

Interfolio Review, Promotion & Tenure

FREQUENTLY ASKED QUESTIONS

This list of frequently asked questions was designed to help you troubleshoot common issues users encounter when learning to use Review, Promotion & Tenure. Please visit our help site at product-help.interfolio.com for additional resources.

1. MY CANDIDATE SAYS THEY'VE SUBMITTED THEIR PACKET BUT I'M UNABLE TO VIEW ANY OF THEIR MATERIALS. WHY CAN'T I SEE THEIR FILES?

If you can't see a candidate's materials, they haven't submitted their packet. You can check the following places in their case to confirm this:

- a. Look at your case list. If you see "Case is with candidate" under the candidate's name, they have not submitted their packet.
- b. Packet sections automatically lock upon submission. If you haven't manually locked the section, the status of the section will say "unlocked."
- c. If your candidate sees the submit button in the upper right corner of their section (especially if your candidate packet is broken into multiple sections), they will need to click that button to submit their section. [Candidates are able to preview their packet before submitting it.](#)

Click [here](#) to view our help article with screenshots and step-by-step instructions.

2. I DON'T WANT MY COMMITTEE TO SEE ALL OF THE DOCUMENTS IN THE CANDIDATE'S CASE. IS THERE A WAY TO EDIT THE SETTING FOR CERTAIN FILES?

Yes. As an Administrator, you can edit the settings for files at any time. You can do this for a single document or for multiple files at one time. Here's how:

- a. Check the box next to all the documents you want to change. Click on the **Settings** button that appears in the blue bar at the top of the screen.
- b. You can change the settings for an individual document by clicking on the [Edit](#) link to the right of the file name.

Click here to view our help article with screenshots and step-by-step instructions.

3. MY COMMITTEE MEMBERS SAY THEY CAN'T SEE THE CASE THAT'S ASSIGNED TO THEM. WHY IS THAT?

Make sure the Committee Member is assigned to the current step. *Committee Members can **only** see the case and case materials when the case is on their assigned step.* Here's how to check to see what workflow step the case is on and view the assigned committee members:

- a. While viewing a case, click **Case Options** and select **Edit Case**.
- b. When you're on the **Case Summary** page, select **Case Review Steps** in the **Creating a Case** box.
- c. You will see "(Current Step)" next to the step your case is currently on.
- d. Click the **Edit** link next to the step to see the list of committee members.

Click [here](#) to view our help article with screenshots and step-by-step instructions.

4. HOW DO I SEND A CASE BACK TO A CANDIDATE?

You can only send the case to the candidate **once**. This happens when you send the case forward and choose to "Notify Candidate."

However, If a candidate needs access to submitted sections of their packet, you can manually unlock the section. Here's how:

- a. The lock or unlock button is in the upper right corner of each candidate section.
- b. **The candidate must resubmit the section if any changes are made.**
- c. Once the candidate submits the section, the committee will be able to see the changes and the section will lock.

Click [here](#) to view our help article with screenshots and step-by-step instructions.

5. HOW DO I SHARE FILES WITH CANDIDATES AND EXTERNAL EVALUATORS?

You can share any file with an External Evaluator, as long as the file has been uploaded to the case. You can share all files (except for materials from External Evaluators) with candidates. Here's how:

- a. Click the blue **Share** button near the top of the screen, you will be taken to the screen where you can fill in fields for the email.
- b. Click the **+ Add** button under the message box to attach the files you'd like to share.
- c. Check the box next to a file(s), then click the **Share** button to attach files from the main case page.
- d. You can attach files when you create your request if you're sharing with External evaluators.

Click [here](#) to view our help article with screenshots and step-by-step instructions.