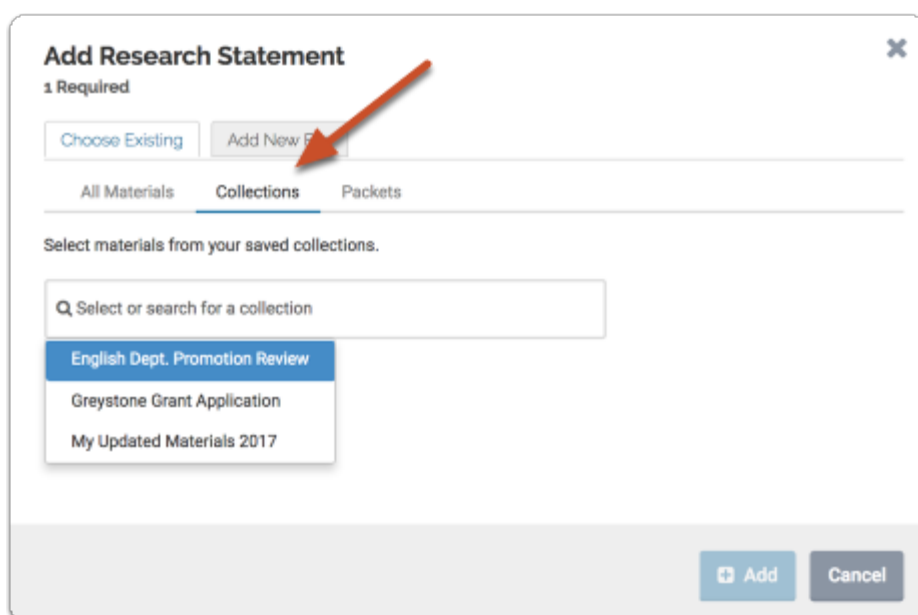
Look for the green check mark when you have satisfied a requirement

When a requirement is satisfied it appears with a green check mark. Likewise, completed sections are marked "Complete."
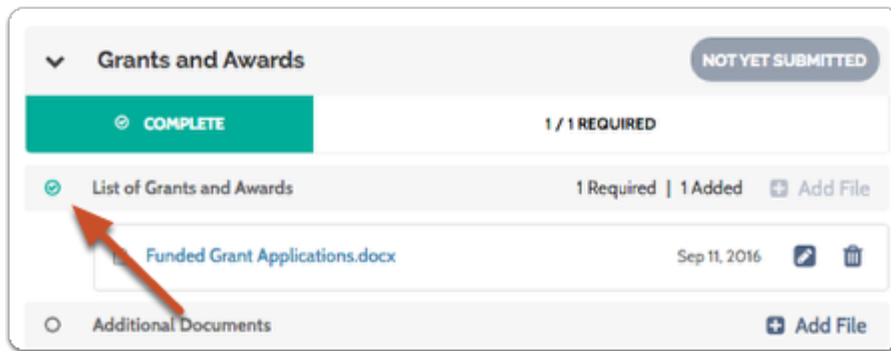
If you need to edit or replace a document, click the edit pencil
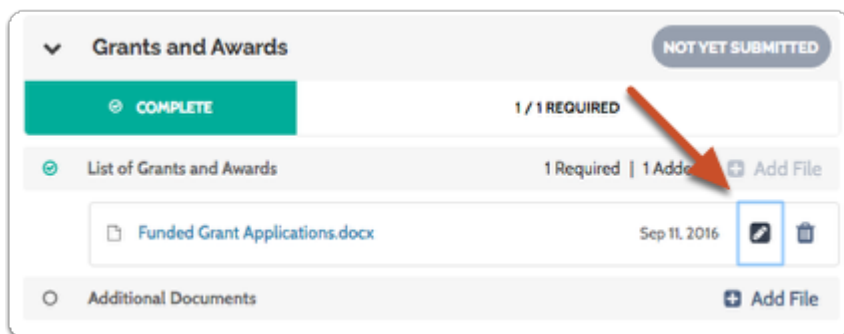
You can edit the title of the file, or click "Replace" to choose a new file to replace it.
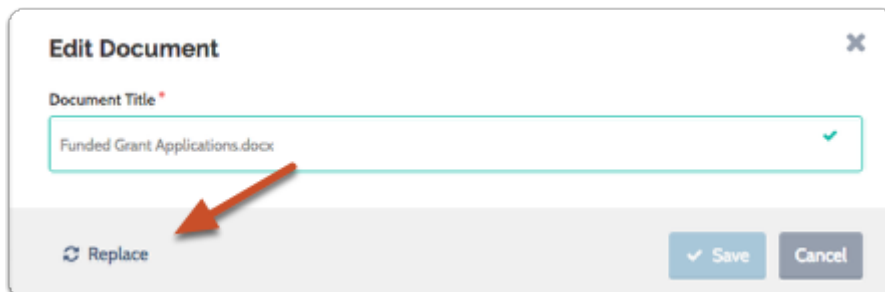
Click "Preview Packet" when you are ready to submit completed sections

