interfolio

Review, Promotion & Tenure
Case Western Reserve University
Unit Administrator Training
Agenda

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What is Interfolio Review, Promotion & Tenure?

Interfolio Review, Promotion & Tenure is an online system for carrying out formal faculty reviews in a shared governance context (including tenure, promotion, annual review, sabbatical/leave, merit review, and any other sequential review), built to help academic institutions ensure that these processes are transparent, equitable, efficient, and well documented.
Why Interfolio?

1. **What is changing?**  
The approach to collecting P&T materials.

2. **What is not changing?**  
The content of P&T materials and the approval workflow.

3. **Why are we changing? Why did we choose Interfolio?**  
Paper/email trails are not the best way to manage the P&T process. Given the complexity involved in building this type of functionality in the FIS, the decision was made to move forward with a vendor solution. Interfolio offers a very organized, user-friendly, and confidential electronic approach to collecting P&T materials.
# Key Concepts

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<tr>
<th><strong>Review, Promotion &amp; Tenure</strong></th>
<th>An Interfolio module used to facilitate the review process anytime a candidate submits materials that one or a series of committees needs to review or approve.</th>
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<tbody>
<tr>
<td><strong>Units</strong></td>
<td>A digital representation of Institutional hierarchy. Within the hierarchy, the different tiers will determine scope. Administrators can be assigned to any given unit. E.g. Institution -&gt; School -&gt; Department</td>
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<td><strong>Templates</strong></td>
<td>Building blocks of the Review, Promotion &amp; Tenure module that allow Administrators to create standardized, repeatable processes for all review types at their institution, colleges, schools, and departments. Templates can be created centrally or copied down to specific units for customization.</td>
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<td><strong>Cases</strong></td>
<td>Lifecycle of a candidate as they progress through a standardized review cycle. Committees have the ability to add a case analysis or evaluation to the case as it progresses through the workflow leading up to the final decision.</td>
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<td><strong>Packet</strong></td>
<td>The collection of materials by which a candidate is being reviewed (documents and other files). The packet is divided into sections which can be worked on and submitted independently of one another. All materials submitted in the packet will be copied to the candidates Dossier for record keeping.</td>
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<td><strong>Committees</strong></td>
<td>Groups of users that can review the candidates case at a given step of the review process. Committees can be: Standing (managed from the central committee tab), Ad Hoc (case specific) or individual assignment (committee of one).</td>
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<td><strong>Dossier</strong></td>
<td>Tool for all faculty to store and manage job, fellowship, and promotion documents in one place. The Dossier will act as the central archiving tool for candidate materials. All information submitted for a review will be copied into the faculty Dossier for archiving or reusability purposes.</td>
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Review, Promotion & Tenure: User Roles

**Administrators** can access documents, reports, e-mail candidates and committees, and move a case forward or backward. Administrators can create and edit templates, forms, and cases for the units to which they have access.

**Case Managers** are assigned to a specific unit. They can review candidates, move cases forward or backward, edit the case-specific requirements and workflow steps as well as e-mail both candidates and committees from within the system.

**Template Administrators** can create and edit templates for the units to which they have access. They can also create and edit standing committees within their unit.

**Committee Managers** are assigned to a specific committee or step. They can review a candidate, move a case forward or backward, and communicate with both candidate and committee members from within the system.

**Committee Members** have the most basic permissions within the system. They can view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to.
Logging into the Product

Sign In

Sign in with email

Email *
Enter Email

Password *
Enter Password

Sign In

Or sign in with:

Partner Institution

Google

Forgot your password?
Logging into the Product

Sign in through your institution

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

Case Western Reserve University
Case Western Reserve University-College of Arts and Sciences

Don't have an account? Sign up now.
Use Interfolio's suite of services to simplify your academic life.

Sign in with an Interfolio account
Demonstration
Questions
Interfolio Pro Tips/Universal Practices

- Preferred Browsers: Google Chrome and Mozilla Firefox
- Ensure you are always using an up-to-date browser
- Do not select the browser back button!

Required documents to upload are located on the Case Details tab of a Case and indicated by a number. Upload your document(s) within this section/tab.
Interfolio Resources

Product Help Center
Quick help articles to guide you through specific tasks and functionality while using the product
product-help.interfolio.com

Scholar Services
Call, email, or chat with our Scholar Services team
Phone: (877) 997-8807
Email: help@interfolio.com