

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.

The screenshot shows the Interfolio account dashboard for Scott Harris. The page is titled "Welcome back, Scott Harris" and features a "Your Action Items" section with five items, each with a right-pointing arrow icon. The items are: "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), and "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). Below the action items is a section titled "Additional Assigned Items" and a search bar with the placeholder text "Search by keyword". The left sidebar contains a navigation menu with categories: Home, Faculty 180, Announcements & Help, Profile, Activities, Evaluations, Forms & Reports, Vitas & Biosketches, Find Colleagues, Account Access, Administration, Faculty Search, Positions, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases, and Templates.

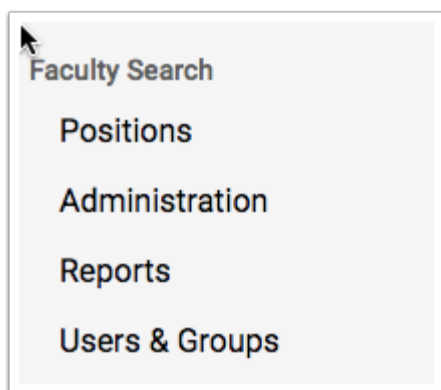
## Institutional Branding

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


## The Faculty Search Navigation Bar

-  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.

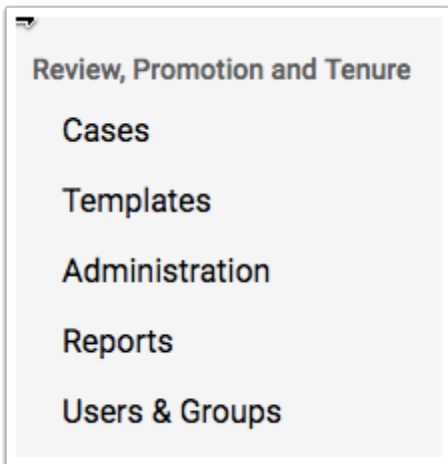
## Click "View Positions" to view your active searches



## The Review, Promotion, and Tenure dashboard:

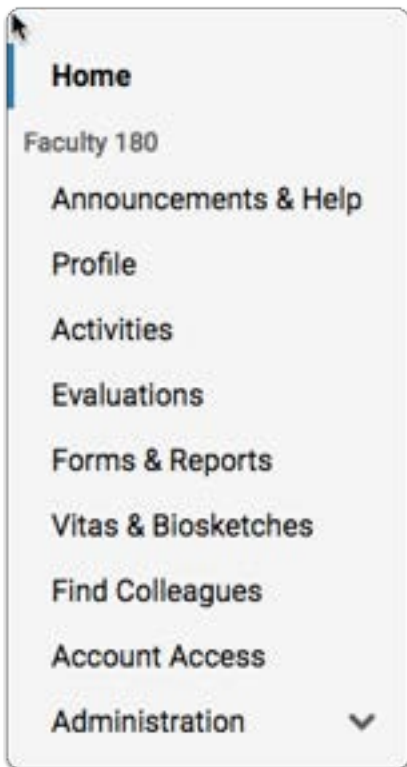
-  Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Committee Managers or committee members in the program.

Click "View Cases" to access the cases you are managing or evaluating



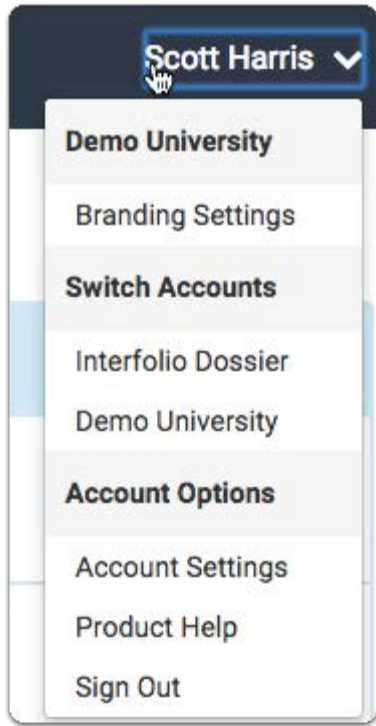
## The Faculty180 Navigation Bar

- 💡 Users will only see the relevant pages, depending on institutional settlings.  
All administrative settings are in the Administration section



## 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:

**i** 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.



## Settings

- Basic Information >
- Email & Communications
- ID Numbers
- Subscription & Billing
- Signing in & Password

### Personal Information

First Name \*

Last Name \*

Status (Pick the option that best describes you) \*

Position Title

Organization

Scholarly Discipline \*

I am or would use Dossier to ... \*

- Apply to jobs in higher education
- Apply to alternative academic jobs
- Apply to grants
- Apply to graduate degree programs

## Communications

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

- Basic Information
- Email & Communications >
- ID Numbers
- Subscription & Billing
- Signing in & Password

### Email + Add Email

Email notifications related to your Dossier account (such as renewal notices) will only be sent to your primary email address.

Primary **scott.harris@interfolio.com**

If you have another account under a different email address you can merge the accounts to access all the information in one place. [Learn more about merging accounts](#)

[Merge Accounts](#)

#### Additional Email Addresses

You can sign in with these email addresses and your Dossier password.

[Make Primary](#) ✕

### Communications

Note: you will always receive important messages and notifications about your account, such as when you reset your password, or when a requested letter or evaluation arrives.

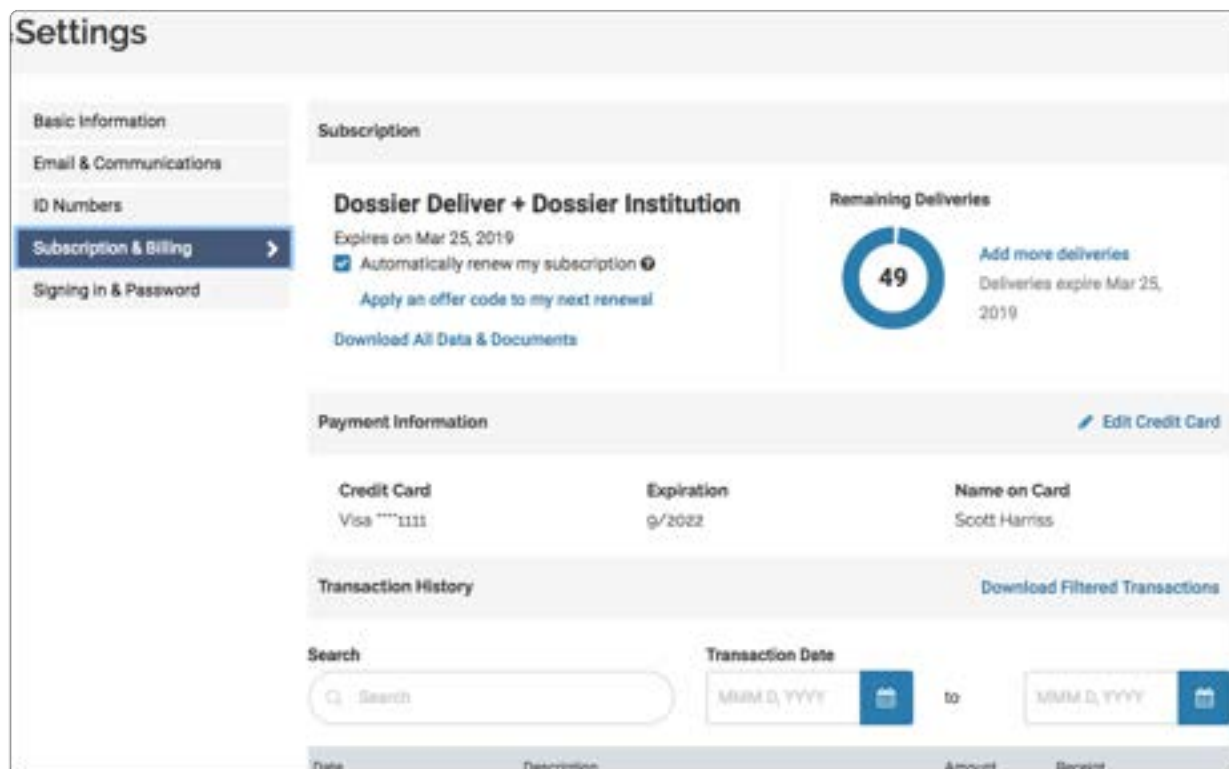
## ID numbers

Need to add ID numbers regularly to your deliveries? If so, then 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 delivery 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

The screenshot shows the 'Settings' page with a sidebar on the left containing the following menu items: Basic Information, Email & Communications, ID Numbers, Subscription & Billing, and Signing in & Password (which is highlighted with a blue bar and a right-pointing arrow). The main content area is titled 'Signing In' and includes a 'Default account' section with the text 'When I sign in, take me to the following account by default:'. Below this text are three radio button options: 'Demo University' (which is selected), 'Dossier', and 'Ask me when I sign in'. A note follows: 'Note: If you are prompted to sign in when attempting to access a link, we will always take you to that link after you sign in regardless of this setting.' Below the 'Signing In' section is a 'Password' section with a note: 'Note: this sets the password for your Interfolio account only. If you log into Interfolio through your Google account or using your Institutional ID and password, you will need to contact Google or your institution to change your password.' Underneath the note are two input fields: 'Enter your current password \*' with a text box containing 'Current password', and 'Enter your new password \*' with an empty text box.

## 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.

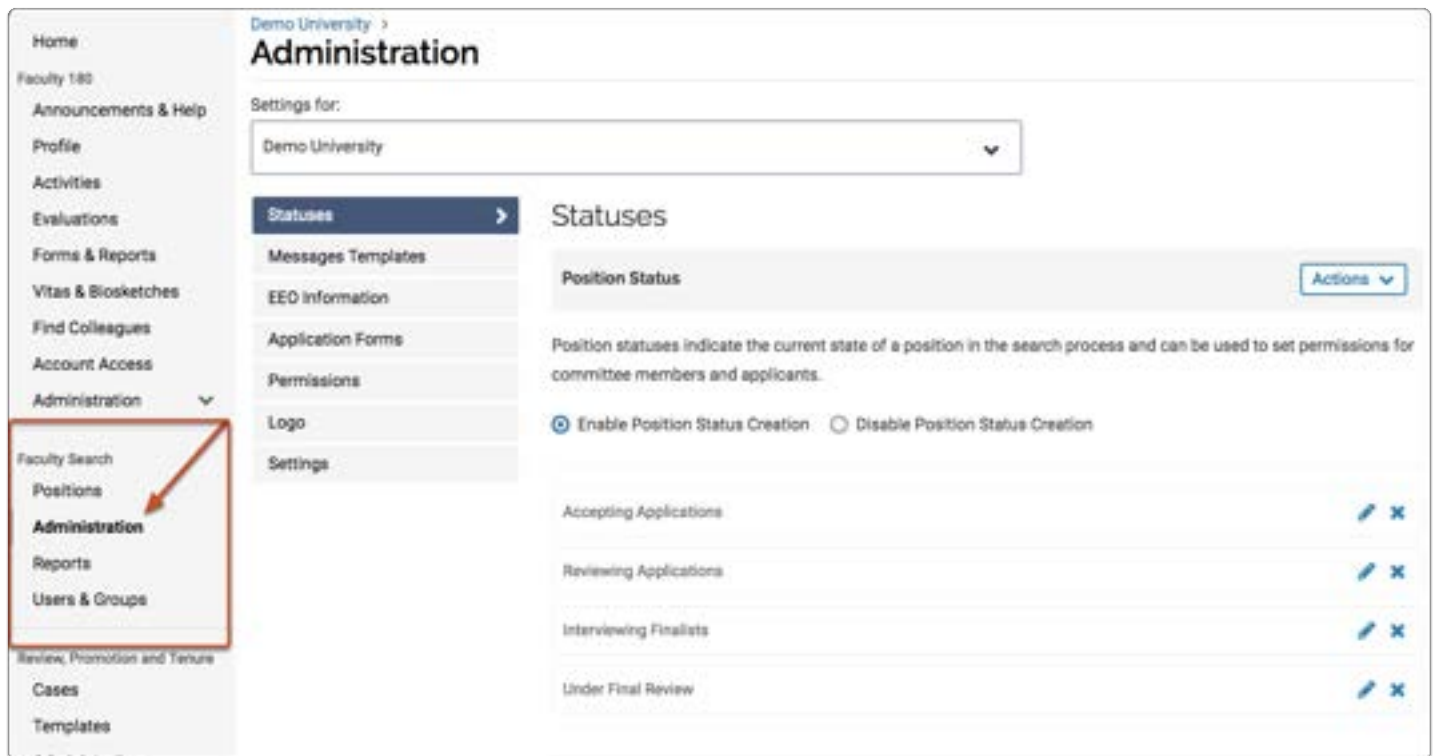
Depending on their administrative privileges, from the "Administration" page, users can:

- 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 manage EEO statements
- Create and manage application forms (including EEO forms)
- Set communication settings to enable or disable comments and tags

 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"

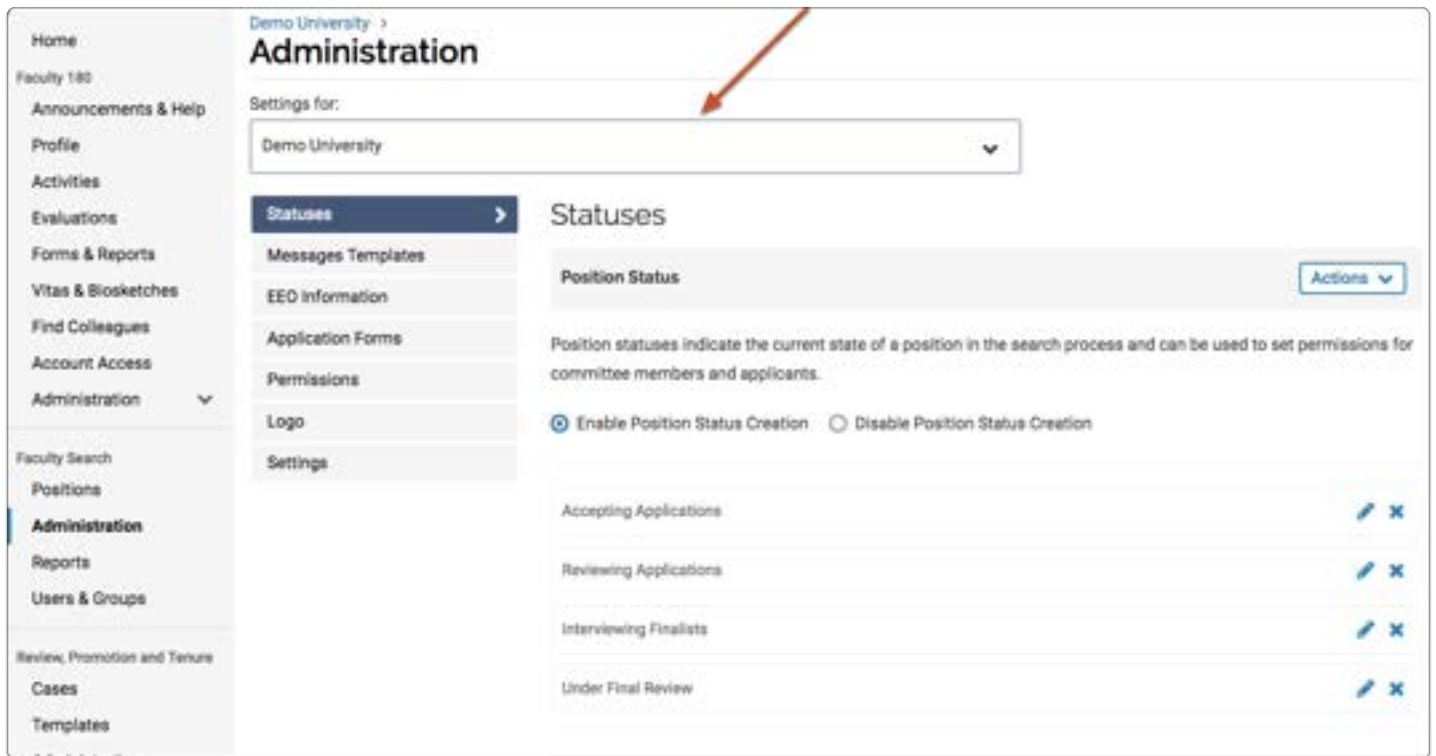


Always make sure you are viewing settings for the correct unit or position

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](#).

**Statuses**

Messages Templates

EEO Information

Application Forms

Permissions

Logo

Settings

## Statuses

**Position Status** Actions ▾

Position statuses indicate the current state of a position in the search process and can be used to set permissions for committee members and applicants.

Enable Position Status Creation  Disable Position Status Creation

Accepting Applications	<span>✎</span> <span>✕</span>
Reviewing Applications	<span>✎</span> <span>✕</span>
Interviewing Finalists	<span>✎</span> <span>✕</span>
Under Final Review	<span>✎</span> <span>✕</span>

**Application Status** Actions ▾

## 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](#).



Demo University >  
**Administration**

Settings for:  
 Demo University

- Statuses
- Messages Templates**
- EEO Information
- Application Forms
- Permissions
- Logo
- Settings

### Templates

Templates Add

Customize messages to send to applicants when the status of a position or application changes. Templates can be used at this and any unit below. You will have the opportunity to edit and confirm messages before sending them.

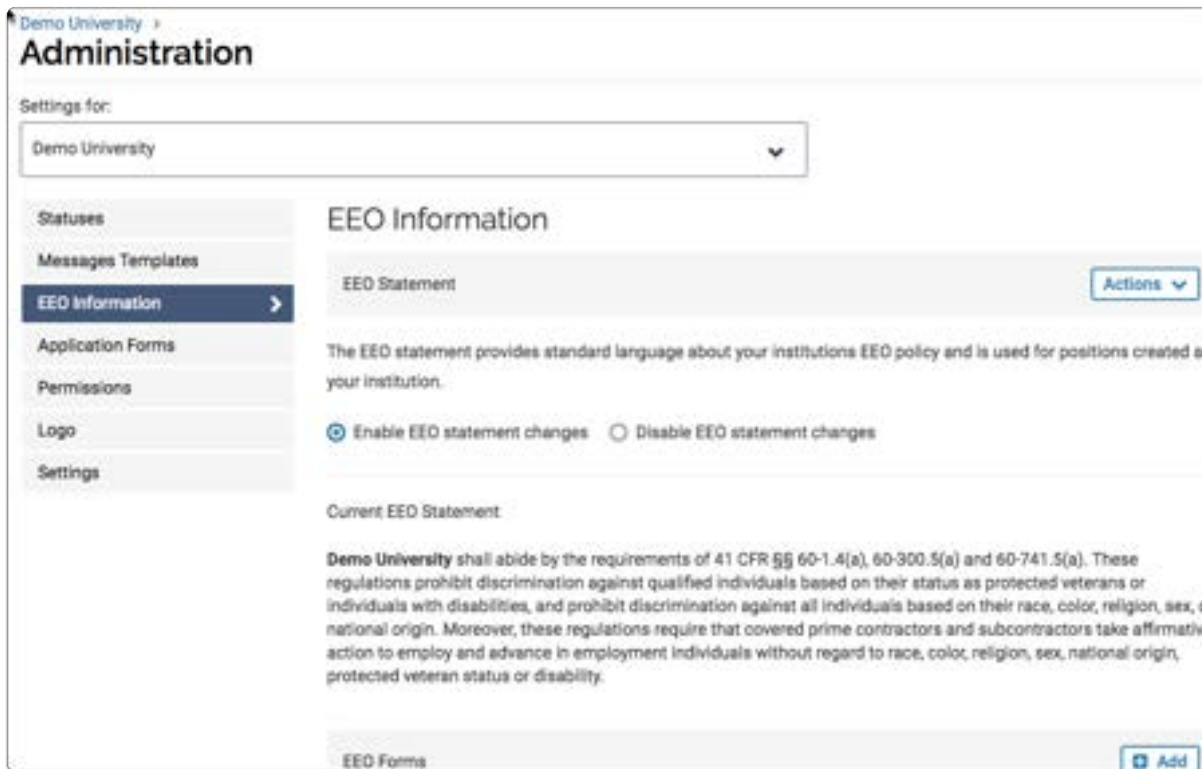
Search by subject or unit name

Subject	Created at	Actions
Interview invitation	Demo University	
Invitation for interview	Department of Geriatric Nursing	

## 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](#).

- Statutes
- Messages Templates
- EEO Information
- Application Forms >
- Permissions
- Logo
- Settings

## Application Forms


Application Forms Add

**Search by form or unit name**

Form Name ^	Created at ^		
Additional information	Department of Geriatric Nursing	Required	✎ ✕
Another test form	Demo University		✎ ✕
EEO	College of Arts and Sciences	Required	✎ ✕
Test	Demo University	Required	✎ ✕

## 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.](#)

**Permissions**

**Comments**

Comments enable reviewers to make observations on applications and are visible to all reviewers for that position. Blind review can be turned on for specific positions to prevent reviewers from seeing each other's comments.

