



Interfolio

For Promotion and Tenure Applicants

October 7 and 8, 2021

Millersville University

Interfolio Help

- Interfolio Knowledge Base
 - Can access from within Interfolio, within your case
 - Product-help.interfolio.com – suggest bookmarking [Getting Help for Interfolio Faculty Search, and Review, Promotion, and Tenure](#) - type in your question
 - [A Candidate's Guide to Review, Promotion and Tenure](#)
 - [Videos and Training Webinars](#)
 - FAQs and Best Practice Documentation:
 - [Best Practices for Naming Packet Materials](#)

Interfolio Help, continued:

- Contact Interfolio's Scholar Services Team
 - Offer support to all Interfolio users
 - Email help@interfolio.com or
 - Call **(877) 997-8807** during work hours
 - In Dossier, there's even a "Chat with us" feature!

Millersville Help

- Interfolio Resources on Provost's webpage
 - [Interfolio Login](#)
 - [Help for Interfolio Users](#)
- Contact local System Administrators by email
 - Donna.Peters@millersville.edu or Nancy.Korycinski@millersville.edu
 - NOTE: Do not contact MU IT Help Desk, they will refer you to us
- “Office Hours”
 - Will set up a Zoom link so faculty can share their screens
 - If you are in the waiting room, it means someone else is being assisted

