Committee Manager's Guide to Interfolio's Faculty Search

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Getting Started

Your Interfolio Account Dashboard and Account Settings

This article explains how your Interfolio account dashboard is configured, some basics on what you can do once you're there, and how you can access your account settings to change basic user information.

After signing in, you will see your account page. From here you can access all of the accounts you have with Interfolio and your Interfolio Account Settings.

Your Institution account page

You will find links to the Interfolio products to which you have access on the Interfolio account screen.

1. If your institution uses Review, Promotion & Tenure, Faculty Search, and Faculty180, than relevant pages will be displayed here.
2. You can also access your Dossier account (personally or institutionally created). If you have access to one, you can access it by the user menu in the top right corner.
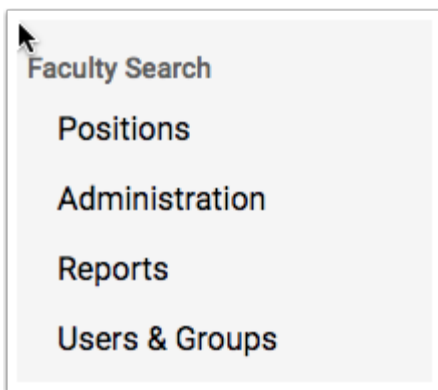
Institutional Branding

[Read about how to brand institutional products here.](#)

The Faculty Search Navigation Bar

ℹ️ Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Evaluators or Committee Managers in the program.

Click "View Positions" to view your active searches

The Review, Promotion, and Tenure dashboard:

ℹ️ Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Committee Managers or committee members in the program.
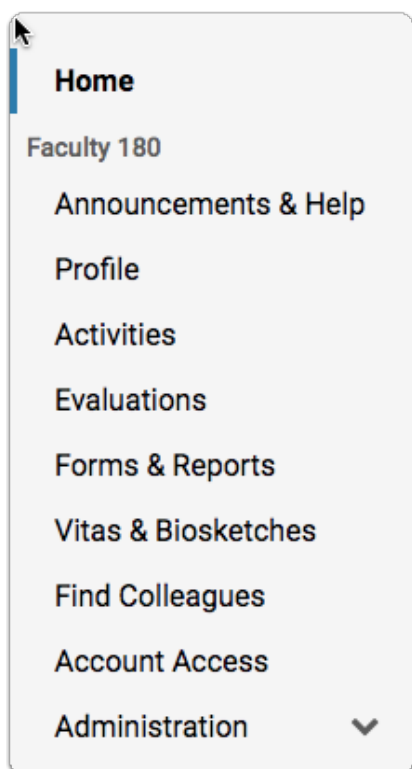
Click "View Cases" to access the cases you are managing or evaluating

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups
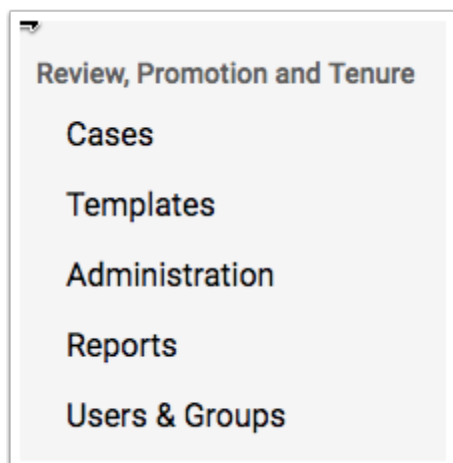
The Faculty180 Navigation Bar

💡 Users will only see the relevant pages, depending on institutional settlings.

All administrative settings are in the Administration section

Home

Faculty 180

Announcements & Help

Profile

Activities

Evaluations

Forms & Reports

Vitas & Biosketches

Find Colleagues

Account Access

Administration ⌄

To access the settings for your account:

Click your name in the upper right hand corner of the screen and select "Account Settings" from the drop down menu.
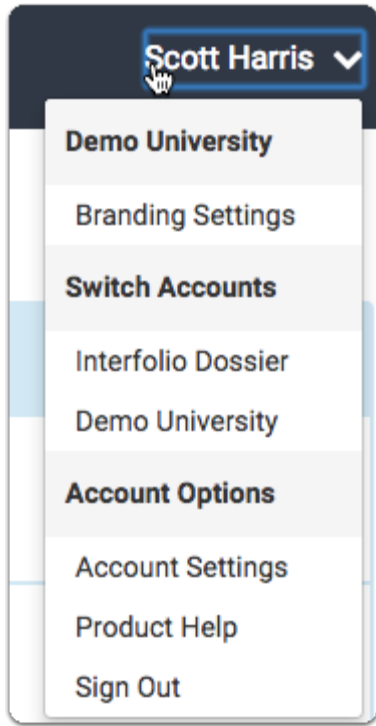
The Account Settings page:

ℹ️   The tabs below appear if you have a Dossier and Interfolio account.

Personal Information

From the "Basic information" tab of "Account Settings," you can access and manage personal information such as your career details, and also contain information like your address and degree. In other tabs you can find your email and notification settings, and any delivery ID numbers associated with your account, as well as some other settings.

Communications

From the "Communications" tab, you can manage communication settings including how and when you receive email from Interfolio

ID numbers

Need to add ID numbers regularly to your deliveries? If so, than you can use the Interfolio ID storage tool to be able to easily store and attach it to your deliveries.

Subscription & Billing

From the "Subscription & Billing" tab, you can renew your account, add deivery credits, view your remaining deliveries, download all data and documents in your account, manage payment info, and view and download a record of your transactions.

From the "Password" tab, you can change the password for your account

Notifications:

Users will receive alerts and notifications on the homepage in the to-do action items, urgent items with deadlines and mandatory response will appear at the top and the rest will overflow to a searchable table at the bottom.

Welcome back, Scott Harris

Your Action Items

Associate Professor, Intercultural Studies
Department of Sociology | Faculty | Faculty Search

Assistant Professor of Landscape Architecture
Department of Architectural History | Faculty | Faculty Search

Assign Activity Classifications for Imported Scholarly Works
Activity Input | Faculty 180

Review Possible Duplicates from Activity Imports
Activity Input | Faculty 180

You have been named by a faculty member within your institution as a contributor to an intellectual or creative contribution. Please verify.
Activity Input | Faculty 180

Additional Assigned Items

Search by keyword

Administration Settings Page in Interfolio Faculty Search

From the "Administration" page of Faculty Search, Administrators can control settings for their assigned unit(s), and Committee Managers can control settings and permissions for the positions they manage.
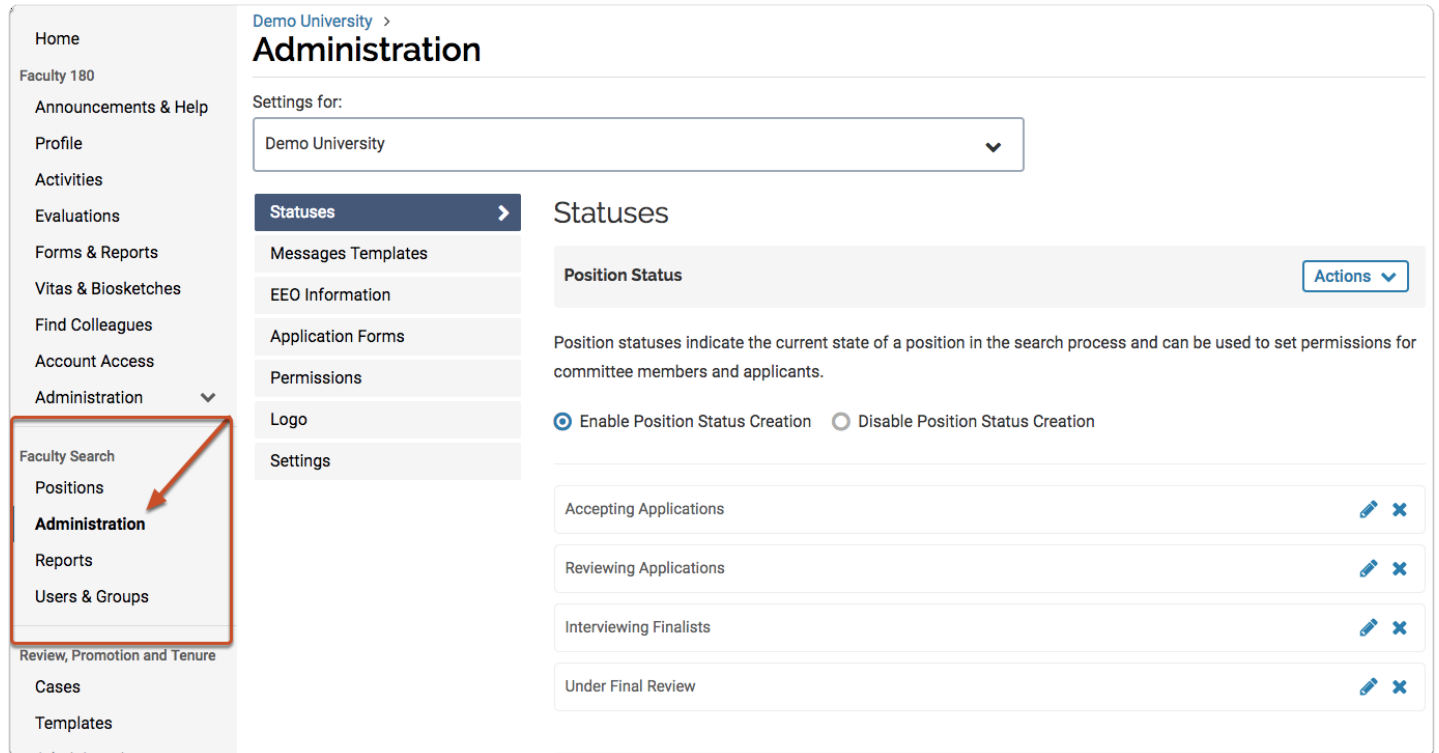
Depending on their administrative privileges, from the "Administration" page, users can:

- Create and edit position and application statuses
- Create message templates to send to applicants when the status of a position or application changes
- Create and and manage EEO statements
- Create and manage application forms (including EEO forms)
- Set communication settings to enable or disable comments and tags

ℹ   The tabs that appear on the "Administration" page are determined by your level of access in the program. Not all tabs listed below will appear for all users.

To navigate to the Administration page:

Click "Manage" on you Faculty Search dashboard and select "Administration"

Always make sure you are viewing settings for the correct unit or position

The name of the unit or position you are viewing is displayed at the top left of the page.

> ❗ Any changes you make to the settings on the "Administration" page will be applied to the unit or position listed here.
>
> Click the drop-down if you need to view and control settings for a different unit or position.

Statuses:

From the "Statuses" tab of the Administration page, you can create and manage:

1. **Position Statuses:** Labels that describe the current state of the selection process, for example, "Accepting Applications"
2. **Application Statuses:** Labels that describe the current state of the applicant in the review process, for example, "Longlist" or "No Further Consideration"

> 💡 See here for more information on how to create a position status, and how to create an application status.

Message Templates:

From the "Message Templates" tab you can create and manage message templates to send customized messages to applicants when the status of a position or application changes. You can set the conditions when the message will be sent, and you can edit and confirm messages before sending them.

> ♀ See here for more information on how to set up applicant notification message templates.

EEO Statement:

From the "EEO Statement" tab, administrative users can create, edit, and set the EEO statement for positions created in a unit.

> 💡 See here for more information on [managing EEO statements.](#)

Application Forms:

From the "Application Forms" tab, Administrators can create application forms to collect information from applicants. Administrators can also create EEO forms and designate forms as default for a unit.

> 💡 See here for more information on creating application forms, and EEO forms.

Permissions:

From the "Permission" tab, Administrators can set whether or not reviewers can comment and assign tags to applications. Administrators can require approval for new positions, set who to notify when a position changes, and set the sender name and "reply-to" address for email messages.

💡 See here for more information on requiring approval to post new positions.

Logo:

From the "Logo" tab, administrative users can upload and change the logo that will display on positions created by a unit or set the logo for a particular position.

💡   See here for more information on **add a logo to the landing page of a position.**

Settings

The Settings page allows an institution to create and use a public positions list.

User Roles in Faculty Search

There are four different types of users in Faculty Search: Administrators, Committee Managers, Evaluators, and EEO Officers. A user's role determines their capabilities in the program.

Evaluators are the users with the least access in the system. As members of a review committee, their role is generally limited to reviewing applicants and comes with no administrative capabilities. Evaluators can view applications, add tags to applicants, andif given accessrate and comment on applications. All Evaluators are assigned to one or more search committees by an Administrator or Committee Manager.

Committee Managers supervise searches at the department level, therefore they have some administrative privileges. Committee Managers can edit settings and statuses, view reports, communicate with applicants, and evaluate applications.

Administrators have the most capabilities in Faculty Search, but their role is still limited by the organizational level to which they are attached. If a user is an Administrator on the college level, for instance, they can create, manage, and monitor searches at that collegethe same goes for Administrators at a department. Institutional Administrators can control settings and view positions, applications, and reports across an entire institution.

The fourth category of user in Faculty Search is an Equal Employment Opportunity Officer. Generally, EEO Officers are staff from Human Resources, Institutional Diversity, or another campus office who are responsible for EEO standards and practices at your institution. EEO officers monitor and run EEO reports on open positions to which they have access. They also flag positions that may not meet an institution's diversity requirements.

In some cases, Administrators may also be granted EEO access, which allows them to perform some duties of an EEO Officer, such as viewing EEO reports and flagging positions.

Search Committee Evaluators

- **Evaluators** are assigned to one or more search committees by a Committee Manager or Administrator
- Evaluators can view, add tags, and—if this feature is activated—rate and comment on applications
- See our [Evaluator's Guide to Faculty Search](#) for more information

Committee Managers

- **Committee Managers** supervise searches at the departmental level
- Committee Managers can edit settings and statuses, view reports, communicate with candidates, and evaluate applications

Administrators

- Administrators create, manage, and monitor searches at the organizational level to which they have access
- Institutional Administrators can control settings and view positions, applications, and reports across an entire institution. Departmental Administrators perform similar functions at the level of a department, school, or college within a larger institutional system
- Administrators may also be granted EEO access, which allows them to perform some duties of an EEO Officer such as viewing EEO reports and flagging positions

EEO Officers

- **Equal Employment Opportunity Officers** are generally staff from Human Resources, Institutional Diversity, or another campus office responsible for EEO standards and practices
- EEO officers monitor and run EEO reporting on open positions to which they have access. They also flag positions that may not meet an institution's diversity requirements

Creating a Search Committee

Edit Search Committee Membership (Add/Remove Users)

In order to be added to a search committee, a person must first be added to the program as an Interfolio Faculty Search user.

Committee Managers and Administrators often add users to a search committee during the process of creating a position, but it is simple to edit the membership of an existing search committee from the "Applications" page of a position.

First, make sure the committee member has been added as a Interfolio Faculty Search user

! If your potential committee member is not already an Interfoio user, you will need to add them to the program.

Find and click the position title to open the list of applicants for the position

Click "Positions Actions" and then the View Committee Option

Click "Edit"
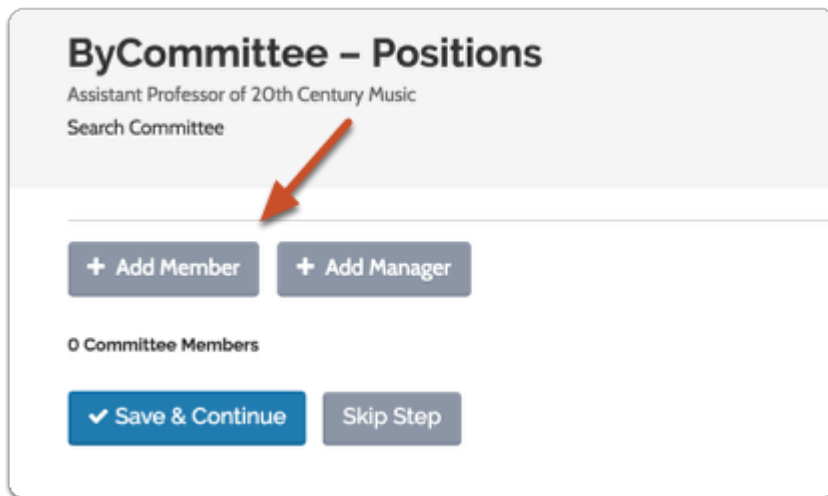
Click "Add Member" to call up a list of available Interfolio users who can serve on your committee

Search for the user by first or last name, and click "Add" to add them to the committee

ℹ️ As you are typing, matches of existing Interfolio users will appear.

Click "Add Manager" to call up a list of available Committee Managers for your committee

Click "Add" to add the user as Committee Manager

ℹ This list displays users who have been assigned the role of Committee Manager for the

unit in which you are working. If you don't see the user you are looking for you, may need to <u>assign the user the role of Committee Manager</u> for the unit in which you are editing the position.

Keep adding members and/or managers until you have your committee assembled, and click "Update"

To remove a member, simply click the X next to the user's information.

Add New Users - Faculty Search

Committee Managers and Administrators can add users to Interfolio Faculty Search. All potential search committee members must be added as Interfolio users before they are able to review applicants.

Users are managed from the Users & Groups page, located from the Navigation Bar
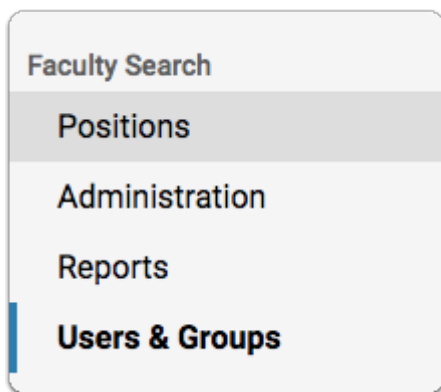
Click the "Add User" button to the right of the Users & Units page

💡 Below is an example of the Committee Manager perspective.