Comments Enabled  Comments Disabled

**Tags**

Tags are bits of text that can be added to an applicant's record to help sort, categorize, and quickly identify applications. To learn more, read about how to [Use Tags to Mark and Sort Applications](#).

Tags Enabled  Tags Disabled


**Position Approval**

Position approval requires an administrator at your institution to approve positions created at your institution. To learn more, read about how to [Require Approval to Post New Positions](#).

Position Approval Required  Position Approval Not Required

## 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](#).

Demo University >

# Administration

Settings for:


Demo University

- Statuses
- Messages Templates
- EEO Information
- Application Forms
- Permissions
- Logo**
- Settings

## Logo

Logo Change

This logo will be displayed on any position published by this unit. For best results, use a logo with a white or transparent background, maximum file size of 20KB, and in one of the following formats: PNG, JPEG, JPG or GIF.



## Settings

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

Statuses

Messages Templates

EEO Information

Application Forms

Permissions

Logo

**Settings**

## Settings

Public Position List

Interfolio provides a public link to a list of all the published positions available at your institution. You can use this link to advertise the positions available on your institutional website or other places where you provide a list of available positions.

**List Name**  
 Demo University Open Positions Edit

**URL**  
<https://apply-alpha.interfolio.com/10207/positions> Copy URL

**Equal Employment Opportunity Statement**  
 This page displays the EEO statement for your institution. [Manage EEO Statement](#)

**Demo University** shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

# 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, and if given access rate 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 college. The 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 Interfolio 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



The screenshot shows the Interfolio Faculty Search interface. At the top, there is a search bar with the text "Search Positions" and a "Filter" dropdown menu. To the right, there is a "Sort by Date" dropdown menu. Below the search bar is a table with the following columns: NAME, STATUS, TYPE, OPENS, CLOSES, and APPLICATIONS. The table contains two rows of data. The first row is for "Associate Professor of Orthodontic Dentistry College of Dentistry" with a status of "ACCEPTING APPLICATIONS", type of "Faculty", opens on "Jan 31, 2016", closes on "Jun 24, 2016", and has 2 applications. The second row is for "Associate Professor of Periodontics College of Dentistry" with a status of "ACCEPTING APPLICATIONS", type of "Faculty", opens on "May 10, 2016", closes on "Nov 6, 2016", and has 0 applications. A red arrow points to the "NAME" column header.

NAME	STATUS	TYPE	OPENS	CLOSES	APPLICATIONS
Associate Professor of Orthodontic Dentistry College of Dentistry	ACCEPTING APPLICATIONS	Faculty	Jan 31, 2016	Jun 24, 2016	2
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS	Faculty	May 10, 2016	Nov 6, 2016	0

Click "Positions Actions" and then the View Committee Option

Demo University > Positions >  
**Assistant Professor of Landscape Architecture**

Unit: Department of Architectural History | Status: Accepting Applications [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2015

**APPLICANTS** (5 of 5)

Keyword Search [Filter]

Position Actions

- Edit Position
- View committee
- View position details
- View referral sources
- Tour this page
- Add new applicant
- Close position

My Overall Rating

Click "Edit"

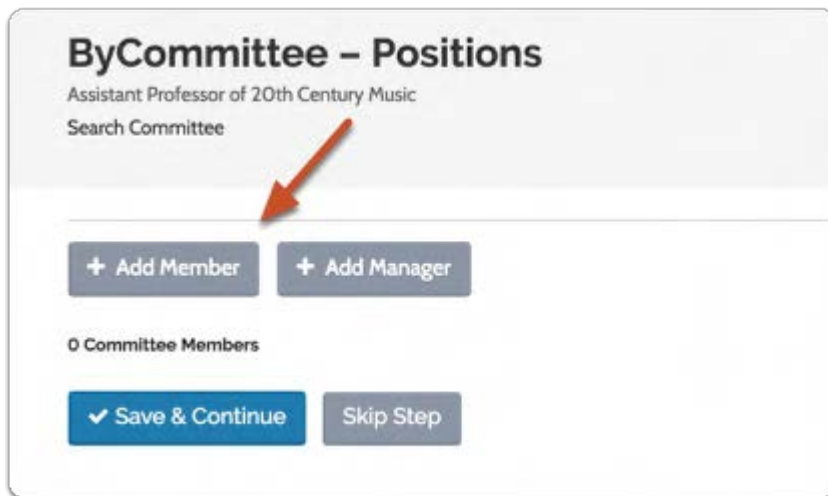
**Committee**

**Managers**  
Sandra Carol

**Evaluators**  
Biertha Groening  
Maxwell Rush  
Stephanie Bigsley  
Beverly Brown

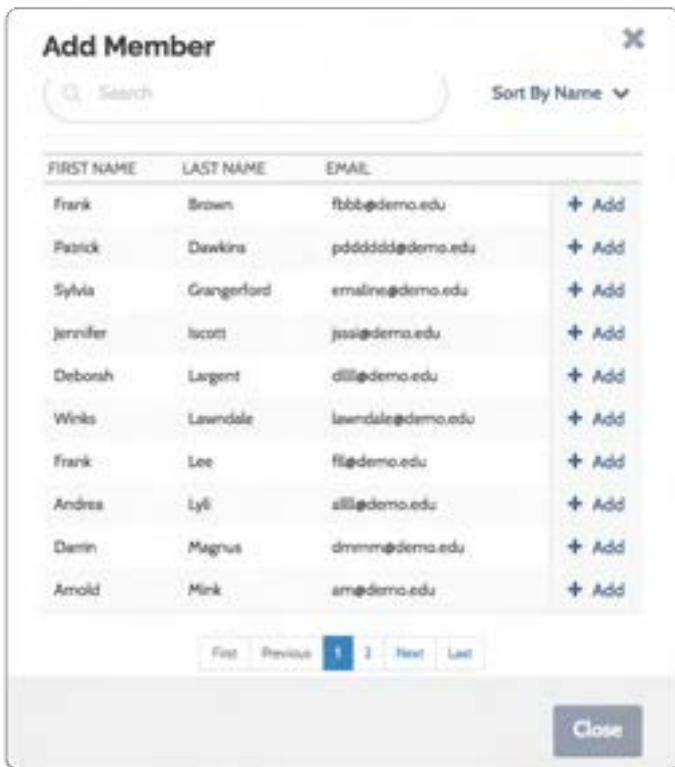
Edit Close

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

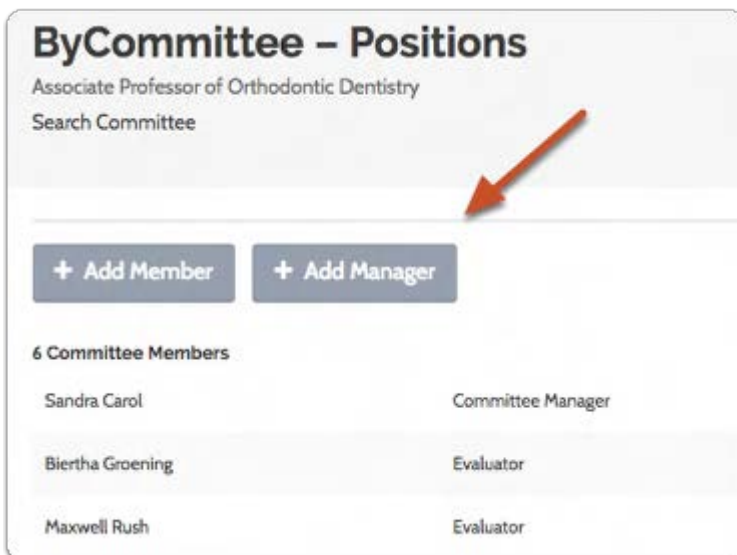


Search for the user by first or last name, and click "Add" to add them to the committee

 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

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

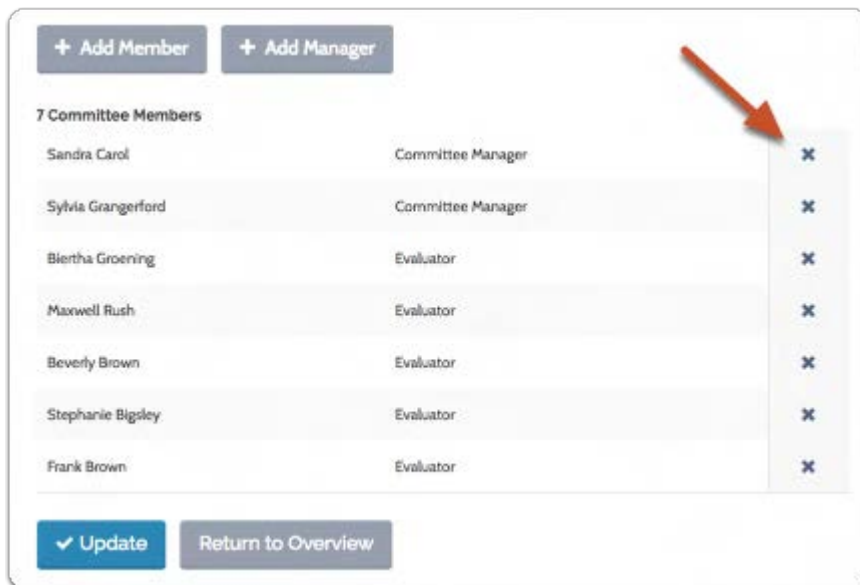
unit in which you are working. If you don't see the user you are looking for you, may need to [assign the user the role of Committee Manager](#) for the unit in which you are editing the position.

FIRST NAME	LAST NAME	EMAIL	
Sandra	Carol	sct@demo.ede	+ Add
Sylvia	Grangerford	emaline@demo.edu	+ Add
Deborah	Largent	dlill@demo.edu	+ Add

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

7 Committee Members	
Sandra Carol	Committee Manager
Sylvia Grangerford	Committee Manager
Biertha Groening	Evaluator
Maxwell Rush	Evaluator
Beverly Brown	Evaluator
Stephanie Bigsley	Evaluator
Frank Brown	Evaluator

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



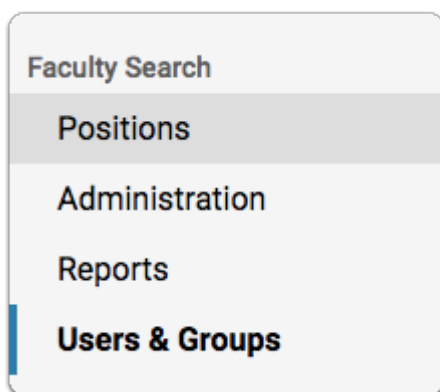
The screenshot displays a user interface for managing committee members. At the top left, there are two buttons: '+ Add Member' and '+ Add Manager'. Below these, the text '7 Committee Members' is displayed. A table lists the members with their names and roles. To the right of each row is a small 'X' icon, which is highlighted by a red arrow. At the bottom of the interface, there are two buttons: 'Update' (with a checkmark icon) and 'Return to Overview'.

Name	Role	Action
Sandra Carol	Committee Manager	X
Sylvia Grangerford	Committee Manager	X
Biertha Groening	Evaluator	X
Maxwell Rush	Evaluator	X
Beverly Brown	Evaluator	X
Stephanie Bigsley	Evaluator	X
Frank Brown	Evaluator	X

# 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.

University of Awesomeness >

## Users, Committees & Units

Users Committees

Search Users

Sort By Name ▾ Browse By All Units ▾ **Add User**

User	Email	Unit & Role	
Logic (updated) again 2016-18-2	logic2016-18-2@interfolio.com	Evaluator	
Logic 2016-20-1	logic2016-20-1@interfolio.com	Evaluator	
Logic wat 2017-5-1 wat	logic2017-5-1wat@interfolio.com	Evaluator	
Logic 2017-5-3	logic2017-5-3@interfolio.com	Evaluator	
Test 25-1	test25-1@interfolio.com	Evaluator	
CM Add 1	cmadd1@interfolio.com	Evaluator	
CM Add Test 1	cmaddtest1@interfolio.com	Evaluator	

Fill out the "Add User" form with the user's name and email address

### Add User ✕

First Name  Last Name

Email

Send new users a welcome message.

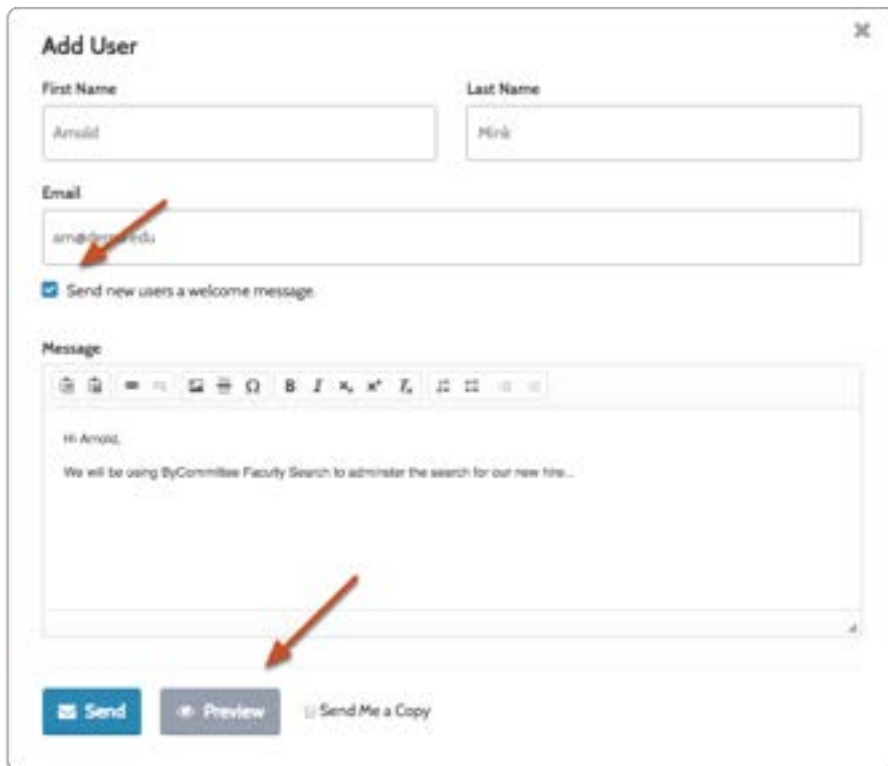
Message

Hi Arnold,  
We will be using ByCommittee Faculty Search to administer the search for our new hire...

Send Me a Copy



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



The screenshot shows a web form titled "Add User". It has three input fields: "First Name" with the value "Arnold", "Last Name" with the value "Perb", and "Email" with the value "arnold@perb.edu". Below the email field is a checked checkbox labeled "Send new users a welcome message". Underneath is a "Message" section with a rich text editor containing the text "Hi Arnold, We will be using ByCommittee Faculty Search to administer the search for our new hire...". At the bottom of the form are three buttons: "Send" (blue), "Preview" (grey), and "Send Me a Copy" (grey). Two red arrows point to the "Email" field and the "Preview" button.

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 User**

First Name \*  Last Name \*

Email \*

Send new users a welcome message

Demo University has invited you to join  
ByCommittee Faculty Search.

[ACCESS NOW](#)

This link will expire in 30 days. After 30 days, you can reactivate  
the account by [requesting a new password](#).

Welcome, we have added you as a user...

Powered by Interfolio's ByCommittee | [Helpdesk Support](#)

## 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 \***  **Last Name \***

**Email \***

**UNITS**


Assign the user to a unit from the dropdown list

**Edit User** ✕

**First Name \***  **Last Name \***

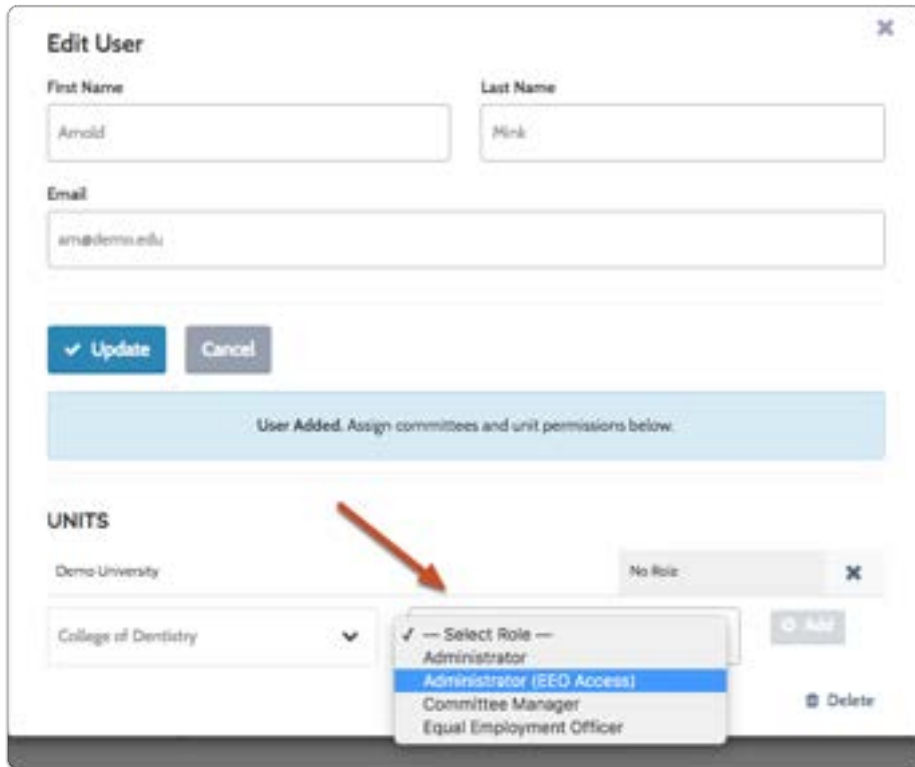
**Email \***

**UNITS**



## Select a role for the user and click "Add"

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



The screenshot shows the 'Edit User' interface. At the top, there are input fields for 'First Name' (Arnold) and 'Last Name' (Pink), and an 'Email' field (arnold@demo.edu). Below these are 'Update' and 'Cancel' buttons. A blue message box states 'User Added. Assign committees and unit permissions below.' The 'UNITS' section shows 'Demo University' with a dropdown menu set to 'College of Dentistry'. A 'No Role' dropdown is also present. A red arrow points to a dropdown menu for selecting a role, which is open and shows the following options: '— Select Role —', 'Administrator', 'Administrator (EEO Access)', 'Committee Manager', and 'Equal Employment Officer'. The 'Administrator (EEO Access)' option is highlighted. There are 'Add' and 'Delete' buttons to the right of the role dropdown.

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.

The screenshot shows the 'Edit User' form with the following fields: First Name (Arnold), Last Name (Hink), and Email (am@demo.edu). Below the fields are 'Update' and 'Cancel' buttons. A light blue banner reads 'User Added. Assign committees and unit permissions below.' Under the 'UNITS' section, there are two rows: 'Demo University' with 'No Role' and 'College of Dentistry' with 'Administrator (EEO Access)'. Below this are dropdown menus for 'Select Unit' and 'Select Role', an 'Add' button, and a 'Delete' button at the bottom right. A red arrow points to the 'Update' button.