Select which sections of your packet you want to submit

ℹ️   Only sections with completed requirements will appear in the list.
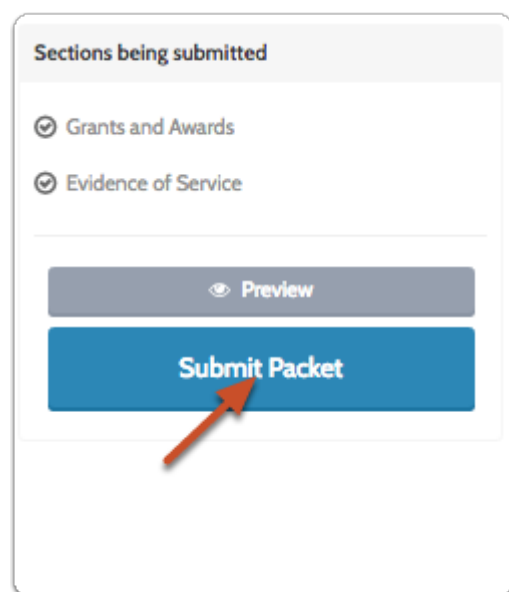
You can preview your packet before submitting:
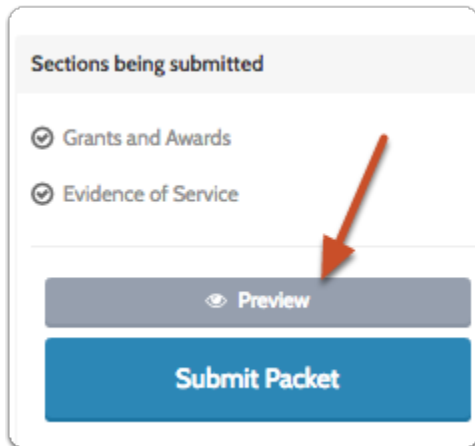
The preview shows exactly how the packet you are submitting will appear to your committee. A sample preview is shown below.
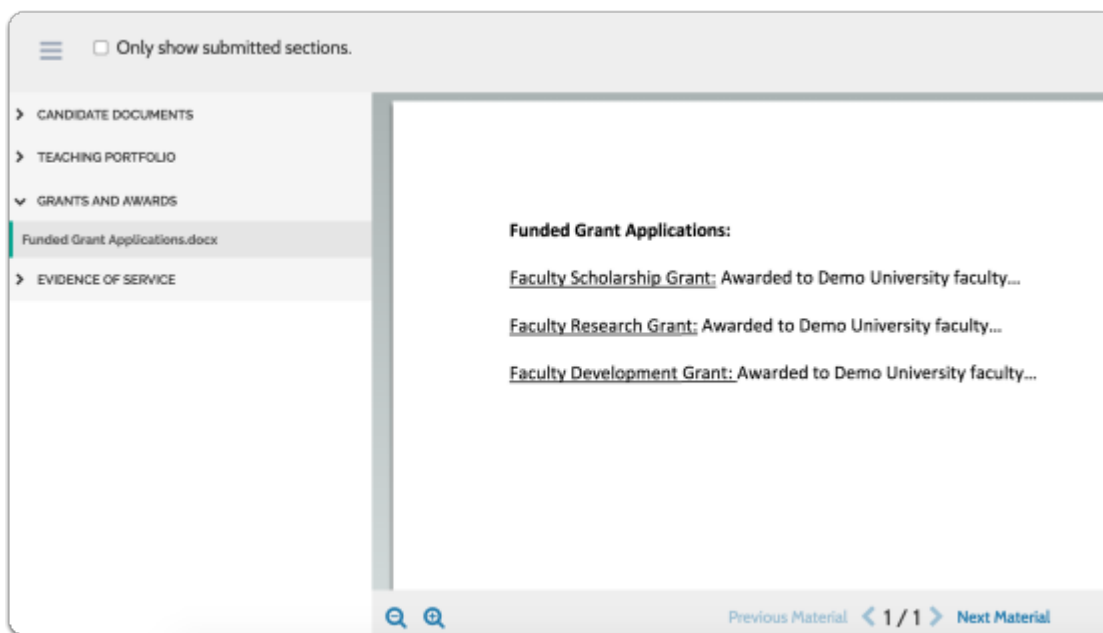
Click "Submit Packet" when you are ready
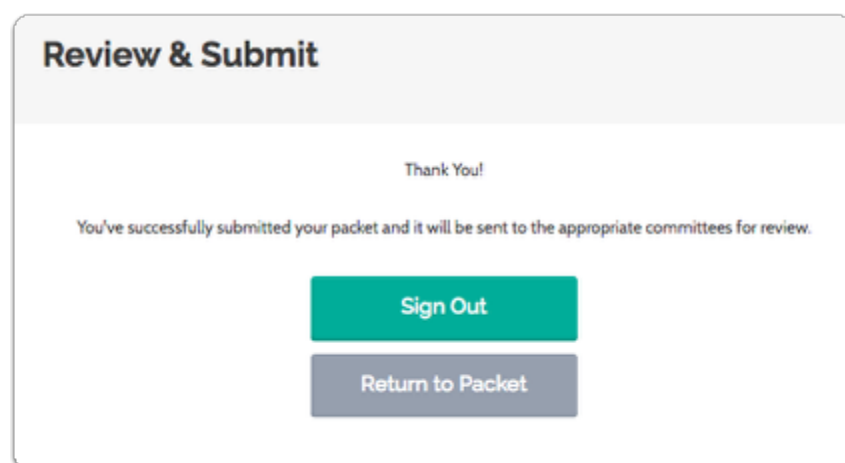
Your packet will be sent to the appropriate committee for review.

Locked Sections

ⓘ If a section is labeled as a "Locked Section," this means your institution has opted to restrict editing after submission. Please contact an administrator at your institution if you have questions about a locked section.

Viewing files shared with you by the committee:

The committee reviewing your case may share files for you to review. The committee may also allow you to respond to the shared files in writing, and may set a date when the response is due.

If the committee shares files with you, you will get an email prompting you to log in and view the shared files.