Fill out the "Add User" form with the user's name and email address
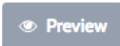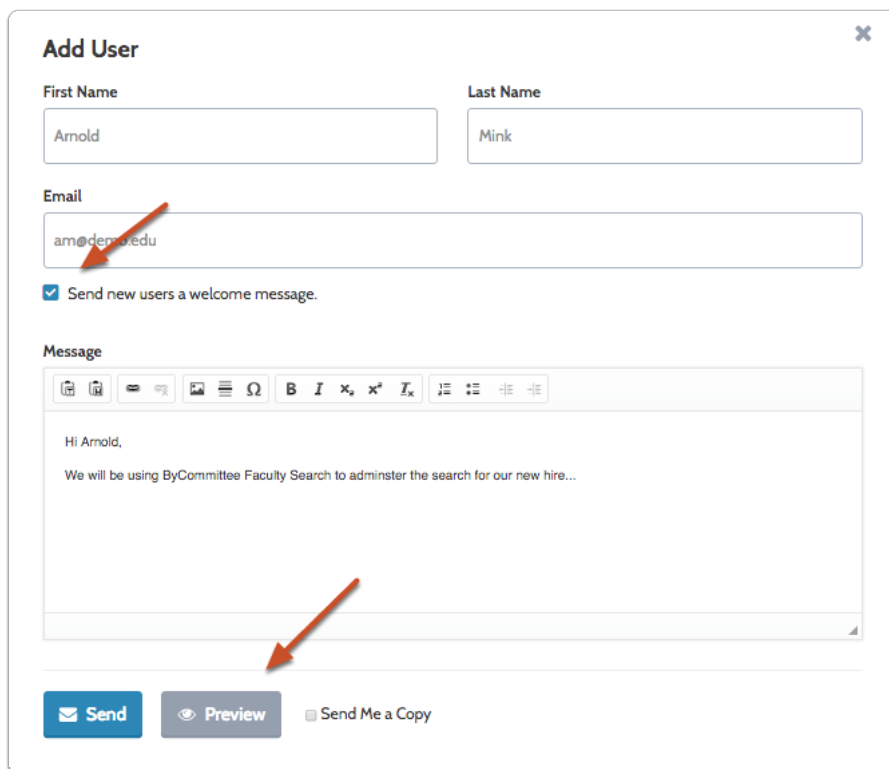
You can choose to add an additional message to the new user. Click preview to see how the message will appear in the inbox of the user

Preview and and click "Send" when you are ready

Important: You can resend this invitation email at any time. For more information see the article Resend the Interfolio Faculty Search Invitation Email.

Add the new user to one or more units, and assign them roles in each unit

When a user is added, the "Edit User" window opens where you can add the user to one or more units, and set their role in each unit to which they are added.

By default, new users are added to the program with the role of Evaluator, however, an administrative user can grant any user a role equal to or lesser than their own role in any unit they administer.

For instance, an Administrator in Faculty Search can add a user to the program and assign that user the role of Administrator or Committee Manager for any of the units in their organizational hierarchy. Committee Managers can add a user to the program, and grant that user the role of Committee Manager or Evaluator in any administrative unit for which they serve as a Committee Manager, but cannot add a user and make them an Administrator.

Edit User

First Name *
Logic (updated) again

Last Name *
2016-18-2

Email *
logic2016-18-2@interfolio.com

✔ **Update**   **Cancel**   ✉ Resend Invitation

UNITS

— Select Unit — ⌄   — Select Role — ⌄   ⊕ Add

🗑 Delete

Assign the user to a unit from the dropdown list

Edit User

First Name *
Logic (updated) again

Last Name *
2016-18-2

Email *
logic2016-18-2@interfolio.com

✔ **Update**   **Cancel**   ✉ Resend Invitation

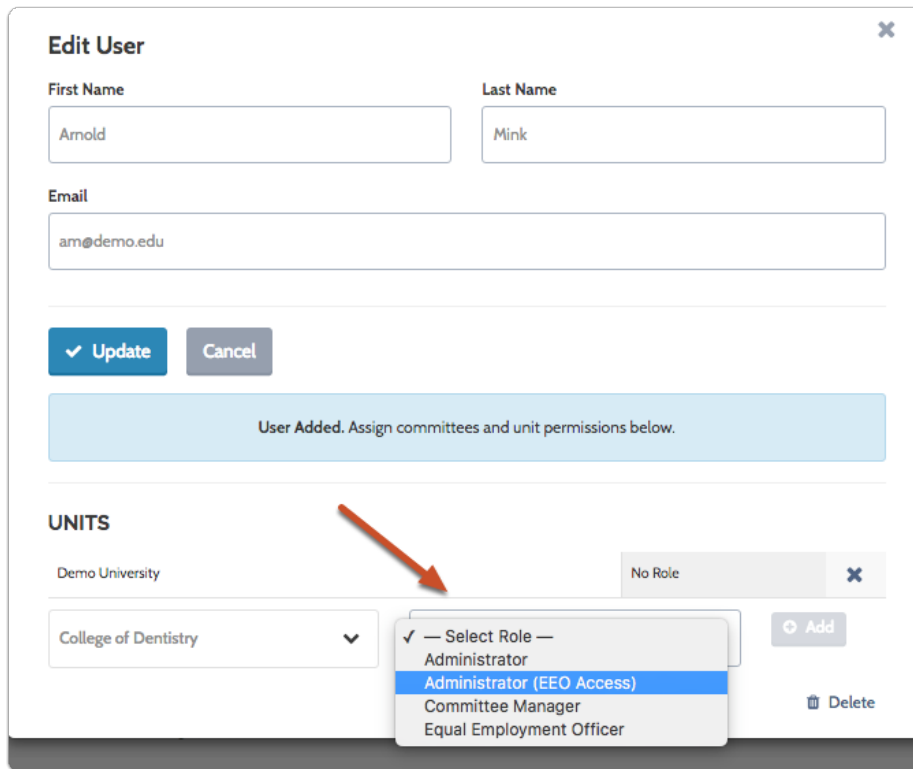**UNITS**

— Select Unit — ⌄   — Select Role — ⌄   ⊕ Add

🗑 Delete

Select a role for the user and click "Add"

💡 Below is an example of an Administrator's view when editing a user's role.

If necessary, add the user to another unit and assign them a role in the new unit to which they are added

In the example below, the user has been added as an Administrator with EEO access in the College of Dentistry, but they can be added to as many units as necessary and assigned a different role in each.

Click "Update" when you are finished editing the user

The user will appear in the list of users listed with their unit and role

Change a User's Role

User roles are set when adding or editing a user. By default, new users are added to the program with the role of Evaluator, but that can easily be changed when necessary by a user with the appropriate permissions in the program. Users can be assigned roles in multiple units. An administrative user can assign a user a role lesser than or equal to their own in any unit in their administrative hierarchy. This article explains how to edit a user's role once they have been added to the program.

Users are managed from the Users & Units page

To access Users & Groups (units), click "Users & Groups" from the Navigation bar on the left-hand side of the page.
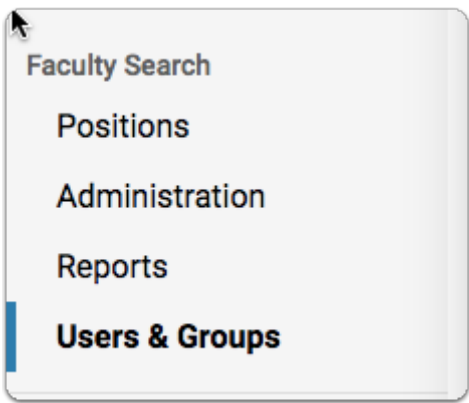
To assign a user a new unit and/or role:

Click the blue edit pencil in the same row as the user you want to edit

The "Edit User" window will open where you can add a new unit and/or role for the user

Edit User

First Name *

Stephanie

Last Name *

Bigsley

Email *

sbbb@demo.edu

✓ Update   Cancel   ✉ Resend Invitation

UNITS

– Select Unit –   ⌄   – Select Role –   ⌄   ⊕ Add

🗑 Delete

Select a unit from the dropdown list

Select a role for the user in the unit

Click "Add"

Edit User

First Name *

Stephanie

Last Name *

Bigsley

Email *

sbbb@demo.edu

✔ Update   Cancel   ✉ Resend Invitation

UNITS

| College of Dentistry ⌄ | Administrator ⌄ | ⊕ Add |

🗑 Delete

Repeat the process above to assign the user additional units and roles

Edit User

First Name *

Stephanie

Last Name *

Bigsley

Email *

sbbb@demo.edu

✔ Update   Cancel   ✉ Resend Invitation

UNITS

College of Dentistry	Administrator	✖
Demo University	Committee Manager	✖
– Select Unit – ⌄	– Select Role – ⌄	⊕ Add

🗑 Delete

To change a user's existing unit or role:

Click the blue edit pencil in the same row as the user you want to edit

Users & Units

Users | Units

USERS

⊕ Add User

Search Users

Sort By Name ∨   Browse By All Units ∨

USER	EMAIL	UNIT & ROLE	
Stephanie Bigsley	sbbb@demo.edu	College of Dentistry (Administrator) ···	✏
Blothar Brown	blothar.brown@interfolio.com	Demo University (Administrator)	✏
Frank Brown	fbbb@demo.edu	Department of Oral and Maxillofacial Surgery (Administrator)	✏

Delete the role you want to change by clicking the X

Edit User

×

First Name *

Stephanie

Last Name *

Bigsley

Email *

sbbb@demo.edu

✔ Update   Cancel

✉ Resend Invitation

UNITS

College of Dentistry	Administrator	✖
Demo University	Committee Manager	✖

– Select Unit – ∨   – Select Role – ∨   ⊕ Add

🗑 Delete

Select a new unit and role for the user and click "Add"

The user will be granted permissions for the unit and role you select.

Edit User

First Name *

Stephanie

Last Name *

Bigsley

Email *

sbbb@demo.edu

✔ Update   Cancel   ✉ Resend Invitation

UNITS

| Demo University | Committee Manager | ✖ |
| College of Dentistry | Administrator (EEO Access) | ✖ |

– Select Unit –   – Select Role –   ⊕ Add

Creating Positions

Create a Position

What is a "position?" In Interfolio Faculty Search, the term "position" refers to a faculty, staff or fellowship opportunity. The position is the object of the search.

So, what is a "search?" You can think of a search in Interfolio Faculty Search as an academic, staff or fellowship position that gathers together application materials to be evaluated by a committee. A search is a single place to collect, store, view, and review applicant materials.

Creating a search is a guided step-by-step process that involves adding information about your search and instructions for applicants, creating a set of requirements for your position, appointing a search committee, and creating a landing page with a unique URL that will serve as the online application for your open position.

It may be useful to familiarize yourself with the process from an applicant's point of view. See our Job Applicant's Guide to Interfolio Faculty Search for more information on the applicant experience of applying for a Faculty Search position.

Positions can be created for any organizational unit in the program. For instance, a position can be created by the unit Demo University or by any lower organizational unit within that university, such as a school or department, or any unit within the school or department and so on.

Administrators can add positions to any organizational unit at or below the unit they have been assigned to administer, and Committee Managers can create positions for any unit at or below the unit for which they have been assigned as a Committee Manager.

When applications are no longer being considered, either because a hire was made or some other reason, Committee Managers, and Administrators can close a position and indicate which applicants were selected to fill the position.

This article explains the steps involved in creating a position in Interfolio Faculty Search.

Note: By creating a position you will also generate a landing page that applicants will use to learn about and apply for your position.

To get started, select "View Positions" on your Faculty Search Account Dashboard
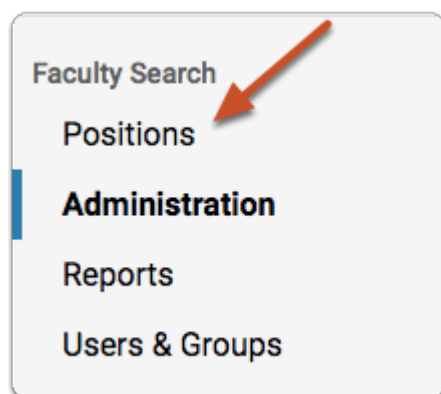
Click "New Position" at the top right of the Positions page

Select the unit for the position you are creating

Choose to create the new position from scratch or use settings from an existing position

- Select the appropriate department and click "Create New Positon."
- -or- Select "Create from Existing Position" to re-use settings, requirements, and basic information from an existing position.

ByCommittee – Positions
Create Position

Select Unit for Position

School of Arts and Sciences ⌄

Create New Position

or

Create from Existing Position

– Select Position – ⌄   Select

If you choose this option, the new position you create will automatically be created under the same unit (such as department, school, or college) as the existing position on which it is based

Now you're ready to create your position!

1. Add position description and dates

1.1. Provide general information about the position

- Position Title: e.g., Assistant Professor
- Location
- Position Type: Faculty, Staff, or Fellowship
- Position Opens: Date when new applications will first be accepted for the position.
- Position Closes: Date when new applications will no longer be accepted.

1.2. Describe the position including specific qualifications

Describe the position in as much detail as possible, and list specific qualifications.

1.3. Provide instructions for applying (required documents, formats, etc.)

1.4. Enter an Equal Employment Opportunity Statement, and click "Save & Continue"

ℹ Note: Your institution may already have the EEO statement set up for you.

2. Add required documents

Here you can add the documents your applicants must submit with their application. You can set the document type such as C.V., or Peer Evaluations, and set the number of documents necessary to fulfill the requirement. For instance, you might require one C.V. and three peer evaluations.

Your applicant can upload these documents and submit them electronically when applying for a Faculty Search position. The applicant will need to upload the exact number of each document type that you set in order to fulfill the requirement. When a requirement is filled the check mark will turn green.

> ❗ The "Number Required" sets the number of individual documents the applicant will need to upload to satisfy the requirement. If, for instance you want three references, but want them in one document, you will need to set the number required to one, instead of three.

> ℹ️ We accept the following file types:
> - DOC

- DOCX
- DOT
- ODT
- WPD
- RTF
- TXT
- HTML
- PDF
- Links to webpages
- Links to videos hosted by YouTube and Vimeo

5 Documents Required

Drag and drop the documents in the list below to change the order they will appear in the application requirements.

REQUIRED DOCUMENTS

Customize the document requirements for your opening using our list of standard document types. Don't see what you need? Select *Other Document* and enter the details.

1	Cover Letter Please address letter to Janet Price...	✏ ✕
1	C.V.	✏ ✕
3	Confidential Letter of Recommendation or Evaluation	✏ ✕

+ Add Requirement

2.1. Click "Add Requirement"

0 Documents Required

Drag and drop the documents in the list below to change the order they will appear in the application requirements.

+ Add Requirement

Additional Applicant Options

☐ Applicants may add additional documents

You may give applicants the ability to include additional materials with their application. If you have documents that you recommend, but don't require as part of the application, you should select this choice.

☐ Send a message on application submission.

✔ Save & Continue   **Skip Step**

2.2. Select the document type from the dropdown list

You will be presented with a list of typical documents such as cover letters, C.V., transcripts, and letters of recommendation.
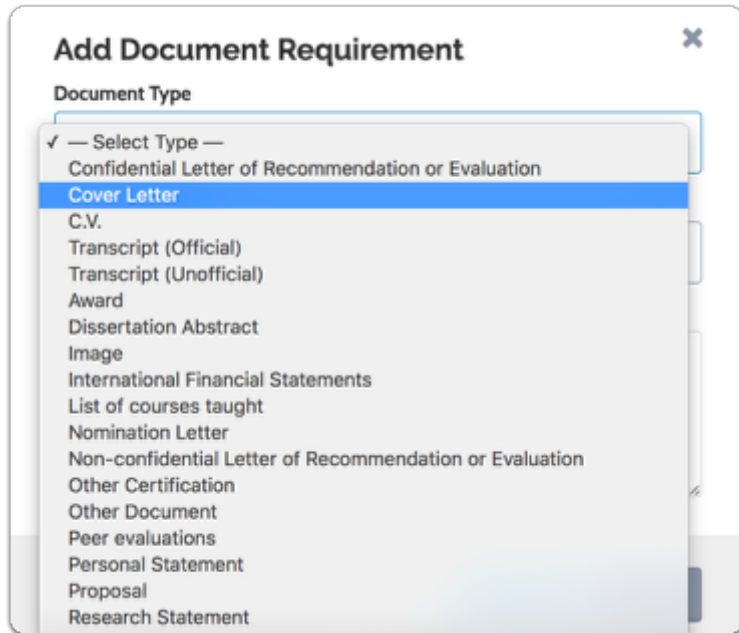
2.3. Set the number required of that document type

> ❗ The "Number Required" sets the number of individual documents the applicant will need to upload to satisfy the requirement. If, for instance you want three references, but want them in one document, you will need to set the number required to one, instead of three.

2.4. Add an optional note with any special instructions or other information about the requirement and click "Save" when you are finished

2.5. You have the option to allow applicants to add additional documents

3. Create an automated message to send applicants when they submit an application

4. Create custom evaluation criteria and edit evaluation settings

If your institution allows, you can establish custom evaluation criteria for rating applicants on a 5-star scale. This allows Evaluators to rate and compare applicants on criteria such as scholarship, teaching, research, publishing, or whatever criteria you add. We will calculate the average score of an applicant by both category and overall rating. You can set whether or not Evaluators can view comments and ratings given by other users.

4.1. Click "Add Criterion"

4.2. Type in the evaluation criterion and click "Save"

4.3. Specify "Blind Review" if you don't want evaluators to see the comments and ratings of their fellow committee members

5. Attach custom application forms to the position

- Application forms are used to gather additional information from applications
- Admins and Committee Managers can create forms for the units they administer and
- Forms can be specific to any institution, college, department or position

Note: Application forms are attached during the process of creating or editing a position, but [forms are created from the Administration page](#).

5.1. Click "Add Form"

5.2. Select form from the dropdown list and click "Save"

A list of forms that have already been created (from the Administration page) will appear in the dropdown list.

5.3. You can click "Preview" to see how applicants will see the form you have added
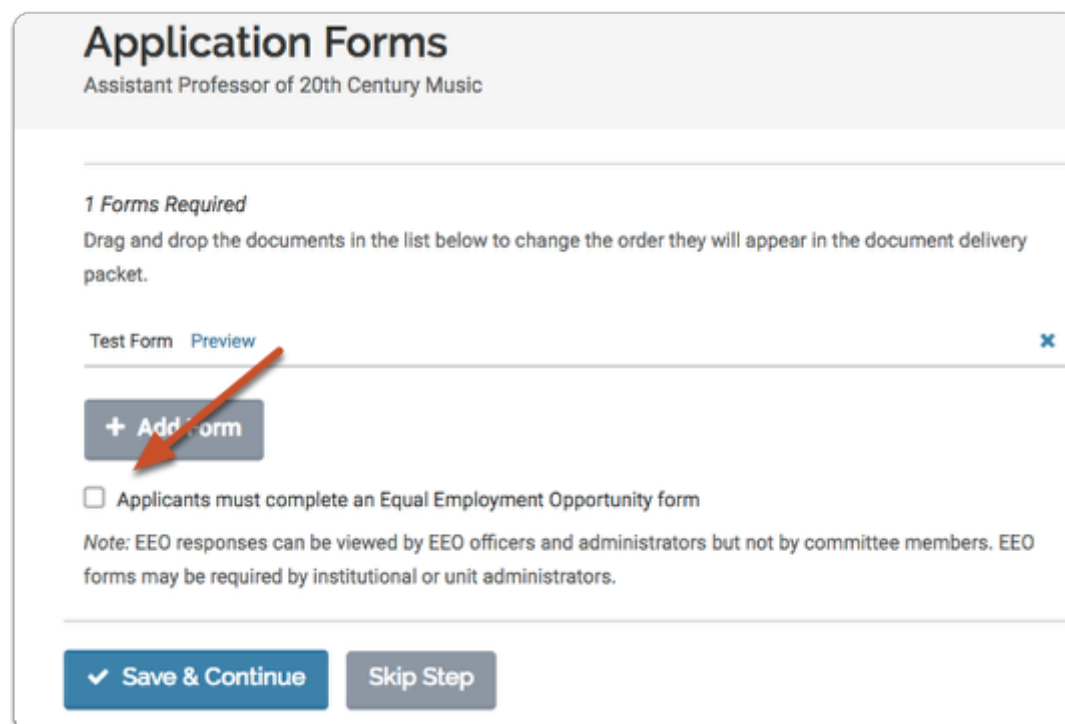
6. Attach EEO Forms to the position

- EEO forms are used to gather EEO information from applications
- Forms can be specific to any institution, college, department or position
- Only users with EEO access (such as an EEO officer or admin with EEO access) can view the answers to EEO questions

Note: EEO forms are attached during the process of creating or editing a position, but EEO forms are created from the Administration page.