Click "Update" when you are finished editing the user

This screenshot is identical to the one above, but with a red arrow pointing to the 'Update' button. The 'UNITS' section now shows 'College of Dentistry' with 'Administrator (EEO Access)' and the 'Demo University' row is no longer visible.

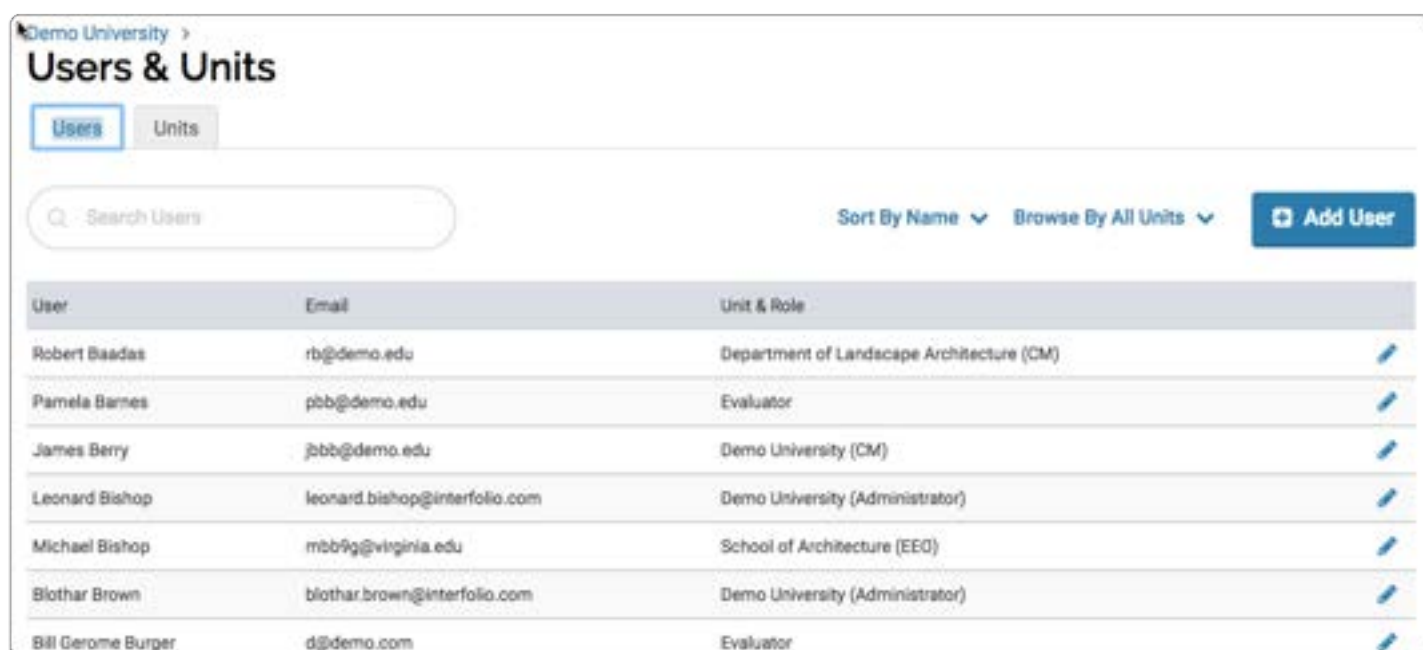
The user will appear in the list of users listed with their unit and role

USERS		
<input type="text" value="Search Users"/>		
USER	EMAIL	UNIT & ROLE
Andrea Lyli	allll@demo.edu	Evaluator
Arnold Mink	am@demo.edu	College of Dentistry (Administrator)
Blothar Brown	blothar.brown@interfolio.com	Demo University (Administrator)

# 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.

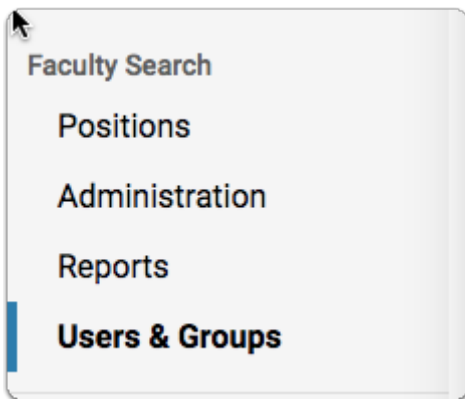
## Users are managed from the Users & Units page



The screenshot shows the 'Users & Units' page for 'Demo University'. It features a search bar, sorting options ('Sort By Name'), a filter ('Browse By All Units'), and an 'Add User' button. Below is a table of users:

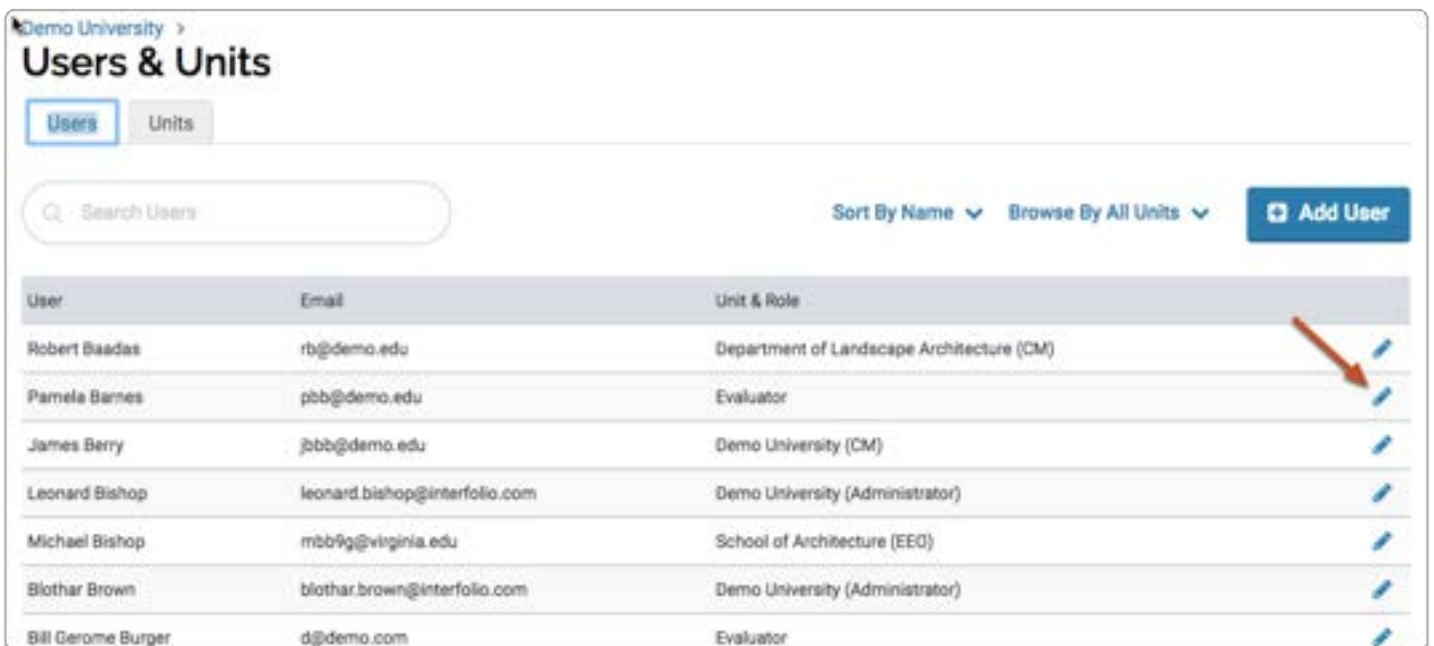
User	Email	Unit & Role
Robert Baadas	rb@demo.edu	Department of Landscape Architecture (CM)
Pamela Barnes	pbb@demo.edu	Evaluator
James Berry	jbb@demo.edu	Demo University (CM)
Leonard Bishop	leonard.bishop@interfolio.com	Demo University (Administrator)
Michael Bishop	mbb9g@virginia.edu	School of Architecture (EEO)
Blothar Brown	blothar.brown@interfolio.com	Demo University (Administrator)
Bill Gerome Burger	d@demo.com	Evaluator

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 screenshot shows the "Users & Units" page in a web application. At the top left, it says "Demo University >". Below that is the title "Users & Units" and two tabs: "Users" (selected) and "Units". There is a search bar labeled "Search Users" and two dropdown menus: "Sort By Name" and "Browse By All Units". A blue "Add User" button is on the right. Below these elements is a table with three columns: "User", "Email", and "Unit & Role". The table contains seven rows of user data. A red arrow points to a blue pencil icon in the rightmost column of the first row, indicating the edit function.

User	Email	Unit & Role
Robert Baadas	rb@demo.edu	Department of Landscape Architecture (CM)
Pamela Barnes	pbb@demo.edu	Evaluator
James Berry	jbb@demo.edu	Demo University (CM)
Leonard Bishop	leonard.bishop@interfolio.com	Demo University (Administrator)
Michael Bishop	mbb9g@virginia.edu	School of Architecture (EEO)
Blothar Brown	blothar.brown@interfolio.com	Demo University (Administrator)
Bill Gerome Burger	d@demo.com	Evaluator



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

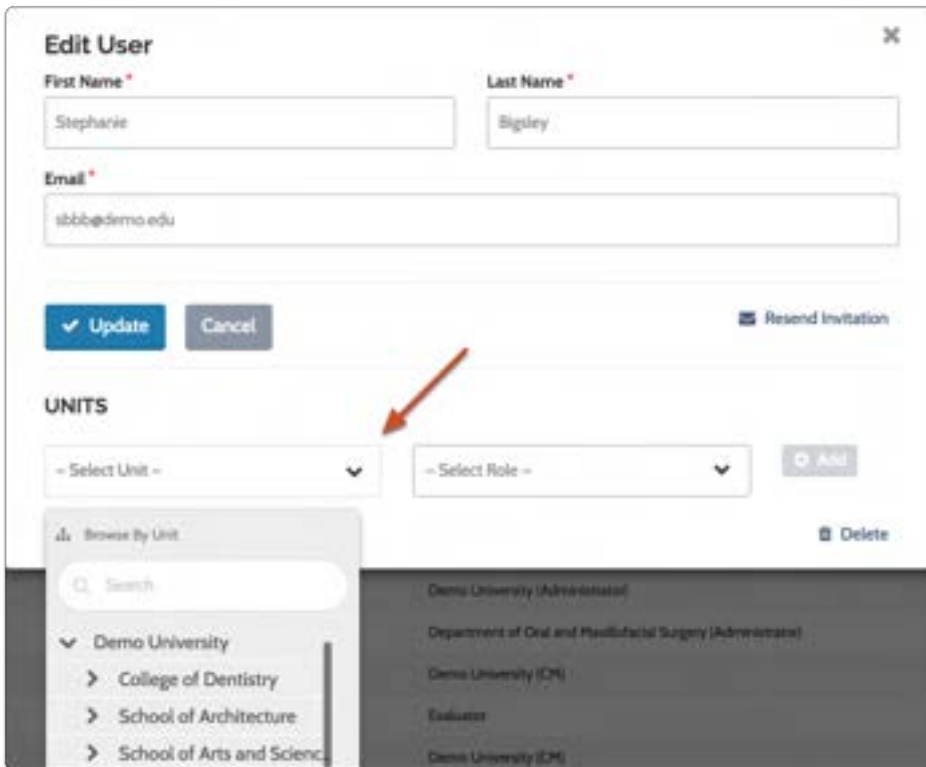
### Edit User ✕

**First Name \***  **Last Name \***

**Email \***

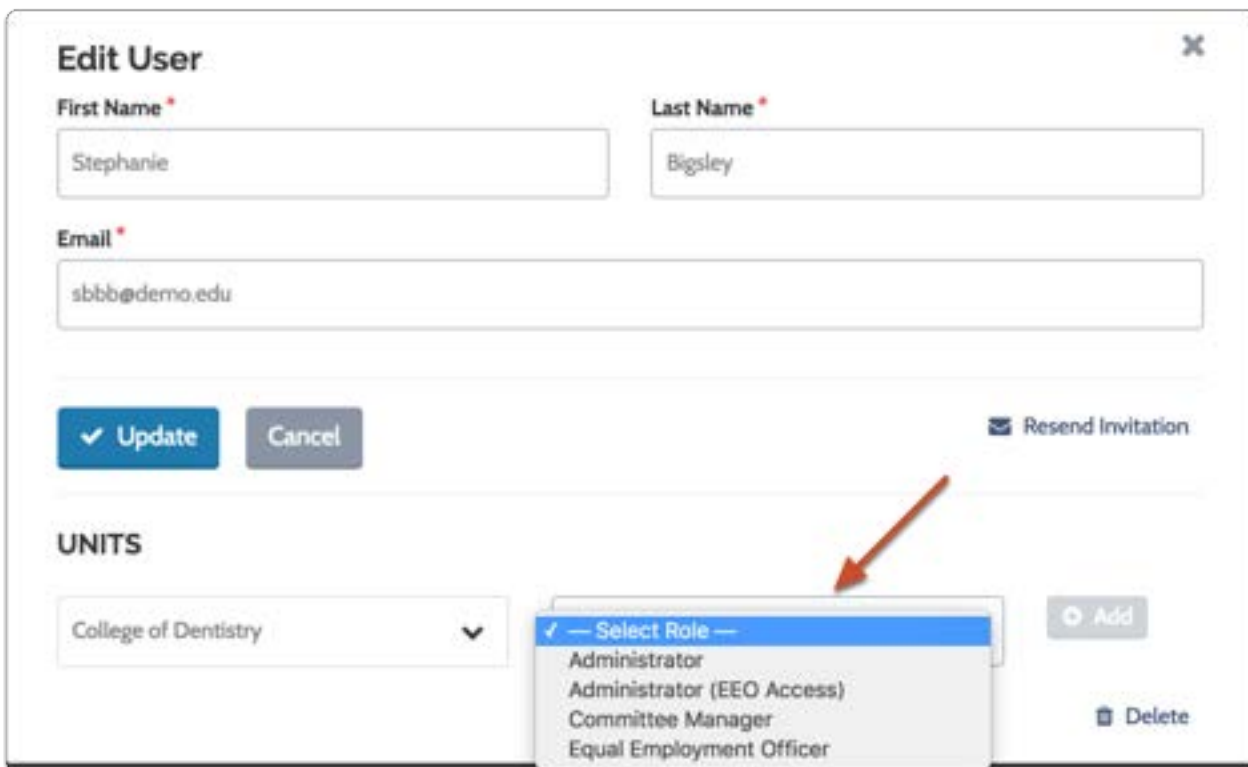
#### UNITS

Select a unit from the dropdown list



The screenshot shows the 'Edit User' form with the following fields: First Name (Stephanie), Last Name (Bigsley), and Email (sbbb@demo.edu). Below these fields are buttons for 'Update', 'Cancel', and 'Resend Invitation'. The 'UNITS' section contains two dropdown menus: '- Select Unit -' and '- Select Role -', along with 'Add' and 'Delete' buttons. A red arrow points to the '- Select Unit -' dropdown, which is open, showing a search bar and a list of units: Demo University (Administrator), Department of Oral and Maxillofacial Surgery (Administrator), Demo University (CIN), Evaluator, and Demo University (EM).

Select a role for the user in the unit



The screenshot shows the 'Edit User' form with the same fields as the previous image. The 'UNITS' section now shows 'College of Dentistry' selected in the first dropdown menu. A red arrow points to the '- Select Role -' dropdown menu, which is open, showing a list of roles: Administrator, Administrator (EEO Access), Committee Manager, and Equal Employment Officer.

Click "Add"

The screenshot shows the 'Edit User' form with the following fields and controls:

- First Name \***: Text input containing 'Stephanie'
- Last Name \***: Text input containing 'Biglsley'
- Email \***: Text input containing 'sbbb@demo.edu'
- Buttons**: 'Update' (blue), 'Cancel' (grey), and 'Resend Invitation' (checkbox).
- UNITS Section**:
  - Dropdown menu: 'College of Dentistry' (with a downward arrow)
  - Dropdown menu: 'Administrator' (with a downward arrow)
  - Add** button (grey) with a red arrow pointing to it.
  - Delete** button (grey) with a trash icon.

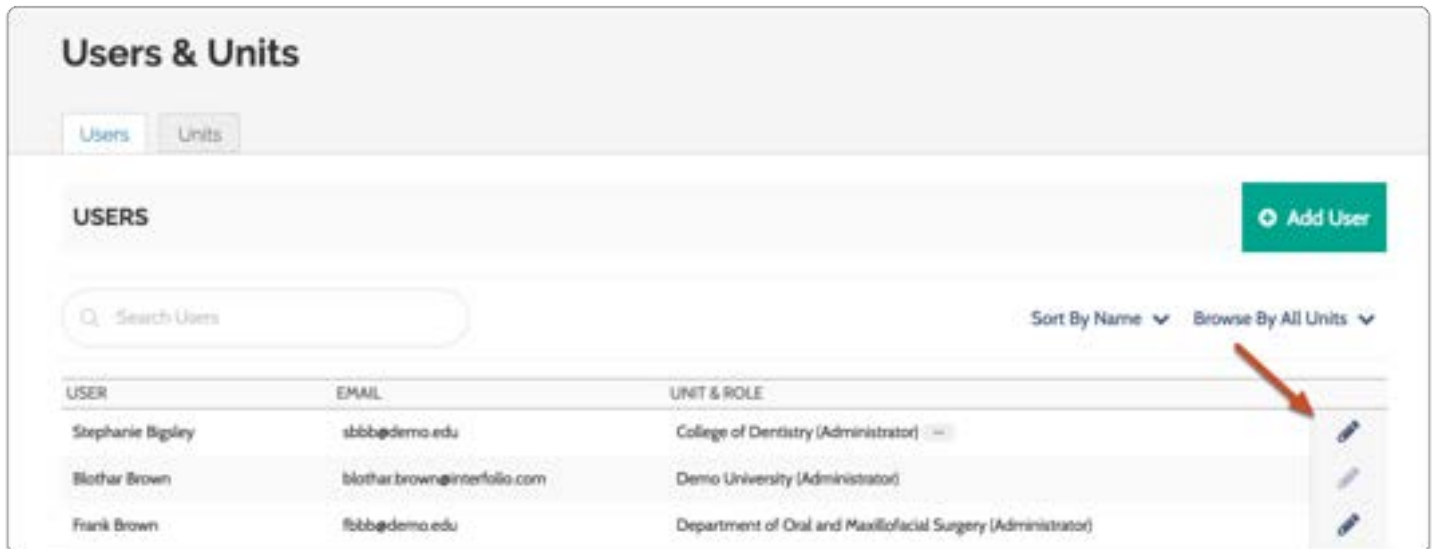
Repeat the process above to assign the user additional units and roles

The screenshot shows the 'Edit User' form with the following fields and controls:

- First Name \***: Text input containing 'Stephanie'
- Last Name \***: Text input containing 'Biglsley'
- Email \***: Text input containing 'sbbb@demo.edu'
- Buttons**: 'Update' (blue), 'Cancel' (grey), and 'Resend Invitation' (checkbox).
- UNITS Section**:
  - Dropdown menu: 'College of Dentistry' (with a downward arrow)
  - Dropdown menu: 'Demo University' (with a downward arrow)
  - Dropdown menu: '- Select Unit -' (with a downward arrow)
  - Dropdown menu: '- Select Role -' (with a downward arrow)
  - Add** button (grey) with a red arrow pointing to it.
  - Delete** button (grey) with a trash icon.
  - Role Selection Menu** (open):
    - Administrator (with a close 'X' button)
    - Committee Manager (with a close 'X' button)

To change a user's existing unit or role:

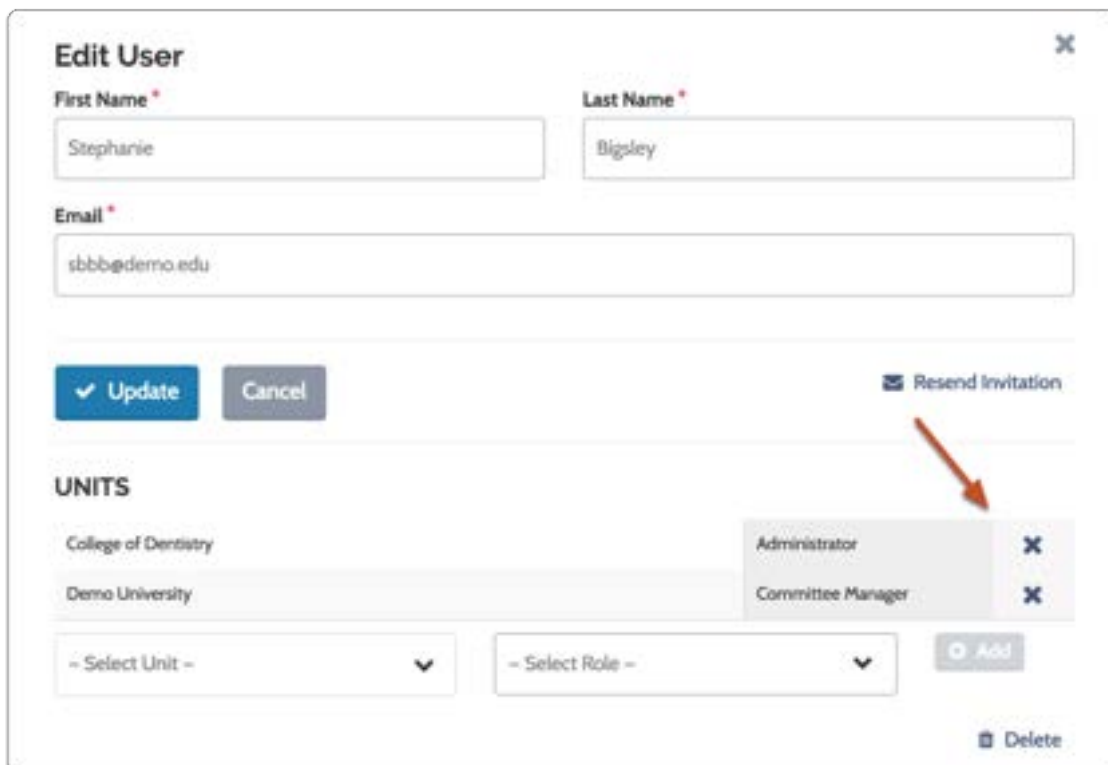
Click the blue edit pencil in the same row as the user you want to edit



The screenshot shows the 'Users & Units' management interface. At the top, there are tabs for 'Users' and 'Units'. Below the tabs is a 'USERS' section with an 'Add User' button. A search bar is present with the text 'Search Users'. To the right of the search bar are dropdown menus for 'Sort By Name' and 'Browse By All Units'. Below these is a table with three columns: 'USER', 'EMAIL', and 'UNIT & ROLE'. The table contains three rows of user data. A red arrow points to a blue pencil icon in the right-hand column of the first row, indicating the edit function.

USER	EMAIL	UNIT & ROLE
Stephanie Bigsley	sbbb@demo.edu	College of Dentistry (Administrator) [edit]
Biothar Brown	biothar.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



The screenshot shows the 'Edit User' form. It has fields for 'First Name' (Stephanie), 'Last Name' (Bigsley), and 'Email' (sbbb@demo.edu). There are 'Update' and 'Cancel' buttons, and a 'Resend Invitation' checkbox. Below the form is a 'UNITS' section. It shows a list of units: 'College of Dentistry' and 'Demo University'. For each unit, there is a dropdown menu for roles. The 'College of Dentistry' dropdown is open, showing 'Administrator' and 'Committee Manager'. A red arrow points to an 'X' icon next to the 'Administrator' role, indicating the delete function. At the bottom, there are dropdown menus for 'Select Unit' and 'Select Role', an 'Add' button, and a 'Delete' button.

## 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 \***  **Last Name \***

**Email \***

#### UNITS

Demo University	Committee Manager <span>✕</span>
College of Dentistry	Administrator (EEO Access) <span>✕</span>

# 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.

The screenshot shows a job posting on the Interfolio platform. At the top left is the Interfolio logo, and at the top right is the user name "Scott Harris". The main heading is "Assistant Professor of Landscape Architecture". Below this, it says "Demo University: Department of Architectural History". There is a table with three columns: "Location" (Washington, D.C.), "Open Date" (Sep 1, 2015), and "Deadline" (Aug 16, 2018 at 11:59 PM Eastern Time). A "Description" section follows, detailing the department's search for a full-time academic. To the right, there is an "Application Process" section with an "Apply Now" button. At the bottom left, there are "Application Instructions" and "Qualifications" sections.

To get started, select "View Positions" on your Faculty Search Account Dashboard

A vertical navigation menu for the Faculty Search Account Dashboard. The menu items are "Faculty Search", "Positions", "Administration", "Reports", and "Users & Groups". A blue vertical bar is on the left side of the menu. A red arrow points to the "Positions" item.



Click "New Position" at the top right of the Positions page

Name	Status	Type	Opens	Closes	Applications
Assistant Professor of Landscape Arc... (ID: 1269) Department of Architectural History	ACCEPTING APPLICATIONS	Faculty	Sep 1, 2015	Aug 16, 2018	5
Lecturer, Architectural History (ID: 1304) Department of Architectural History	ACCEPTING APPLICATIONS	Faculty	Apr 13, 2016	May 1, 2016	1
Associate Professor, Intercultural Stu... (ID: 1311) Department of Sociology	ACCEPTING APPLICATIONS	Faculty	Apr 21, 2016	May 29, 2016	1
Professor of Chemistry (ID: 1302) Demo University	ACCEPTING APPLICATIONS	Faculty	May 2, 2016	May 20, 2016	0

Select the unit for the position you are creating

Select Unit for Position

School of Architecture ▼

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

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

- Select the appropriate department and click "Create New Position."
- -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.

**Description & Dates**

**Position Title \***  
 Assistant Professor of 20th Century Music

**Location \***  
 Washington, DC

**Position Type \***  
 Faculty  Staff  Fellowship

**Position Opens \***  
 Jun 30, 2016

**Position Closes**  
 Jul 29, 2017

## 1.2. Describe the position including specific qualifications

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

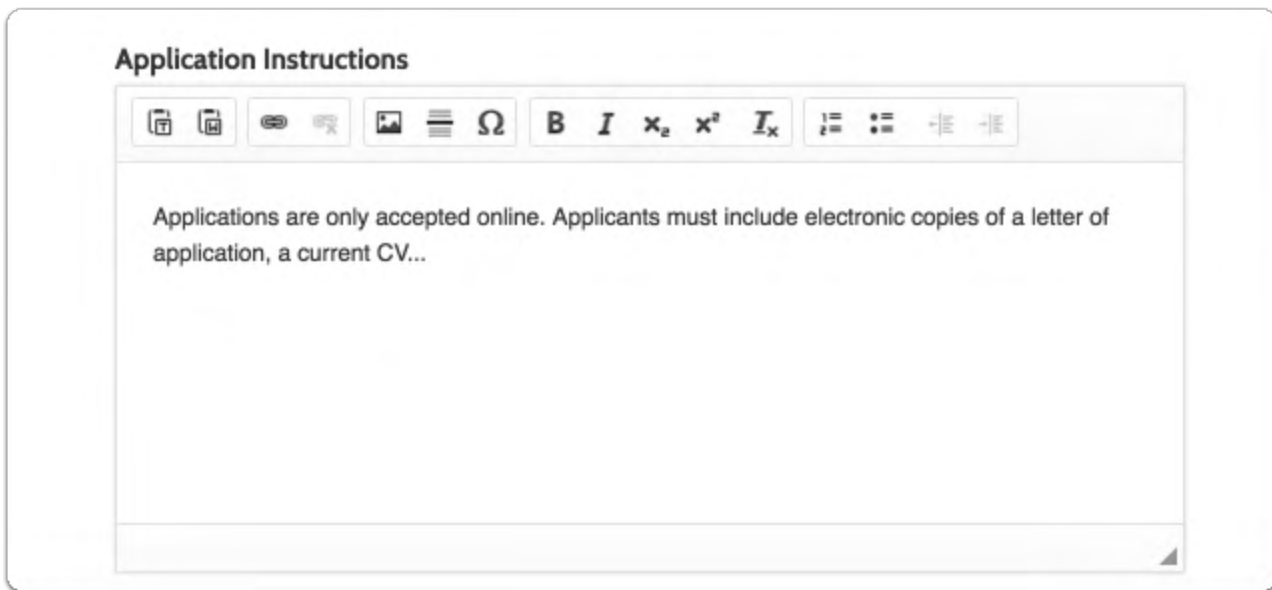
**Position Description \***

The McDonaldson Department of Music invites applicants to apply for a tenure-track position in CCS in Music to begin Fall of 2018...

**Qualifications**

Excellence in teaching is expected, both in the classroom and in mentoring students outside the classroom.

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



**Application Instructions**

Applications are only accepted online. Applicants must include electronic copies of a letter of application, a current CV...

### 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.

**Equal Employment Opportunity Statement**

It is the policy of Demo University to provide **equal employment opportunity (EEO)** to all persons regardless of age, color, national origin, citizenship status, physical or mental disability, race, religion, creed, gender, sex, sexual orientation, gender identity....

✓ Save & Continue   Skip Step

## 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.

i 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.

1	Cover Letter Please address letter to Janet Price...	 
1	CV	 
3	Confidential Letter of Recommendation or Evaluation	 

**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.

**+ 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**

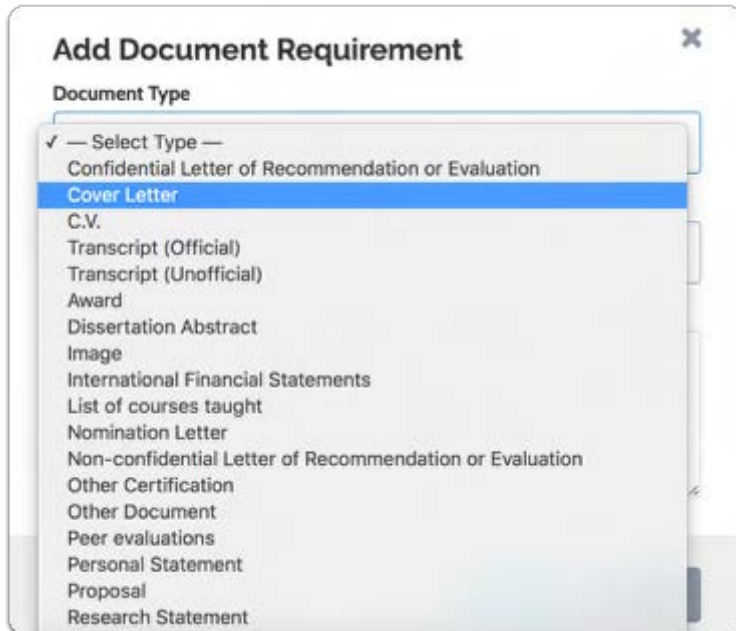
Applicants may add additional documents  
 You may give applicants the ability to include additional materials with their application. If you have documents that you recommend, but don't require as part of the application, you should select this choice.

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.

**Add Document Requirement** ✕

Document Type  
Cover Letter ▼

Number Required  
1 ▼

Requirement Note


✓ Save Cancel

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

**Add Document Requirement** ✕

Document Type  
Cover Letter ▼

Number Required  
1 ▼







Requirement Note  
Please address letter to Janet Price... 

✓ Save Cancel



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

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

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


**+ 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**



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

**+ 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.

**Subject \***

Thank You For Applying

**Body \***

The Music Department at Demo University has received your application...

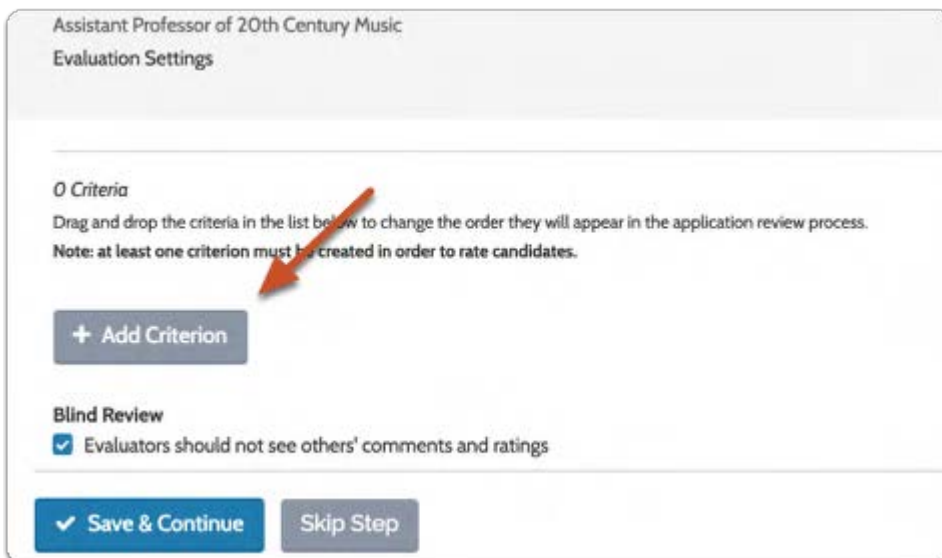
**Preview**

**Save & Continue** **Skip Step**

## 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"



Assistant Professor of 20th Century Music  
Evaluation Settings

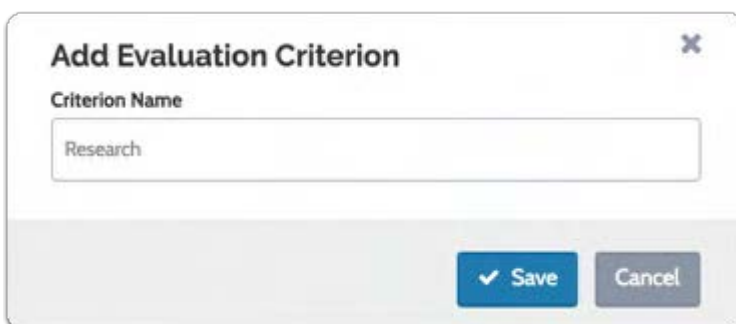
0 Criteria  
Drag and drop the criteria in the list below to change the order they will appear in the application review process.  
**Note: at least one criterion must be created in order to rate candidates.**

+ Add Criterion

Blind Review  
 Evaluators should not see others' comments and ratings

✓ Save & Continue Skip Step

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



Add Evaluation Criterion X

Criterion Name  
Research

✓ Save Cancel

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

1 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.

Research

+ Add Criterion

Blind Review

Evaluators should not see others' comments and ratings

Save & Continue Skip Step

### 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](#).

#### Application Forms

Assistant Professor of 20th Century Music

1 Forms Required

Drag and drop the documents in the list below to change the order they will appear in the document delivery packet.

Test Form Preview

+ Add Form

Applicants must complete an Equal Employment Opportunity form

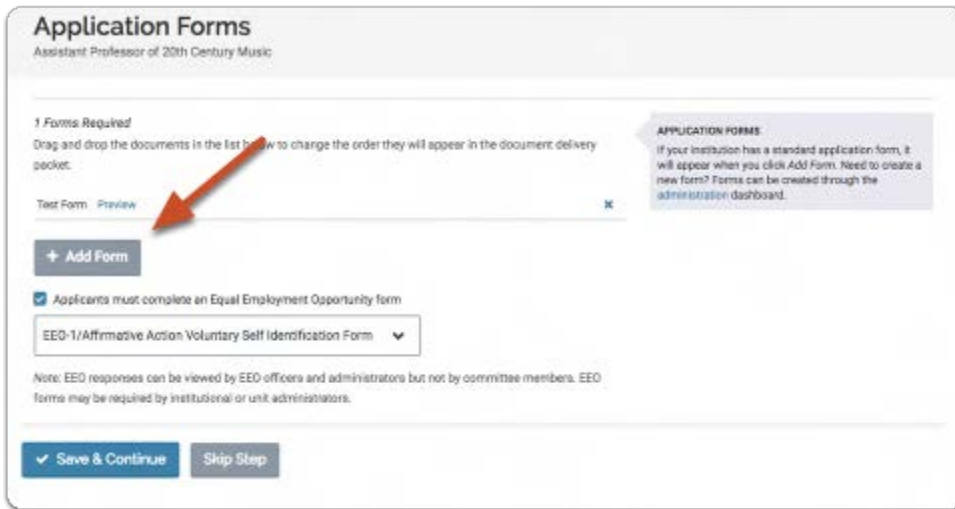
EEO 1/Affirmative Action Voluntary Self Identification Form

Note: EEO responses can be viewed by EEO officers and administrators but not by committee members. EEO forms may be required by institutional or unit administrators.

APPLICATION FORMS  
If your institution has a standard application form, it will appear when you click Add Form. Need to create a new form? Forms can be created through the administration dashboard.

Save & Continue Skip Step

## 5.1. Click "Add Form"



**Application Forms**  
Assistant Professor of 20th Century Music

1 Forms Required  
Drag and drop the documents in the list below to change the order they will appear in the document delivery pocket.

Text Form [Preview](#)

**+ Add Form**

Applicants must complete an Equal Employment Opportunity form

EEO-1/Affirmative Action Voluntary Self Identification Form

Note: EEO responses can be viewed by EEO officers and administrators but not by committee members. EEO forms may be required by institutional or unit administrators.

**APPLICATION FORMS**  
If your institution has a standard application form, it will appear when you click Add Form. Need to create a new form? Forms can be created through the administration dashboard.

## 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.

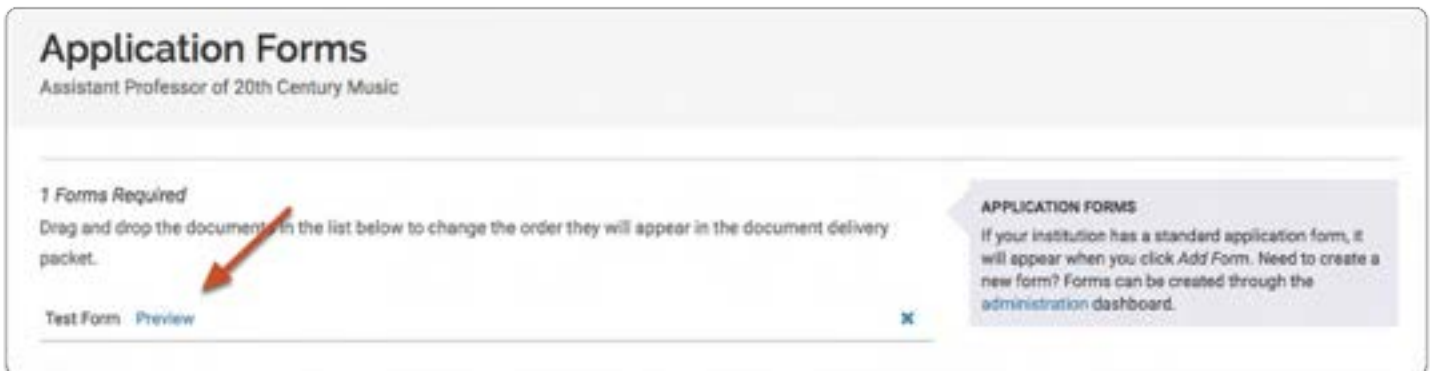


**Add Application Form**

Select Form

✓ — Select Form —  
Test Form

### 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."

**Application Forms**  
Assistant Professor of 20th Century Music

1 Forms Required  
Drag and drop the documents in the list below to change the order they will appear in the document delivery packet.