You will need to be logged in to view and/or respond to files shared with you by the committee
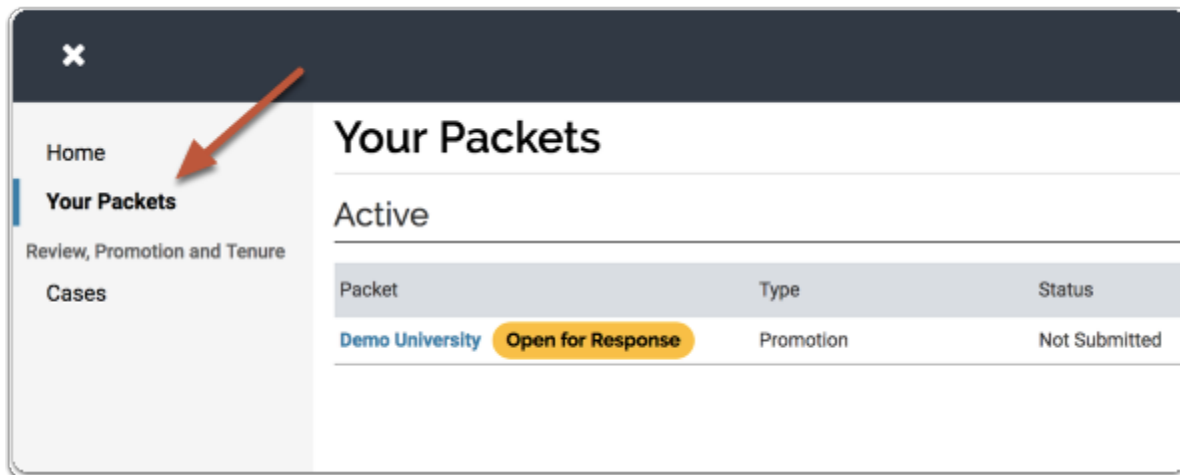
Once logged in, and within the relevant case. Click the "Committee Files" link
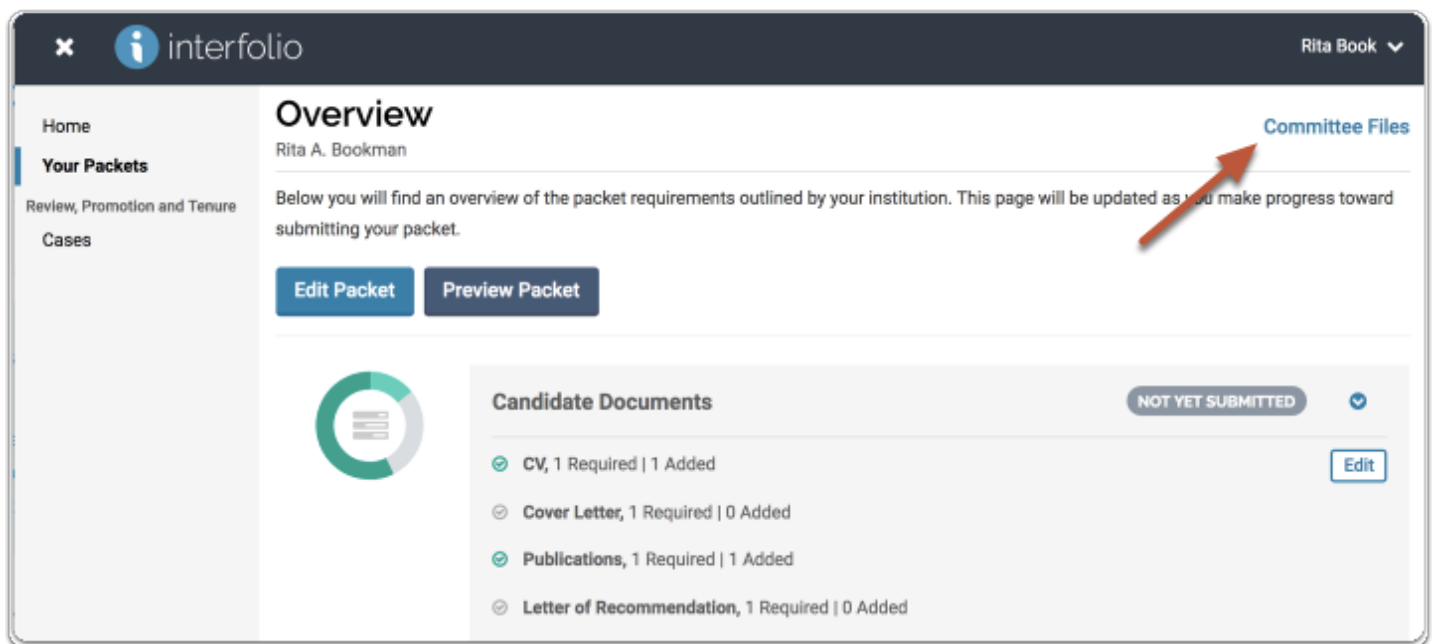
Open the file in our materials reader

You will see a list of files shared with you. Click the title of the file, or "View" to open the file in our materials reader

Responding to shared files:

If you are allowed to respond to the content of the file, you will see a link labeled "Respond," and a due date for when your response is due.

> 🛈 **Please Note:** This is a hard deadline, and you cannot respond to the shared files after the due date.
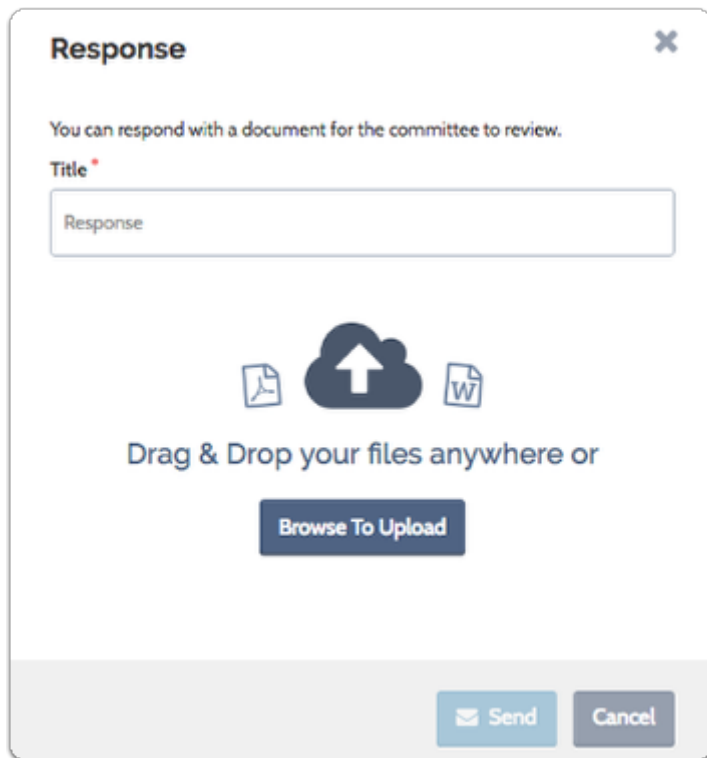
Click "Respond"