6.1. Check the box labeled "Applicants must complete an Equal Employment Opportunity form."

## 6.2. Select the form from the dropdown menu and click "Save & Continue" when you are done adding forms

7. Create a search committee

You have the option to add members to a search committee as part of the position creation process. Note that in order to be assigned to a search, potential committee members must be added to the program as Interfolio faculty Search users.


Note: You can also add committee members after a position is created from the Review Position screen. For more information, see [How do I add members to a search committee?](#)

7.1. Click "Add Member" to call up a list of available Faculty Search users who can serve on your committee
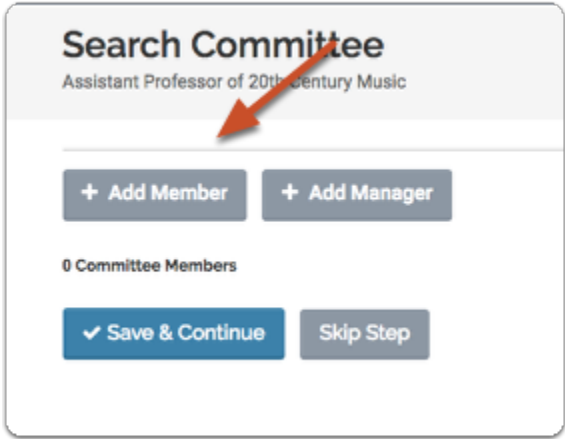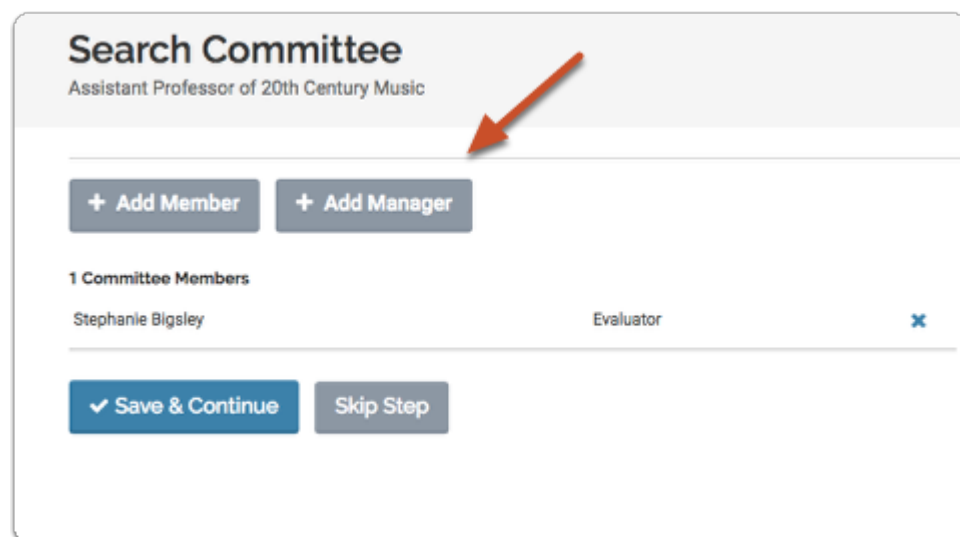

7.2. Search for the user by first or last name, and click "Add" to add them to the committee

As you are typing, matches of existing Faculty Search users will appear. If you don't see the user you are looking for, you may need to add them as Faculty Search user.
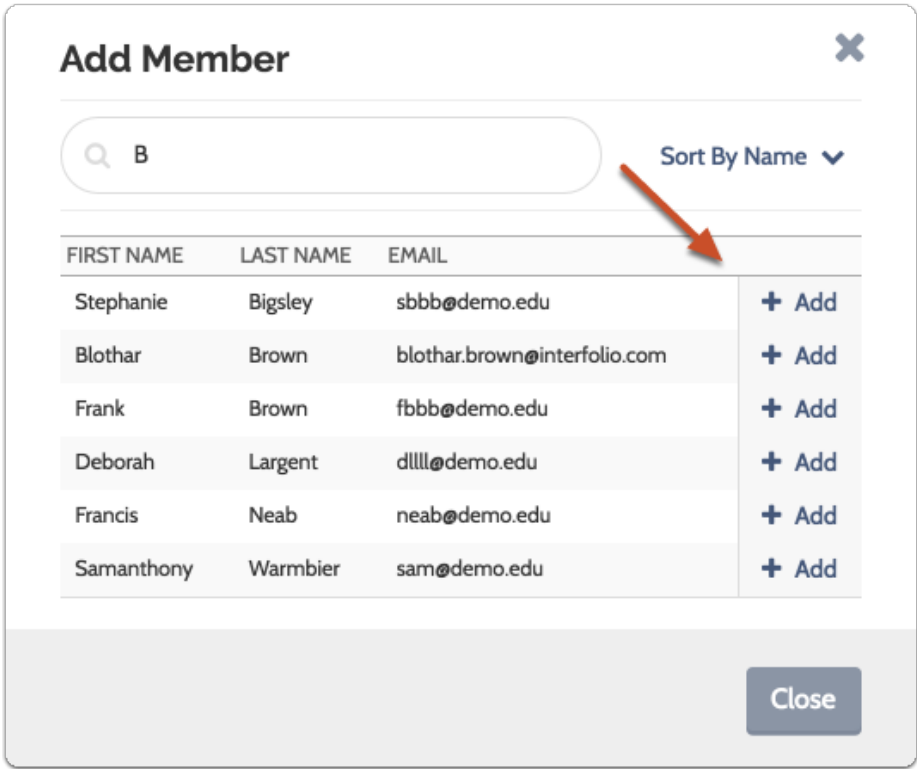
7.3. Click "Add Manager" to call up a list of available Committee Managers for your committee
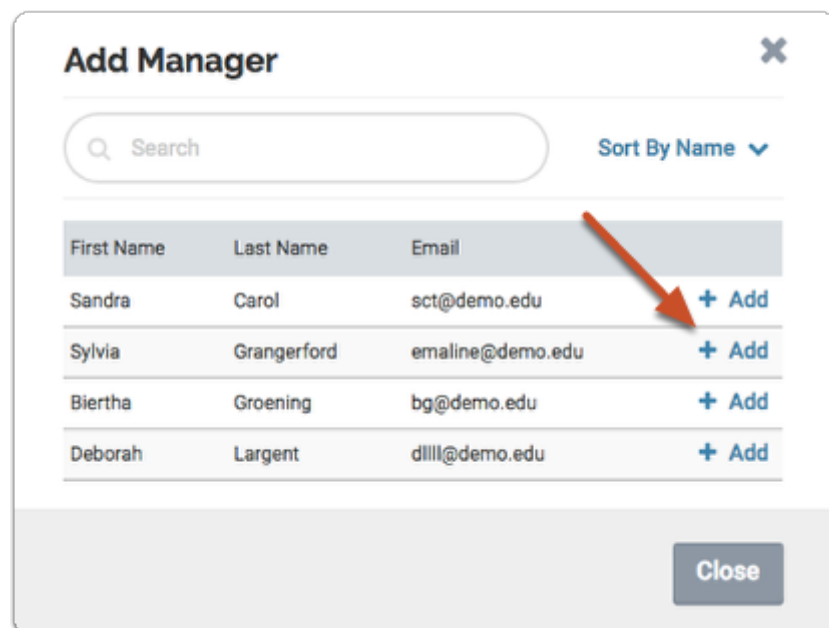
7.4. Click "Add" to add the user as manager for the committee

This list displays users who have been assigned the role of Committee Manager for the unit in which you are creating the position. If you don't see the user you are looking for you may need to add them to the program as a ByCommittee user, or assign the user the role of Committee Manager for the unit in which you are creating the position.

7.5. Keep adding members and/or managers until you have your committee assembled, and click "Save & Continue"

ℹ️ To remove a member, simply click the X next to the user's information.

8. Enter internal notes

You will be taken to the "Internal Notes" page of the position. Internal notes are optional, are only accessible to users at your institution and will never be seen by applicants. They are available to all committee members for the position.

Here you can add a position ID number, enter a salary range, select a term length for the position you have created, identify the funding source, writer out a hiring plan, add general notes, and upload files that will become available for committee members evaluating the position.

You may need to submit your positon for approval by an administrator before it can be published

If approval is required, click "Submit for Approval." An email will be sent to the administrator responsible for approving the position and he or she will be notified that your position requires approval when they log into the program.

You may continue making edits and preparing the position while awaiting approval. You will receive a notification once your position is approved or if changes need to be made to the position.

See here for more information on submitting a position for approval.

You will be notified if changes need to be made before the position can be approved

Warren Pease has requested that you make changes to your position (Lecturer in Trumpet Performance) before it is approved.

UPDATE POSITION

Please add the following text to the position qualifications section:

"Other preferred qualifications will include proficiency on a musical instrument or voice, and ability to teach courses on topics in non-Western music and/or early music as needed."

You will receive a notification once your position is approved and you can continue with the steps below

9. Review and open your position

Your position will automatically be published when the Open date passes -or- you can click "change" to publish the "Apply Now" page manually.

Click "Update Status" to set an initial status for the position

You will need to set an initial status for the position (such as "Accepting Applications").

Select the initial status from the dropdown list, or click "Add New Status" to create a new one

Set permissions related to the status

Set whether or not applicants can view or update their materials, and whether or not evaluators can review applications when the status is active.

Publish Your Position

When the open date passes your "Apply Now" page will automatically be published, but you can click "change" to publish it manually.

The URL of your position will display on the review page. You can use this URL wherever you want to announce your position.

Position Announcement:

After you create a position and the position has passed it's open date, or you have manually published the URL, Faculty Search generates a landing page announcing the position.

The landing page includes details and application instructions. It also provides applicants with a free Interfolio Dossier account, which they use to apply for your position.

Establish Custom Ratings Criteria and/or Set Up a Blind Review

If permissions allow, Committee Managers can set custom evaluation criteria for rating applicants on a five-star scale. It is also possible to set up a "blind review" in which Evaluators will not see the comments and ratings left by others.

Custom ratings criteria and/or a blind review can be set during the process of creating a position, or when editing a position.

The directions below explain how to add criteria and set a blind review when editing a position.

Select Positions from the navigation bar on the left-hand side

Find and click the position title to open the list of applicants for the position

Select Position Actions, and then choose the Edit Position option in the drop-down

Click "Evaluation Settings" to the right of the page

On the Evaluation Settings page:

1. Click "Add Criterion" to add a custom criterion to the list
2. Click X to delete a criterion
3. Select "Blind Review" if you don't want Evaluators to see comments and ratings entered by their fellow committee members

ByCommittee – Positions

Associate Professor of Orthodontic Dentistry

Evaluation Settings

3 Criteria

Drag and drop the criteria in the list below to change the order they will appear in the application review process.

Note: at least one criterion must be created in order to rate candidates.

Teaching	✖
Scholarship	✖
Resaerch	✖

+ Add Criterion

Blind Review

☑ Evaluators should not see others' comments and ratings

✔ Update **Return to Overview**

⚠ If evaluators comment during a blind review, and the blind review setting is turned off, then evaluators associated with the search will be able to see summary information but not specific results.

If users with the proper permissions want to see ratings by the evaluator that they will need to run an applications report.

Submit a New Position for Approval

If your organization requires approval for posting new positions, you will be prompted to submit new positions for approval as the final step in creating a position. The Administrator who is designated to approve new positions will be notified that you have submitted a position for approval, and can either approve the position or send it back for changes. If changes are required, you will be notified of the necessary changes and can resubmit the position once the required changes have been made. This article explains more about the process of approving positions. To get a view from the other side of the approval process, see the help article on how to require approval to post new positions.

You will first need to create a new position

See here for detailed instructions on how to create a position.

If approval is required, you will be asked to submit the new position for approval on the Positions page

POSITION BEING CREATED

This position requires approval, but has not yet been submitted for approval by the position's creator. Once submitted for approval, the designated Administrator will receive a message to review the position.

Submit for Approval

The designated approver will be sent an email notifying them that you have submitted a position to be approved

Blothar Brown has created a new position in ByCommittee that requires your approval.

REVIEW POSITION

Position: Associate Professor of Music and Composition

Unit: Jazz Studies

Questions? Check out our Help Center.

Get in Touch

help@interfolio.com | (877) 997-8807 | interfolio.com

You may continue to make changes and updates to the position while awaiting approval

APPROVAL REQUIRED
Position sent for approval by Blothar Brown on June 27, 2016.
This position has been submitted for approval. You may continue to make changes and updates to this position.

While awaiting approval the new position will appear in the list of positions with the status "Approval Required"

Note: Until it is submitted for approval, a position will appear in the positions list with the status "Position Being Created."

You will be notified by email once the position has been approved or if changes need to be made before approval

If changes need to be made you will receive an email prompting you to update the position

Warren Pease has requested that you make changes to your position (Lecturer in Trumpet Performance) before it is approved.

UPDATE POSITION

Please add the following text to the position qualifications section:

"Other preferred qualifications will include proficiency on a musical instrument or voice, and ability to teach courses on topics in non-Western music and/or early music as needed."

Managing Positions

Interfolio Faculty Search: Best Practices for Managing a Search

If you're managing a search this year, here are a few best practices to keep in mind:

1. **Logging In:** You can help your faculty access their account by [resending the invitation to Interfolio](#). That email will prompt your faculty member to create a new password and help them access their account. If your committee members experience any trouble, they can select ["Forgot your password?"](#) from the Interfolio home page. .
2. **Requiring Confidential Letters of Recommendation:** Don't forget! In order for an applicant to apply to your position, they need to complete all requirements before they can submit. That means, fulfilling each [required document](#) slot and completing all required form questions before they can submit their application.

3. **Collecting Additional Documents from a Subset of Applicants:** A common strategy for narrowing down a large applicant pool is [a two-stage search](#). After you narrow down your applicant pool, you can request additional documents from the smaller list of applicants. Don't forget to add additional document requirements (if necessary), and make sure to edit either the Position Status or the Application Status to permit those applicants to update their application materials.
4. **(For Committee Managers)** Don't see the position you're looking for? It's possible that you may need to [change your role](#) so that you can toggle your scope within the institution, school, college or department. Learn more about our user roles [here](#).
5. **Landing Page Analytics:** Wonder how your applicants are finding your positions? We now have a tool that shows a simple pie chart illustrating how your potential applicants are

accessing your position's "Apply Now" page. [This handy chart](#) can help you learn whether your recruitment dollars are paying off—why pay to post someplace that no one goes? If you aren't getting the applicant pool you expected for whatever reason (not diverse enough, not competitive enough), you can see which job boards are getting applicants and switch tack, if necessary.

Additionally, we have guidebooks for every user type where all relevant articles for your role are sourced for you. The fifth resource listed is a webinar our Client Success team hosted back in August 2016. It's a comprehensive training covering how to create and manage a search in Interfolio.

1. [A Committee Manager's guide to Interfolio Faculty Search](#)
2. [An Evaluator's guide to Interfolio Faculty Search](#)
3. [An Applicant's guide to applying to a Interfolio position](#)
4. [Help evaluating applications](#)
5. ["Finding the Faculty" webinar](#)

Still Stuck?

We're here to help! Anyone can contact our Scholar Services team at help@interfolio.com or (877) 997-8807 Monday- Friday, 9:00-6:00 PM ET.

Administration Settings Page in Interfolio Faculty Search

From the "Administration" page of Faculty Search, Administrators can control settings for their assigned unit(s), and Committee Managers can control settings and permissions for the positions they manage.

Depending on their administrative privileges, from the "Administration" page, users can:

- Create and edit position and application statuses
- Create message templates to send to applicants when the status of a position or application changes
- Create and and manage EEO statements
- Create and manage application forms (including EEO forms)
- Set communication settings to enable or disable comments and tags

ℹ️ The tabs that appear on the "Administation" page are determined by your level of access in the program. Not all tabs listed below will appear for all users.

To navigate to the Administration page:

Click "Manage" on you Faculty Search dashboard and select "Administration"

Always make sure you are viewing settings for the correct unit or position

The name of the unit or position you are viewing is displayed at the top left of the page.

> ❗ Any changes you make to the settings on the "Administration" page will be applied to the unit or position listed here.
>
> Click the drop-down if you need to view and control settings for a different unit or position.

Statuses:

From the "Statuses" tab of the Administration page, you can create and manage:

1. **Position Statuses:** Labels that describe the current state of the selection process, for example, "Accepting Applications"
2. **Application Statuses:** Labels that describe the current state of the applicant in the review process, for example, "Longlist" or "No Further Consideration"

> 💡 See here for more information on how to create a position status, and how to create an application status.

Message Templates:

From the "Message Templates" tab you can create and manage message templates to send customized messages to applicants when the status of a position or application changes. You can set the conditions when the message will be sent, and you can edit and confirm messages before sending them.

> ♀ See here for more information on **how to set up applicant notification message templates**.

EEO Statement:

From the "EEO Statement" tab, administrative users can create, edit, and set the EEO statement for positions created in a unit.

💡   See here for more information on **managing EEO statements.**

Application Forms:

From the "Application Forms" tab, Administrators can create application forms to collect information from applicants. Administrators can also create EEO forms and designate forms as default for a unit.

> 💡 See here for more information on [creating application forms](#), and [EEO forms](#).

Permissions:

From the "Permission" tab, Administrators can set whether or not reviewers can comment and assign tags to applications. Administrators can require approval for new positions, set who to notify when a position changes, and set the sender name and "reply-to" address for email messages.

> 💡 See here for more information on [requiring approval to post new positions.](#)

Logo:

From the "Logo" tab, administrative users can upload and change the logo that will display on positions created by a unit or set the logo for a particular position.

💡   See here for more information on **add a logo to the landing page of a position.**

Settings

The Settings page allows an institution to create and use a public positions list.