Test Form Preview ✕

**+ Add form**

Applicants must complete an Equal Employment Opportunity form

Note: EEO responses can be viewed by EEO officers and administrators but not by committee members. EEO forms may be required by institutional or unit administrators.

**✓ Save & Continue** **Skip Step**

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

**+ Add Form**

Applicants must complete an Equal Employment Opportunity form

**✓ — Select Form —**  
EEO-1/Affirmative Action Voluntary Self Identification Form  
Test 2  
New Test EEO Form  
EEO 2018

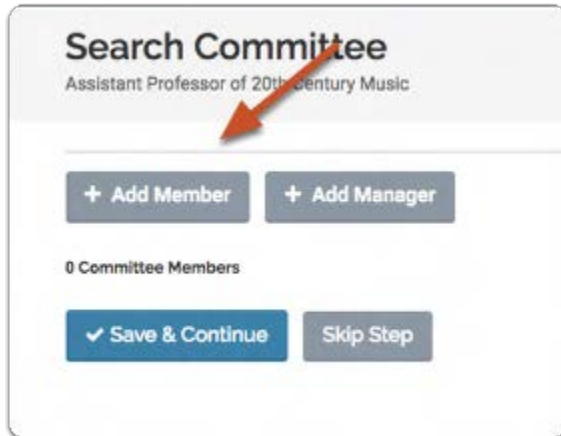
**✓ Save & Continue** **Skip Step**

## 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](#).

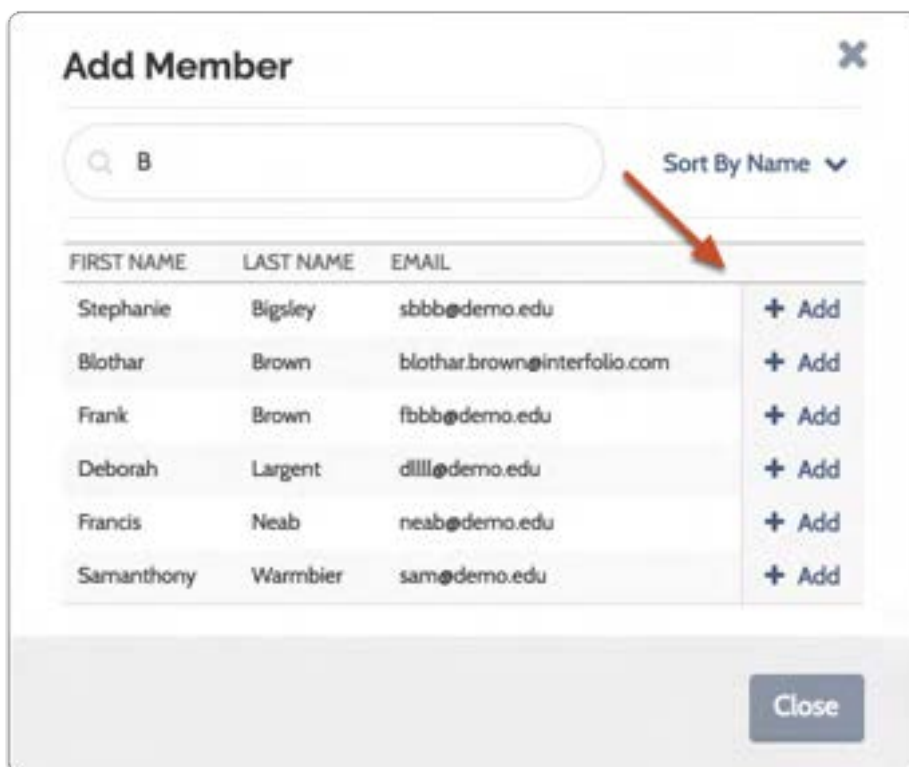
Note: You can also add committee members after a position is created from the Review Position screen. For more information, see [How do I add members to a search committee?](#)

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

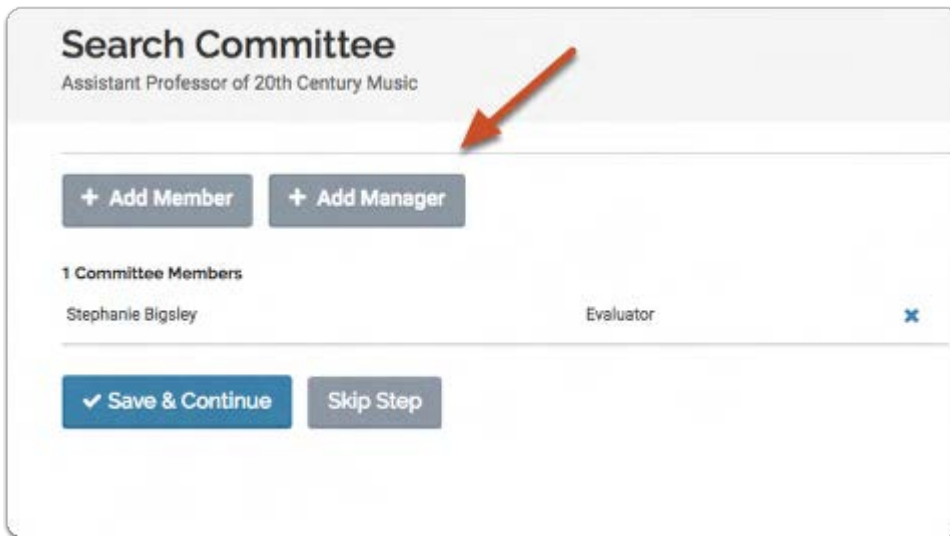


## 7.2. Search for the user by first or last name, and click "Add" to add them to the committee

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.

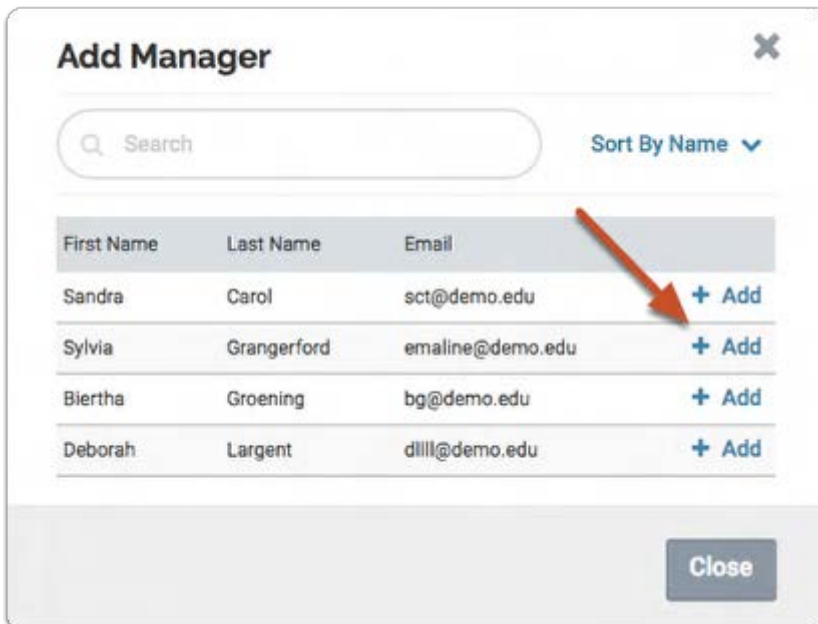


### 7.3. Click "Add Manager" to call up a list of available Committee Managers for your committee



### 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"

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

Assistant Professor of 20th Century Music  
Search Committee

+ Add Member + Add Manager

5 Committee Members

Sandra Carol	Committee Manager	X
Stephanie Bigsley	Evaluator	X
Deborah Largent	Evaluator	X
Winks Lawndale	Evaluator	X
Darrin Magnus	Evaluator	X

✓ Save & Continue Skip Step

## 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, write out a hiring plan, add general notes, and upload files that will become available for committee members evaluating the position.

Position ID or Requisition Number

Salary Range or Pay Grade

Position Term Length

Funding Source

Hiring Plan

General Notes

File Attachments

+ Add File

Save & Continue Skip This

You may need to submit your position 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](#).

**Review Position**

Assistant Professor of 20th Century Music

< Return to Application List

**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

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.

## 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](#)

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").

## Review Position

THIS POSITION IS: ⓘ

Closed to new applicants

It will open on **Mar 23, 2018**. [change](#) [clear](#)

It is **not scheduled** to close. [change](#) [clear](#)

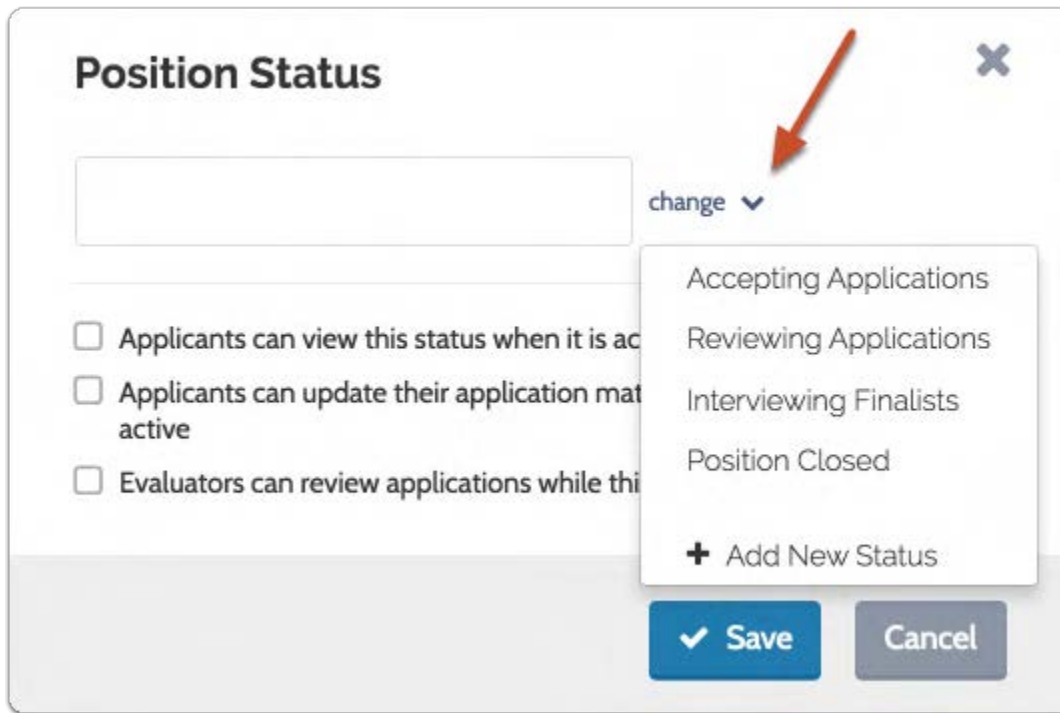
"Apply Now" page is **not published**. [change](#)

POSITION STATUS: ⓘ

Please set an initial status for your position.

[Update Status](#)

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



The screenshot shows a modal window titled "Position Status" with a close button (X) in the top right corner. On the left, there is a text input field. To its right is a dropdown menu currently showing "change" with a downward arrow. An orange arrow points to this dropdown. The dropdown menu is open, displaying the following options: "Accepting Applications", "Reviewing Applications", "Interviewing Finalists", "Position Closed", and "+ Add New Status". Below the dropdown, there are two buttons: a blue "Save" button with a checkmark icon and a grey "Cancel" button. On the left side of the modal, there are three unchecked checkboxes with labels: "Applicants can view this status when it is active", "Applicants can update their application materials while this status is active", and "Evaluators can review applications while this status is active".

## 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.

## Position Status ✕

Accepting Applications 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 Your Position

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

Demo University > Positions > Lecturer, Architectural History >

## Review Position

**THIS POSITION IS:** 🌐

**Closed to new applicants**

It will open on **Mar 23, 2018**. [change](#) [clear](#)

It is **not scheduled** to close. [change](#) [clear](#)

"Apply Now" page is **not published**. [change](#)

**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](#)

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

Demo University > Positions > Lecturer, Architectural History >

## Review Position

**THIS POSITION IS:**

**Closed to new applicants**

It will open on **Mar 23, 2018**. [change](#) [clear](#)

It is **not scheduled** to close. [change](#) [clear](#)

"Apply Now" page is **published**. [view](#) [change](#)

<http://apply-alpha.interfolio.com/22961>

**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...**

- [Description & Dates](#)
- [Required Documents](#)
- [Evaluation Settings](#)
- [Application Forms](#)
- [Search Committee](#)
- [Internal Notes](#)

## 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.

Scott Harris ▾

### Assistant Professor of Landscape Architecture

Demo University: Department of Architectural History

Location	Open Date	Deadline
Washington, D.C.	Sep 1, 2015	Aug 16, 2018 at 11:59 PM Eastern Time

**Description**

The Department of Landscape Architecture at the College of Interfolio seeks an individual to fill a vacancy at the fulltime academic (9.5 month), tenure-track level. Appointment will be at the rank of Assistant Professor; the position will commence in August 2015. The Department consists of graduate programs in landscape architecture, city planning, as well as architecture and works collaboratively with students to tie the existing urban environment to the everexpanding definition of landscape architecture.

**Application Instructions**

Applications will only be accepted through Interfolio. An Interfolio account will automatically be created for you. Please be sure all information is entered completely and accurately (especially names and email addresses). All uploaded files must be in Adobe PDF format. Files in another electronic format (e.g., MS Word) should be saved or 'printed to' PDF format before uploading.

**Qualifications**

Master of Landscape Architecture degree or Bachelor of Landscape Architecture with a terminal

**Application Process**

This institution is using Interfolio's Faculty Search to conduct this search. Applicants to this position receive a free Dossier account and can send all application materials, including confidential letters of recommendation, free of charge.

[Apply Now](#)

Powered by interfolio

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.

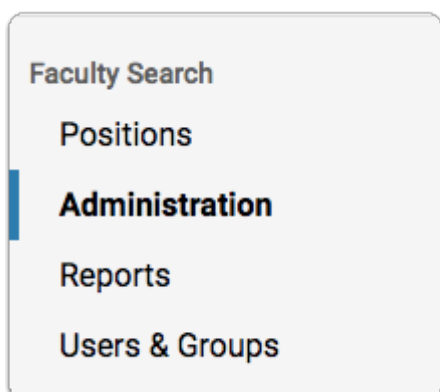
# Establish Custom Ratings Criteria and/or Set Up a Blind Review

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

A screenshot of the Faculty Search interface. At the top, there is a search bar with the text 'Search Positions', a 'Filter' dropdown, and a 'Sort by Date' dropdown. Below the search bar is a table with the following columns: NAME, STATUS, TYPE, OPENS, CLOSES, and APPLICATIONS. The table contains two rows of data. An orange arrow points to the first row's title.

NAME	STATUS	TYPE	OPENS	CLOSES	APPLICATIONS
Associate Professor of Orthodontic Dentistry College of Dentistry	ACCEPTING APPLICATIONS	Faculty	Jan 31, 2016	Jun 24, 2016	2
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS	Faculty	May 10, 2016	Nov 6, 2016	0



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

Demo University > Positions >  
**Assistant Professor of Landscape Architecture**

Unit: Department of Architectural History | Status: Accepting Applications [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2016

**APPLICANTS** (5 of 5)

Keyword Search [Filter](#) [Saved Views](#)

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Sasha Brown <b>INCOMPLETE</b>	Jan 25, 2018	Hired		★ ★ ★ ★ ☆

**Position Actions** ▼

- Edit Position
- View committee
- View position details
- View referral sources
- Tour this page
- Add new applicant
- Close position
- My Overall Rating

Click "Evaluation Settings" to the right of the page

**THIS POSITION IS:** Closed to new applicants  
It opened on Jan 31, 2016. [change](#) [clear](#)  
It closed on Jun 24, 2016. [change](#) [clear](#)  
"Apply Now" page is published. [view](#) [change](#)

**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

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	X
Scholarship	X
Research	X


+ 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](#).

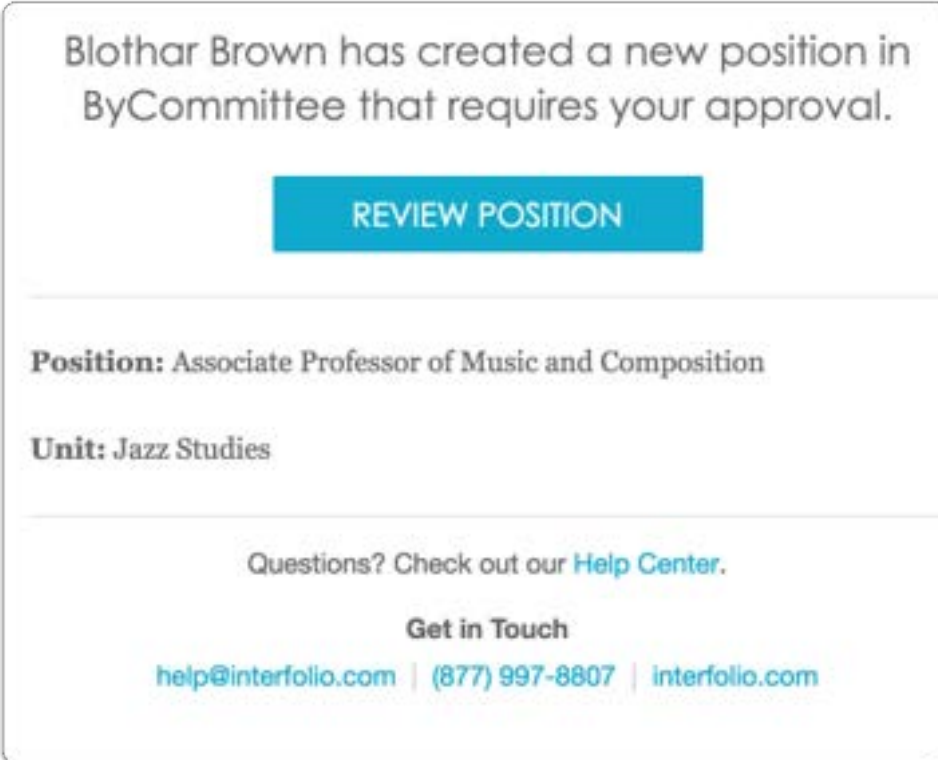
If approval is required, you will be asked to submit the new position for approval on the Positions page

### 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

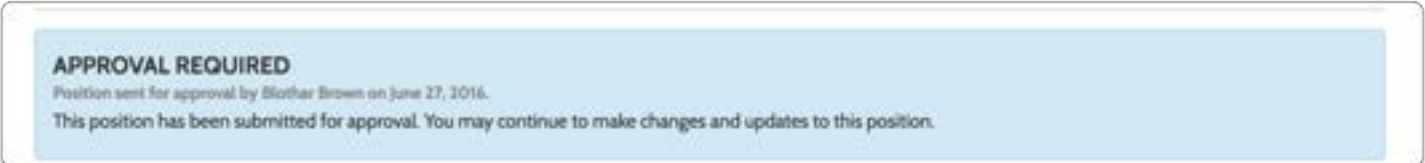
**Unit:** Jazz Studies

Questions? Check out our [Help Center](#).

**Get in Touch**

[help@interfolio.com](mailto:help@interfolio.com) | [\(877\) 997-8807](tel:(877)997-8807) | [interfolio.com](http://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."

## Positions

Demo University

Search Positions Filter

NAME	STATUS
Associate Professor of Orthodontic Dentistry College of Dentistry	ACCEPTING APPLICATIONS
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS
Associate Professor of Music and Composition Jazz Studies	APPROVAL REQUIRED
Jazz Performance Instructor Jazz Studies	APPROVAL REQUIRED
Visiting Assistant Professor/Instructor in American Literature Department of English Language and Literature	

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

Your position (Professor of Chemistry) has been approved!

Sign in to ByCommittee to view your position.

[VIEW POSITION](#)

Questions? Check out our [Help Center](#).

**Get in Touch**

[help@interfolio.com](mailto:help@interfolio.com) | (877) 997-8807 | [interfolio.com](https://interfolio.com)

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.

