COLORADO STATE UNIVERSITY

Unit Administrator Guide to Interfolio Review, Promotion, and Tenure

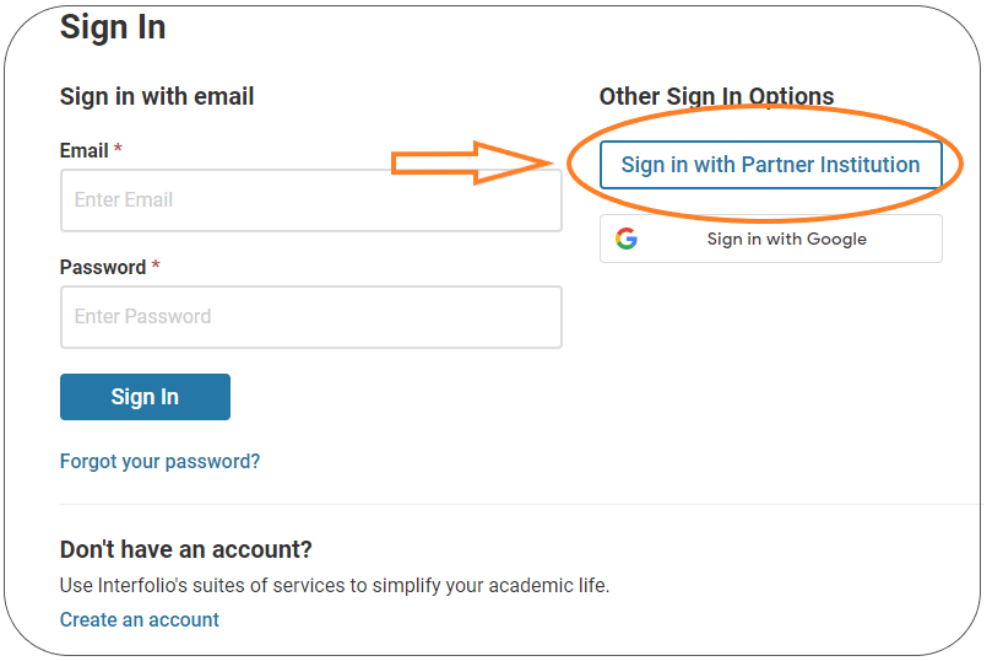
- Additional information and product help can be found here: https://product-help.interfolio.com/en_US/review-promotion-tenure
- Unit Administrators are encouraged to complete Interfolio's E-Learning course here: https://product-help.interfolio.com/en_US/product-training#accordion307350

In this document:

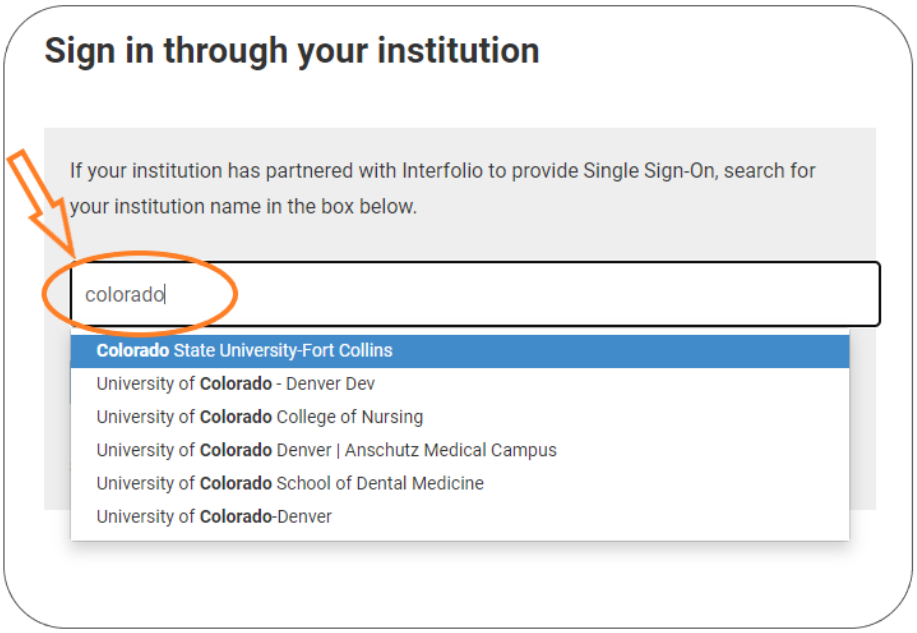
- How do I access my Interfolio account?
- Overview of user roles in Interfolio
- Templates
  - Duplicating a template
- Creating and managing committees
- Creating and managing cases
  - Creating an individual case
  - Creating multiple cases
  - Viewing the status of a case
- Notifying candidates
- Uploading materials to a candidate's packet

How do I access my Interfolio account?

1. The link from the notification email will take you to the Interfolio sign-in screen. You may also login at interfolio.com.



2. Select “Partner Institution” as shown above, and search for Colorado State University-Fort Collins as shown below.



3. Select Colorado State University-Fort Collins from the drop-down list.
4. You will be taken to “NetID Login” to enter your CSU NetID and Password and then you will be immediately directed back to Interfolio.

5. You will have both an institutional account and a personal Dossier account. Select your Colorado State University-Fort Collins institutional account when prompted.

Overview of user roles in Interfolio

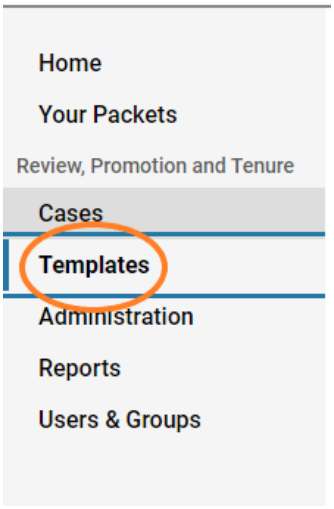
There are several user role types in Interfolio that have different levels of access to materials and actions in the system.

1. **Institutional Administrators**: administrators with University level access in the Interfolio system. These administrators have access to all users and groups, templates, and cases across units.
2. **Unit Administrators**: users with administrator permission are able to access documents, email candidates and committees, move cases forward or backward, create templates, forms, and can create cases for the units they have access to. Unit administrators can exist at different levels, so there may be unit administrators at both the college and department levels.
3. **Committee Members**: users must be added to a committee to view a candidate's packet and download documents on the cases that they have access to.
4. **Committee Managers**: these users have the same capabilities as a committee member and can also move cases backward or forward in the workflow, after the committee has finished reviewing it. They can email the candidate and committee members from within Interfolio and can record committee votes. In order to make a user a Committee Manager, a Unit Administrator must manually select them to serve this role (see section on creating and managing committees).