Set the Open Date of Your Search, Publish Your Position, and Start Accepting Applications

Once you've created and reviewed your Interfolio Faculty Search position, the position URL that advertises your search will be published automatically when your position reaches its "Open" date. The article below explains the rules around publishing a position, how to publish your "Apply Now" page, and how to retrieve the link for that page so you can start advertising your position.

Your unique landing page

While entering all the information and requirements for your position, you are also creating a unique landing page that announces your search, and which applicants will use to apply for your opportunity. The landing page includes details and application instructions, and provides applicants with a free Interfolio Dossier & Portfolio account, which they will need to apply.

You generally set the open date while creating your position, but you can also edit the date if necessary

From the Positions page, on the navigation bar, select the relevant

Click the Position Actions button and then select an Edit Position page

Click "Change" to make changes to the open and close dates

Click "Change" to either publish or unpublish the web page announcing your position

The URL for your position will be published when the open date arrives

1. The position pictured below is "Open." Note that you can change the open and close dates from the Review Position screen
2. Note that the "Apply Now" page has been published. Click the link to view the page, or click "change" to unpublish it
3. To begin accepting and reviewing applications you will also need to set an initial position status such as "Accepting Applications" that allows applicants to submit and update applications, and allows Evaluators to review materials

---

Click "View" to see your position announcement

You can preview your announcement and copy the URL
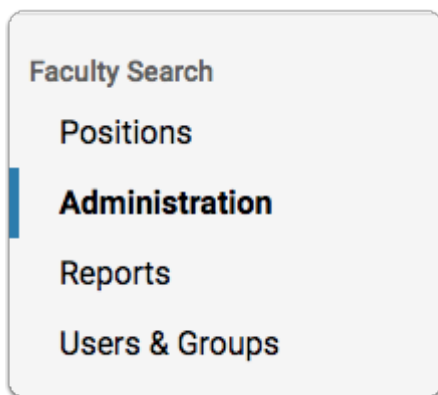
Assign or Change a Position Status

Administrators and Committee Managers can change the status of a position in ByCommittee Faculty Search from the Applications page or the Review Position screen.

To change position status from the Applications page:

1. From the Navigation bar, select Positions.

Faculty Search

Positions

Administration

Reports

Users & Groups

2. Click the position title to view the list of applicants

3. Click the Change button for the position's Status field.

4. Select a new status from the dropdown menu

Note: Notice the "Close Position" status at the bottom of the list. See here for more information on [closing a ByCommittee search](#).

5. Confirm and notify applicants

The "Change Status" window reminds you of the permissions associated with the active status and gives you the option to compose and send an email to applicants about the change.

To change position status from Review Position page:

1. Click "change" to open the "Position Status" window

2. Apply an existing status or create a new one

Position Status   ✖

Interviewing Finalists   change ⌄

☐ Applicants can view this status when it is active.
☐ Applicants can update their application materials while this status is active
☑ Evaluators can review applications while this status is active.

✔ Save   Cancel

Publish and Find the URL For Your Position

In the process of creating a position in Interfolio Faculty Search, you are also creating an "Apply Now" landing page that will announce your opening online. You can copy the unique URL of this landing page and use it wherever you want to post your position.

Make sure your the "Apply Now" page for your position has been published

Once the open date of your position arrives, the "Apply Now" page will be published automatically. You may also publish the "Apply Now" page manually when editing a position.

The URL of your "Apply Now" page will appear on the Review Position page

Demo University › Positions › Assistant Professor of Landscape Architecture ›
Review Position

THIS POSITION IS: ❓

Open to new applicants

It opened on **Sep 1, 2015**. change   clear

It will close on **Aug 16, 2018**. change   clear

"Apply Now" page is **published** . view | change

🌐 http://apply-alpha.interfolio.com/22946

POSITION STATUS: ❓

Accepting Applications

With this status active:
- Applicants **can** view this status.
- Applicants **can** update their application materials.
- Evaluators **can** review applications to this position.

change

EDIT POSITION...

1. **Description & Dates**
2. **Required Documents**
3. **Evaluation Settings**
4. **Application Forms**
5. **Search Committee**
6. **Internal Notes**

Copy and paste this URL anywhere you want to announce your position

THIS POSITION IS: ❓

Open to new applicants

It opened on **Jun 30, 2016**. change | clear
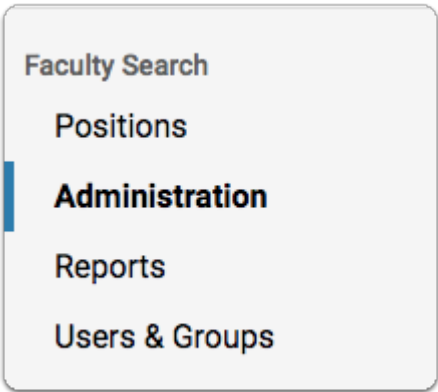
It will close on **Apr 14, 2017**. change | clear

"Apply Now" page is **published** . view | change

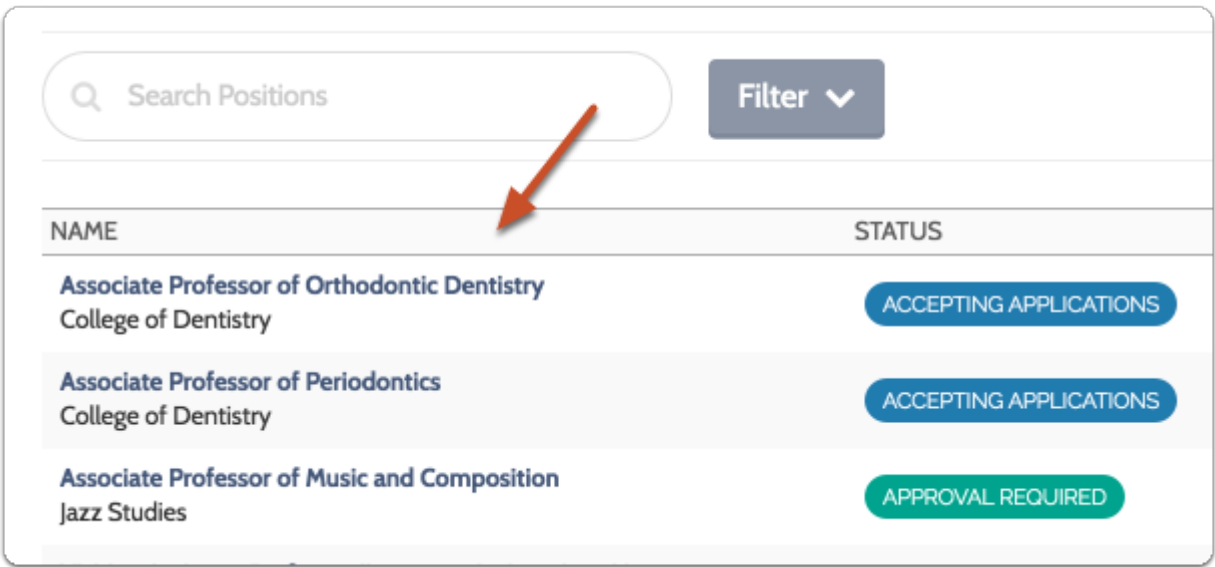🌐 http://apply-test.interfolio.com/24389

Edit an Existing Position

Committee Managers and Administrators can edit position settings and information from the Review Position screen in Interfolio Faculty Search.
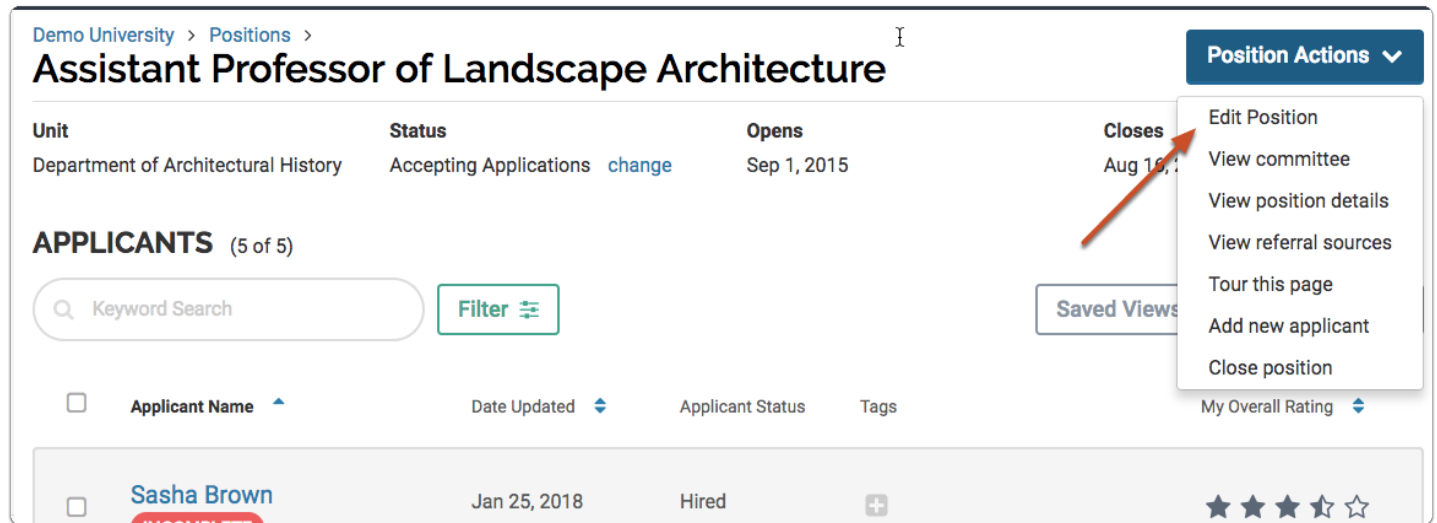
Select the Positions option from the Navigation bar

Select the position to edit

Click the Positions Actions button and select Edit Position
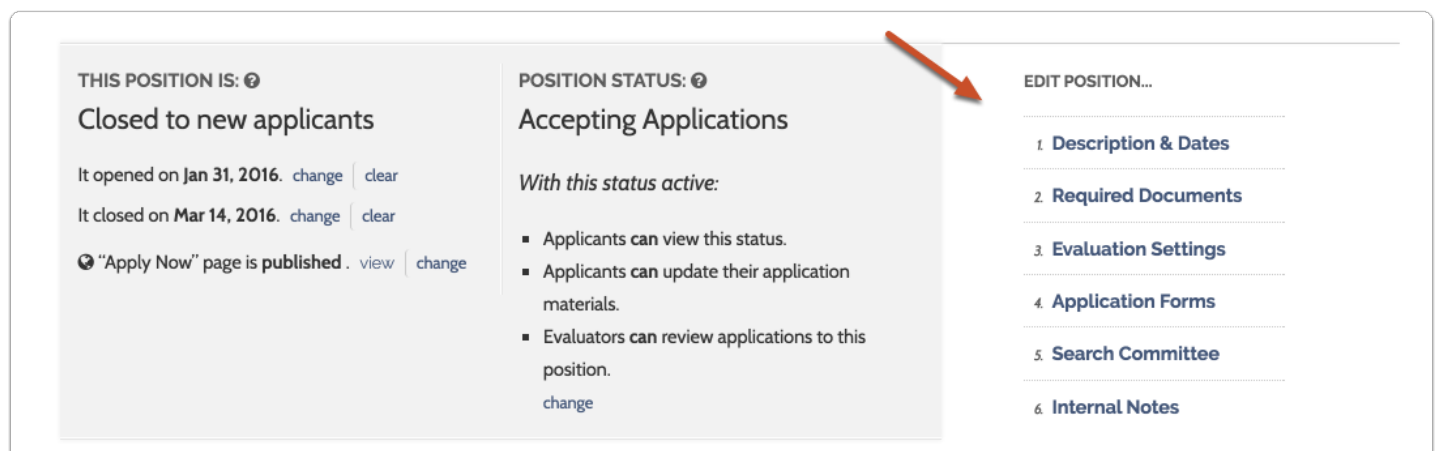
Select a step to edit from the sidebar

Click the name of any of the six steps listed in the "Edit Position..." sidebar to edit information and settings for the position.

Other edits possible from the Review Position page

From the Review Position page you can edit all of the information and settings established when creating the position:

1. Set the open and close dates of the position
2. Click "view" to see published landing page for the position. Click "change" to unpublish landing page.

3. Click "change" to set status of a position and select associated permissions (e.g., allow Evaluators to review applications, allow applicants to update applications and/or view status).

Note: While some areas are easy to change at any time, such as the members of the committee, we recommend exercising caution when editing other areas, particularly the required documents and application forms. Changes to required documents and forms initiated after the position opens may result in issues with the complete/incomplete status of individual applications.

Close a Position (Archive) and Indicate an Outcome

A Interfolio Faculty Search position is either "Open," meaning the positon is accepting new applications, or "Closed," meaning no new applications are being accepted.

Committee Managers and Administrators can close a position when applications are no longer being considered, either because a hire has been made or for some other reason.

When closing a position, Committee Managers or Administrators are asked to indicate which applicants were selected to fill the position, and if no applicants were selected, can leave an optional note to document why no selection was made. The user is also asked to set a final closed status for the position and has the option to send a message to all applicants based on the status they have chosen.

In addition, Administrators can run reports that clearly document who was hired for every search in the system. For more information see this article on how to run a report on hired applicants.

This article explains how to close a position and document the outcome of the search.

Note: The open and close dates for a position represent the date range within which new applicants can apply. If a position is reopened, new open and close dates will need to be set from the Review Position screen as explained below.

💡 If you want to reopen a position, see our available guide.

Select the position you want to close from the list of positions, available from the navigation bar.

The current position status is displayed at the top of the screen.

Click the change button to view a list of available statuses and choose Close

Indicate whether or not an applicant was selected to fill the position

If no applicant was selected, you can leave an optional note to document why no selection was made

If an applicants was selected, type the name in the search bar and click "Add" when it appears

CLOSING POSITION FOR:

Associate Professor of Orthodontic Dentistry

| STEP 1: SELECT APPLICANT | STEP 2: COMPLETE THE SEARCH |

Was an applicant selected?

⦿ Yes ◯ No

Select Applicants

Search for the selected applicant(s) below. You must select at least one applicant to continue.

> m 🔍

Clear

APPLICANT NAME	EMAIL ADDRESS	
Eric Beamer	ebeamer@demo.edu	✚ Add
James Grimm	jgrimm@demo.edu	✚ Add
Marvin Butler	mb@demo.edu	✚ Add

Click "Continue" when all of the applicants selected to fill the position have been added to the list

Select a position status or add a custom position status to complete the search

The position status is a label that indicates where a search is in the process and allows you to set rules for what Evaluators and applicants can do when that particular status is active. See here for more information on [Position Statuses.](#)

Select an existing position status from the dropdown list

CLOSING POSITION FOR:

Associate Professor of Orthodontic Dentistry

STEP 1: SELECT APPLICANT	STEP 2: COMPLETE THE SEARCH

Position Status

Interviewing Finalists

Sending Invitations for Campus Visits

Accepting Applications

Reviewing Applications

Interviewing Finalists

Position Closed

Add Custom Status

-or- Add a new custom status and click "Finish"

CLOSING POSITION FOR:

Associate Professor of Orthodontic Dentistry

STEP 1: SELECT APPLICANT	STEP 2: COMPLETE THE SEARCH

Position Status

Add Custom Status

Hire Made

- Applicants **cannot** view this status.
- Applicants **cannot** update their application materials.

Message

☐ Send a message to all applicants with this change

Finish   **Cancel**

If you have to add a custom status you will need to set permissions linked to the new status

Whether you use a custom status or create a new one, you can set whether or not applicants can view the status, update their application materials, and whether or nor evaluators can review applications while the status is active.

You can elect to send a message to applicants notifying them of the change in status
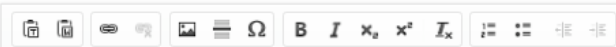
Click "Preview' to see how the message will appear in the inbox of applicants. Click "Finish" when you are ready.

Message

☑ Send a message to all applicants with this change
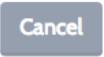
Subject *

> Message Subject

Body

[🔲 🔲 🔗 🔲 | 🖼 ▤ Ω | **B** *I* x₂ x² *I*ₓ | ≔ ≔ ⫶ ⫶]

◉ Preview

Finish   Cancel

The position is now closed

💡 **Note:** The landing page of the closed position will be unpublished and no longer accessible to applicants.

The position will no longer appear in the list of active cases but will appear in the list of closed (archived) positions viewable by filtering the list of positions
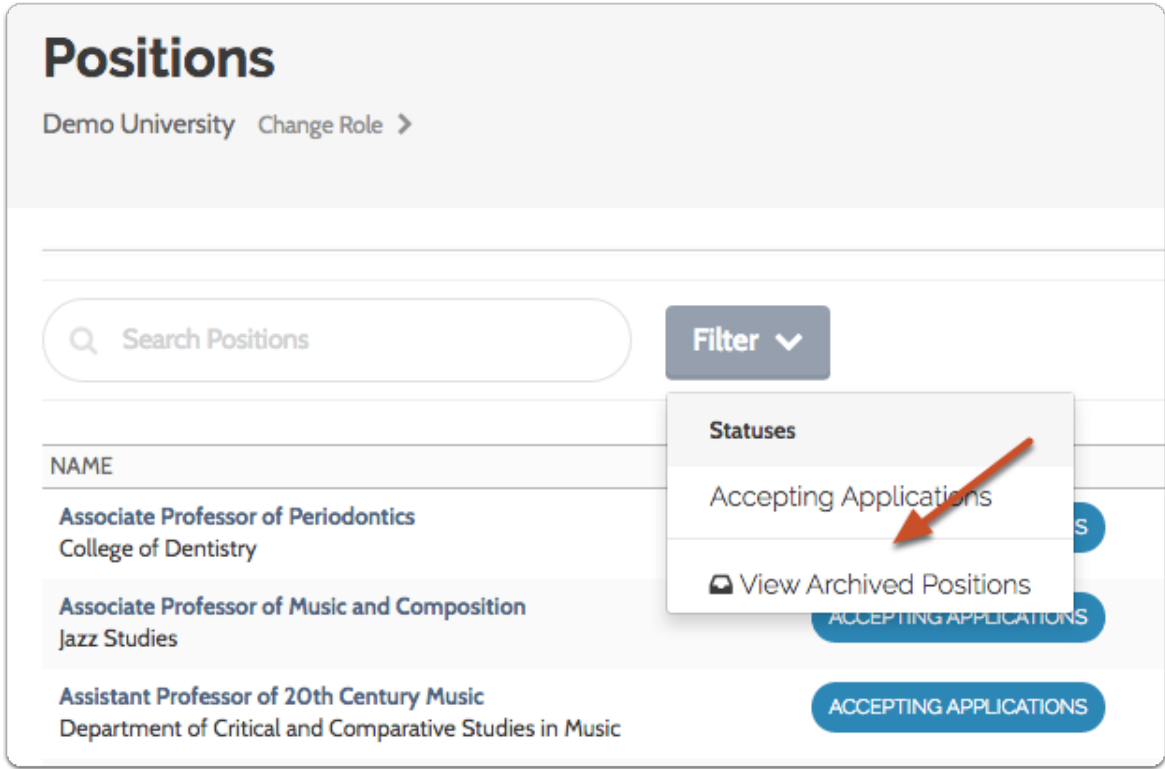
To reopen the position, select it from the list of closed positions

[If you want to reopen a position, see our available guide.](#)

View Referral Sources to See Where People are Finding Your Position

Administrative users can get an idea of where people are finding a position by viewing a graph of the top websites sending visitors to the landing page of a position.