-or- open the file in our materials reader and click "Send Response"
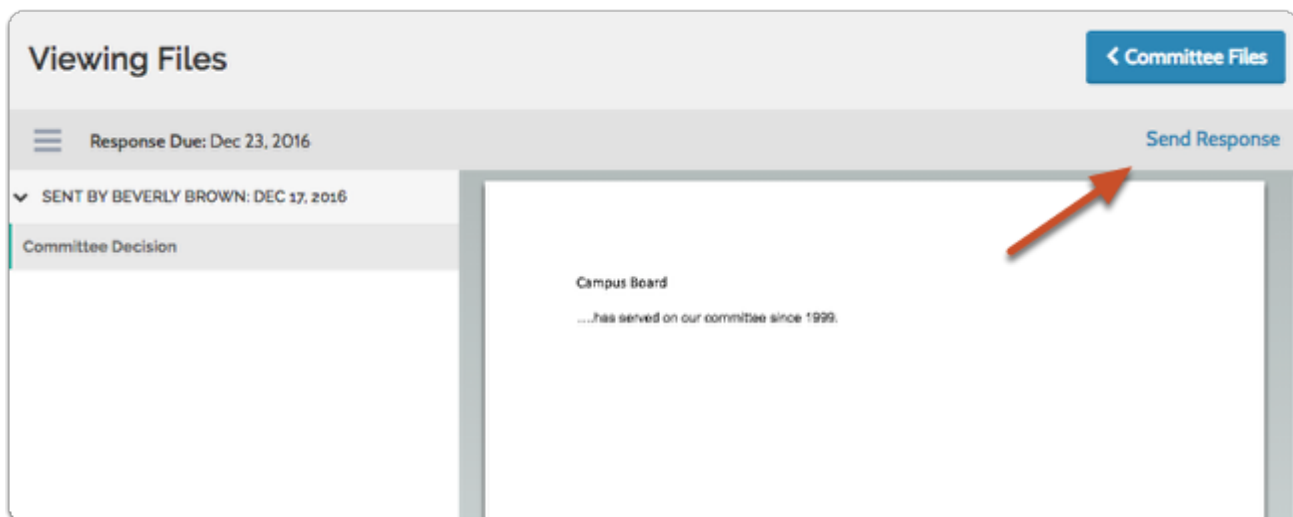
Upload a file with your response
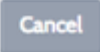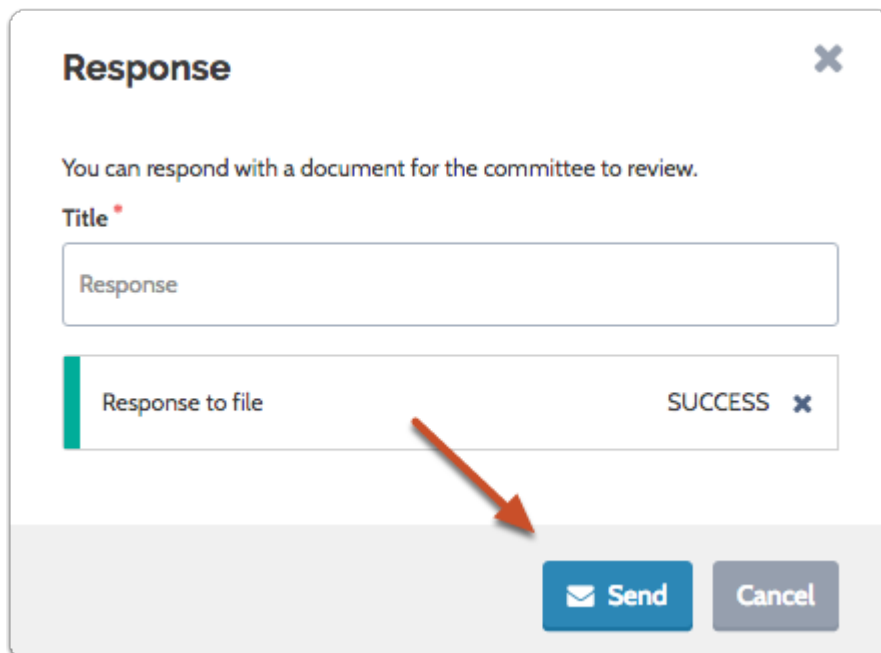
Click to "Send"
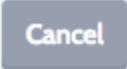
Submitted responses will appear along with shared files in the list Committee Files

Committee Files

Below you will see files that have been sent to you by committee members.

Sent by Beverly Brown on
Dec 17, 2016   DUE: DEC 23, 2016   View

Committee Decision   Dec 17, 2016

Response

Rebuttal to Committee Decision   Sent: Dec 17, 2016

Sent by Beverly Brown on
Dec 18, 2016   DUE: DEC 23, 2016   View

Report One   Dec 18, 2016

For External Evaluators: Guide to Providing Requested Evaluations in Interfolio Review, Promotion, and Tenure

If you have been asked to provide an evaluation for a candidate who is up for review at an institution that uses Interfolio Review, Promotion & Tenure, you can fulfill this request in a few, simple steps outlined below.

💡 You can print this article using the link to the left of the page.

Indicate if you accept or decline the letter request

All requests for evaluations are managed by an administrator at the institution conducting the search. This individual will invite you to submit an evaluation via email.

The email will include:

- A due date for submission of the evaluation
- The email address of the individual who sent the request, in case you have questions
- A personal note (if any) from the person or committee making the request

If you accept the request:

Click "I accept"

If you choose to accept the request you will be taken to a page with relevant documents (if any), provided by the institution, to help guide your review.

Click "View" to access files included with the request within the Interfolio Document Viewer.

> 💡 *Selecting "Accept" will notify the requester that you have accepted, but will not show whether you have read or uploaded materials.*