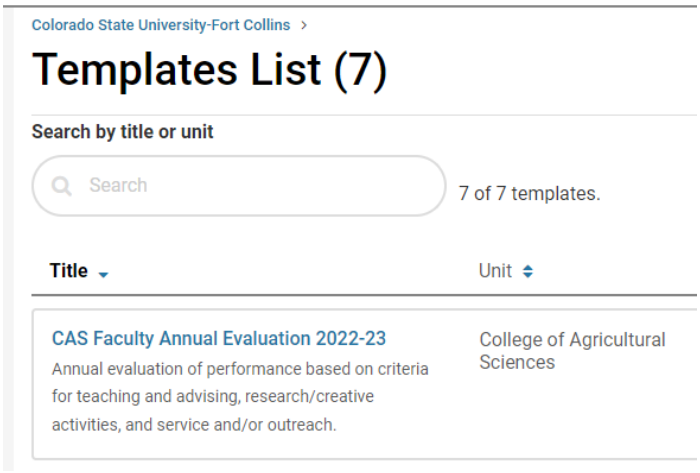
Templates

Templates for various reviews will be created at the University level to reflect the requirements of the Faculty Manual. These templates can then be copied down to different unit levels. The Unit Administrator then has access to edit the "Candidate Instructions" as well as the Committees assigned in the Case Review steps.

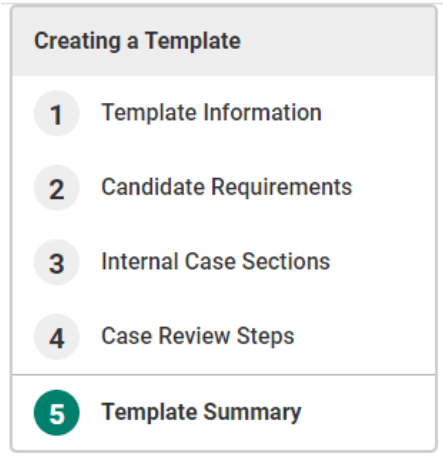
1. Select the "Templates" tab to view templates that are visible at your unit level.



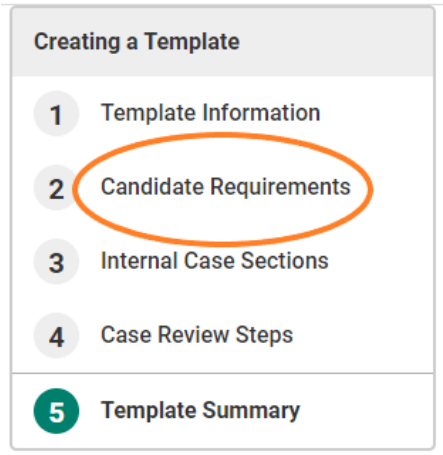
2. You will be able to view templates that are available at your unit level, as well as search for cases by title or unit.



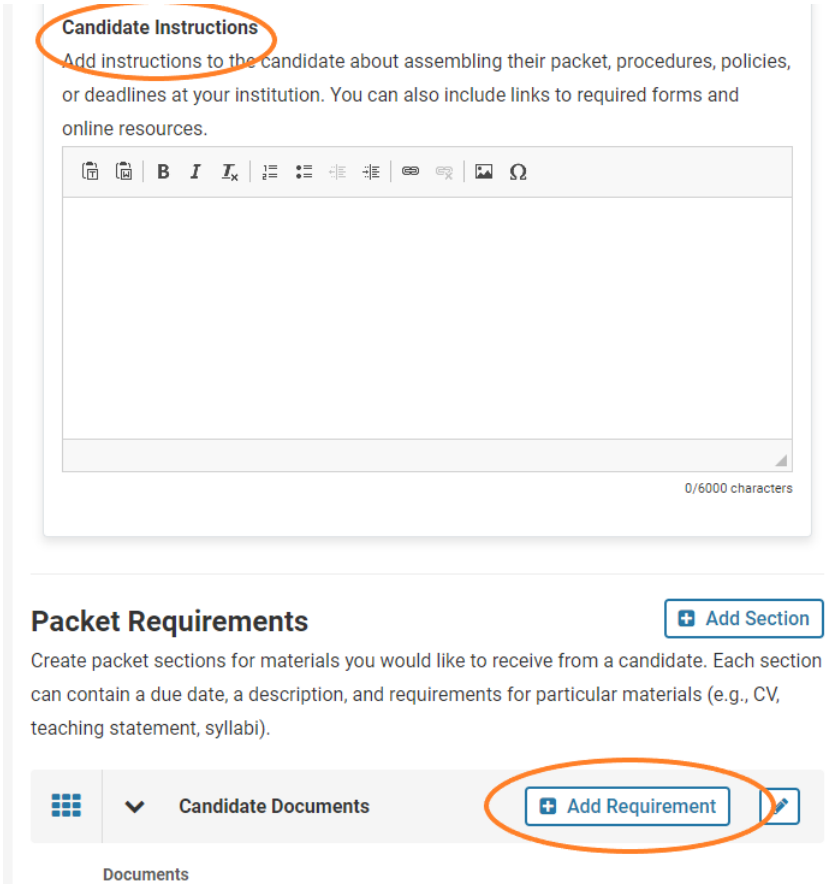
3. When you select a template, you will be able to view the Template Summary, Template Information, Candidate Requirements, Internal Case Sections, and Case Review Steps.



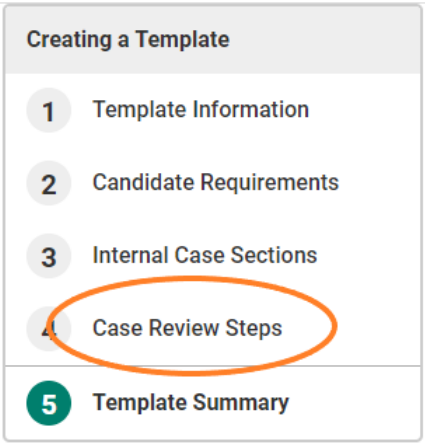
4. Select “Candidate Requirements”.