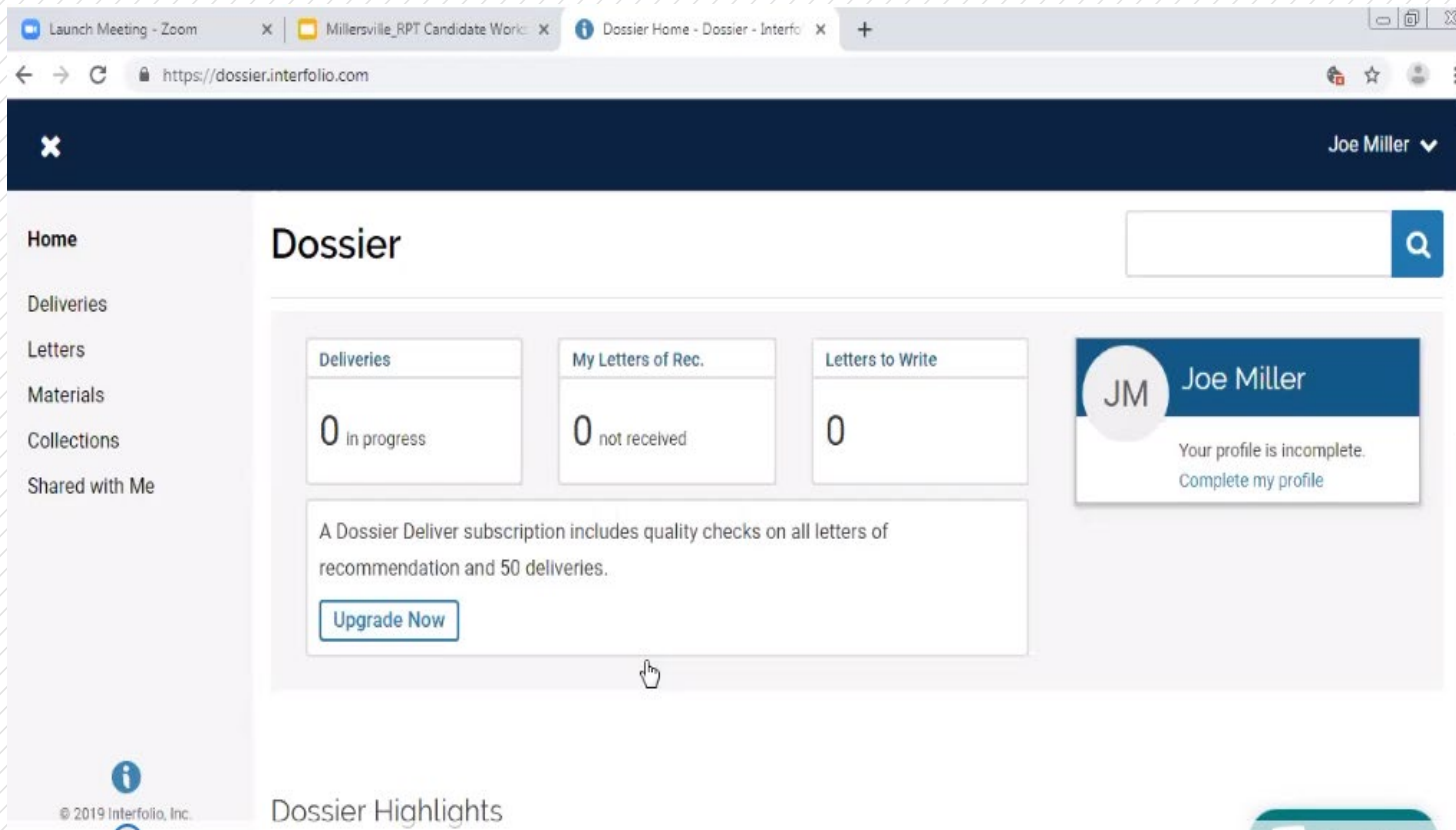
Logging In

- Several locations on MU website that allow you to do so
- But, NOT in Millersville Logins at bottom of home page (not enough space to add it)
- Available on [Provost's webpage](#)
- Available on the [Faculty & Staff](#) webpage, top right link
- Enter “Interfolio” in the webpage search area (next to the magnifying glass icon, upper right of the main MU webpage)

Choose Dossier or Millersville

- What is Dossier?
 - A place for you to store all files and manage your reappointment, promotion and tenure documents
 - Private to you and portable between universities
- What is Millersville?
 - Your case(s) will show in the opening screen, My Tasks

