



interfolio

Annual Faculty Review

Department Administrator and Supporting Staff Training

Demonstration Agenda

1. Interfolio Key Concepts
2. Interfolio User Roles
3. Administrator Role and Functionality - Demonstration
 - a. Search for Case
 - b. Manage a Case
 - i. [Upload Candidate Materials/ Files](#)
 - ii. Communications - Download, Email
 - iii. Move Case Forward/Backward, if needed
 - iv. Close a Case, if needed
- How to Find Support

What is Interfolio?

Interfolio an online system for carrying faculty reviews, built to help academic institutions ensure that these processes are transparent, equitable, efficient, and well documented.

Key Terms within Interfolio

Cases: The lifecycle of a candidate as they progress through a standardized review cycle.

Packet: The collection of materials by which a candidate is being reviewed.

User Roles:

Administrators

- Add files to candidates packet on their behalf
- Can help move cases forward/backward
- Communicate with faculty within the platform

Candidates

- Complete a packet with their materials to submit for review.

Another way to Log In

The image shows a screenshot of the interfolio website's sign-in interface. At the top, the navigation bar includes the interfolio logo, menu items like 'Products', 'Challenges', 'Services', 'About Us', 'Resources', and 'News & Events', a 'Get a Demo' button, and a 'Log In' link. The 'Log In' link is circled in red. Below the navigation, a sign-in modal is displayed. On the left, it says 'Smart P' and 'Smart T'. Below that, it reads: 'We are on a mission to enable y success with faculty-first techn are here as a partner as you tra and promotion, appointment m to fully online processes. We in best practices from peers for n'. The modal has a 'Sign In' title and a 'Sign in with email' section with 'Email *' and 'Password *' fields. To the right, under 'Or sign in with:', there are buttons for 'Partner Institution' and 'Google'. A red arrow points from the 'Log In' link to the 'Partner Institution' button. At the bottom of the modal, there is a 'Sign In' button and a 'Forgot your password?' link.

Interfolio Resources - for Technical Support

Product Help Center

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

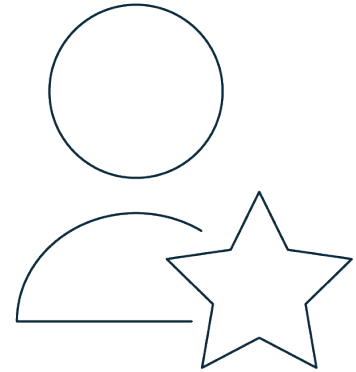
product-help.interfolio.com

Scholar Services



Call, email, or chat with our Scholar Services team

Phone: [\(877\) 997-8807](tel:8779978807)

Email: help@interfolio.com



Interfolio Pro Tips/ Universal Practices

- Preferred Browsers: Google Chrome  and Mozilla Firefox 
- Ensure you are always using an up-to-date browser