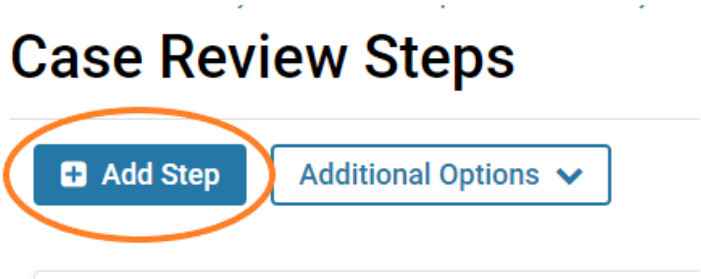
5. As needed, edit the “Candidate Instructions” and “Packet Requirements” per college/department requirements. Candidate documents can be set as required or optional, and can be set to a page limit as well.



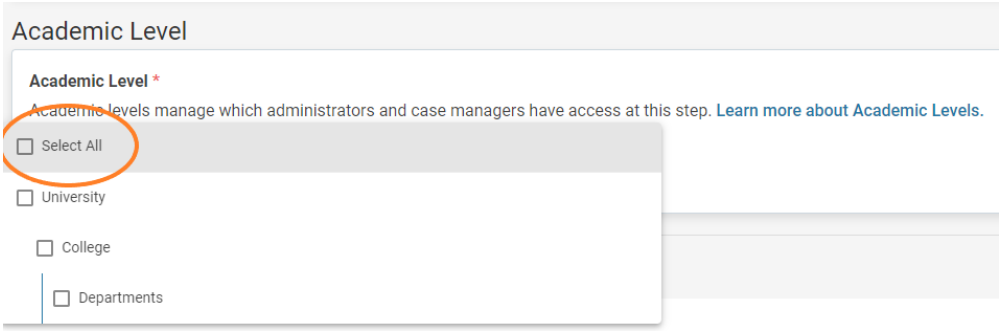
6. Select the “Case Review Steps” tab and review the instructions and committees assigned at each step. The last step should be the “Provost’s Office”, and no changes should be made to that step unless otherwise instructed by the Provost’s Office.



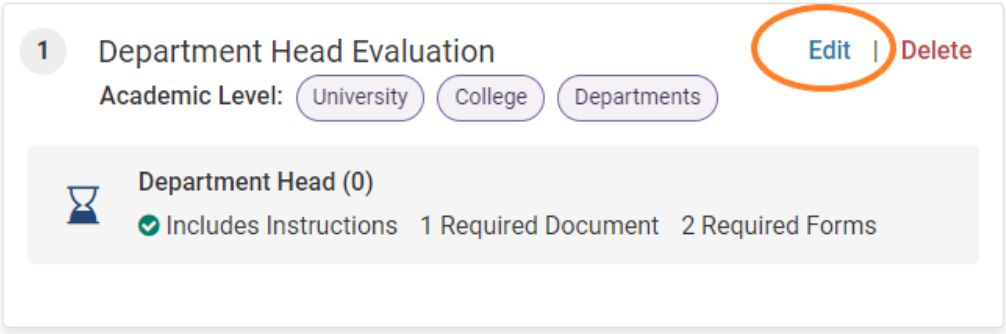
7. To add a step, select the “Add Step” button.



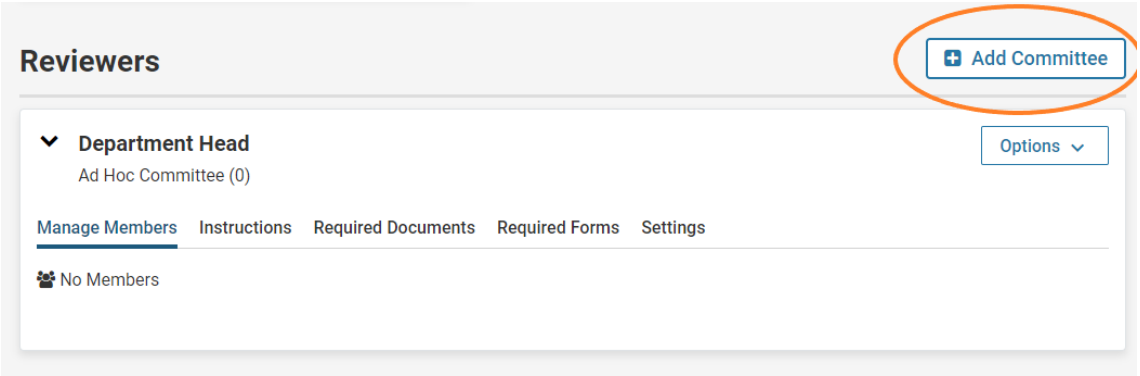
8. Fill the required fields. For “Academic Level” choose “Select All”.



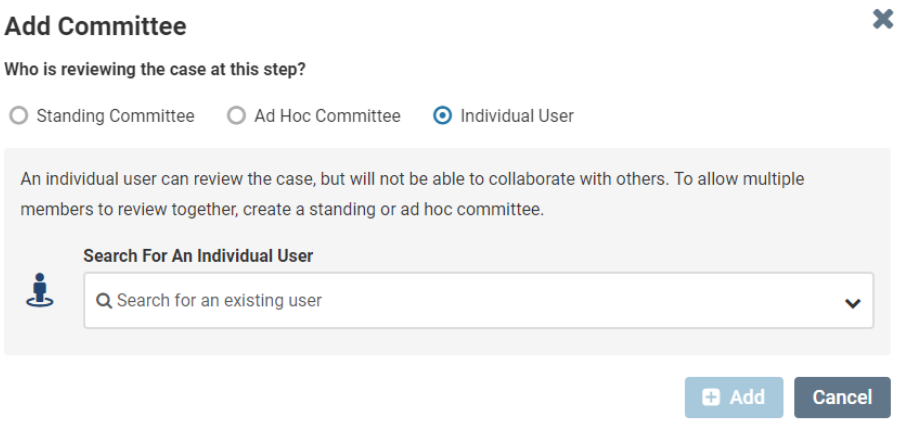
9. Click “Save”.
10. To edit a new or existing step, select “Edit” next to the step.



11. On this page, you may edit the step details including the Due Date, Instructions, Required Documents and Forms, and Committees.