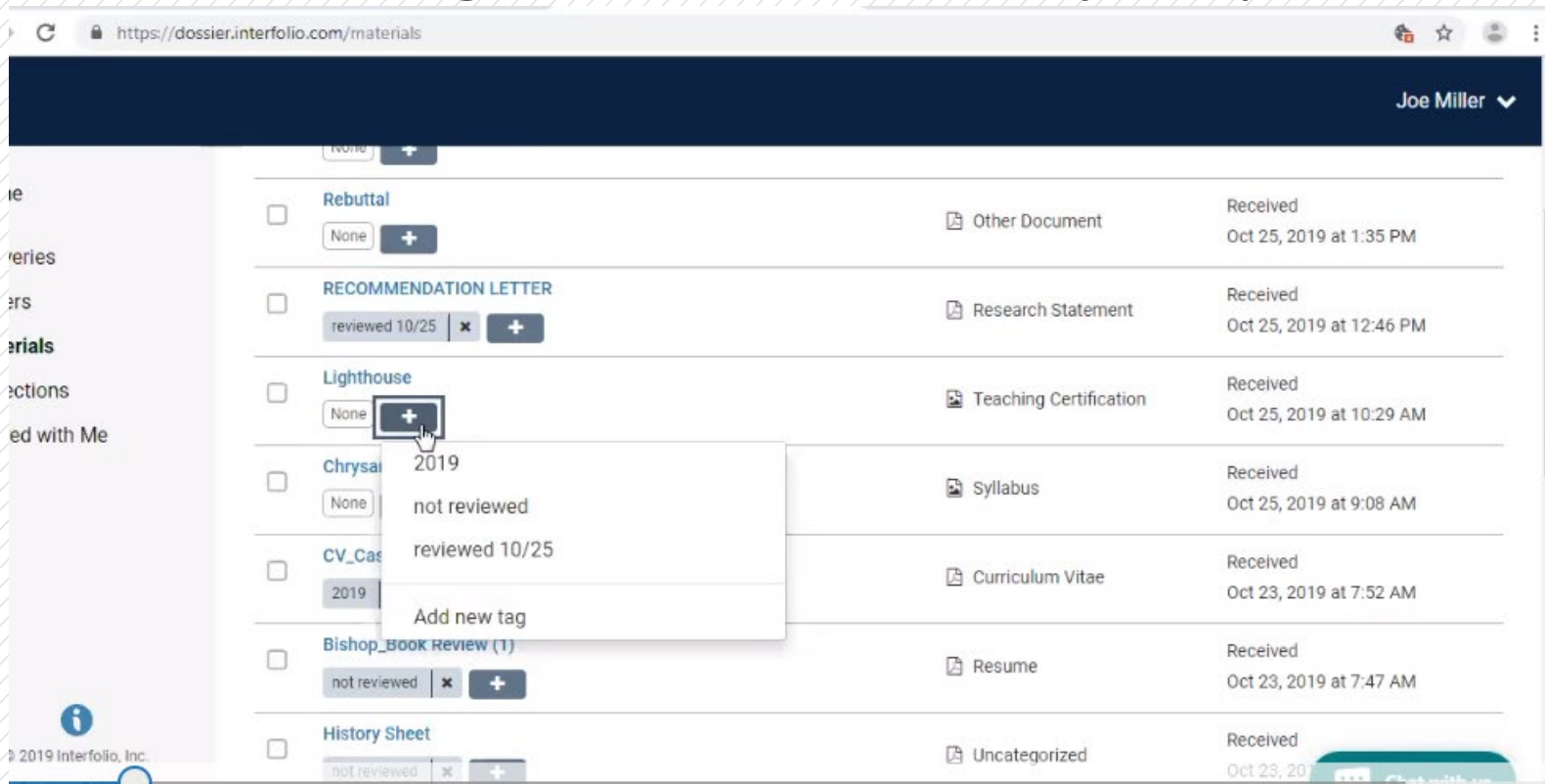
Opening Screen



The screenshot shows a web browser window with the URL <https://dossier.interfolio.com>. The browser tabs include "Launch Meeting - Zoom", "Millersville_RPT Candidate Work", and "Dossier Home - Dossier - Interfo". The application interface features a dark blue header with a close button (X) and the user name "Joe Miller" with a dropdown arrow. A left sidebar contains navigation links: Home, Deliveries, Letters, Materials, Collections, and Shared with Me. The main content area is titled "Dossier" and includes a search bar. Three summary cards are displayed: "Deliveries" (0 in progress), "My Letters of Rec." (0 not received), and "Letters to Write" (0). A profile card for "Joe Miller" (JM) indicates "Your profile is incomplete. Complete my profile". A promotional message states: "A Dossier Deliver subscription includes quality checks on all letters of recommendation and 50 deliveries." with an "Upgrade Now" button. The footer shows "© 2019 Interfolio, Inc." and "Dossier Highlights".

