



interfolio

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Review, Promotion & Tenure  
Candidate Training

# Agenda

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- Interfolio Key Concepts
- Candidate Experience
  - Logging in
  - Your Packet
    - Uploading Documents
    - Preview your Packet
    - Submitting for Review
  - Review Interfolio Dossier
    - Collections
    - Guidelines
- How to Find Support

# What is Interfolio Review, Promotion & Tenure?

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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.

# Key Concepts

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<b>Review, Promotion &amp; Tenure</b>	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.
<b>Packet</b>	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.
<b>Cases</b>	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.
<b>Dossier</b>	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.

# Logging into the Product

The screenshot shows the interfolio website's navigation bar with the following items: interfolio logo, Products, Challenges, Services, About Us, Resources, News & Events, Get a Demo, Log In, and Search. A red circle highlights the 'Log In' button. Below the navigation bar is a sign-in modal with the following elements:

- Sign In** (Section Header)
- Sign in with email** (Section Header)
- Email \*** (Label) with an input field containing "Enter Email"
- Password \*** (Label) with an input field containing "Enter Password"
- Sign In** (Button)
- Forgot your password?** (Link)
- Or sign in with:** (Section Header)
- Partner Institution** (Button)
- Google** (Button)

# 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



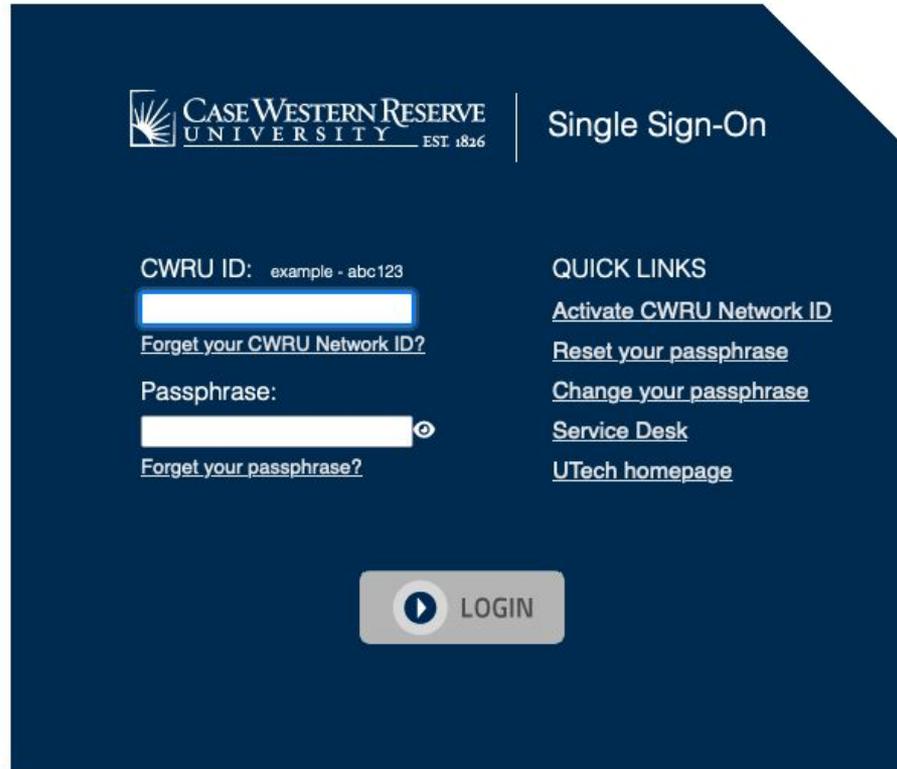
[Sign in with an Interfolio account >](#)

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

[Sign Up](#)



# Logging into the Product



The screenshot shows a dark blue login interface for Case Western Reserve University. At the top left is the university logo with the text 'CASE WESTERN RESERVE UNIVERSITY EST. 1826'. To the right of the logo is the title 'Single Sign-On'. Below the logo, there are two input fields: 'CWRU ID: example - abc123' and 'Passphrase:'. Each field has a corresponding 'Forget your [CWRU Network ID / passphrase]?' link below it. To the right of the input fields is a 'QUICK LINKS' section with five links: 'Activate CWRU Network ID', 'Reset your passphrase', 'Change your passphrase', 'Service Desk', and 'UTech homepage'. At the bottom center is a grey 'LOGIN' button with a play icon.

**CASE WESTERN RESERVE UNIVERSITY** EST. 1826

## Single Sign-On

CWRU ID: example - abc123  
  
[Forget your CWRU Network ID?](#)

Passphrase:  
  
[Forget your passphrase?](#)

### QUICK LINKS

- [Activate CWRU Network ID](#)
- [Reset your passphrase](#)
- [Change your passphrase](#)
- [Service Desk](#)
- [UTech homepage](#)



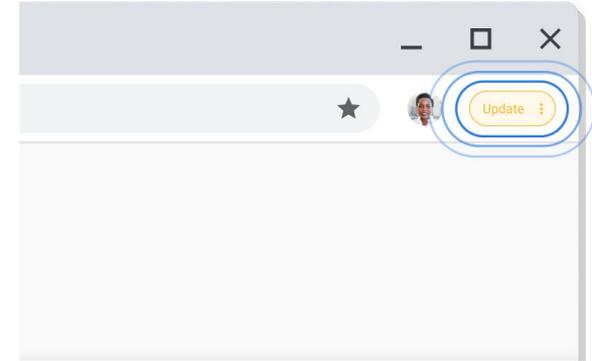
# Questions

# Interfolio Pro Tips/ Universal Practices

- Preferred Browsers: Google Chrome and Mozilla Firefox



- Ensure you are always using an up-to-date browser



- Required fields are indicated by the number where it says “3 required”. You must upload all numbered of required documents before you can Submit.

Publications 3 required, 0 Added Add

Three most significant publications must be included in the dossier.

No files have been added yet.

# Interfolio Resources

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## Product Help Center

Quick help articles to guide you through specific tasks and functionality while using the product

[product-help.interfolio.com](https://product-help.interfolio.com)

## Scholar Services

Call, email, or chat with our Scholar Services team

Phone: [\(877\) 997-8807](tel:(877)997-8807)

Email: [help@interfolio.com](mailto:help@interfolio.com)