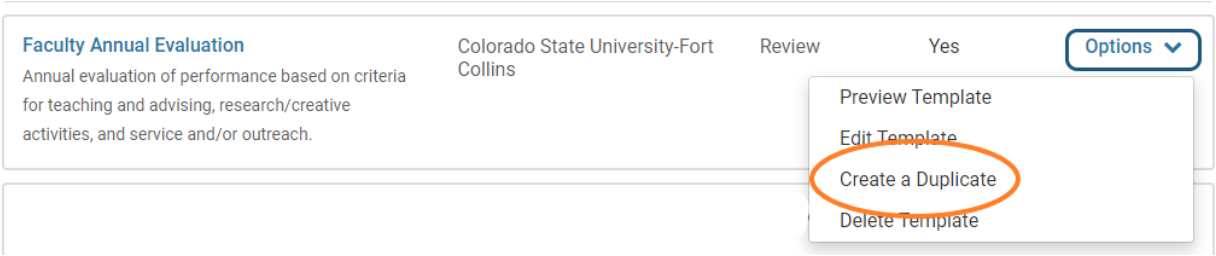
12. To assign a committee or user to a review step, select “Add Committee”. You can select three types of reviewers.
    a. **Standing Committee**: These are existing committees that you can create/manage under Users and Groups.
    b. **Ad Hoc Committee:** You can create an Ad Hoc Committee at this step if there isn’t an existing Standing Committee.
    c. **Individual User**: Select for review steps where there is only one reviewer needed.



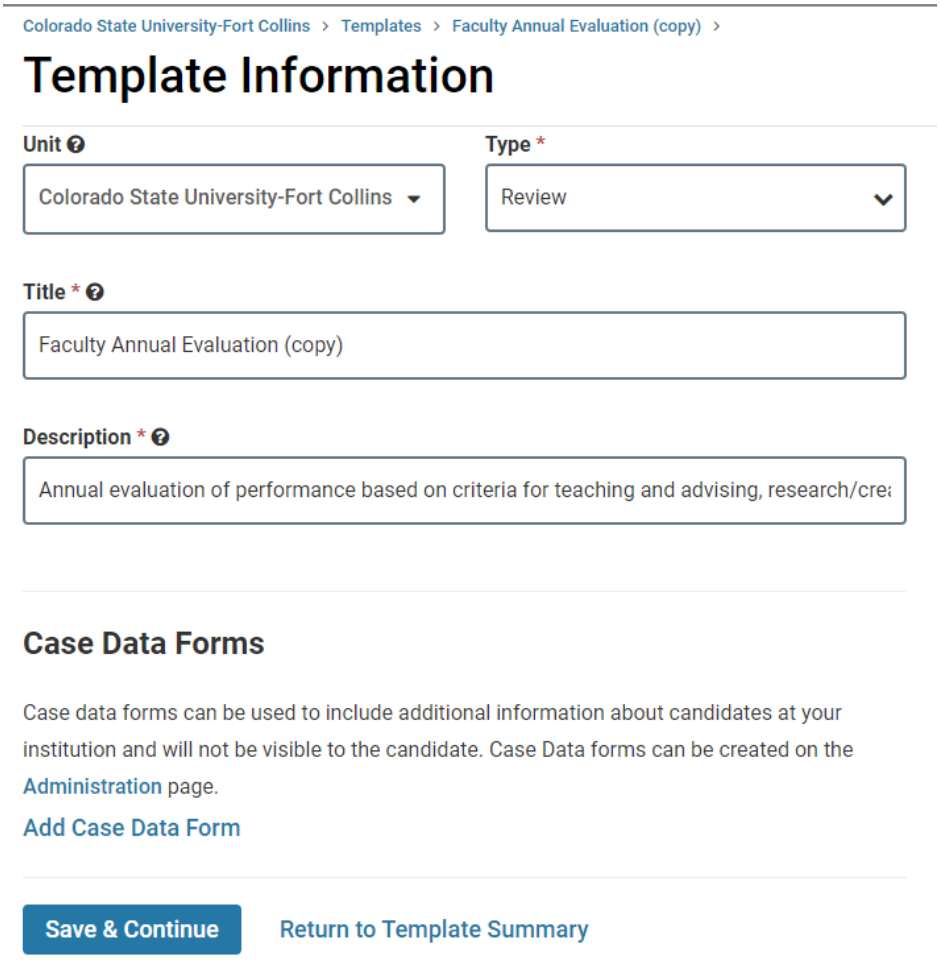
13. Once you have reviewed and edited the template, copies can be made for different units.

Duplicating a template

1. The Provost’s Office will create base templates that are duplicated for the Colleges. The College can make necessary edits to the template and duplicate for the individual departments.
2. To duplicate a template, select the “Options” dropdown next to the template, and select “Create a Duplicate”.



3. You will then need to select the Unit you are creating this duplicate for, edit the title and description as needed, and click “Save and Continue”.

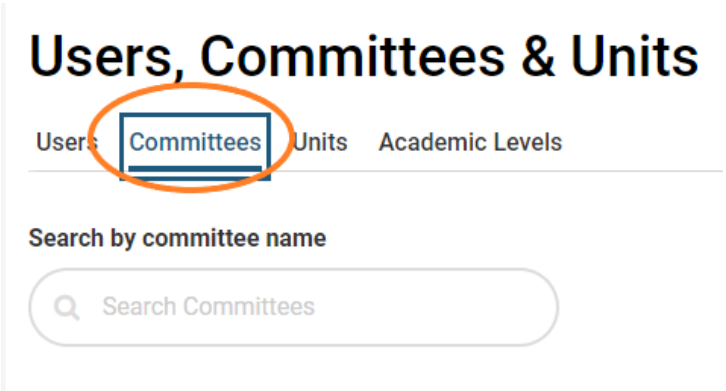


4. Once a template has been duplicated for a specific unit, the administrators can then edit the template if needed, and use the template when creating cases.

Creating and managing committees

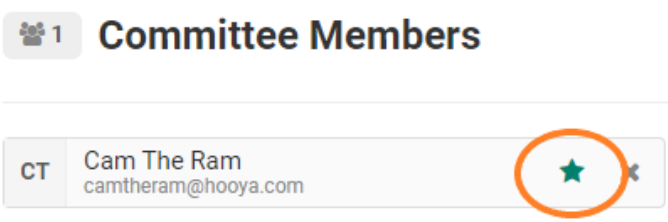
From the “User & Group” page, users can be assigned to standing committees. Committees consist of the people who will be assigned to different workflow steps.

1. Select the “Committees” tab on the Users & Groups” page.



2. You will be able to view committees at your unit level. You can edit existing committees or create a new one by selecting “Add Committee”.