The screenshot shows the 'Required Documents' configuration page in Interfolio. At the top, the breadcrumb trail reads 'Demo University > Positions > Lecturer, Architectural History >'. The main heading is 'Required Documents' with a sub-heading 'Lecturer, Architectural History'. Below this, it states '5 Documents Required' and provides instructions: 'Drag and drop the documents in the list below to change the order they will appear in the application requirements.' A list of five document types is shown, each with a quantity of '1' and edit/delete icons: 'Cover Letter', 'C.V.', 'Research Statement', 'Teaching Statement', and 'Writing Sample'. A '+ Add Requirement' button is located below the list. To the right, a callout box titled 'REQUIRED DOCUMENTS' explains that users can customize requirements using a list of standard document types or select 'Other Document' for custom ones. Below the document list, the 'Additional Applicant Options' section includes a checked checkbox for 'Applicants may add additional documents' (with a note that this allows applicants to include materials without requiring them) and an unchecked checkbox for 'Send a message on application submission'. At the bottom, there are 'Save & Continue' and 'Skip Step' buttons.

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](mailto: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.

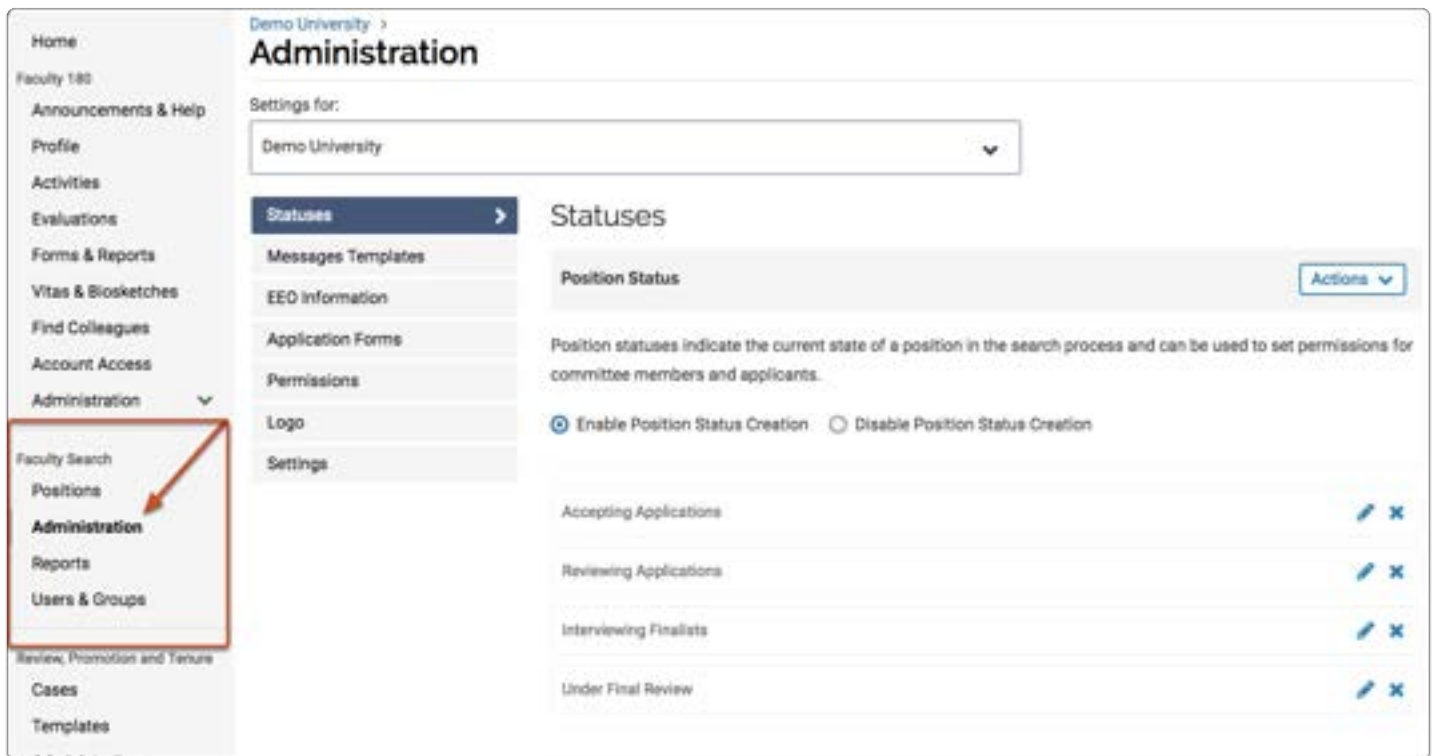
Depending on their administrative privileges, from the "Administration" page, users can:

- 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 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"

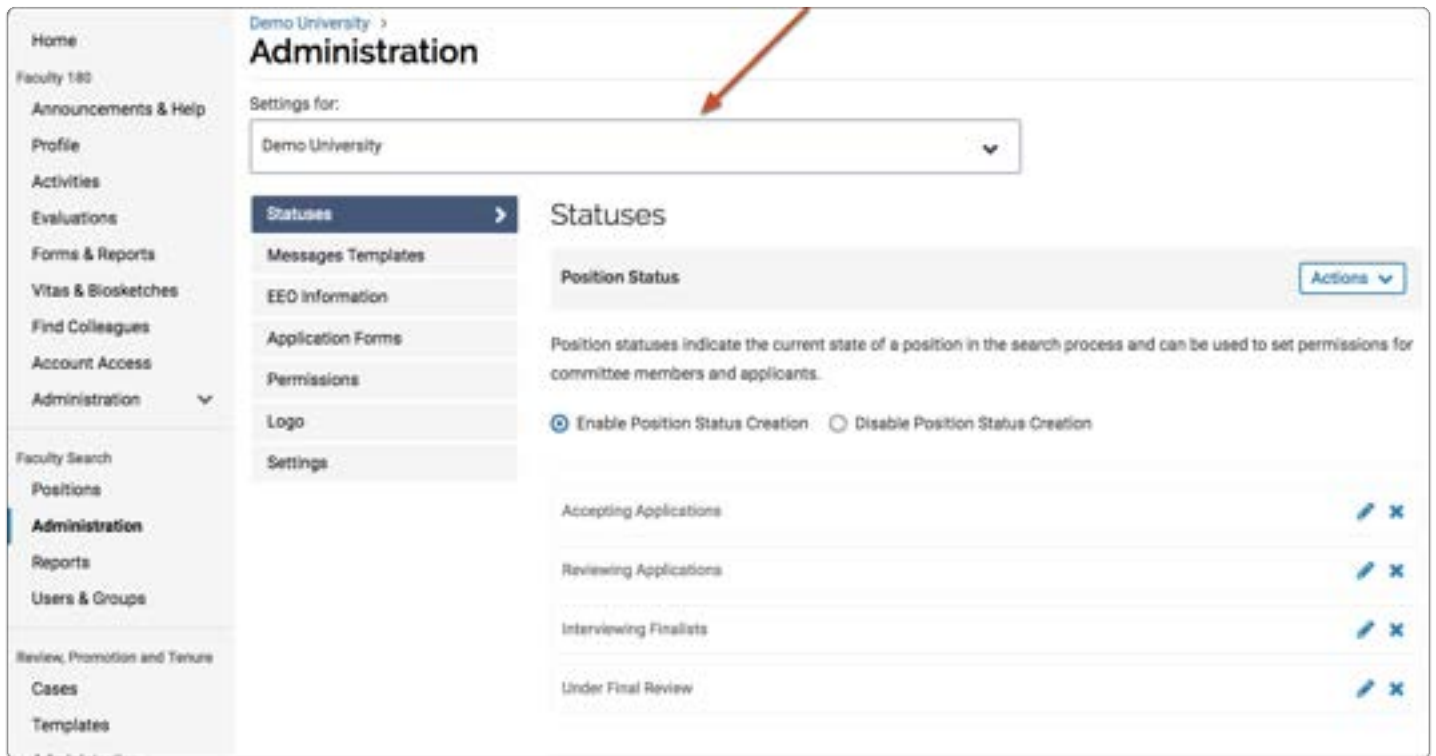


Always make sure you are viewing settings for the correct unit or position

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](#).

**Statuses**

Messages Templates

EEO Information

Application Forms

Permissions

Logo

Settings

## Statuses

**Position Status** Actions ▾

Position statuses indicate the current state of a position in the search process and can be used to set permissions for committee members and applicants.

Enable Position Status Creation  Disable Position Status Creation

Accepting Applications	<span>✎</span> <span>✕</span>
Reviewing Applications	<span>✎</span> <span>✕</span>
Interviewing Finalists	<span>✎</span> <span>✕</span>
Under Final Review	<span>✎</span> <span>✕</span>

**Application Status** Actions ▾

## 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](#).

Demo University >  
**Administration**

Settings for:  
 Demo University

- Statuses
- Messages Templates**
- EEO Information
- Application Forms
- Permissions
- Logo
- Settings

### Templates

Templates Add

Customize messages to send to applicants when the status of a position or application changes. Templates can be used at this and any unit below. You will have the opportunity to edit and confirm messages before sending them.

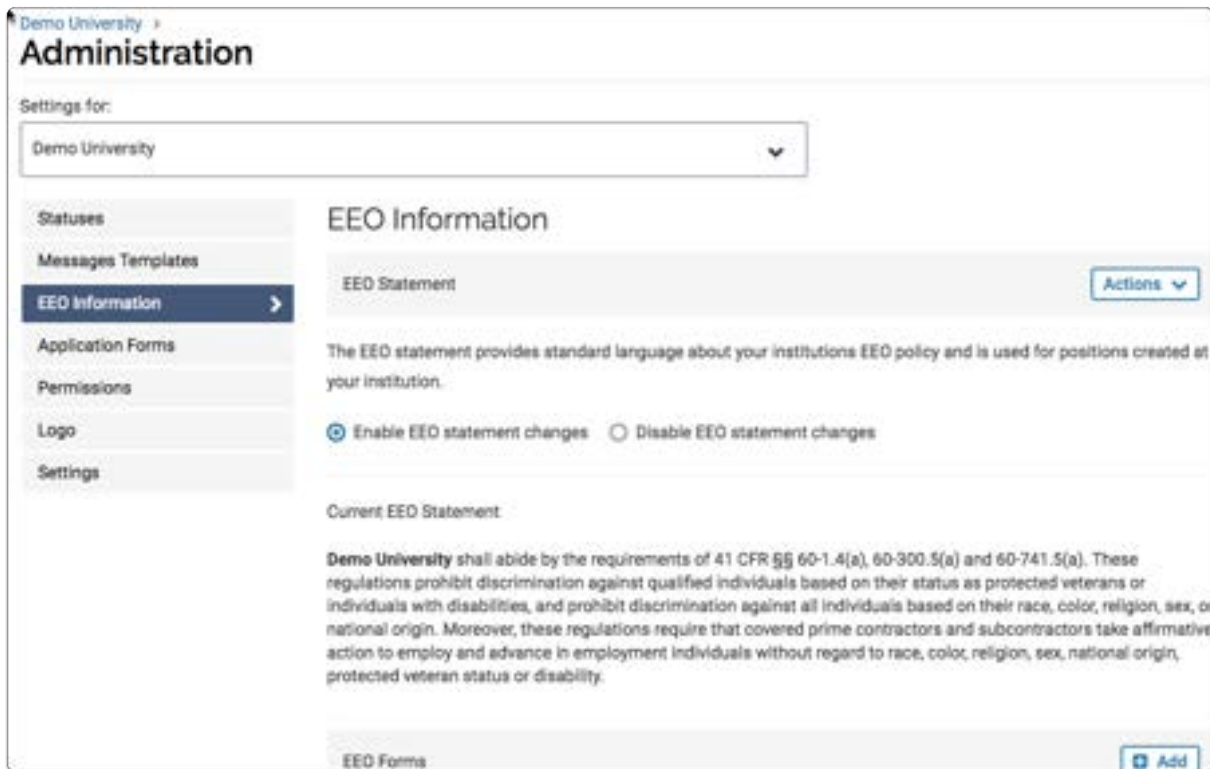
Search by subject or unit name

Subject	Created at	Actions
Interview invitation	Demo University	
Invitation for interview	Department of Geriatric Nursing	

## 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](#).

**Application Forms**

Application Forms Add

Search by form or unit name

Search forms

Form Name	Created at		
Additional information	Department of Geriatric Nursing	Required	
Another test form	Demo University		
EEO	College of Arts and Sciences	Required	
Test	Demo University	Required	

## 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.](#)



**Permissions**

**Comments**

Comments enable reviewers to make observations on applications and are visible to all reviewers for that position. Blind review can be turned on for specific positions to prevent reviewers from seeing each other's comments.

Comments Enabled  Comments Disabled

**Tags**

Tags are bits of text that can be added to an applicant's record to help sort, categorize, and quickly identify applications. To learn more, read about how to [Use Tags to Mark and Sort Applications](#).

Tags Enabled  Tags Disabled


**Position Approval**

Position approval requires an administrator at your institution to approve positions created at your institution. To learn more, read about how to [Require Approval to Post New Positions](#).

Position Approval Required  Position Approval Not Required

## 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](#).

Demo University >

# Administration

Settings for:


Demo University

- Statuses
- Messages Templates
- EEO Information
- Application Forms
- Permissions
- Logo**
- Settings

## Logo

Logo Change

This logo will be displayed on any position published by this unit. For best results, use a logo with a white or transparent background, maximum file size of 20KB, and in one of the following formats: PNG, JPEG, JPG or GIF.



## Settings

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

Statuses

Messages Templates

EEO Information

Application Forms

Permissions

Logo

**Settings**

## Settings

Public Position List

Interfolio provides a public link to a list of all the published positions available at your institution. You can use this link to advertise the positions available on your institutional website or other places where you provide a list of available positions.

**List Name**  
 Demo University Open Positions Edit

**URL**  
<https://apply-alpha.interfolio.com/10207/positions> Copy URL

**Equal Employment Opportunity Statement**  
 This page displays the EEO statement for your institution. [Manage EEO Statement](#)

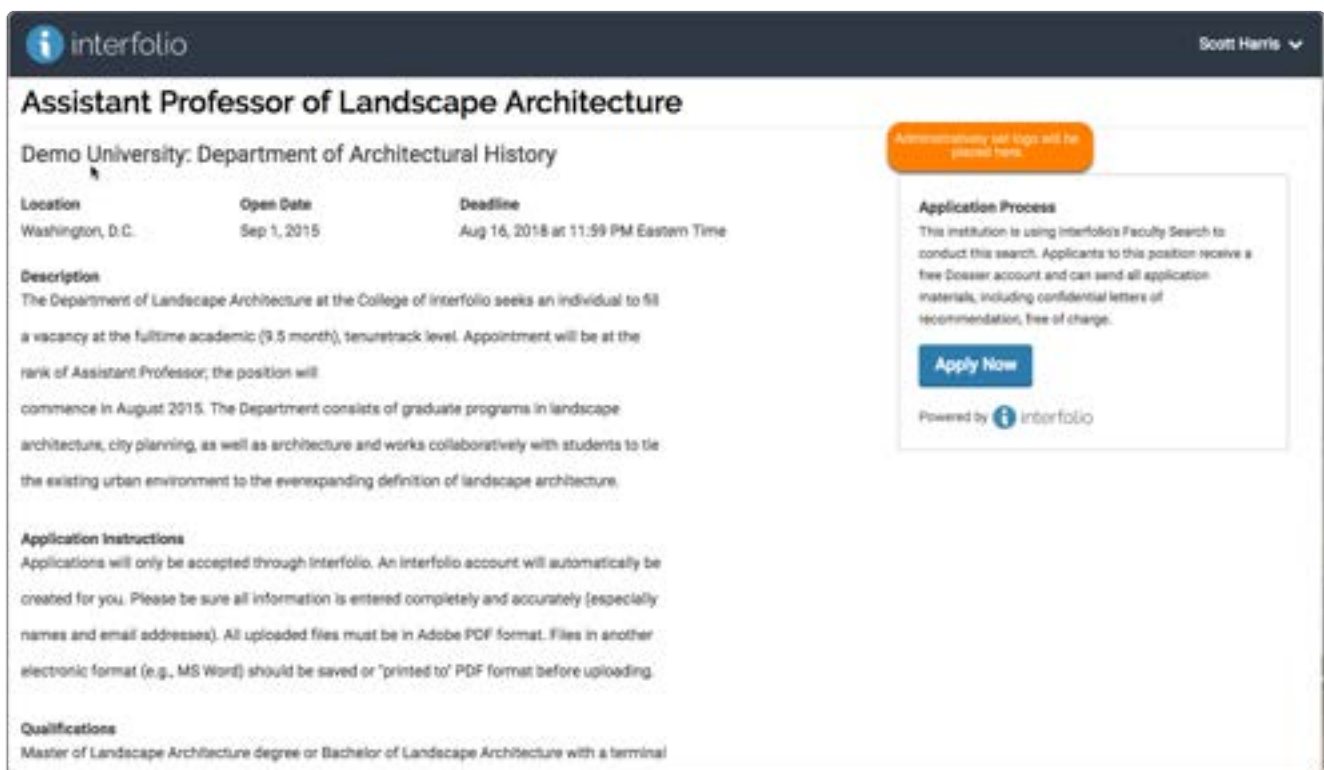
**Demo University** shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

# 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.



The screenshot shows a web page for an Interfolio Faculty Search. The header includes the Interfolio logo and the user name "Scott Harris". The main title is "Assistant Professor of Landscape Architecture". Below the title, it says "Demo University: Department of Architectural History". There is a table with three columns: "Location" (Washington, D.C.), "Open Date" (Sep 1, 2015), and "Deadline" (Aug 16, 2016 at 11:59 PM Eastern Time). The "Description" section states that the Department of Landscape Architecture at the College of Interfolio seeks an individual to fill a vacancy at the fulltime academic (9.5 month), tenure-track level. The "Application Instructions" section states that applications will only be accepted through Interfolio and that a free Dossier account will be created for applicants. The "Qualifications" section requires a Master of Landscape Architecture degree or a Bachelor of Landscape Architecture with a terminal degree. On the right side, there is a box titled "Application Process" with an "Apply Now" button and a note that administrative set fees will be passed to the applicant. The page is powered by Interfolio.

