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

Agenda

- What is Interfolio?
- Interfolio Key Concepts
- Candidate Experience
  - Review Interfolio Dossier
- Administrator Role
  - Administrative Settings: Forms, Users & Groups, Committees
  - Create a Case
    - Adding Committees to a Case
  - Manage a Case
    - Review Case Materials
    - Upload Files
    - Request External Evaluations
    - Committee Communications
    - Move Case Forward or Backward
- How to Find Support

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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.

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Key Concepts

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Review, Promotion & Tenure	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.
Units	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 -> School -> Department
Templates	Building blocks of the Review, Promotion & 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.
Cases	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.
Packet	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.
Committees	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).
Dossier	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.

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Review, Promotion & Tenure: User Roles
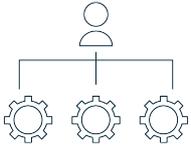
Administrators can access documents, reports, e-mail candidates and committees, and move a case forward or backward. Administrators can create and edit templates, forms, and cases for the units to which they have access.

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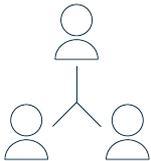
Committee Managers are assigned to a specific committee or step. They can review a candidate, move a case forward or backward, and communicate with both candidate and committee members from within the system.

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.

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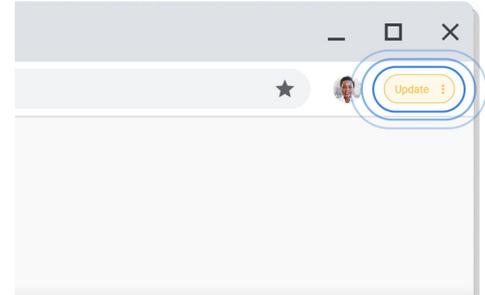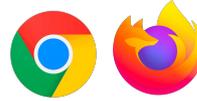# Logging into the Product

Logging into the Product

Demonstration

Questions

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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!

University of Washington College of Engineering > Cases > Dubs II Husky >

Case Summary

Case Information

Type	Name
Promotion	Dubs II Husky

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

University of Washington College of Engineering > Cases >

Dubs II Husky

Send Case ⌄   **Case Options** ⌄

Unit	Template	Status
Civil & Environmental Engineering	Promotion & Tenure	● CASE WITH EXTERNAL LETTERS change

Case Materials   Case Details 6

Reviewing as
Department Reviewers

> Instructions

> Required Items   6 missing

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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**