⚠ Note that the number of visitors will be larger than the number of applicants to your position because more people will view the posting than will apply for a position.
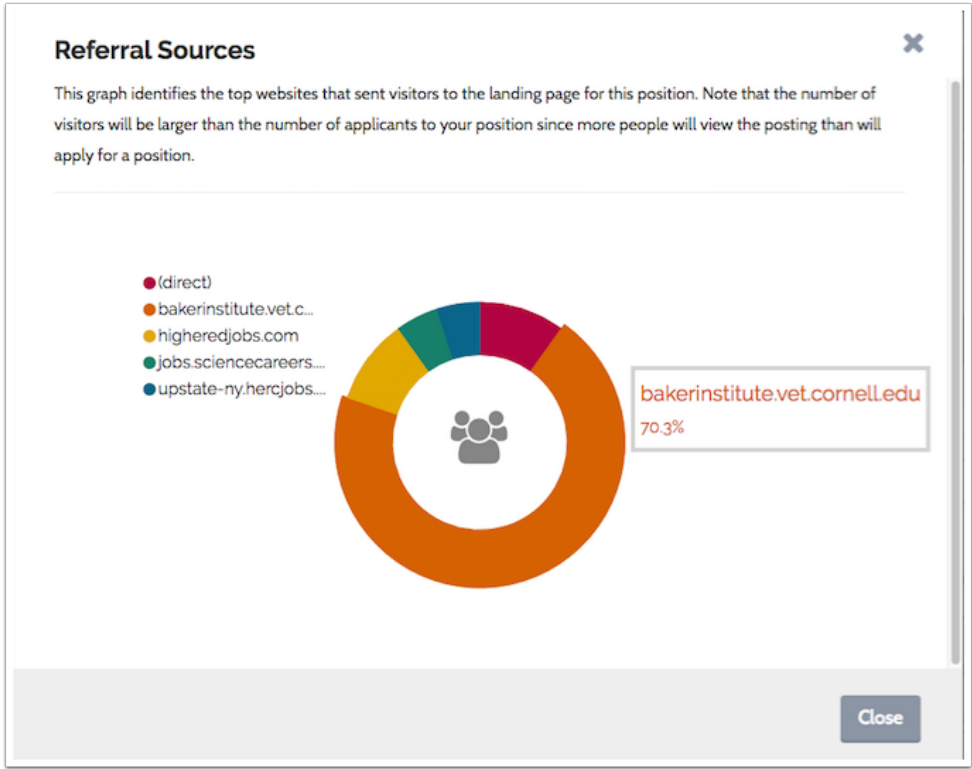
Click the Positions option from the navigation bar on the left.
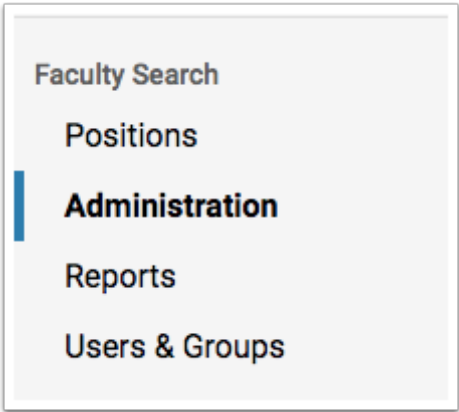
Select the position to track
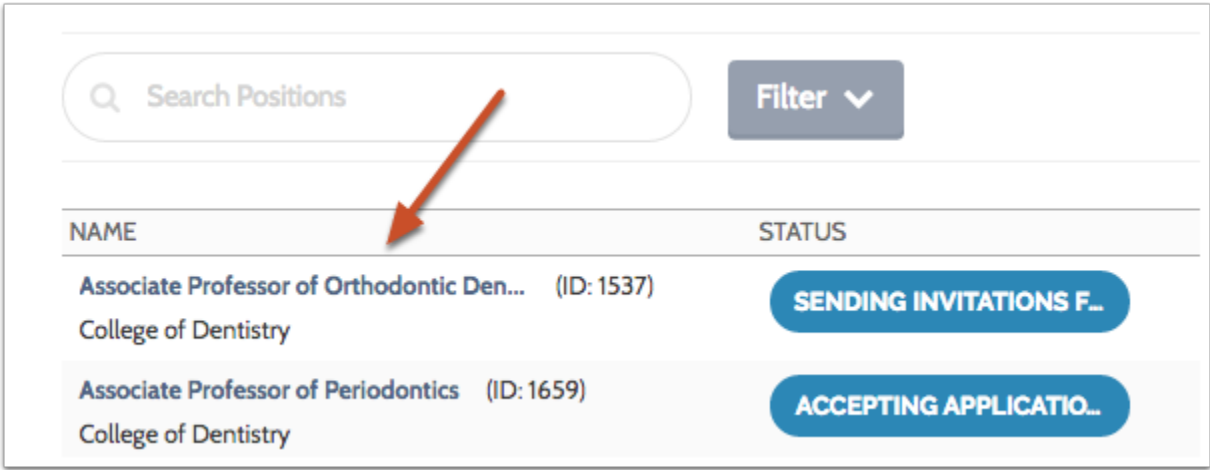
Click the Position Actions button and then click View referral sources

The top referring websites are represented in a color coded circle graph
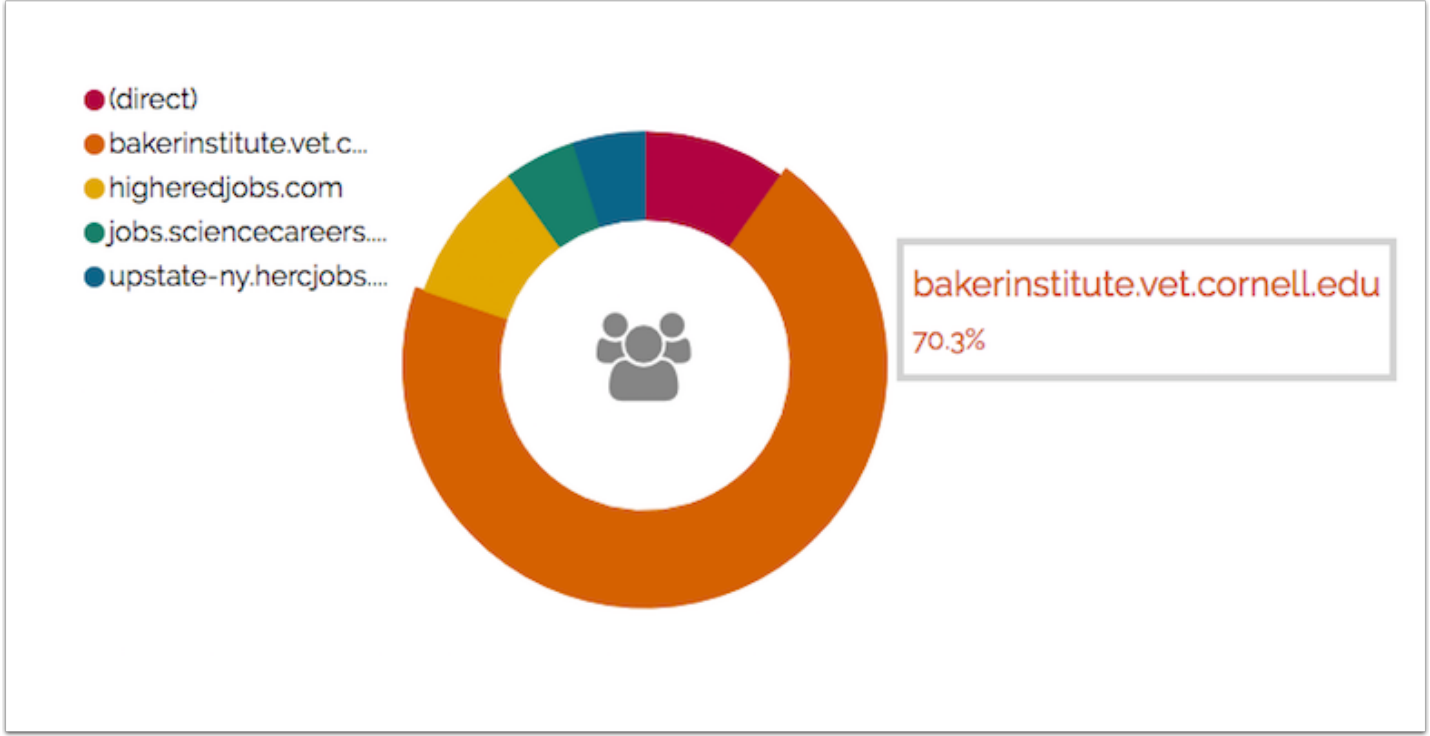
Click a section of the graph to see the percentage of visitors sent to your position by the source
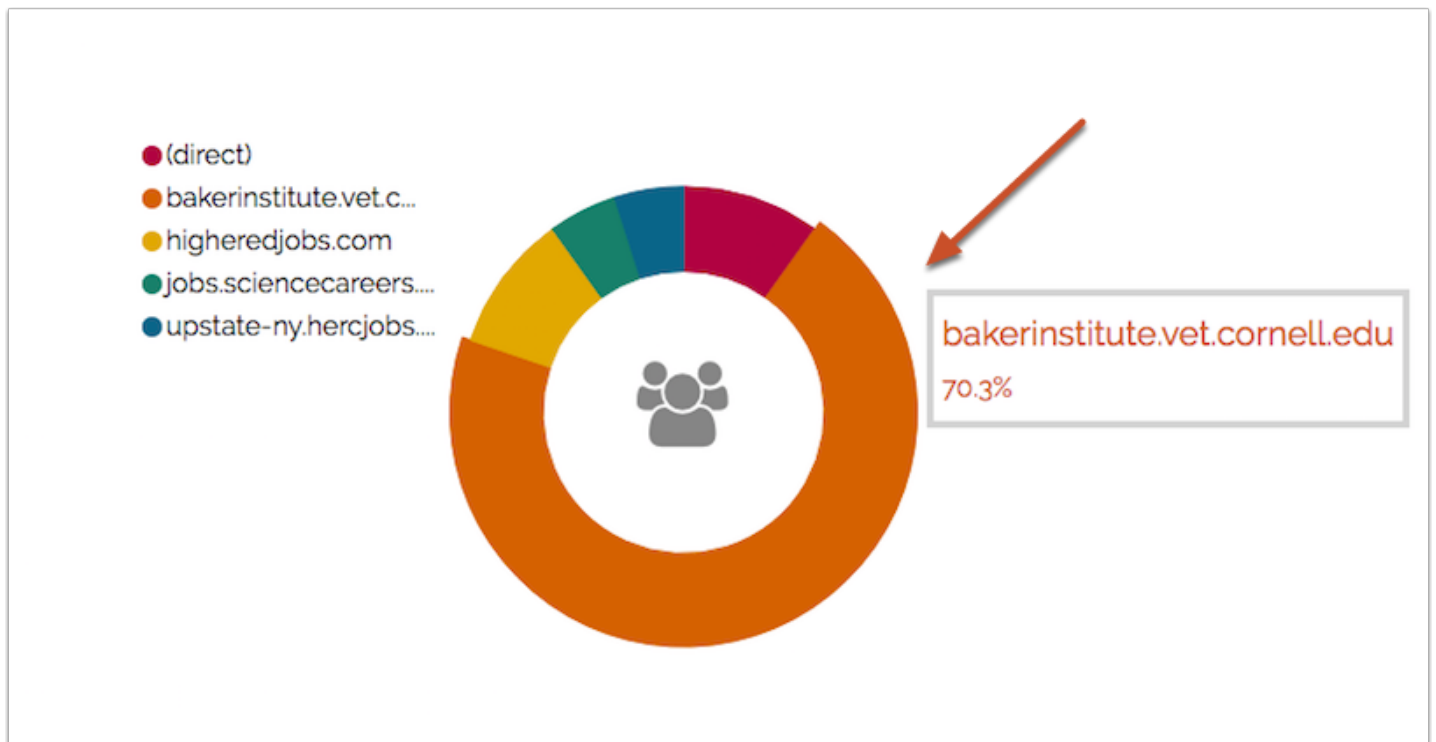
Statuses

Position and Application Statuses

Position and Application Statuses are tags you can use to mark the stages of a search and track the progression of an applicant. Statuses are useful for sorting positions or applications, and can be a very effective tool for managing search processes that involve several steps.

Statuses in Interfolio Faculty Search can also be tied to settings in the product that control the levels of access Evaluators and applicants have to materials. For example, depending on your settings, statuses can be used to determine when applicants can submit materials or when Evaluators can review applications.

Position Statuses

Position statuses indicate where a position is within the search process. Some common position statuses are "Accepting Applications," and "Reviewing Applications." These statuses are useful for viewing or sorting a list of open positions.

In addition, each position status can carry its own set of rules that impact permissions in the program. When creating a position status, you have the option of choosing whether:

1. Evaluators can review applications while this status is active
2. Applicants can update their application materials while this status is active
3. Applicants can see this status when it is active.

So, for example, when changing a status from "Accepting Applications" to "Reviewing Applications," you can set the program so that Evaluators can review application materials, but applicants can no longer submit or update application materials.

Application Statuses

Application statuses are applied to individual applicants to indicate where their application is within the search process; for instance, you might use "Rejected," "Longlist," or "Shortlist" as possible application statuses. This feature is particularly useful for sorting applicants and controlling when subsets of applicants can and cannot update their applications.

When creating an application status, you can control whether:

1. Applicants can update their application materials while this status is active.
2. Applicants can see this status.

If a search process requires applicants to add additional documents at a later time, application statuses are the best way to accomplish that process. For instance, you might want to see

another letter of recommendation just from the top candidates halfway through your search. By creating a "Shortlist" application status, you can allow just those applicants to submit more materials. Application statuses are also beneficial because they help organize and narrow down large lists of applicants.

Useful Articles for Getting Started

[Create a Position Status](#)

[Assign or Change a Position Status](#)

[Create an Application Status](#)

[Assign or Change an Application Status](#)

Create and Manage Position Statuses

If permissions allow, Committee Managers and Administrators can create position statuses, such as "Accepting Applications," or "Under Review," to mark the current state of a position review.

Position statuses are created on the "Administration" page of a unit in Faculty Search.

When creating statuses, you have the option to enable or disable position status creation for all administrative units below the unit you are editing. You also have the option of making the position statuses you create available for units below the unit you are currently editing.

Finally, Administrators can choose to send the entire set of position statuses down to administrative units that are lower in the hierarchy.

⚠ Note that the option to create statuses may appear as "locked" if an Administrator from a higher unit has disabled position status creation.
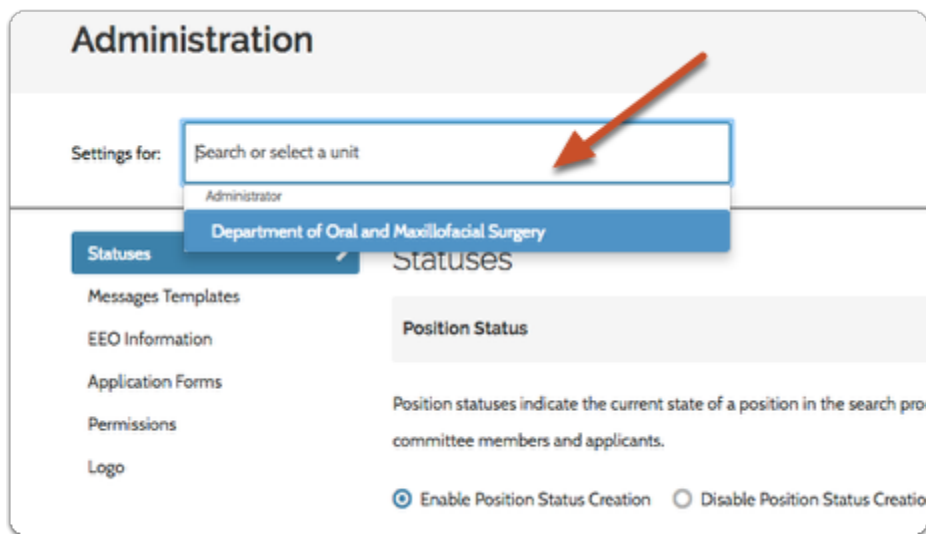
1. On the navigation bar select the Administrar option
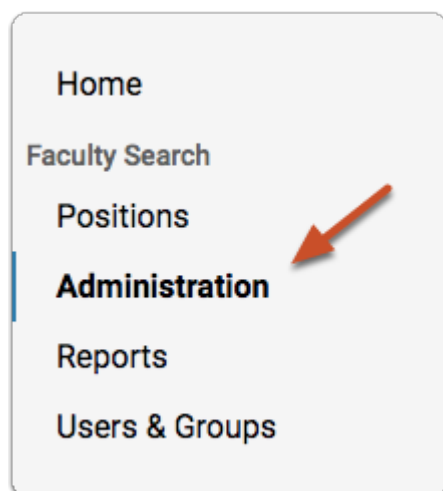
2. Make sure you are editing settings for the correct unit
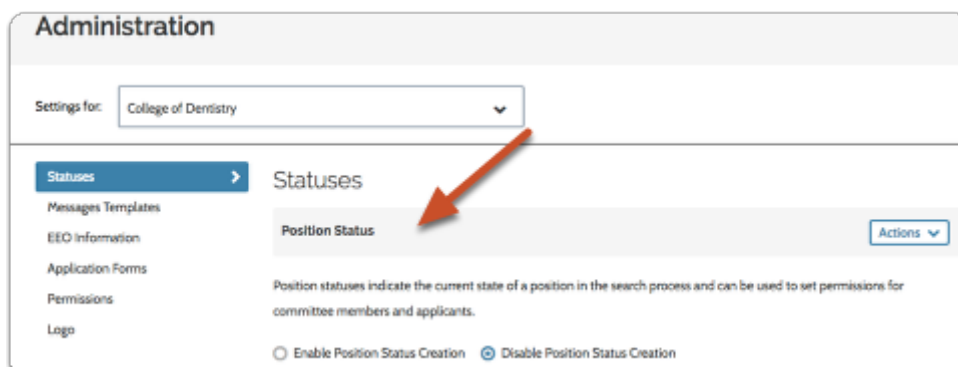
> ℹ️ The settings you make on this page apply to the unit displayed at the top left of the page. Click the drop down menu to select another unit.
>
> The changes you make here will apply to the current administrative unit, but you can also disable the creation of application statuses for lower units, and send application statuses or the set of application statuses down to lower units.