The document viewer will load and allow you to easily view the materials from within your browser.
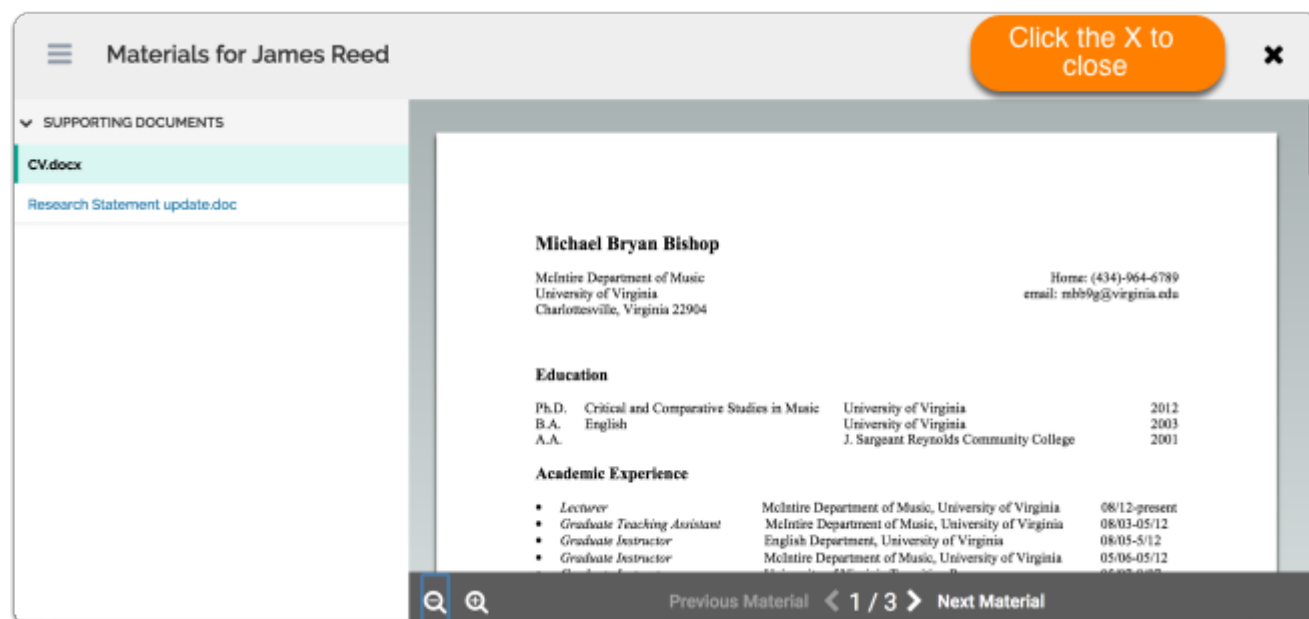
After closing the document viewer, when you are ready to submit your evaluation, click "Select File for Upload"

You can return to the page at any time while you are working on your evaluation by either re-opening the initial email request and clicking "Accept," or, if you have an Interfolio account, sign into your account to find the request on your dashboard.

Drag & Drop or browse to locate the file containing your evaluation
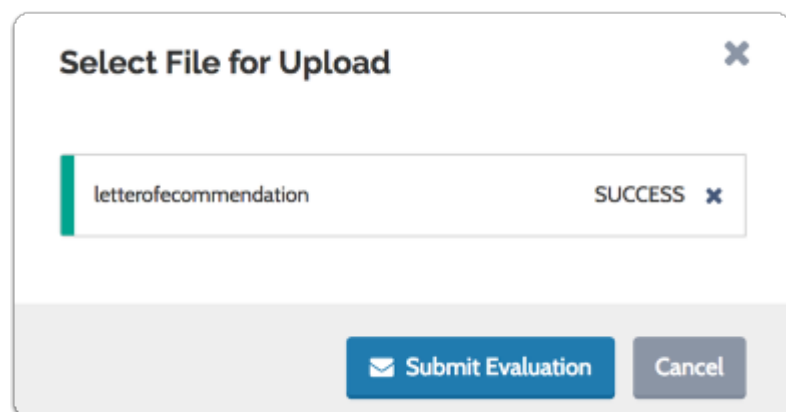
Click "Submit Evaluation"
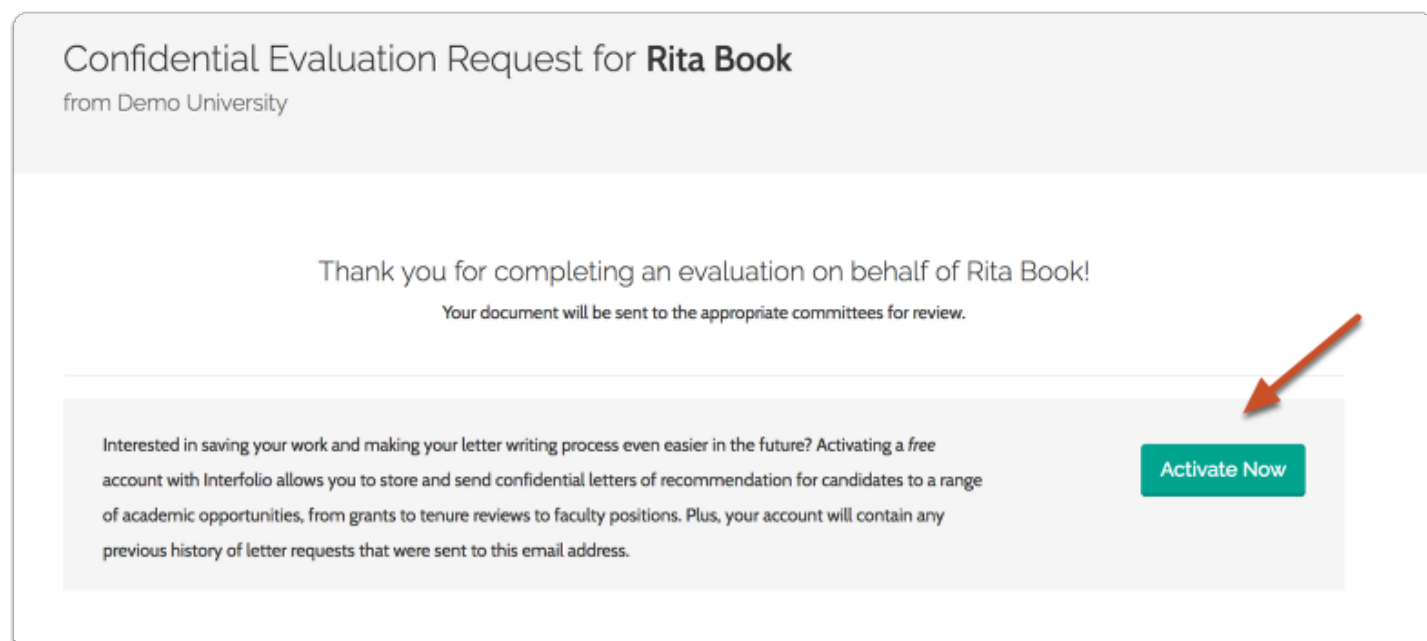
Activate your free Interfolio account

You will see a confirmation screen thanking you for your evaluation and inviting you to create a *free* Interfolio account.