Location	Open Date	Deadline
Washington, D.C.	Sep 1, 2015	Aug 16, 2016 at 11:59 PM Eastern Time

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

Associate Professor of Orthodontic Dentistry  
Review Position

**THIS POSITION IS:**

**Closed to new applicants**

It opened on **Jan 31, 2016**. [change](#) [clear](#)

It closed on **Jun 24, 2016**. [change](#) [clear](#)

"Apply Now" page is **published**. [view](#) [change](#)

**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](#)

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

Search Positions  [Filter](#) Sort by Date

NAME	STATUS	TYPE	OPENS	CLOSES	APPLICATIONS
Associate Professor of Orthodontic Dentistry College of Dentistry	<a href="#">ACCEPTING APPLICATIONS</a>	Faculty	Jan 31, 2016	Jun 24, 2016	
Associate Professor of Periodontics College of Dentistry	<a href="#">ACCEPTING APPLICATIONS</a>	Faculty	May 10, 2016	Nov 6, 2016	

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

Semo University > Positions >  
**Assistant Professor of Landscape Architecture**

Unit: Department of Architectural History | Status: Accepting Applications [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2015

**APPLICANTS** (5 of 5)

Keyword Search  [Filter](#)

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Sasha Brown <b>INCOMPLETE</b>	Jan 25, 2018	Hired		★ ★ ★ ☆ ☆

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

Associate Professor of Orthodontic Dentistry  
Review Position

**THIS POSITION IS:**  Closed to new applicants [change](#) [clear](#)

It opened on Jan 31, 2016. [change](#) [clear](#)

It closed on Jun 24, 2016. [change](#) [clear](#)

"Apply Now" page is published. [view](#) [change](#)

**POSITION STATUS:**  Accepting Applications

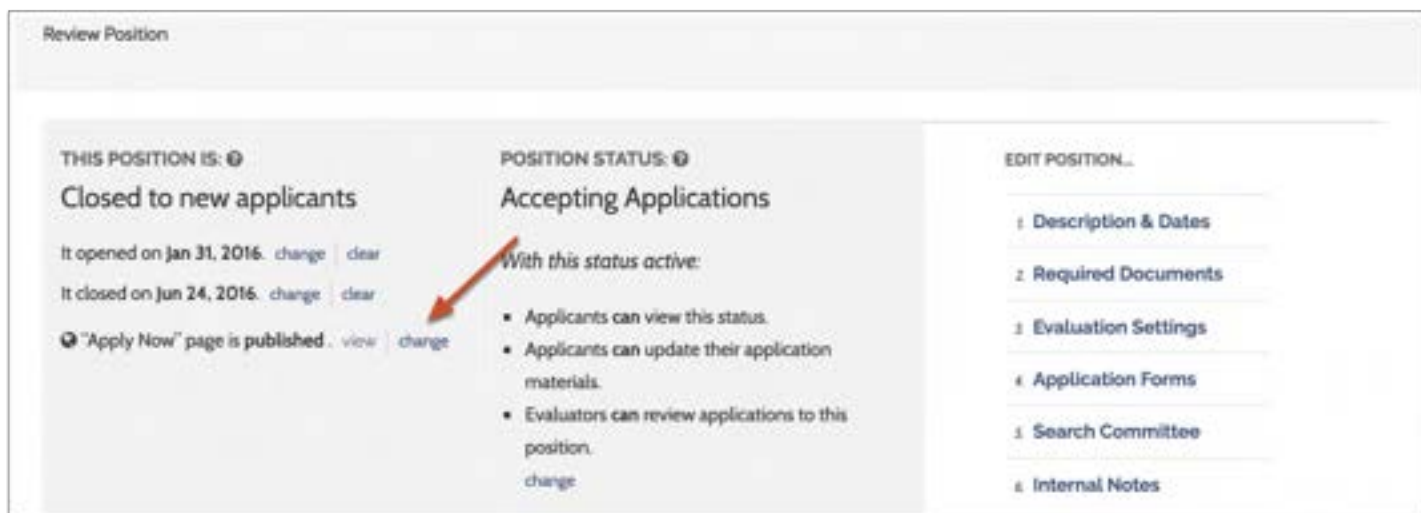
With this status active:

- 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

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

THIS POSITION IS: ⓘ 1

## 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](#) 2

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

POSITION STATUS: ⓘ 3

## 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](#)

Click "View" to see your position announcement

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>

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](#)

You can preview your announcement and copy the URL

The screenshot shows a job posting on the Interfolio website. At the top left is the Interfolio logo, and at the top right is the user name "Scott Harris" with a dropdown arrow. The main heading is "Assistant Professor of Landscape Architecture". Below this, the employer is identified as "Demo University: Department of Architectural History". A table provides key details: Location (Washington, D.C.), Open Date (Sep 1, 2015), and Deadline (Aug 16, 2018 at 11:59 PM Eastern Time). The "Description" section explains the role and department. The "Application Instructions" section details the application process, including the requirement for an Interfolio account and PDF uploads. The "Qualifications" section lists the required degrees. On the right side, there is a call to action "Apply Now" and a note about the application process.

**interfolio** Scott Harris

## Assistant Professor of Landscape Architecture

Demo University: Department of Architectural History

Location	Open Date	Deadline
Washington, D.C.	Sep 1, 2015	Aug 16, 2018 at 11:59 PM Eastern Time

**Description**  
The Department of Landscape Architecture at the College of Interfolio seeks an individual to fill a vacancy at the fulltime academic (9.5 month), tenure-track level. Appointment will be at the rank of Assistant Professor; the position will commence in August 2015. The Department consists of graduate programs in landscape architecture, city planning, as well as architecture and works collaboratively with students to tie the existing urban environment to the everexpanding definition of landscape architecture.

**Application Instructions**  
Applications will only be accepted through Interfolio. An Interfolio account will automatically be created for you. Please be sure all information is entered completely and accurately (especially names and email addresses). All uploaded files must be in Adobe PDF format. Files in another electronic format (e.g., MS Word) should be saved or "printed to" PDF format before uploading.

**Qualifications**  
Master of Landscape Architecture degree or Bachelor of Landscape Architecture with a terminal

Administratively set logo will be placed here.

**Application Process**  
This institution is using Interfolio's Faculty Search to conduct this search. Applicants to this position receive a free Dossier account and can send all application materials, including confidential letters of recommendation, free of charge.

[Apply Now](#)

Powered by **interfolio**

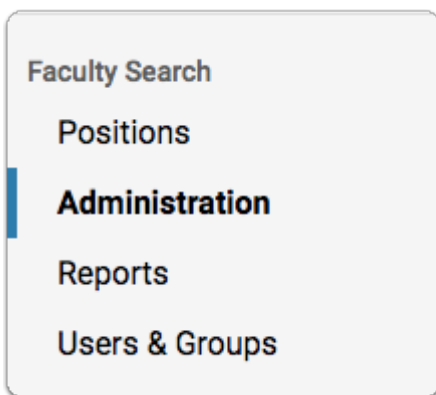


# Assign or Change a Position Status

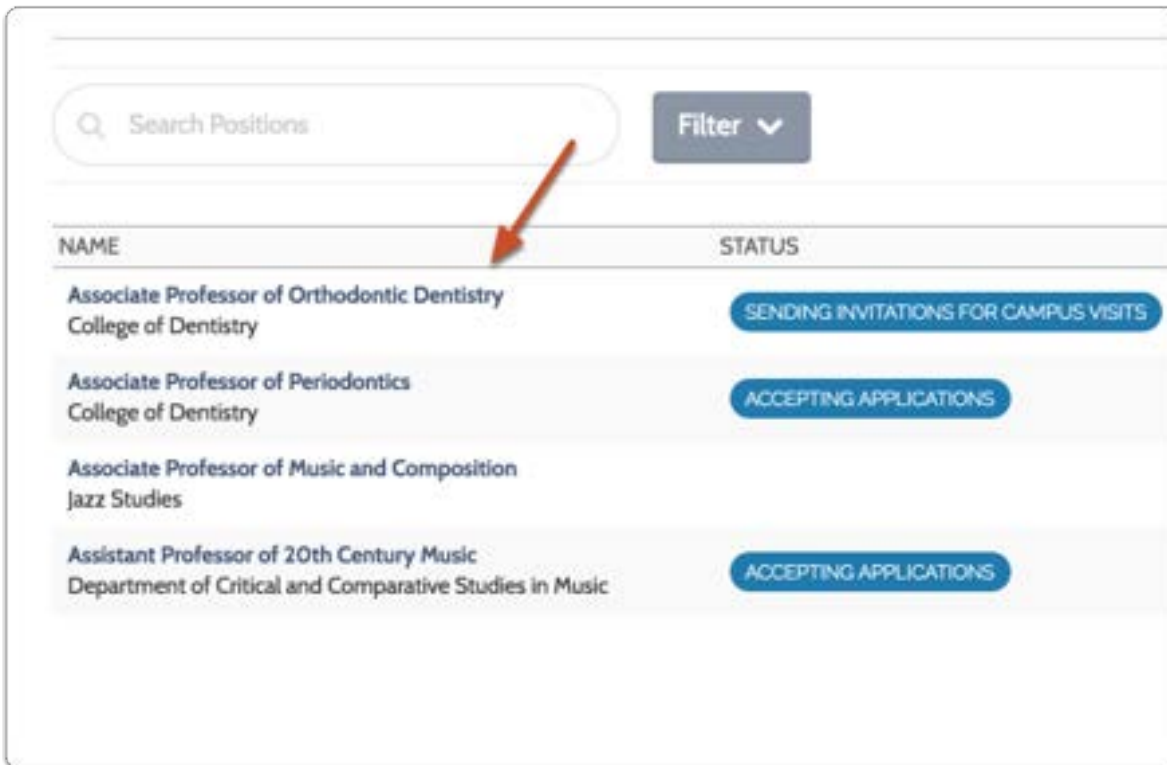
Administrators and Committee Managers can change the status of a position in ByCommittee Faculty Search from the Applications page or the Review Position screen.

To change position status from the Applications page:

1. From the Navigation bar, select Positions.



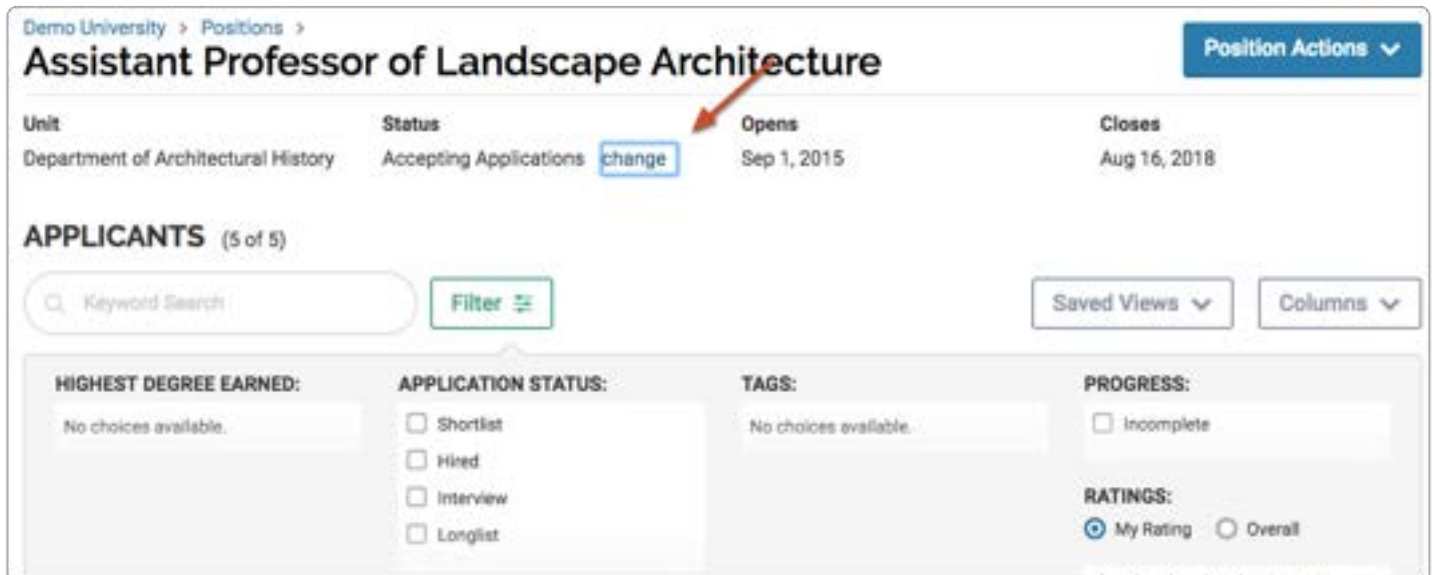
## 2. Click the position title to view the list of applicants



The screenshot shows a search interface for positions. At the top, there is a search bar labeled "Search Positions" and a "Filter" button with a dropdown arrow. Below this is a table with two columns: "NAME" and "STATUS". A red arrow points to the first row's name. The table contains the following data:

NAME	STATUS
Associate Professor of Orthodontic Dentistry College of Dentistry	SENDING INVITATIONS FOR CAMPUS VISITS
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS
Associate Professor of Music and Composition Jazz Studies	
Assistant Professor of 20th Century Music Department of Critical and Comparative Studies in Music	ACCEPTING APPLICATIONS

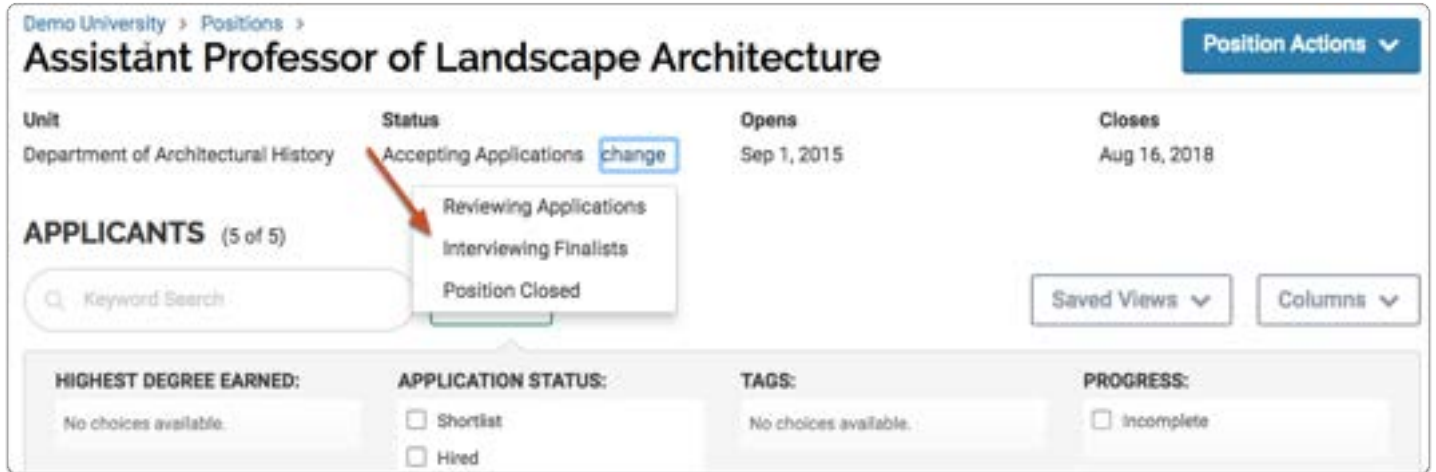
## 3. Click the Change button for the position's Status field.



The screenshot shows the details for a position titled "Assistant Professor of Landscape Architecture". At the top right is a "Position Actions" button with a dropdown arrow. Below the title, there are fields for "Unit", "Status", "Opens", and "Closes". A red arrow points to a "change" button next to the "Status" field. Below this is an "APPLICANTS (5 of 5)" section with a search bar, a "Filter" button, and "Saved Views" and "Columns" dropdowns. At the bottom, there are four filter sections: "HIGHEST DEGREE EARNED:", "APPLICATION STATUS:", "TAGS:", and "PROGRESS:". The "APPLICATION STATUS:" section has radio buttons for "Shortlist", "Hired", "Interview", and "Longlist". The "PROGRESS:" section has a radio button for "Incomplete". The "RATINGS:" section has radio buttons for "My Rating" (selected) and "Overall".

## 4. Select a new status from the dropdown menu

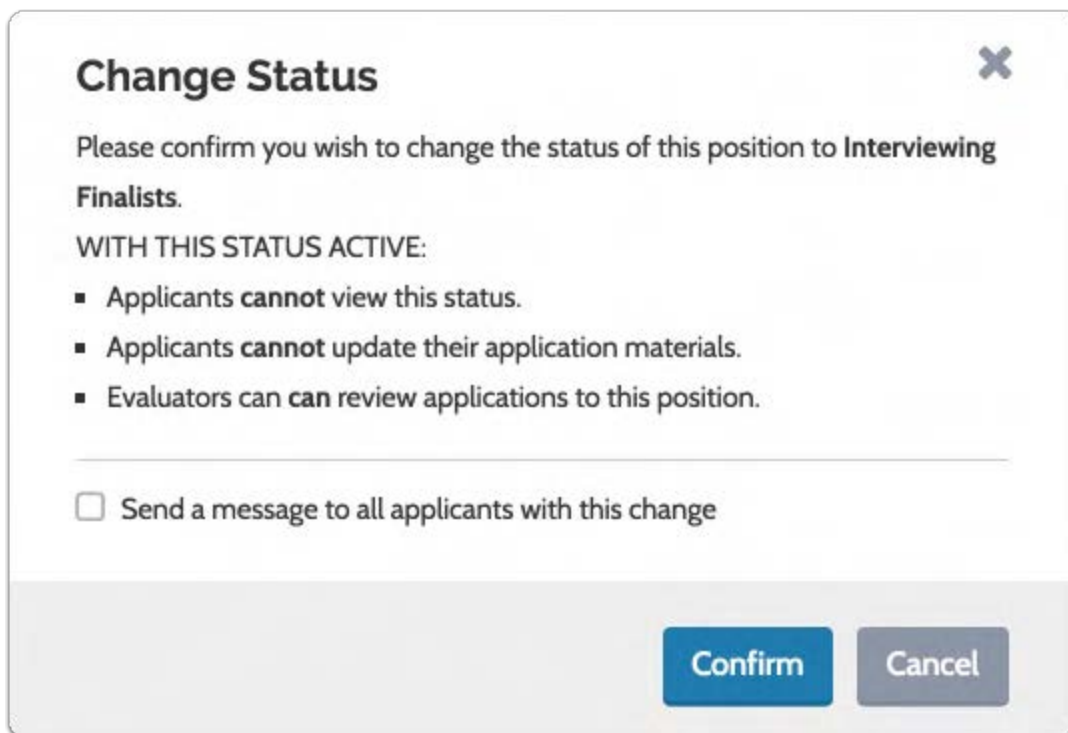
Note: Notice the "Close Position" status at the bottom of the list. See here for more information on [closing a ByCommittee search](#).



The screenshot shows the position page for "Assistant Professor of Landscape Architecture" at "Demo University". The current status is "Accepting Applications" with a "change" button next to it. A dropdown menu is open, showing options: "Reviewing Applications", "Interviewing Finalists", and "Position Closed". The page also displays the unit "Department of Architectural History", the opening date "Sep 1, 2015", and the closing date "Aug 16, 2018". There are 5 applicants. Below the dropdown, there are filters for "HIGHEST DEGREE EARNED:", "APPLICATION STATUS:" (with checkboxes for "Shortlist" and "Hired"), "TAGS:", and "PROGRESS:" (with checkbox for "Incomplete").

## 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.



The "Change Status" window prompts the user to confirm changing the status to "Interviewing Finalists". It lists the following permissions with this status active:

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

There is a checkbox for "Send a message to all applicants with this change". At the bottom, there are "Confirm" and "Cancel" buttons.

To change position status from Review Position page:

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

## ByCommittee – Positions

Associate Professor of Orthodontic Dentistry  
Review Position

**THIS POSITION IS:** ⓘ

**Open to new applicants**

It opened on **Jan 31, 2016**. [change](#) | [clear](#)


It will close on **Jun 30, 2016**. [change](#) | [clear](#)

🔒 "Apply Now" page is **published**. [view](#) | [change](#)

**POSITION STATUS:** ⓘ

**Interviewing Finalists**

*With this status active:*

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

[change](#)

## 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 screenshot shows the 'Review Position' interface for an Assistant Professor of Landscape Architecture. It is divided into three main sections: 'THIS POSITION IS:', 'POSITION STATUS:', and 'EDIT POSITION...'.  
1. 'THIS POSITION IS:': Shows 'Open to new applicants'. It includes dates: 'It opened on Sep 1, 2015.' and 'It will close on Aug 16, 2018.'. A red arrow points to the 'published' status of the 'Apply Now' page. A URL is provided: <http://apply-alpha.interfolio.com/22946>.  
2. 'POSITION STATUS:': Shows 'Accepting Applications'. Below this, it lists actions for applicants and evaluators.  
3. 'EDIT POSITION...': A list of settings to be edited, including Description & Dates, Required Documents, Evaluation Settings, Application Forms, Search Committee, and Internal Notes.