3. Select “Add Committee”, then name the committee, select the appropriate Unit, and click “Save”.
4. Search for Users who will be committee members and click “Add” next to their name.
5. To make a committee member a **Committee Manager**, select the green star next to their name (see user roles listed above for more information about Committee Managers).



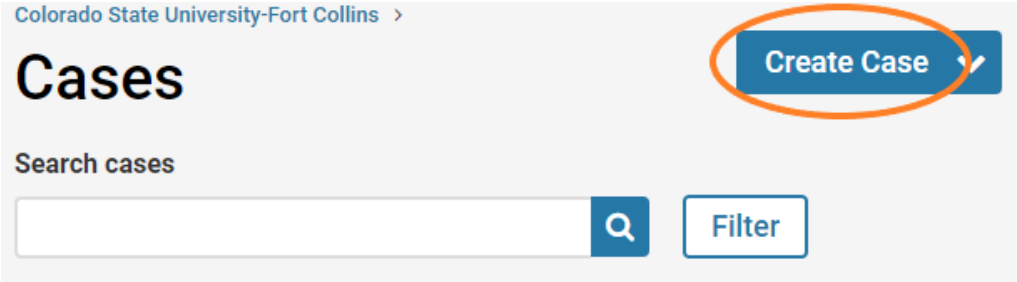
6. Once you have added all committee members and assigned a committee manager if needed, click “Update”.
7. This standing committee can now be assigned to Case Review Steps in your templates.

Creating and managing cases

Unit Administrators can create cases for individual faculty members, or multiple cases at once.

Creating an individual case

1. To create a case you will navigate to the “Cases” tab on the left-hand navigation bar. Select “Create Case” in the upper right.



2. Search for the Candidate’s name, select “Yes, the candidate will be involved during the case”, select the Unit, and click “Confirm”.

Add New Case

Search for a Candidate *

Selected Candidate *

The candidate information will display here once they are selected.

Will the candidate be involved in this evaluation? *

This setting cannot be changed after this step. Learn more about candidate involvement.

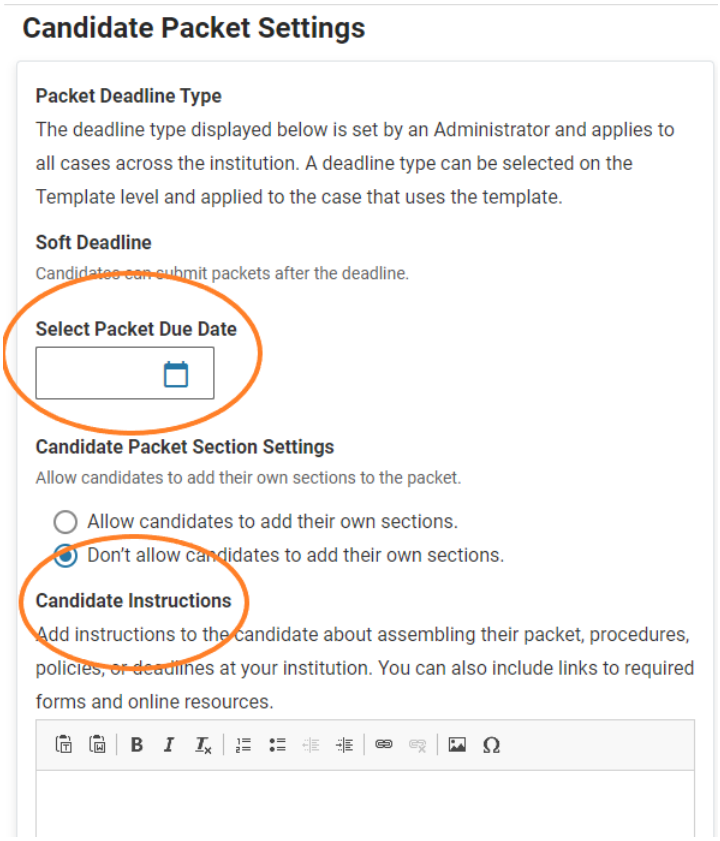
- ◯ Yes, the candidate will be involved during the case.
- ◯ No

Unit for Case *

Please select an organizational unit for this case.

Confirm Cancel

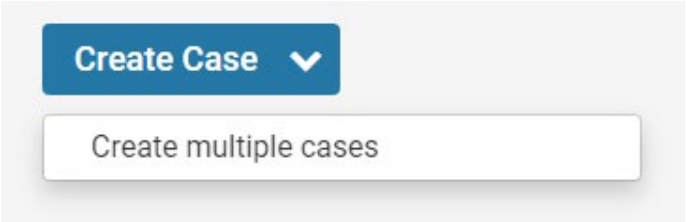
3. Next, select the template that you are assigning for this case. Click “Save and Continue”. At this step you can select a Packet Due Date and add any additional Candidate Instructions.