> 💡 You do not need an account to submit an evaluation. This is an optional step. However, you may find it useful to store, track requests, and send confidential recommendations using your free account.
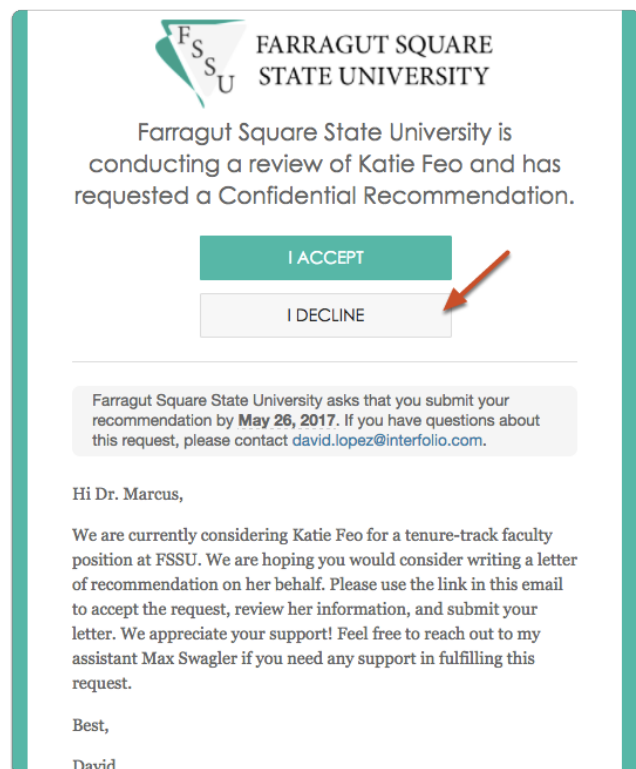

If you decline the request:

Click "I Decline"

If you choose to decline the request for an evaluation you will be taken to a page confirming your choice. Note that if you change your mind, you can come back to this page through the original email (or your Interfolio account if you have one) and agree to submit an evaluation.

Click "Message the Committee" if you want to write a message to the committee who sent the request
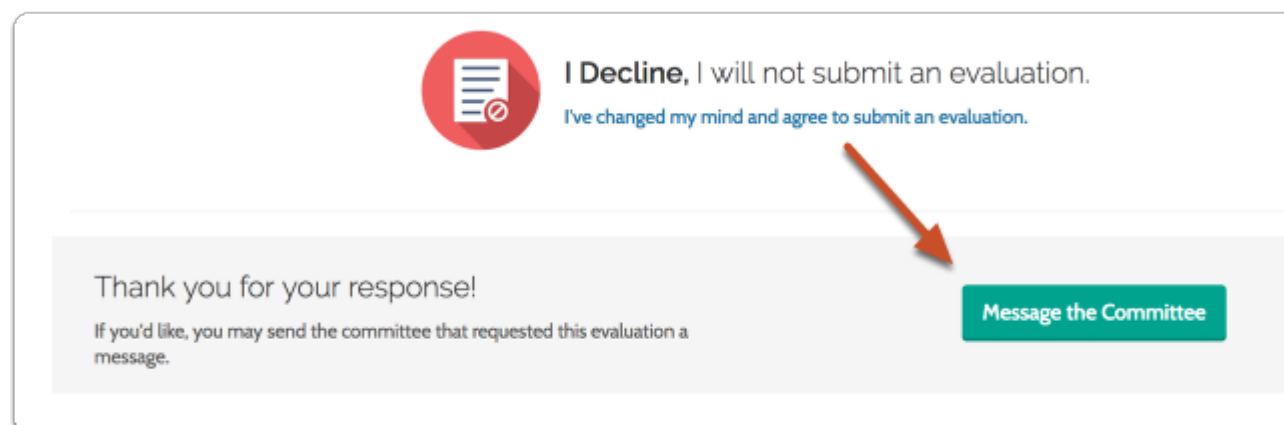
Type your reply and hit "Send Message"
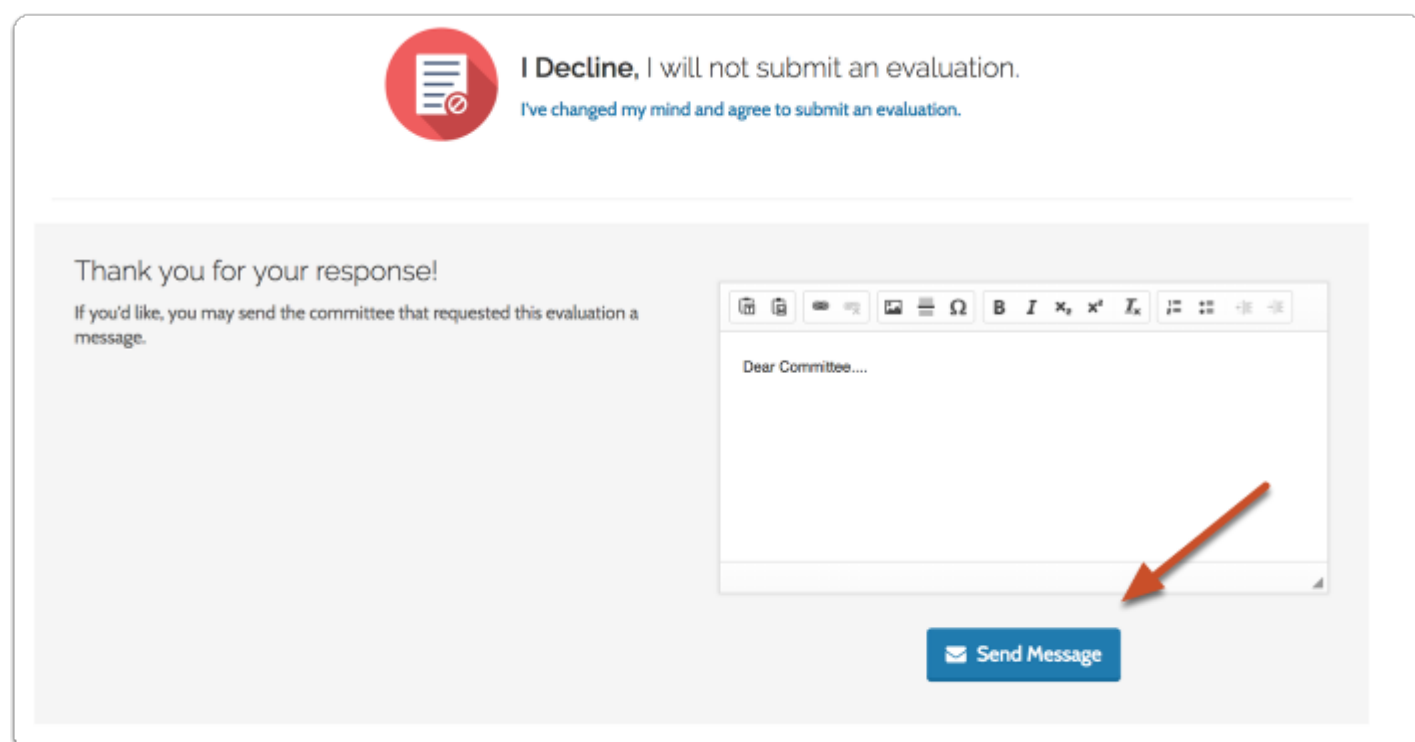
Activate your free Interfolio account