Materials Section

- You can add tags to the documents you upload

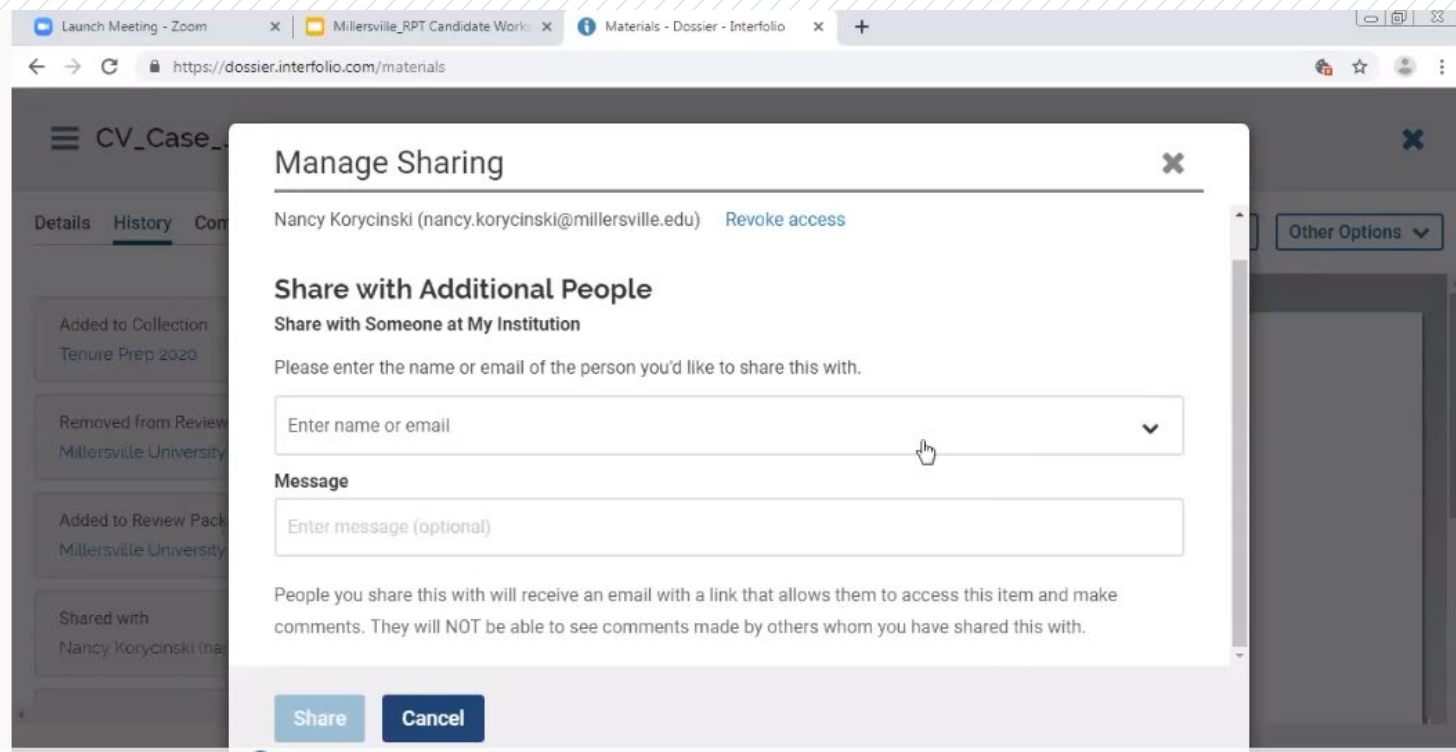


The screenshot shows the 'Materials' section of the Dossier application. The interface includes a navigation sidebar on the left and a main content area displaying a list of documents. Each document entry consists of a checkbox, a title, a tag, a document type, and a received date. A dropdown menu is open for the 'Lighthouse' document, showing options for tags: 'None', '2019', 'not reviewed', and 'reviewed 10/25'. The 'Add new tag' option is also visible at the bottom of the dropdown. The user's name 'Joe Miller' is displayed in the top right corner of the application.

Document Title	Tag	Document Type	Received Date
Rebuttal	None	Other Document	Received Oct 25, 2019 at 1:35 PM
RECOMMENDATION LETTER	reviewed 10/25	Research Statement	Received Oct 25, 2019 at 12:46 PM
Lighthouse	None	Teaching Certification	Received Oct 25, 2019 at 10:29 AM
Chrysalis 2019	None	Syllabus	Received Oct 25, 2019 at 9:08 AM
CV_Case	reviewed 10/25	Curriculum Vitae	Received Oct 23, 2019 at 7:52 AM
Bishop_BOOK Review (1)	not reviewed	Resume	Received Oct 23, 2019 at 7:47 AM
History Sheet	not reviewed	Uncategorized	Received Oct 23, 2019

Sharing Files for Feedback

- You can only share this way with other individuals within Millersville.