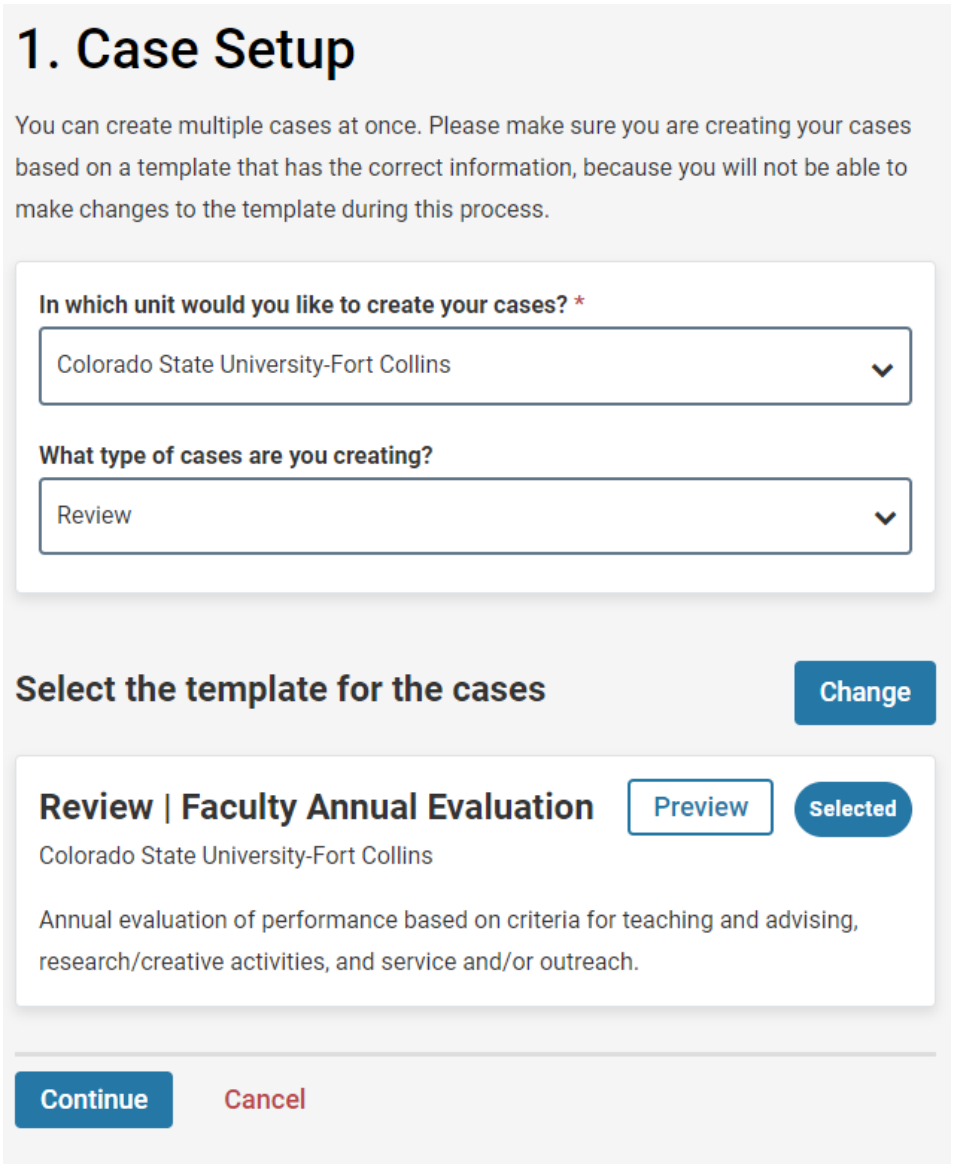
4. Click "Continue" through the remaining sections.

Creating multiple cases

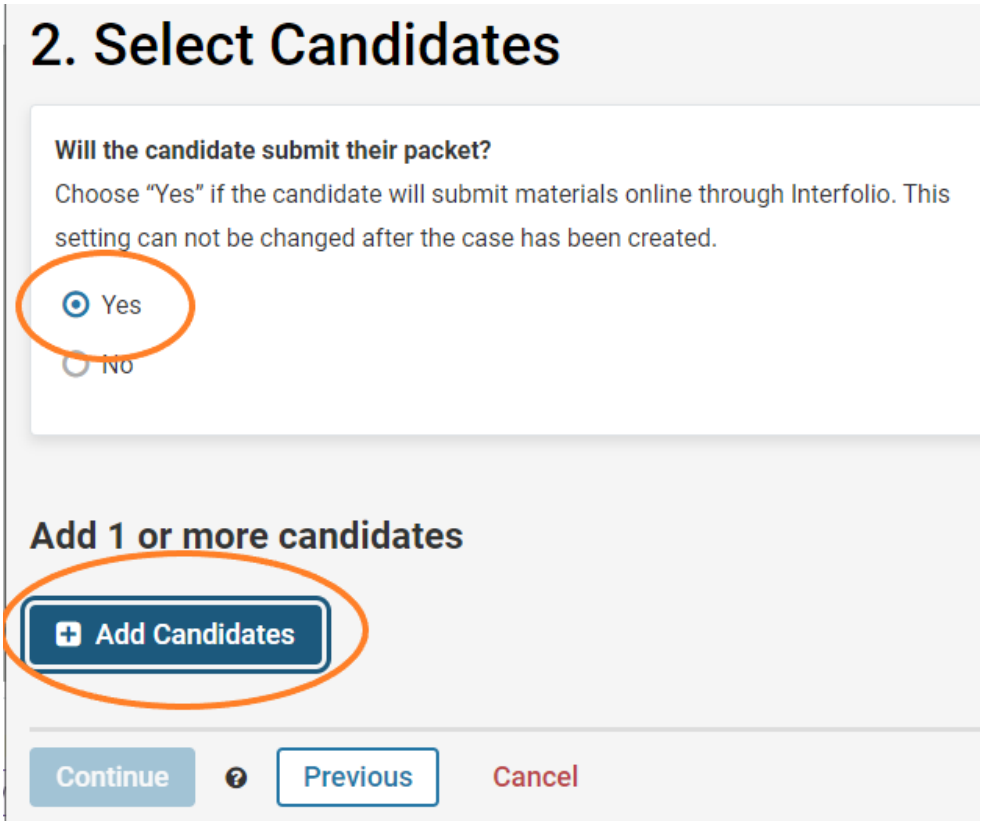
1. To create multiple cases at the same time, click the arrow next to the "Create Case" button, and select "Create multiple cases".



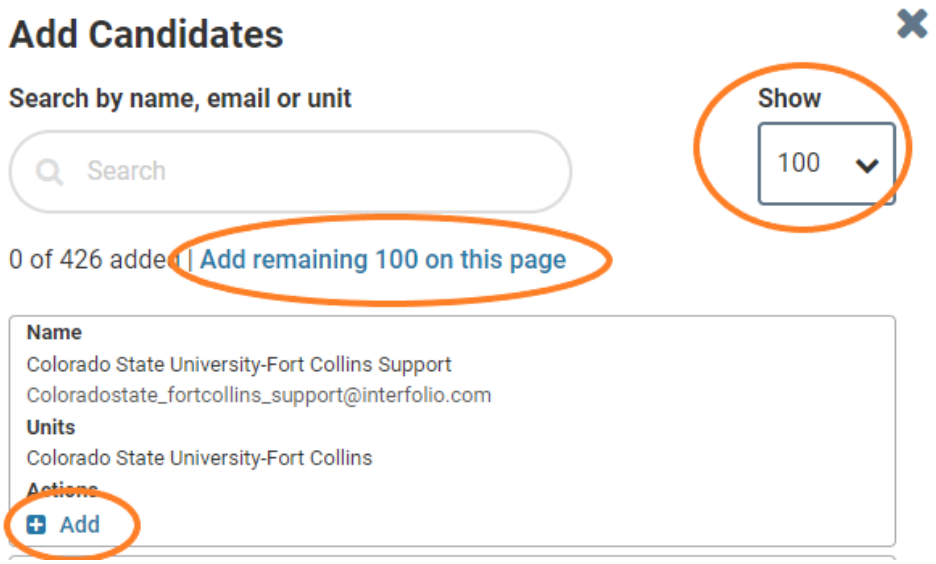
2. Select your unit, the type of case you are creating, and the template you will use for the cases. Click "Continue".