You will see a confirmation screen thanking you for your decision alsong with an invitation to create a free Interfolio account.

Confidential Evaluation Request for **Rita Book**
from Demo University

Thank you, we received your decision on May 1, 2017.

If you have any questions, please contact blothar.brown@interfolio.com.

Interested in saving your work and making your letter writing process even easier in the future? Activating a *free* account with Interfolio allows you to store and send confidential letters of recommendation for candidates to a range of academic opportunities, from grants to tenure reviews to faculty positions. Plus, your account will contain any previous history of letter requests that were sent to this email address.

Activate Now

Help and Resources

Getting Help For Interfolio

You can access detailed help for Interfolio by signing in to your account and visiting our Help Center.

If your institution has partnered with us to provide Single Sign-On, follow this link to sign in through your institution.

Online Help Center

If you have questions about how to accomplish a specific task, sign in to your account, click on your name to select "Help" and try searching the extensive knowledge base of articles with step-by-step instructions at our online Help Center.

Scholar Services

You can also submit a help request via email to our Scholar Services team at help@interfolio.com.

-or- contact Scholar Services by telephone Monday-Friday, 9am-6pm, Eastern Standard at (877) 997-8807 (Toll Free).

We can also be reached via social media:

@interfolio on Twitter

@interfolio on Facebook

Help from your Institution

Some of our client institutions prefer that faculty members reach out to internal resources as opposed to our Scholar Services staff. Typically this is true for users at an institution that uses Faculty180.

Our staff will do our best to answer your questions, but you may first want to confirm that you shouldn't be getting support from resources at your institution.

Administrator's Guide to Interfolio Dossier

Quick Reference Guide to Dossier Institution for Faculty Members

What is Dossier?

Dossier, by Interfolio, is an online platform for faculty to collect, categorize, manage, and store scholarly materials in a secure, centralized place accessible only by you. Dossier may be integrated with your institution's new electronic case and committee review system, Review, Promotion & Tenure. This integration allows faculty to move selected materials easily from your private Dossier into your electronic file.

Soon, Faculty180 Users will have access to a Dossier to be able to store their information and connect to Review, Promotion, & Tenure. Allowing for institutions to track faculty work within Faculty180 and take advantage of the advantageous presentation and processes of Review, Promotion, and Tenure.

How do I access my Dossier?

There are multiple ways to access Interfolio Dossier, depending on your institution's set-up or your account status. Expand one of the links below to find the relevant guide.

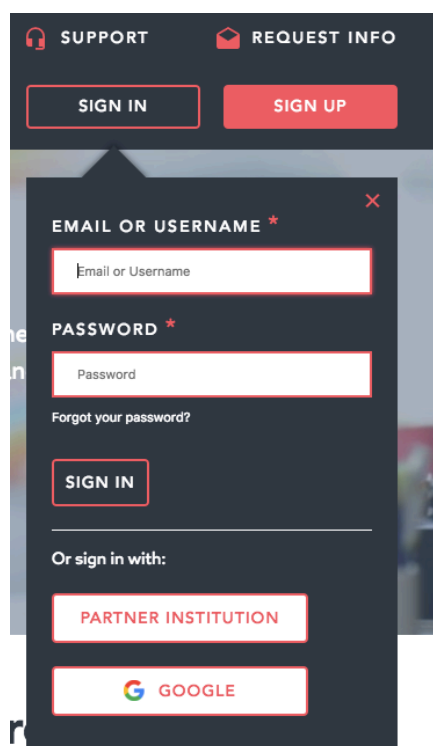## To sign in via Single Sign-On (SSO) or by using your institutional credentials

Login with your institutional credentials via Single Sign-On.

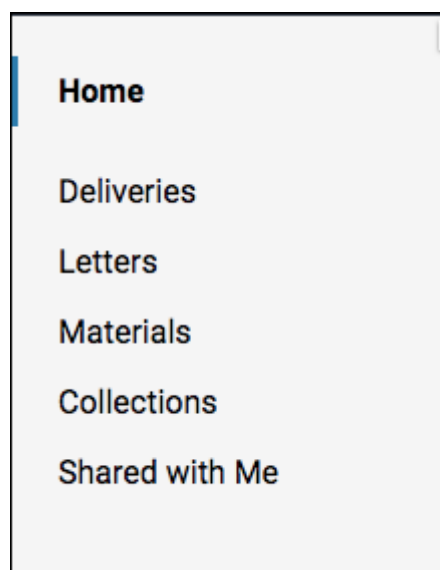## To sign in with your own personal credentials

Navigate to www.interfolio.com.

https://www.interfolio.com/

Select the Sign In button and login with your credentials

How do I upload materials?

1. To upload files to Dossier, click Materials on the navigation bar

2. Click Add Files to upload one or multiple documents from yourcomputer to the All Materials section of your Dossier via the drag and drop or browse to upload functions.

3. Select a Description and attach the relevant files or URL

For each file, select a description of the material from the dropdown (i.e., C.V., Student Evaluations) and click Add.

If no accurate description exists for the file, select "Other Document".

The file name can also be edited at this time.