3. On the "Statuses" tab, look for the "Position Status" section at the top of the page

4. Click "Actions"

⚠ The "Actions" menu and the option to enable or disable position status creation will not appear if an Administrator of a higher administrative unit has disabled position status creation.

5. Select "Add new status"
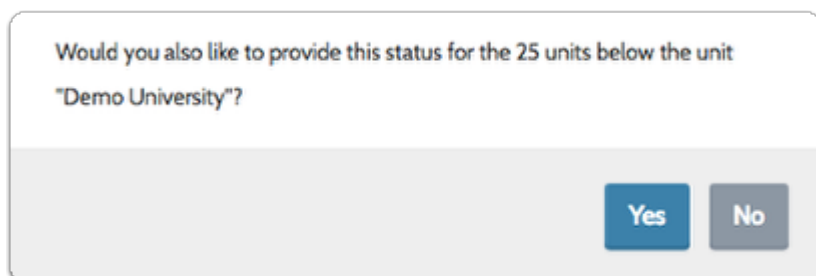
6. Enter the status name and indicate the permissions associated with the status

Set permissions by indicating whether Evaluators can review applications, applicants can update materials, and applicants can view the status when it is applied to a position. Click "Save" to apply the changes.

7. Once you have created a status you will have the option to send that status down to lower administrative units

To send the entire set of position statuses down to lower units:

> ❗ When you send the new set of statuses to lower units, you will replace any statuses they have created.

Click "Action" and select "Send statuses to lower units"

Confirm that you want to replace any statuses the lower units have created

To enable or disable position status creation for lower administrative units:

Click to disable or enable status creation

When disabled, units below cannot create, edit or delete statuses, but you can still create and edit statuses for the current unit.

To edit existing position statuses:

1. Click the edit pencil next to the status

2. Make your edits and click "Save"

Assign or Change a Position Status

Administrators and Committee Managers can change the status of a position in ByCommittee Faculty Search from the Applications page or the Review Position screen.

To change position status from the Applications page:

1. From the Navigation bar, select Positions.

2. Click the position title to view the list of applicants

3. Click the Change button for the position's Status field.

4. Select a new status from the dropdown menu

Note: Notice the "Close Position" status at the bottom of the list. See here for more information on [closing a ByCommittee search](#).

5. Confirm and notify applicants

The "Change Status" window reminds you of the permissions associated with the active status and gives you the option to compose and send an email to applicants about the change.

To change position status from Review Position page:

1. Click "change" to open the "Position Status" window

2. Apply an existing status or create a new one

Position Status   ✖

Interviewing Finalists   change ∨

☐ Applicants can view this status when it is active.

☐ Applicants can update their application materials while this status is
active

☑ Evaluators can review applications while this status is active.

✔ Save   Cancel

Create and Manage Application Statuses

If permissions allow it, Committee Managers and Administrators can create application statuses (such as "Longlist," or "Shortlist," or "Removed From Consideration") that can be used to mark where an application is in the process of review.

Application statuses are created on the "Administration" page of a unit in Faculty Search. The individual statuses you create, or even the whole set of application statuses can be sent down to lower units.

⚠️ Note that the option to create statuses may appear as "locked" if an Administrator from a higher unit has disabled position status creation.

1. From your navigation bar, click "Administration"

Faculty Search
Positions
Administration
Reports
Users & Groups
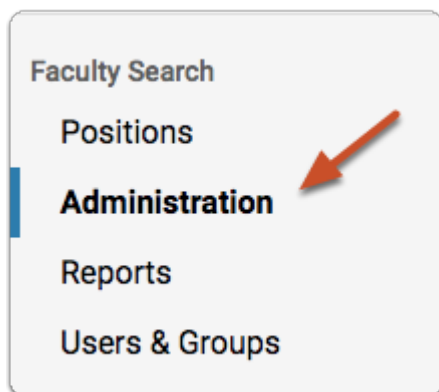
2. Check to make sure you are editing settings for the correct unit

ℹ️ The changes you make here will apply to the current administrative unit, but you can also disable the creation of application statuses for lower units, and send application statuses or the set of application statuses down to lower units.

3. On the "Statuses" tab, scroll down to "Application Status"

Application Status

Changes to application statuses have been locked by unit **Demo University**

Invitation for Interview

4. Click "Actions"

⚠ The "Actions" menu and the option to enable or disable application status creation will not appear if an Administrator of a higher adminstrative unit has disabled position status creation.

Application Status   Actions ⌄

Application statuses indicate where an individual application is in the review process and can be used to set permissions for applicants.

⦿ Enable Application Status Creation   ○ Disable Application Status Creation

Invitation for Interview   ✏ ✖

Longlist   ✏ ✖

5. Select "Add new status"

6. Enter the status name, set whether or not applicants can update application materials, and view the status when it is applied, and click to save

7. You will be given the option to provide this status for any units that are below the unit you are editing

To send the entire set of application statuses down to lower units:

> ⓘ When you send the new set of statuses to lower units, you will replace any statuses they have created.

Click "Action" and select "Send statuses to lower units"

Confirm that you want to replace any statuses the lower units have created

To enable or disable application status creation for lower administrative units:

Click to disable or enable status creation

When disabled, units below cannot create, edit or delete statuses, but you can still create and edit statuses for the current unit.

To edit existing statuses, click the blue "edit" pencil

Edit the status and click to "Save"

Edit Status

Interview

☐ Applicants can view this status when it is active.
☐ Applicants can update their application materials while this status is active

✔ Save   Cancel

Assign or Change an Application Status

Committee Managers or Administrators can assign or change an application status in Interfolio Faculty Search from the Applications page or the Applicant Profile page.

Select the Positions page from the Navigation bar
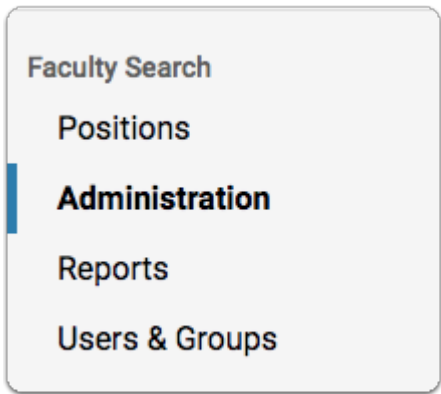
Faculty Search

Positions

Administration

Reports

Users & Groups

Click the position title

NAME	STATUS	TYPE	OPENS	CLOSES	APPLICATIONS	
Associate Professor of Orthodontic Dentistry College of Dentistry	ACCEPTING APPLICATIONS	Faculty	Jan 31, 2016	Jun 24, 2016	3	⚑
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS	Faculty	May 10, 2016	Nov 6, 2016	0	⚑
Associate Professor of Music and Composition Jazz Studies	APPROVAL REQUIRED	Faculty	Jun 5, 2016		0	⚑

Select one or more applications
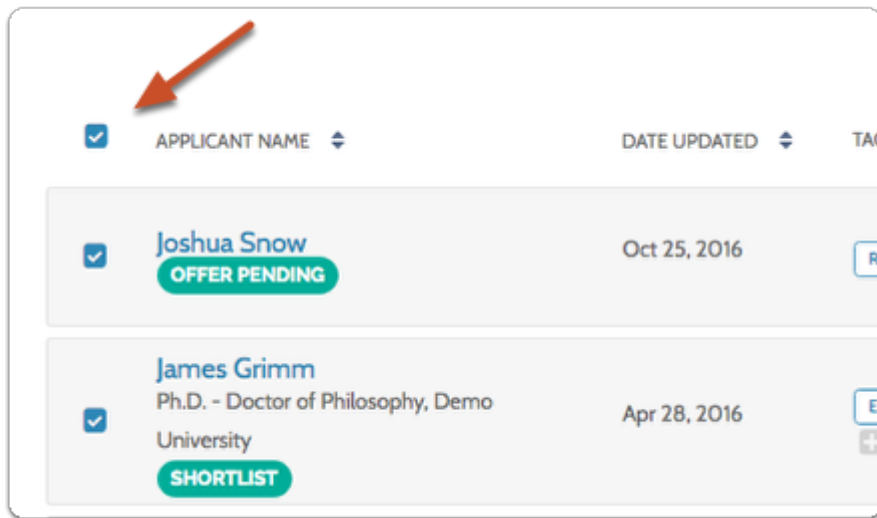
Click the "Status" button that appars to the right of the page
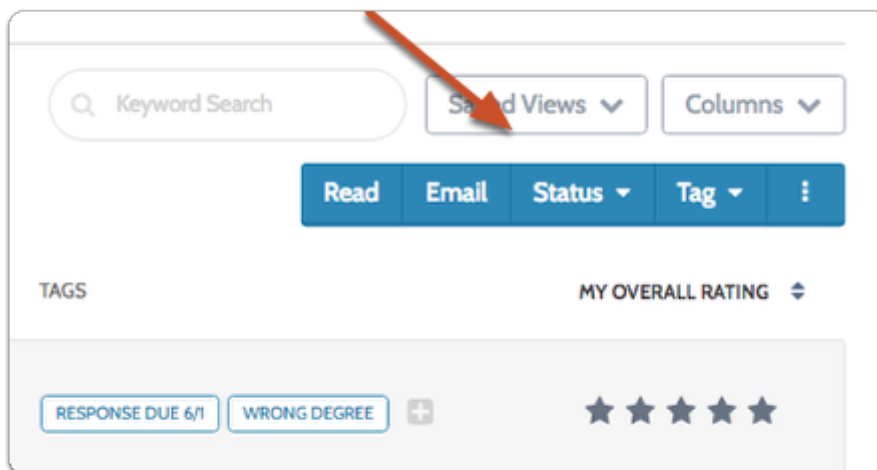
Select the appropriate status to apply to the selected applications

💡 You can also remove a status this way
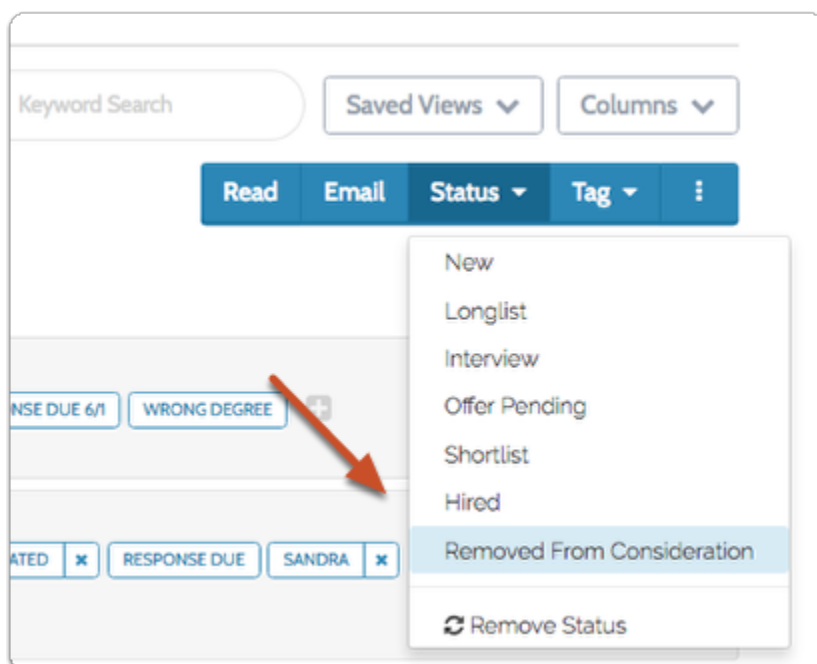
Confirm and notify applicants

> ℹ️ In the "Change Status" window you can compose and send an email to the selected applicants about the change.

You can also assign or change an application status from the Applicant Profile page:

Click the applicant's name to open the Applicant Profile

Click the change button near the current status to update the Position's status.
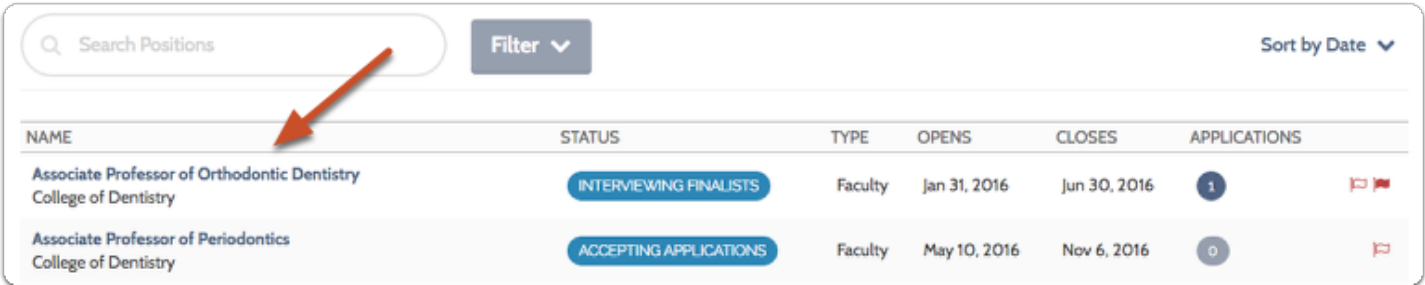
Managing Applications

Add Materials on Behalf of an Applicant

This article explains how Committee Managers and Administrators can add materials to an application on behalf of an applicant in Interfolio Faculty Search.

Click the Positions link from the navigation bar

Faculty Search

Positions

Administration

Reports

Users & Groups

Click the position title

Click the applicant's name to open the Applicant Profile page

Add document files (pdf, .doc, etc):

Scroll down to the "Documents" section and click "Add File"

You can drag & drop or browse to upload document files

Give the document title, and identify the type (cover letter, C.V., etc)

Add Document ✕

Upload   Video   Webpage

| Cover_Letter | Success ✕ |

Title *

J. Snow Cover Letter

Type

Cover Letter ⌄

What requirement does this file satisfy?

Cover Letter ⌄

⊞ Add   Cancel

If the file satisfies a requirement, indicate which requirement it satisfies

Type

— Select Type — ⌄

What requirement does this file satisfy?
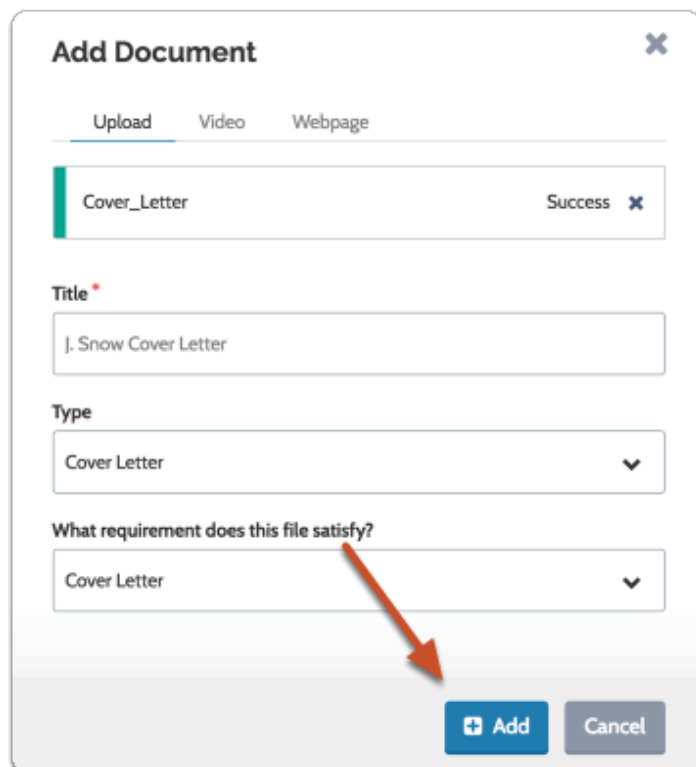
✓ None
Cover Letter
C.V.
Confidential Letter of Recommendation or Evaluation

⊞ Add   Cancel

Click "Add" to upload the document

Add video files:

ℹ️ You can also upload links to Vimeo or Youtube videos and use those to satisfy document requirements of the application.

Select the "Video" tab, give the video a title, add the url of a Youtube or Vimeo video, and add a description

If the video satisfies a requirement, indicate which requirement it satisfies

The video will be added to the application materials

Evaluators can view the video in the materials reader

Add Webpages:

> ℹ️ You can also add links to webpages and use those to satisfy document requirements of the application.

Select the "Webpage" tab, give the webpage a title, add the url and a description of the page

If the webpage satisfies a requirement, indicate which requirement it satisfies

A link to the page will be added to the application materials, and will display to evaluators when they open the materials reader

The link will display in the materials reader

Note: Clicking the link will open the webpage in a new browser tab.
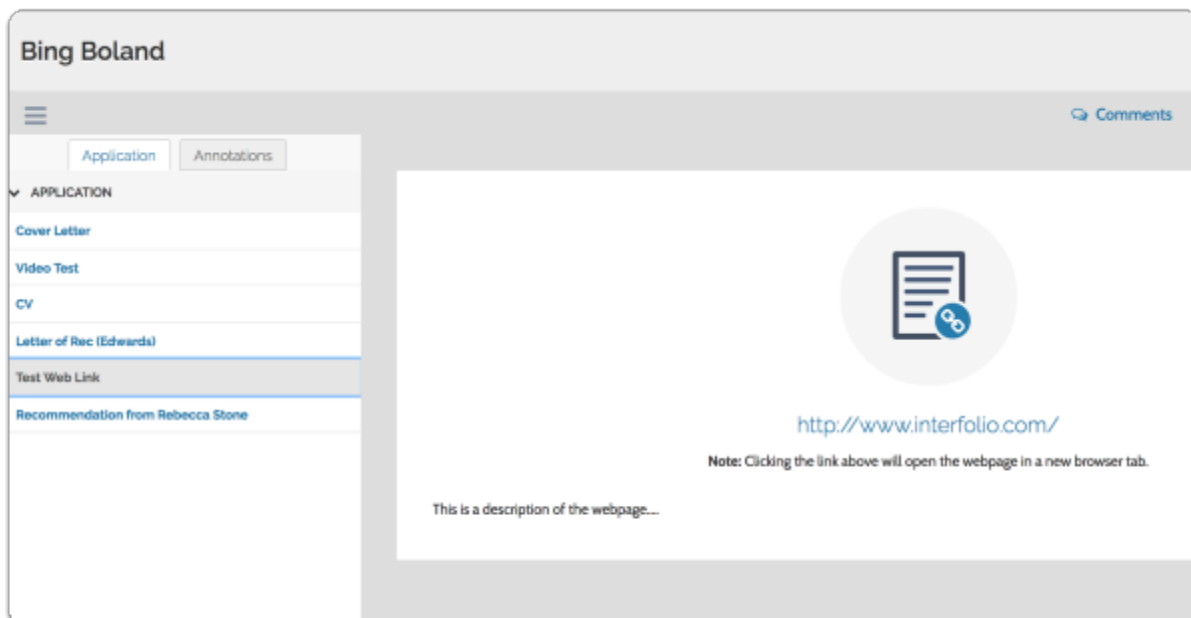
Click the Actions button and then Mark application as complete

Demo University > Positions > Assistant Professor of Landscape Architecture >

Sasha Brown

Actions ⌄

Education Information	Status	Tags
	Hired change	➕

Share application
Email applicant
Download Documents
Mark application complete
Request recommendation

⌄ **Documents**   INCOMPLE   ad

Create an Application on Behalf of an Applicant

This article explains how Committee Managers and Administrators can create an application on behalf of an applicant in Interfolio Faculty Search.