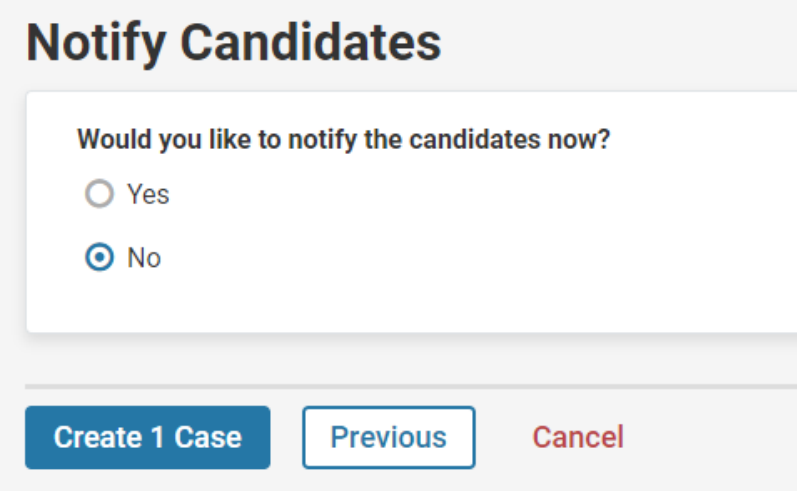
3. Select “Yes” if the candidate will submit materials through Interfolio. Then select “Add Candidates”.



4. Search for candidates by name or unit and click "Add" next to their name. To add all users from a unit, search for the unit, then adjust the number under "Show" and click "Add remaining # on this page".



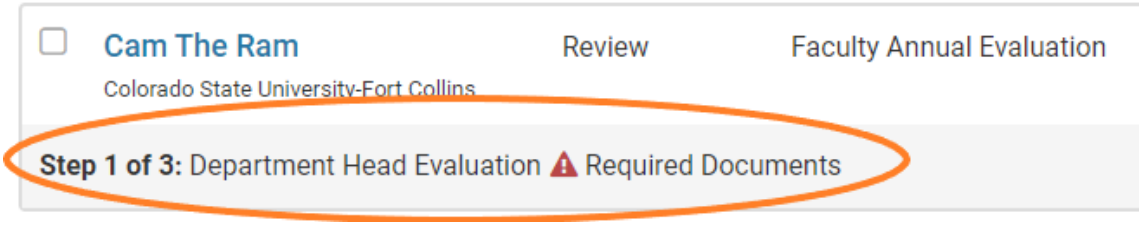
5. Click “Continue”. You will be taken to the “Summary and Confirmation” page where you can add candidate instructions and set deadlines as needed.
6. You can choose to notify candidates now, or wait to notify them later. If you select “No”, you can still notify the candidates at a later date.



7. Once you have filled all necessary fields, click “Create Cases”.

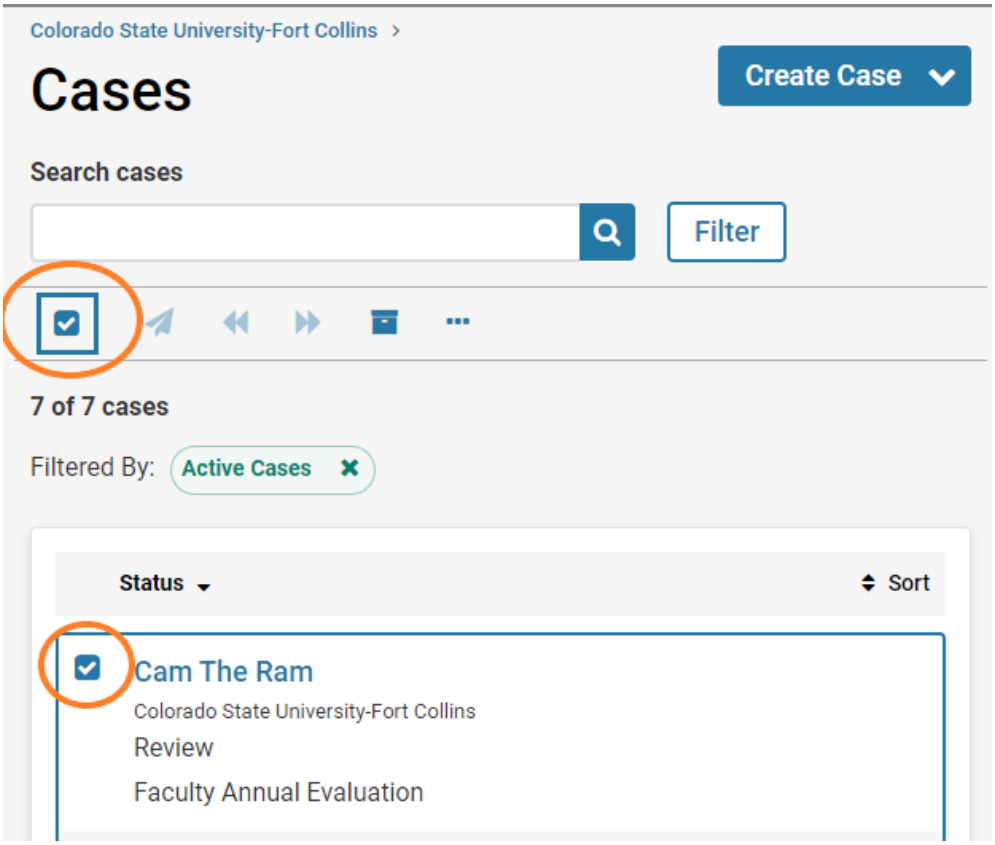
Viewing the status of a case

1. Once you have created cases, you can view which step they are at. Click the “Cases” tab on the left-hand navigation bar. Your list of cases will show which step they are at in the review process.