Preview and Prepare for Future Cases

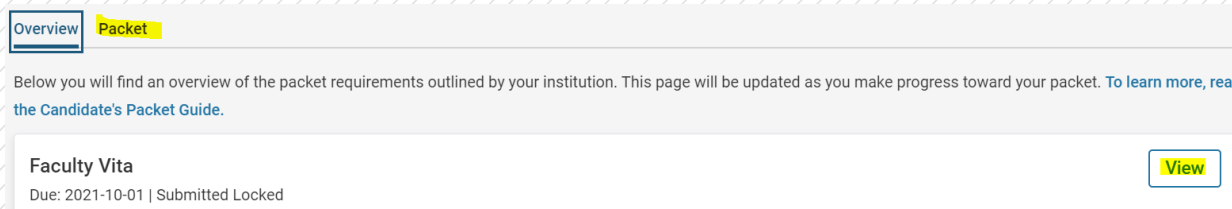
- You can preview guidelines for review – click Guidelines button
- Select the template, save and then click Prepare for Review
- Prompts you to create a Collection (a folder within your Dossier)
- Will see all the case requirements listed at right of screen
- Can then click Add Materials and Choose Existing from within documents already in Dossier, or browse to add new documents
- Can share a complete collection with a mentor for review and feedback
- Can filter documents by tag and then click Add to button to add to collection

Case Overview

- Cases open to an Overview
- From the overview, you can upload documents by clicking the Add button
- Overview also has an Interfolio help link, highlighted below:

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. [To learn more, read the Candidate's Packet Guide.](#)

- Overview lists what's "required" v. "optional" BUT ... go to the Packet view to see if it is optional for YOU.
- You can click View to get to the packet, or click at top of the case (both highlighted below):

A screenshot of the 'Case Overview' interface. At the top, there are two tabs: 'Overview' (highlighted with a blue border) and 'Packet' (highlighted with a yellow background). Below the tabs is a paragraph of text: 'Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. [To learn more, read the Candidate's Packet Guide.](#)' At the bottom of the interface, there is a box containing the text 'Faculty Vita' and 'Due: 2021-10-01 | Submitted Locked'. To the right of this box is a yellow 'View' button.

Packet

- Packet view allows you to see the instructions associated with each section
- Can also edit – i.e., delete your uploads or move their order within a section
- Reviewers can also see sections this way, in addition to the Viewer screen
- NOTE! Tenure applicants get two cases:
 - Letter of Intent – goes to President
 - Application

Required v. Optional

- Cases are created using a template applicable to all faculty
- Some sections are identified as Optional since they may not apply to all faculty
- Most sections are identified as Optional, No Limit in terms of the uploads you can make
 - This is a change from last year based on survey feedback

File Uploads

- Review of [Guidelines for Submitting Materials to Interfolio](#)
- Upload a copy of the document, don't share OneDrive file (won't be visible to reviewers)
- Uploads have a 100 MG limit per file
- Document titles and any bookmarks you add to documents are what show in the Reader table of contents for reviewers
 - Section headings don't appear in the Reader, so your document titles are critical for identifying your supporting materials
- NOTE! Sometimes it takes Interfolio a minute or two to show updates. Wait before uploading again. Last year, lots of instances of files uploaded twice or even three times.

Uploading from Your Dossier

- If you've stored documents in a Dossier collection, can add from there; use Choose Existing, Collections
- If you want to use documents from prior packets, use Choose Existing, Packets and select the appropriate packet
- Once you click Submit on a section, it locks your entries and you cannot make any more changes
 - Can contact Donna or Nancy to unlock until the application due dates
 - If you try to submit but did not complete a system requirement, Interfolio lets you know
 - Remember, system requirements are different than content requirements;
 - Interfolio indicates optional when not all faculty are required to upload

A photograph of two white swans swimming in a pond. The water is dark and filled with fallen autumn leaves in shades of yellow, orange, and brown. The swans are white with long necks and large, bright orange beaks with black tips. They are positioned in the middle ground, with one slightly behind the other. A semi-transparent white banner with a fine diagonal line pattern is overlaid across the center of the image, containing text.

Questions?

Email Donna.Peters@millersville.edu

System Administrator