Select the positions page from the navigation bar
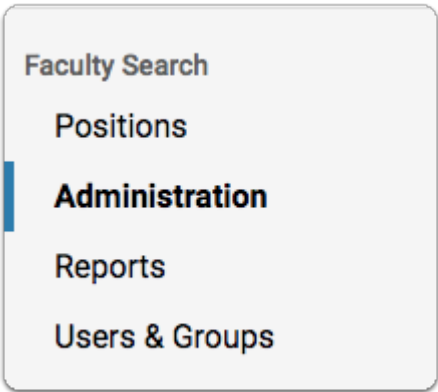
Find the position you are working on and click the title to open the list of applicants for the position

Click the Actions button and then "Add a new applicant"

Fill out the "Add New Application" form and click "Add"

The applicant's name now appears in the list of applications

Applicants will receive a standard email after being added
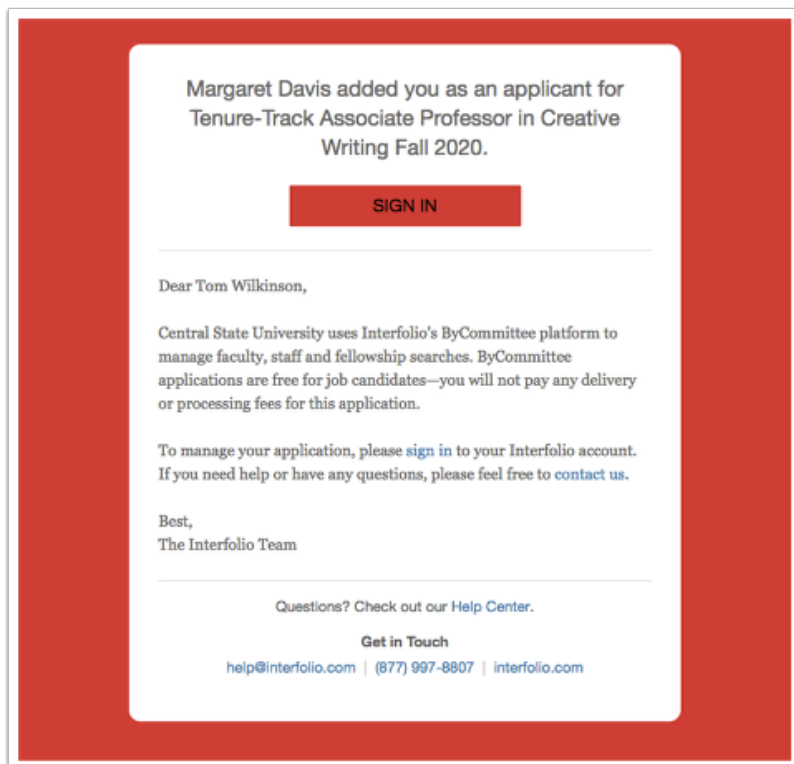
> ⊘ Administrators and Commitee Managers **CANNOT** fill out forms (EEO or Custom) on behalf of applicants.
>
> Applicants must be notified to complete any form responses, and to do so the application must allow for updates. For more information on how to accomplish this, reference our resources on Messaging Applicants and Creating a Position Status.

To add materials to the application:

Click the applicant's name to open the Applicant Profile page
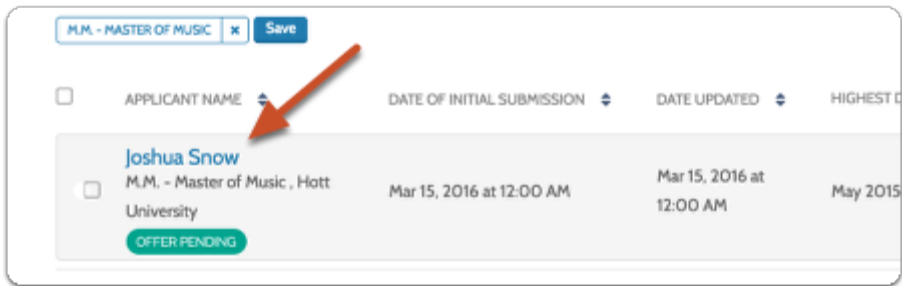
Scroll down to the "Documents" section and click "Add File"
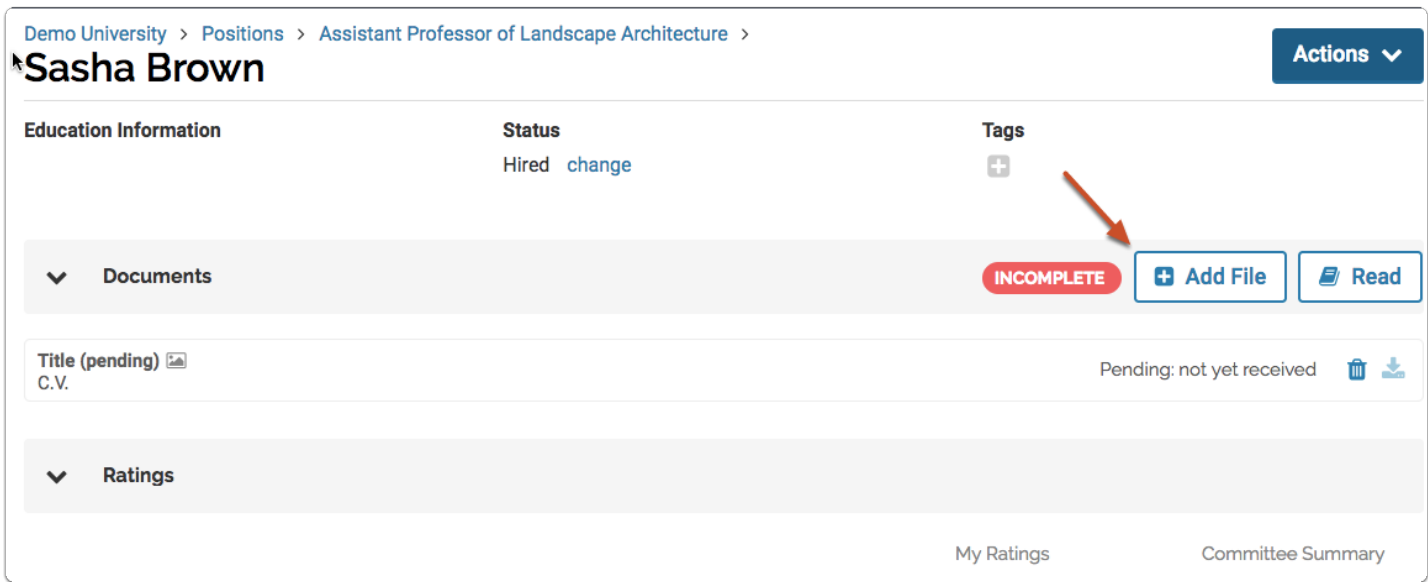
Add document files (pdf, .doc, etc):
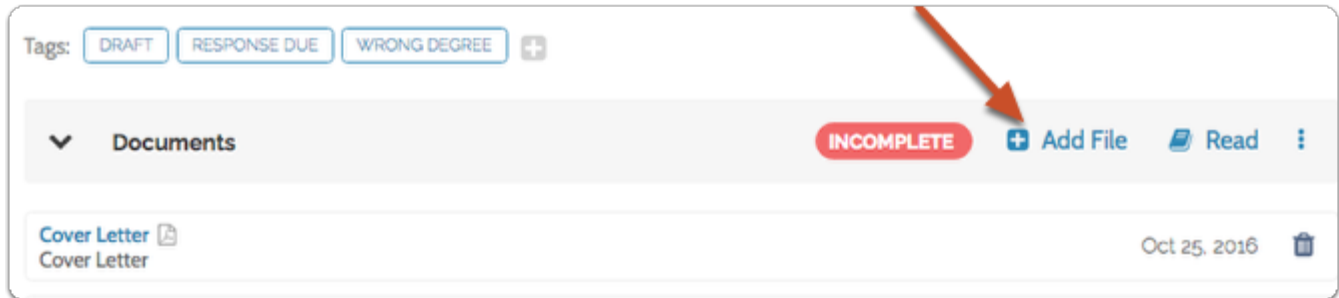
Scroll down to the "Documents" section and click "Add File"

You can drag & drop or browse to upload document files
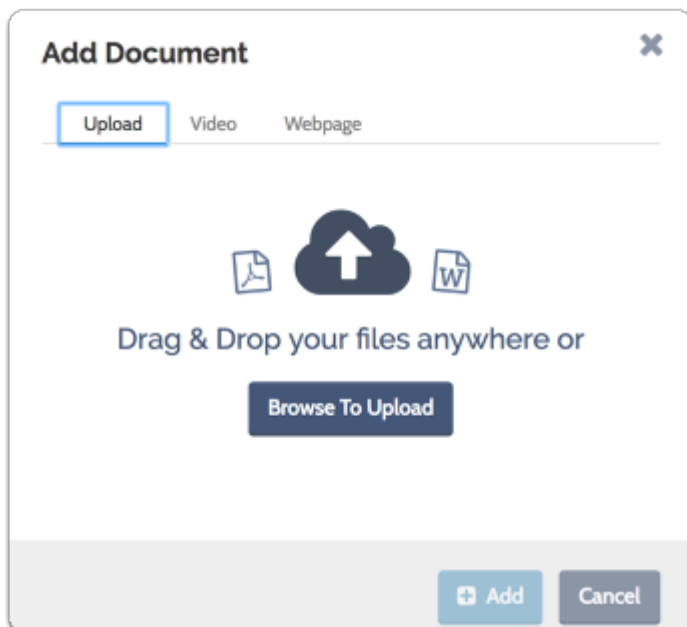
Give the document title, and identify the type (cover letter, C.V., etc)

Add Document ✖

Upload   Video   Webpage

| Cover_Letter | Success ✖ |

Title *

J. Snow Cover Letter

Type

Cover Letter ⌄

What requirement does this file satisfy?

Cover Letter ⌄

➕ Add   Cancel

If the file satisfies a requirement, indicate which requirement it satisfies

J. Snow Cover Letter
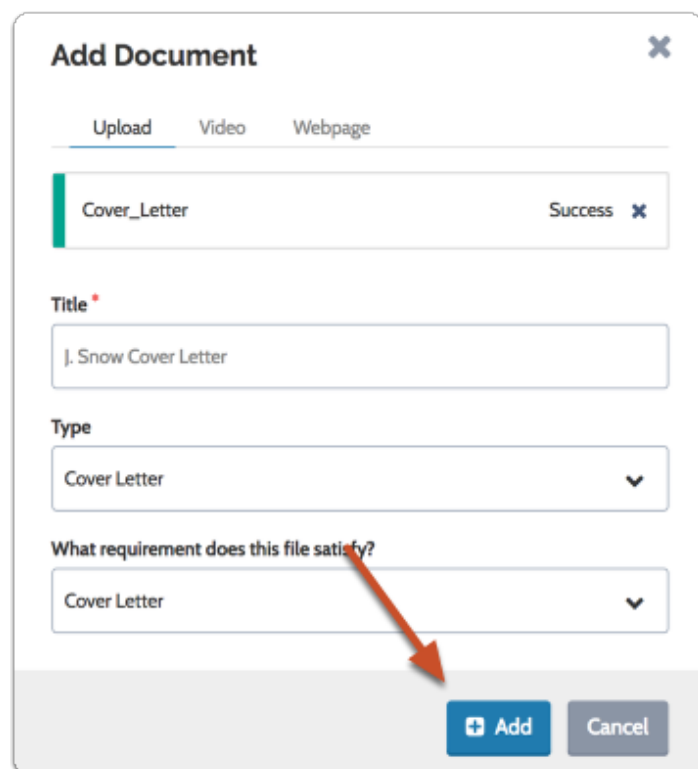
Type

Cover Letter ⌄

What requirement does this file satisfy?

Cover Letter ⌄

➕ Add   Cancel

Click "Add" to upload the document

Add video files:

ℹ️ You can also upload links to Vimeo or Youtube videos and use those to satisfy document requirements of the application.

Select the "Video" tab, give the video a title, add the url of a Youtube or Vimeo video, and add a description

If the video satisfies a requirement, indicate which requirement it satisfies

The video will be added to the application materials

Evaluators can view the video in the materials reader

Add Webpages:

> ℹ️ You can also add links to webpages and use those to satisfy document requirements of the application.

Select the "Webpage" tab, give the webpage a title, add the url and a description of the page

If the webpage satisfies a requirement, indicate which requirement it satisfies

A link to the page will be added to the application materials, and will display to evaluators when they open the materials reader

The link will display in the materials reader

> ℹ️ Note: Clicking the link will open the webpage in a new browser tab.

Mark the application as complete

Click the "Actions", and select "Mark Application Complete."

Demo University > Positions > Assistant Professor of Landscape Architecture >

Sasha Brown

Education Information	Status	Tags	Actions ∨
	Hired change	➕	Share application
			Email applicant
			Download Documents
∨ **Documents**		INCOMPLE...	Mark application complete
			Request recommendation

Request a Letter of Recommendation on Behalf of an Applicant

Committee Managers and Administrators can request confidential letters of recommendation directly from recommenders on behalf of an applicant. This allows, for instance, a committee to request recommendations from a list of potential recommenders suggested by the applicant without involving the applicant in the request process.

Navigate to the applicant's profile page

Click Positions from the navigation bar

Faculty Search

> Positions
>
> **Administration**
>
> Reports
>
> Users & Groups
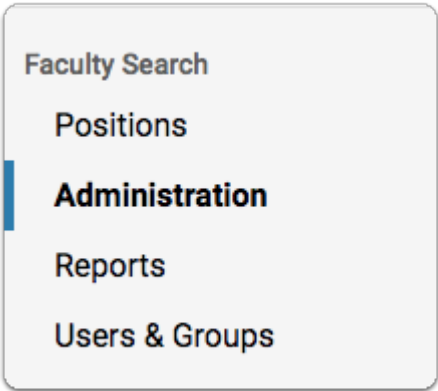
Click the name of the position

Positions

Demo University   Change Role >

Search Positions	Filter ˅

NAME	STATUS
Associate Professor of Orthodontic Den... (ID: 1537) College of Dentistry	ACCEPTING APPLICATIONS
Associate Professor of Periodontics (ID: 1659) College of Dentistry	ACCEPTING APPLICATIONS

Select the applicant

Click the Actions button and then select Request recommendation

Fill out the request form, set a due date for the recommendation, and write an email message to recommenders

> ℹ️ Letter writers will receive the message you create along with instructions for submitting the recommendation.

You can request recommendations from multiple letter writers at once

When requesting recommendations from multiple writers, you can use text variables to automatically fill in the first and last name of each letter writer

You can also attach files from the materials submitted by the applicant

Click "Add"

Select a document to include with the request
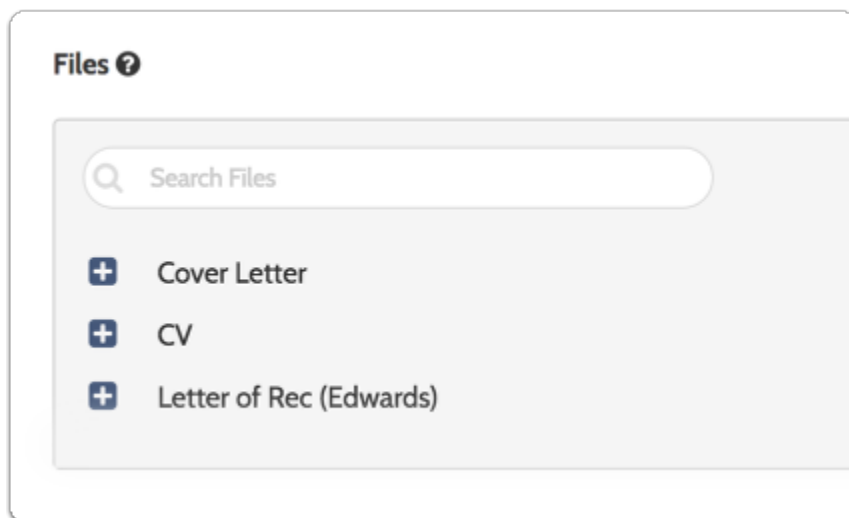
The request will appear listed in the applicant's document queue. While it is still pending, you can resend, edit and resend, or cancel the request
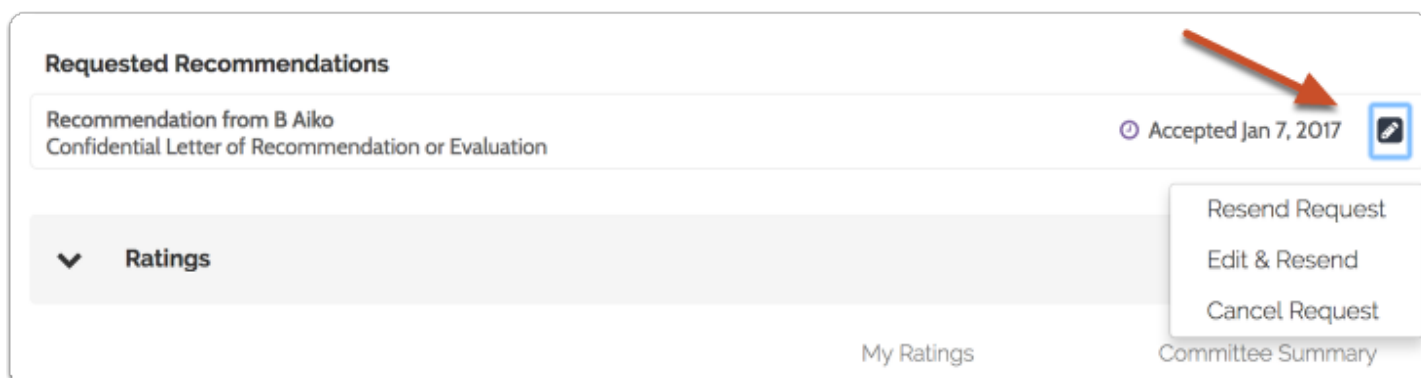
Once received, the recommendation will appear in the "Documents" section of the Applicant Profile page

Mark Applications as Complete
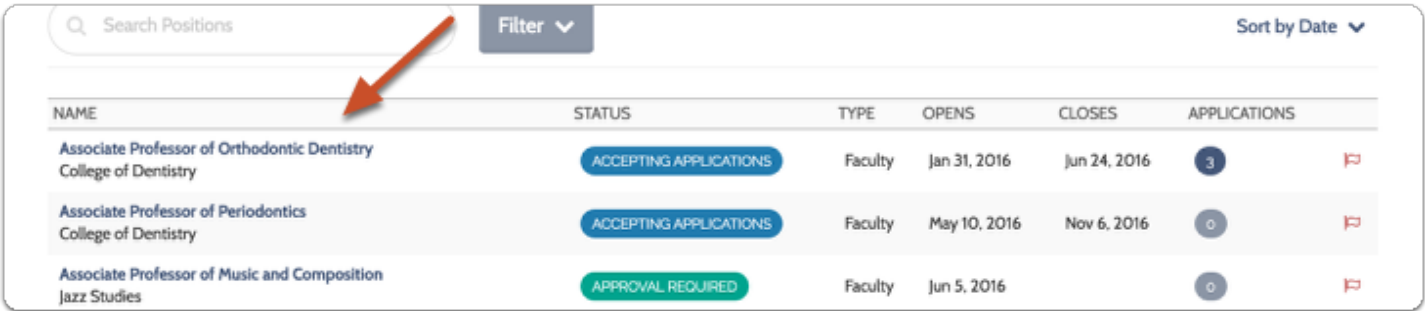
Committee Managers can mark applications as complete once all documents are uploaded and other requirements satisfied in Interfolio Faculty Search.