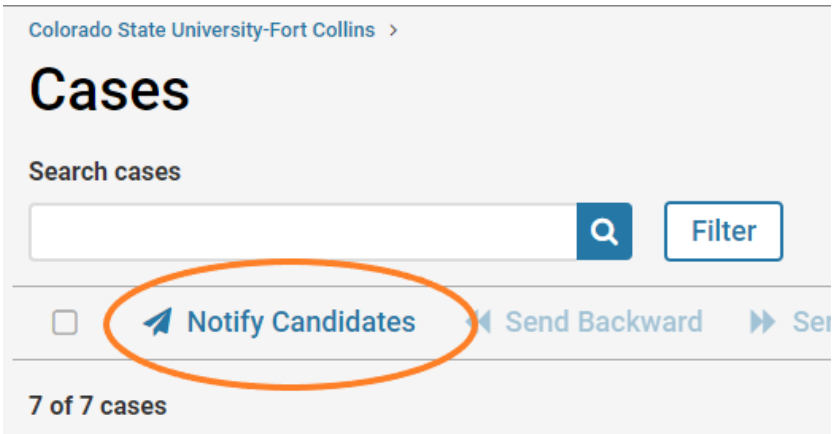


Notifying candidates

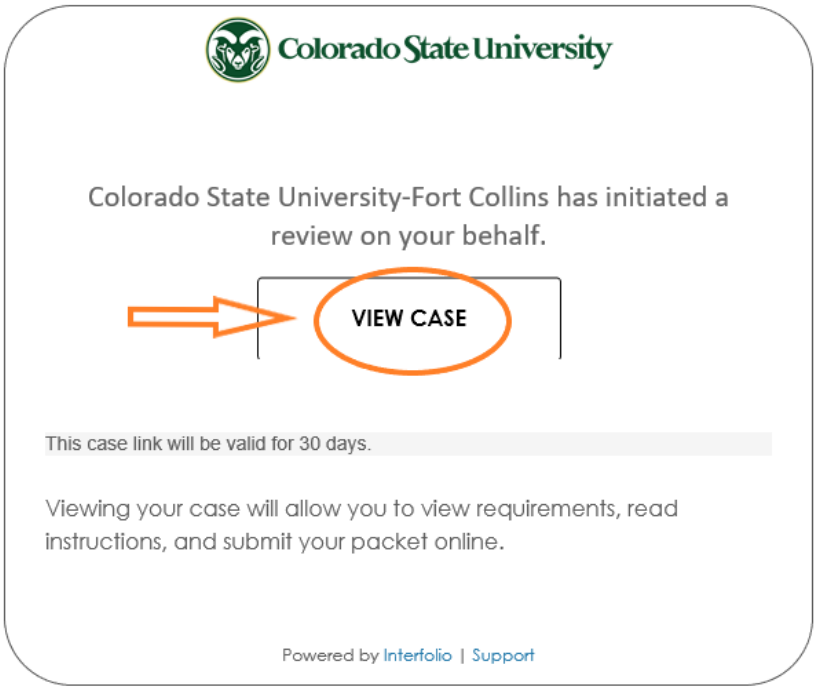
1. If you chose not to notify candidates when creating their case, you can send the notification email at a later date.
2. Select the “Cases” tab on the left-hand navigation bar.
3. Check the box next to individual candidates or check the box below the search bar if all candidates need to be notified.



4. Select “Notify Candidates”.

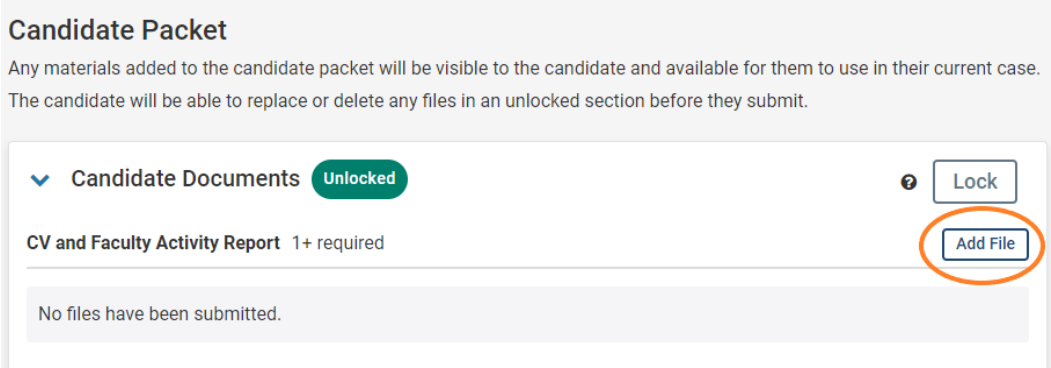


5. At this step, you can include a personal message. Otherwise click “Send”, and the candidate will receive a notification email that looks like this:

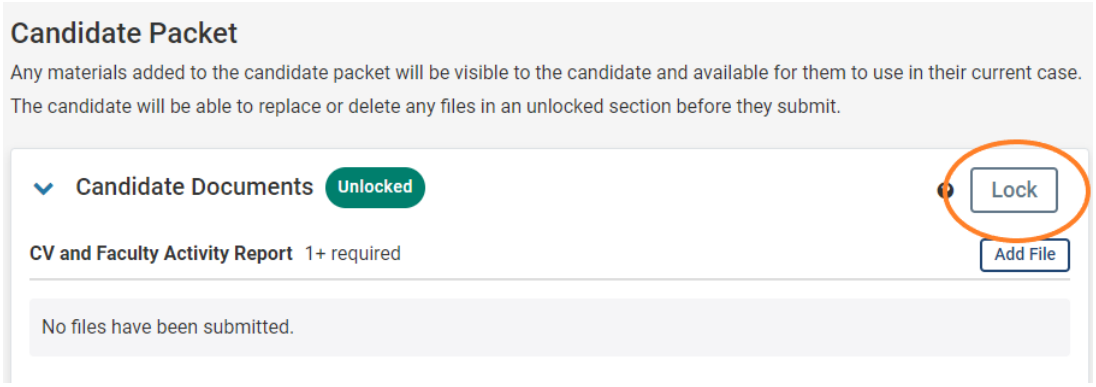


Uploading materials to a candidate’s packet

1. If a unit administrator needs to upload materials for a candidate’s packet, they can do so by opening the individual case and selecting “Add File” under the “Candidate Documents” section.



2. You can then choose whether to “Lock” the Candidate Documents. While the Candidate Documents are “Unlocked”, the candidate can edit, add, or delete items. Once the Candidate Documents are “Locked”, the candidate cannot edit, add, or delete files but can still view them.



3. Once all required files are uploaded to the Candidate Documents, the unit administrator can send the case forward to the next review step. Select “Send Case” and “Forward to” the next step.