To add links to videos, presentations, and websites to your Dossier, navigate to the Video or Webpage tab, enter the URL with a description, and click Add.

4. Your uploaded materials will now appear in the All Materials section of your Dossier.

Faculty180 Users can Export their CV/Vita/Biosketch to their personal Dossier

> ❗ This feature has not yet been released. This is expected to be available to Faculty180 users in March 2018.

Faculty users in Faculty180 that have a Dossier institution account are able to export their CV directly to their personal Dossier for personal record keeping purposes and future storage.

Simply click on the Export/Share button and select "My Interfolio Dossier", to send the document to your personal Dossier as a PDF.

How do I organize my Dossier?

Related materials can be organized into folders or collections that will be useful when compiling various types of documents and evidence for an upcoming Faculty Review cycle.

To start, we recommend you create the following some basic collections to assist you with organizing your materials in preparation for your review. From here, you can create custom collections specific to your professional needs.

[Here is a guide to learn more about managing your Dossier.](#)

How do I create a collection of individual materials?

To move uploaded materials from the All Materials section into a Collection, navigate to the All Materials section, select the checkbox(es) on the item(s), click Add To, and select from the dropdown the Collection to which the materials should be added.

Materials can also be uploaded directly to a Collection by selecting the Collection at the time of upload. Materials uploaded directly to a Collection will also appear in the All Materials section.

Here is a guide with more information on creating a collection.
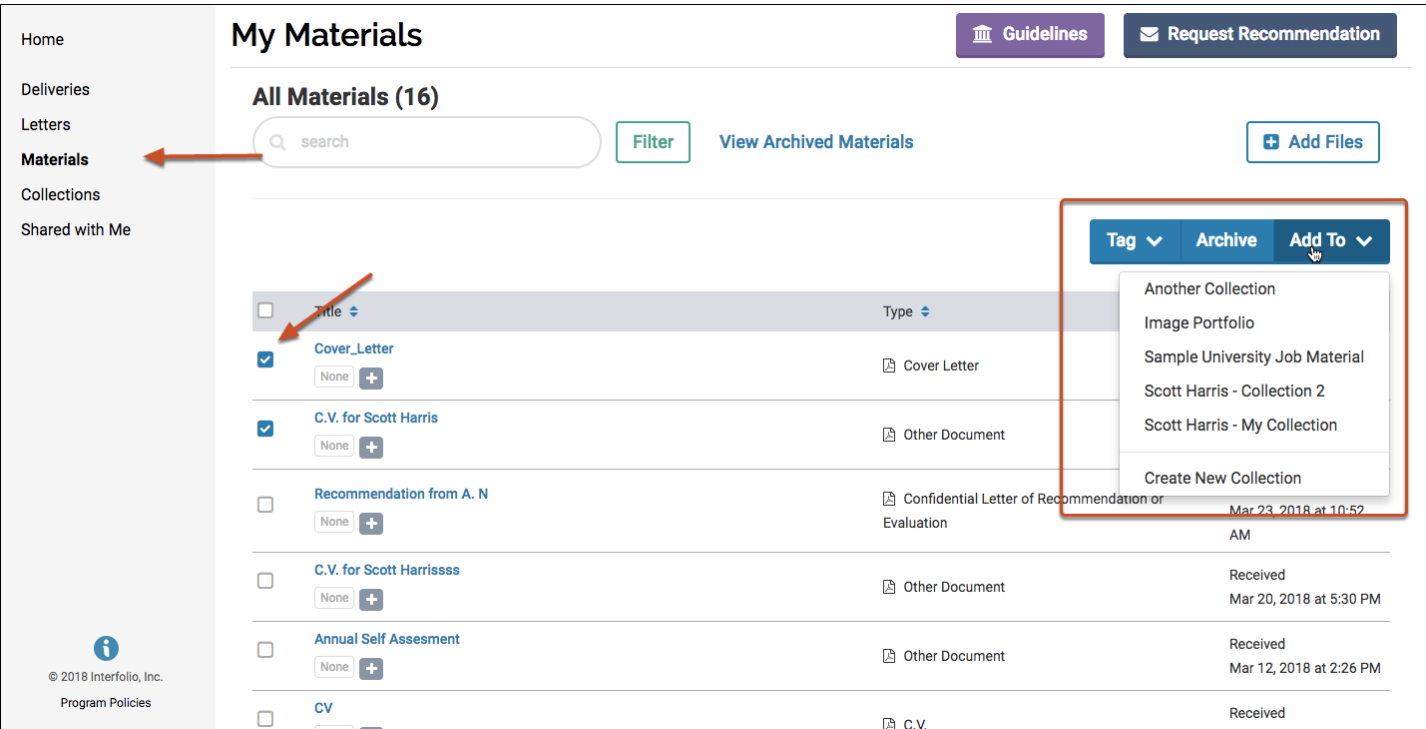
How do I share and receive feedback materials or collections?

Client institutions with Dossier Institutions, provides accounts to it's faculty members to keep track of their documents, and if necessary prepare for any reviews at the institution.

Here is more information on how to share documents and receive feedback.

Further Support

A direct link to Dossiers Quick Start Guide is located under the Dossier section of your Interfolio Dashboard.

If you need further assistance, please contact your institutional interfolio administrator. For general and technical support, contact help@interfolio.com

Video Guides

Interfolio Help Videos (Legacy)

> 💡 Note: These videos contain workflows and processes for Faculty Search and Review Promotion & Tenure. These videos are out of date but are referencable for a demonstration of what a single product experience or workflow is like.

Product	Date.Recorded - Title	URL
Faculty Search	11.2016 - Managing/Evaluating a Search	http://edu.interfolio.com/clie managing-creating-search
Review, Promotion & Tenure	11.2016 - Managing/Evaluating a Case	http://edu.interfolio.com/clie managing-creating-case
Review, Promotion & Tenure/Dossier	09.2016 - Candidate Experience	http://edu.interfolio.com/clie p-t-candidate
Review, Promotion & Tenure	09.2016 - Admin Experience	http://edu.interfolio.com/clie p-t-admin
Faculty Search	08.2016 - Creating/Managing a Search	http://edu.interfolio.com/clie creating-and-managing-a-sea
Review, Promotion & Tenure	02.2017 - Promtion & Tenure Admin	http://edu.interfolio.com/clie p-t-admin