⚠ You can mark an application as complete, but it will be listed as "Complete Pending Letters" until any outstanding letters of recommendation are received.

Click Positions from the Navigation menu

Faculty Search

Positions

Administration

Reports

Users & Groups

Click the position title

Click the applicant's name to open the Applicant Profile page

Click the Actions button and then select Mark application as complete

The application will then be marked "Complete" on the profile page of the applicant

⚠ You can mark an application as complete, but it will be listed as "Complete Pending Letters" until any outstanding letters of recommendation are received.

Archive or Unarchive an Application

Committee Managers are able to archive and unarchive applications in Interfolio Faculty Search. Applications can be archived and unarchived from the Applications page.

Select positions from the navigation bar
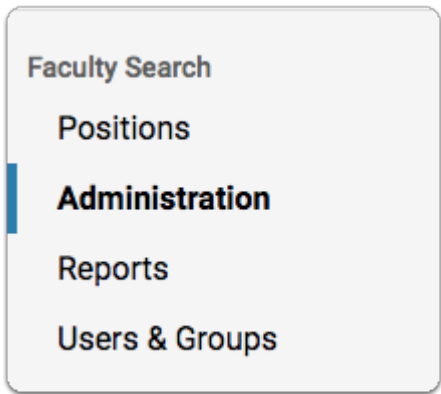
Click the position title to access applications for the position

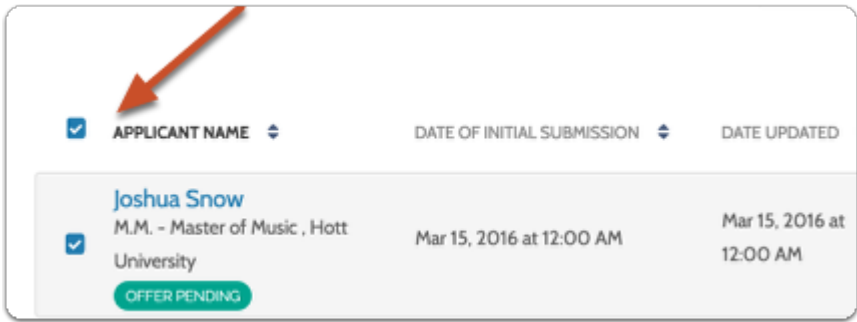# Select the application(s) to archive
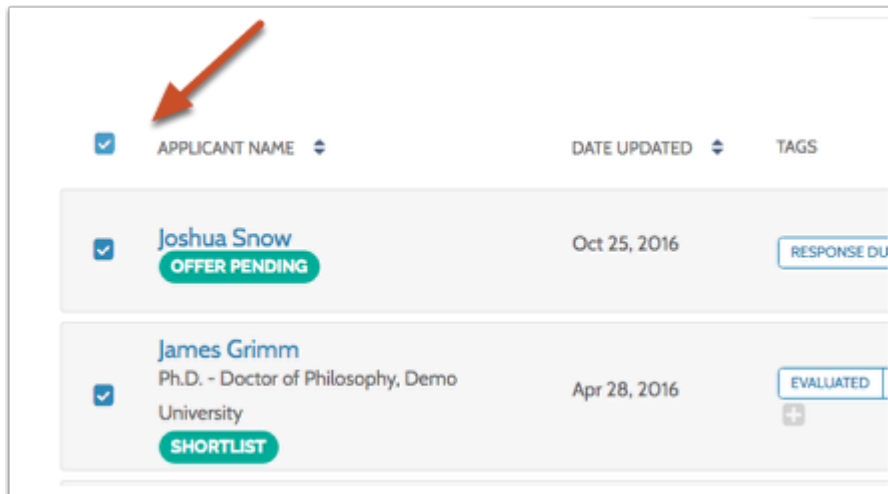
Click the "Additional Options" icon (to the right of the page) and select "Archive" to archive the selected applications
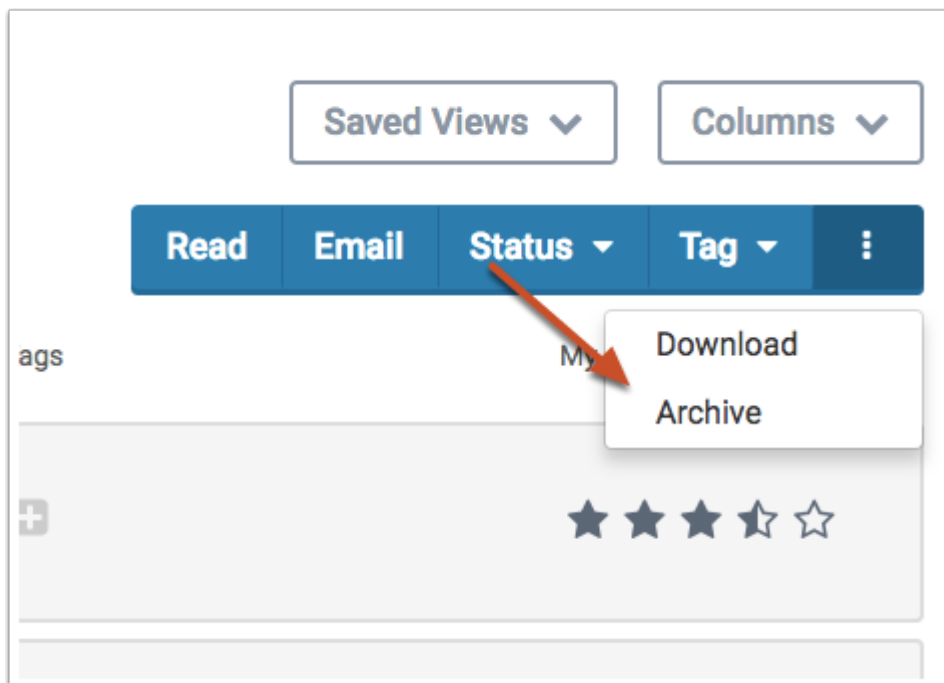
To unarchive an application, click the "Filter" button and select "Archived" to the right of the page

This will filter the list to display only archived positions.

Select one or more names in the list to unarchive

Click the "Additional Options" icon (to the right of the page) and select "Unarchive" to unarchive the selected applications

Remember to clear the "Archived" filter to view active applications

Why can't Evaluators see the applicants?

If Evaluators can't see the applications for a position, check to make sure they have been added to the search committee, that the position status allows Evaluators to review applications, and that the position or application has not been archived.

Committee Managers or Administrators must add Evaluators as new users to the system, but these users must also be assigned to the search committee for a position. For more information, see this article on **adding members to a search committee.**

Also, the position status must allow for Evaluators to review applications. See this article on **position statuses**.

If the Evaluator has more than one role in the system, they may be viewing the program as the wrong user type. See this article on **how to change user scope**.

Finally, positions and applications that have been archived will not show up by default on the Positions or Applications pages, so check to make sure your Evaluators are viewing active positions.

See this article (written for Evaluators) for more information on viewing positions **"Don't see the position you are looking for?"**

Communicating with Applicants

Email Applicants

Committee Managers and Administrators can email applicants individually or in groups, as well as create automated email notifications in Interfolio Faculty Search.

🛑 **Note:** When messaging more than one applicant, recipients will never see the names or email addresses of other applicants being contacted.

Navigate to applications for the position you are managing:

1. Select Positions from the Navigation bar
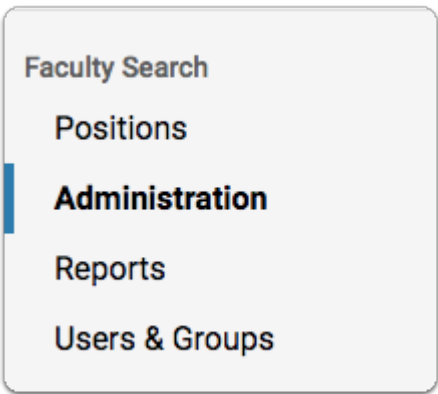
2. Click the position title to access applications for the position

---
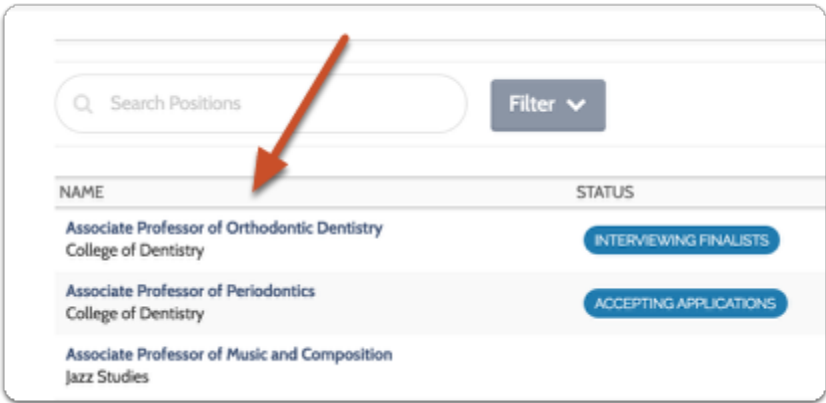
To email multiple applicants at the same time:

ℹ️ To email a group of applicants, it is best to do so from the Applications page.

1. Check the box next to the name(s) of applicants you want to email

💡 **Note:** Selecting "Applicants" at the top of the table will select all applicants in the list.

2. Click "Email" to open a window where you can type your message to all selected applicants
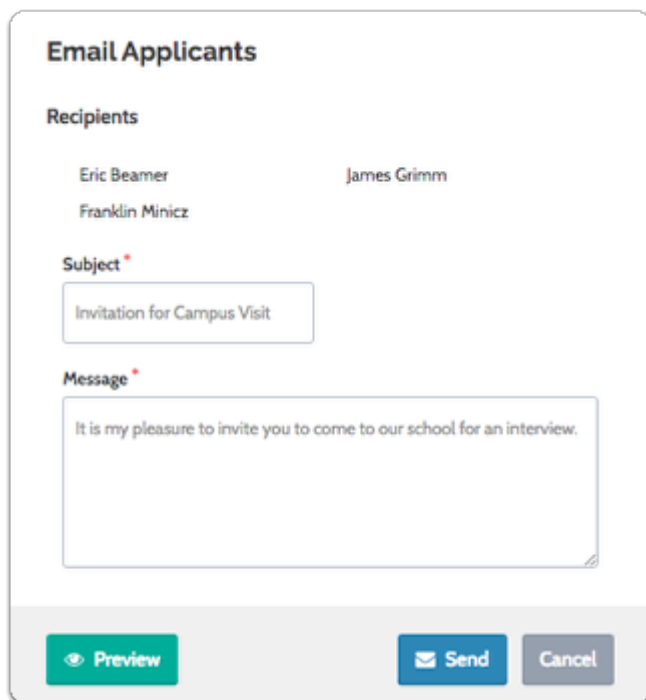
3. Enter your message, click "Preview" to see how it will appear to the recipients, and send when you are ready

To send an email to just one applicant from the "Applicant Profile" page:

1. Click the applicant's name to open their "Applicant Profile"

2. Click on the Actions button and select Email applicant

About applicant notification message templates:

[See here for more information on creating message templates.](#)

Create and Manage Message Templates

Committee Managers and Administrators can create message templates that notify applicants when the status of a position or application changes.

Message templates are created on the "Administration" page. When changing the status of an applicant or position, you can select one of the message templates you've created and send it out to applicants notifying them of the change. Of course, you will always have the opportunity to edit and confirm messages before you send them.

See here for **a list of sample message templates.**

This article explains:

1. How to create message templates to notify applicants of changes in the status of a position or application
2. How to use the message templates you create to notify applicants of a change in application or position status

1. From the navigation bar, select the Administration option

2. Open the "Message Templates" tab of the "Administration" page

3. Click "Add" to create a new message template

4. Enter the message information including the "from name," the "reply to" email address, a subject, and the message text

The messages you create will appear when you make a change in the status of a position or application:

For example, let's say you want to send a message to all applicants thanking them and letting them know that you are now reviewing applications. You will be changing the status of the position from "Accepting Applications," to "Reviewing Applications."

1. Open the "Applications" page of the position and select all applicants in the list

2. Click to change the status of the position

3. Click to send a message to applicants with the change

4. Click to open the list of available message templates

Change Status

Please confirm you wish to change the status of this position to **Reviewing Applications**.

WITH THIS STATUS ACTIVE:

- Applicants **cannot** view this status.
- Applicants **cannot** update their application materials.
- Evaluators **can** review applications to this position.

☑ Send a message to all applicants with this change

Select a message template

No Template ⌄

From Name *

Beverly Brown

Reply to email address *

blothar.brown@interfolio.com
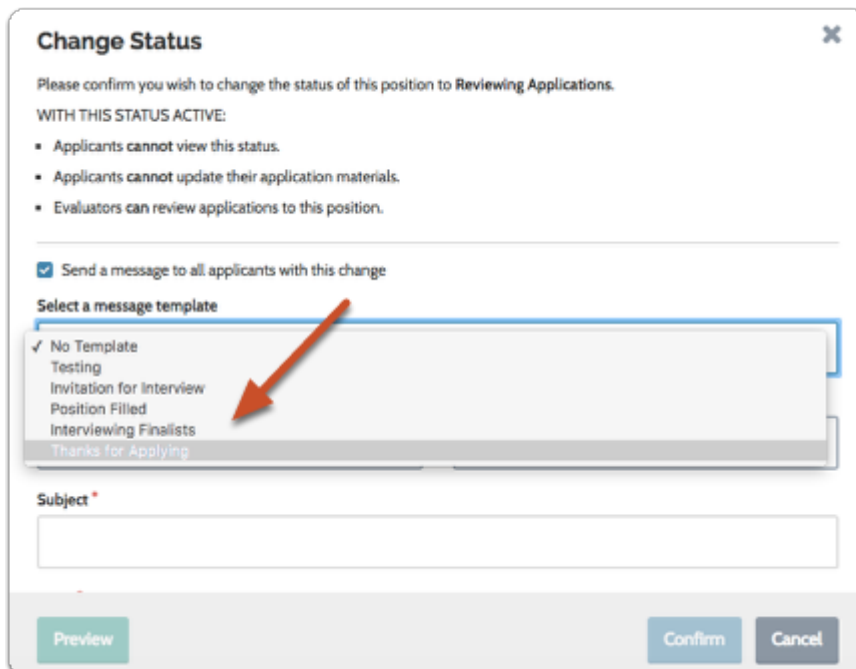
5. Select the template from the list

Change Status

Please confirm you wish to change the status of this position to **Reviewing Applications**.

WITH THIS STATUS ACTIVE:

- Applicants **cannot** view this status.
- Applicants **cannot** update their application materials.
- Evaluators **can** review applications to this position.

☑ Send a message to all applicants with this change
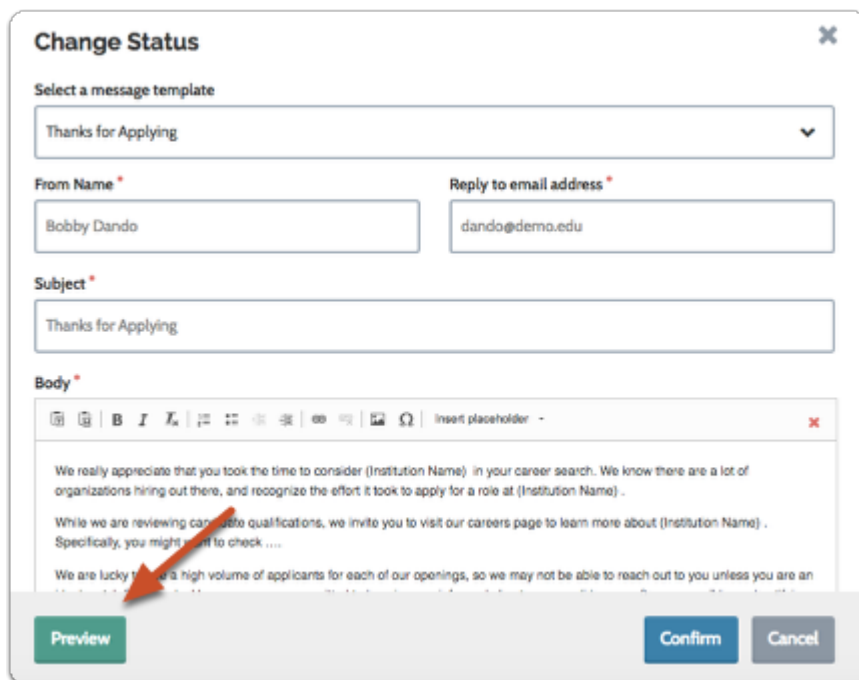
Select a message template

✓ No Template
Testing
Invitation for Interview
Position Filled
Interviewing Finalists
Thanks for Applying

Subject *

Preview   Confirm   Cancel

6. Confirm the message and make any necessary changes. Click "preview" to see how the message will appear to recipients.

7. Click "Confirm" to send the message, or "Edit" to make changes

For application statuses, the process is the same:

For example, let's say you want to send a message to only some applicants inviting them to an interview.

1. On the applications page, select the applicants you want to notify

2. Select the new application status

3. Confirm the change and select "Send message to selected applicants with this change"

4. Select the message template from the drop down list as shown below:

5. Click "Preview" to see how the message will appear to the applicant, and send when you are ready

See here for a list of sample message templates.