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](#)

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

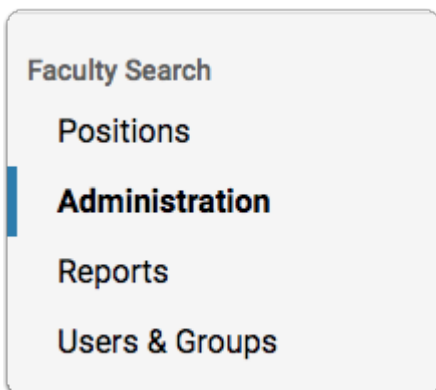
THIS POSITION IS: ⓘ  
**Open to new applicants**

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>

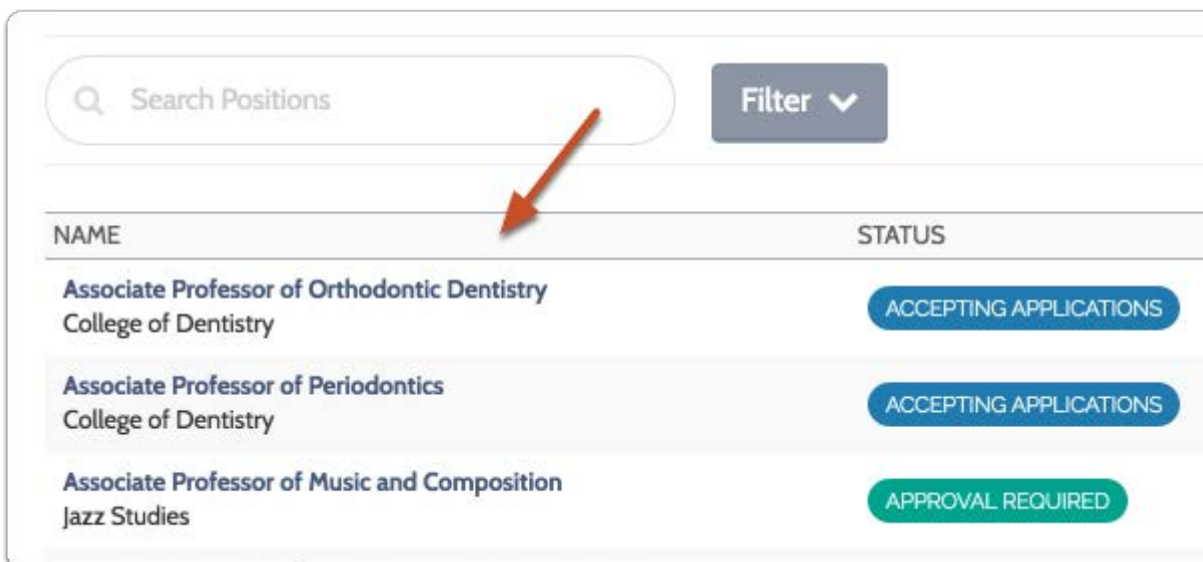
# Edit an Existing Position

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

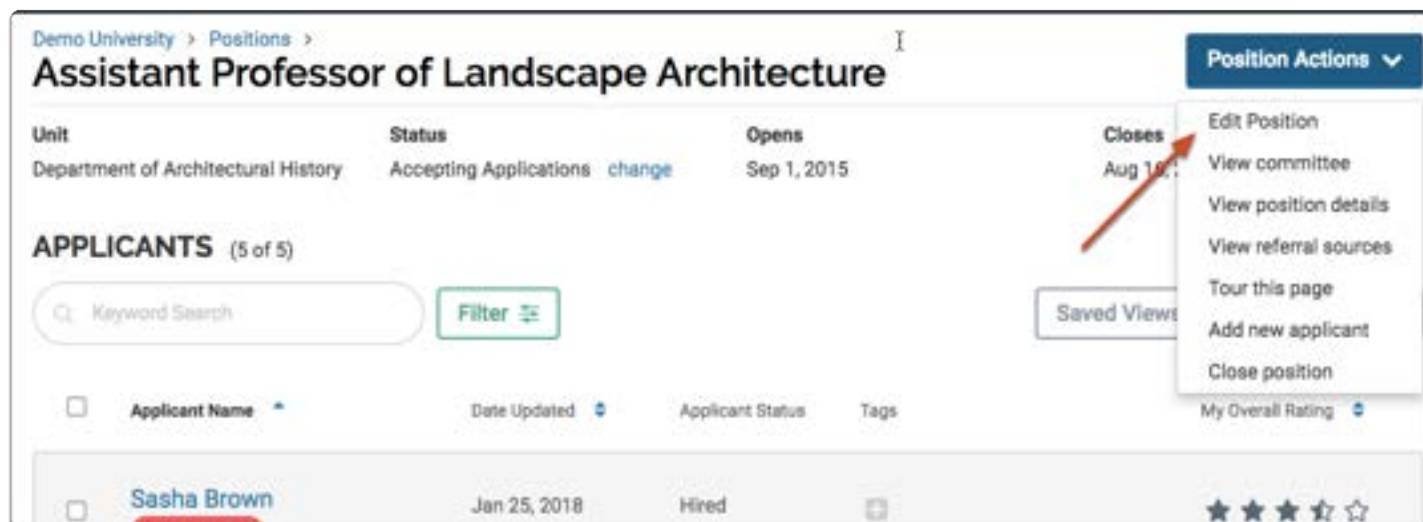


Select the position to edit





## 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.

## ByCommittee – Positions

Associate Professor of Orthodontic Dentistry  
Review Position

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**THIS POSITION IS:**

**Open to new applicants**

It opened on **Jan 31, 2016**. [change](#) | [clear](#) 1

It will close on **Jun 24, 2016**. [change](#) | [clear](#)

"Apply Now" page is **published**. [view](#) | [change](#) 2

**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](#) 3

# Close a Position (Archive) and Indicate an Outcome

A Interfolio Faculty Search position is either "Open," meaning the position 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.](#)

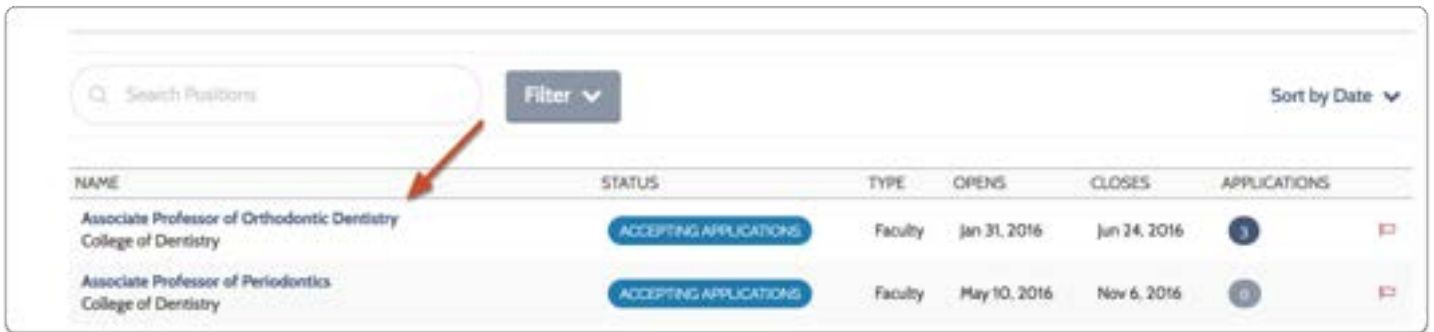
This article explains how to close a position and document the outcome of the search.

**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.



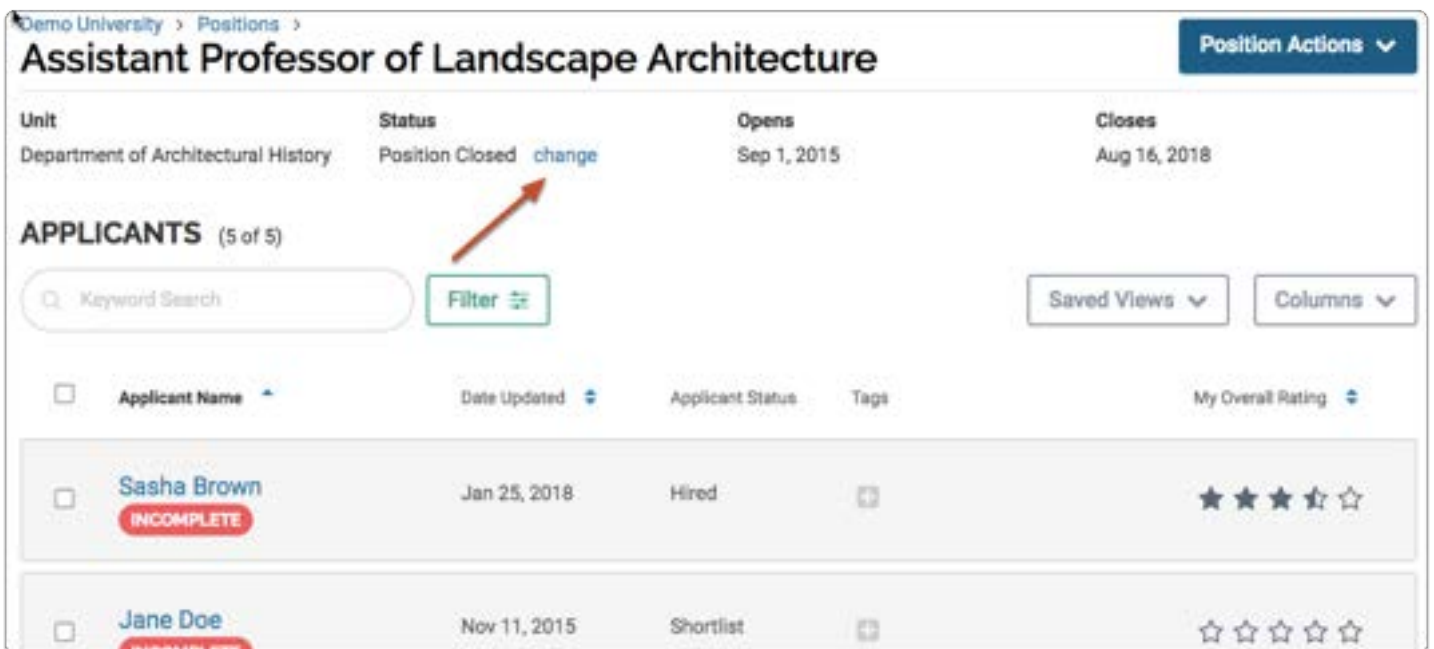
[If you want to reopen a position, see our available guide.](#)

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



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

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



Demo University > Positions > Assistant Professor of Landscape Architecture

Unit: Department of Architectural History | Status: Position Closed [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2018

APPLICANTS (5 of 5)

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
Sasha Brown <b>INCOMPLETE</b>	Jan 25, 2018	Hired		★★★★☆
Jane Doe <b>INCOMPLETE</b>	Nov 11, 2015	Shortlist		☆☆☆☆☆

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

Demo University > Positions > Assistant Professor of Landscape Architecture

Unit: Department of Architectural History | Status: Accepting Applications (change) | Opens: Sep 1, 2015 | Closes: Aug 16, 2018

APPLICANTS (5 of 5)

Keyword Search

Position Actions: Saved Views, Columns

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Sasha Brown INCOMPLETE	Jan 25, 2018	Hired		★★★★☆
<input type="checkbox"/>	Jane Doe INCOMPLETE	Nov 11, 2015	Shortlist		☆☆☆☆☆

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

CLOSING POSITION FOR:  
Associate Professor of Orthodontic Dentistry

STEP 1: SELECT APPLICANT (Active) | 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.

Search Applicant(s) [Q]

Continue Cancel

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

CLOSING POSITION FOR:  
Associate Professor of Orthodontic Dentistry

STEP 1: SELECT APPLICANT      STEP 2: COMPLETE THE SEARCH

Was an applicant selected?

Yes     No

Notes  
You may leave an optional note here 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.



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

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.

Eric Beamer    ebeamer@demo.edu   

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

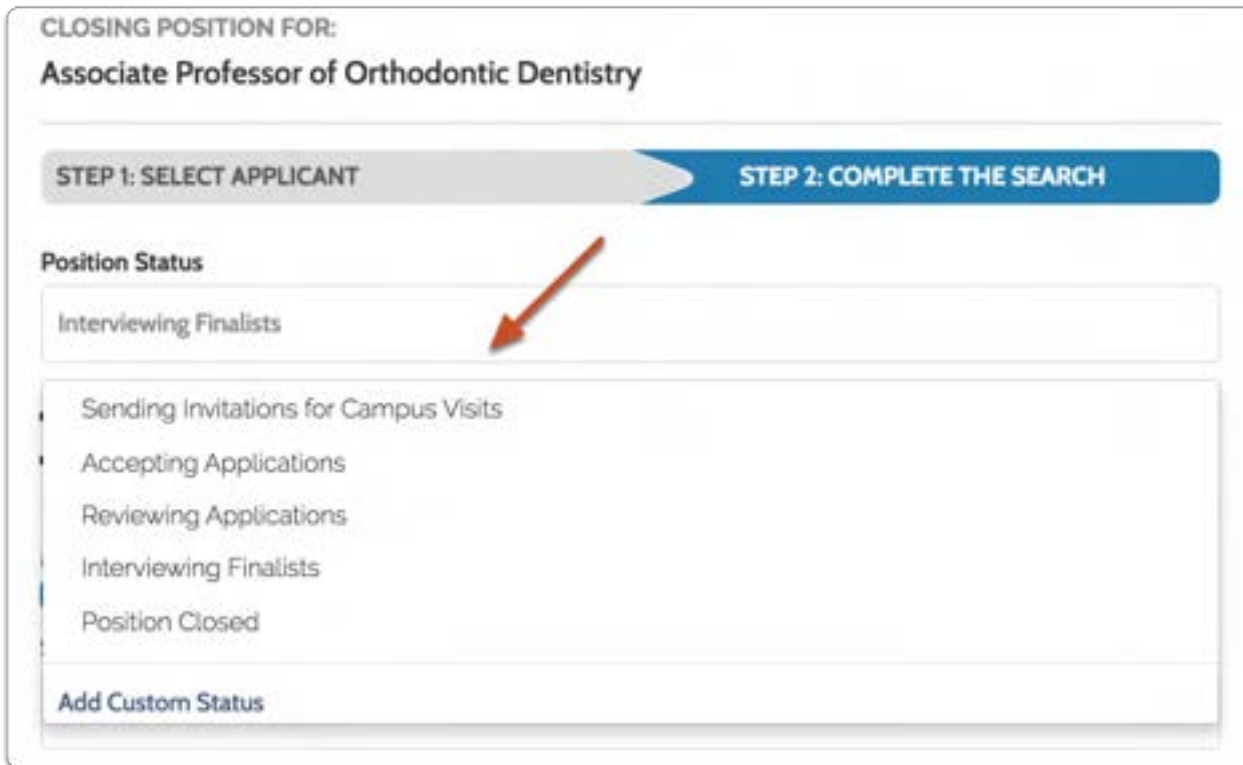
Accepting Applications

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

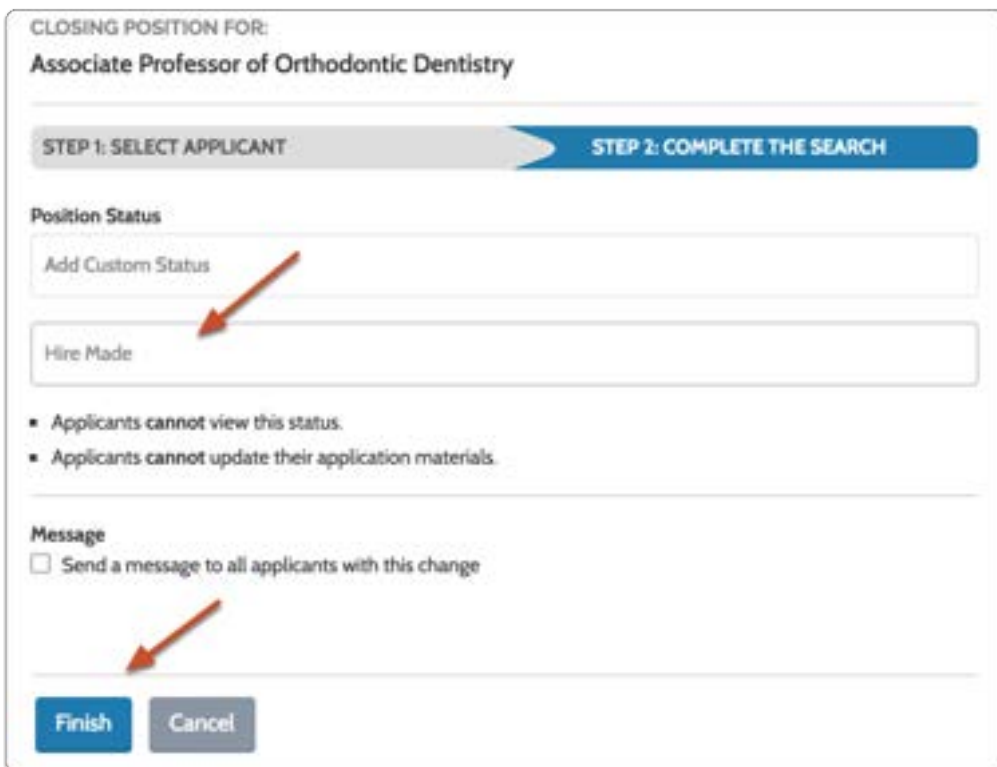
Hire Made

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

**Message**

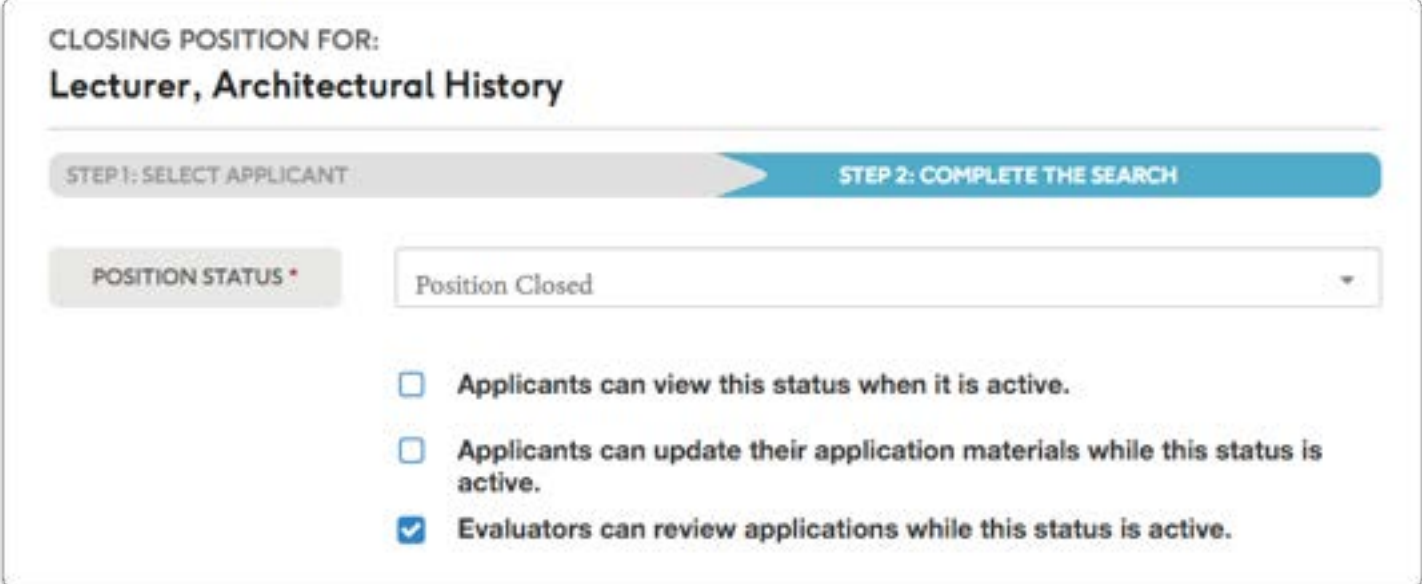
Send a message to all applicants with this change

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 not evaluators can review applications while the status is active.



CLOSING POSITION FOR:  
**Lecturer, Architectural History**

STEP 1: SELECT APPLICANT      STEP 2: COMPLETE THE SEARCH

POSITION STATUS \*      Position Closed

- 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.

## 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

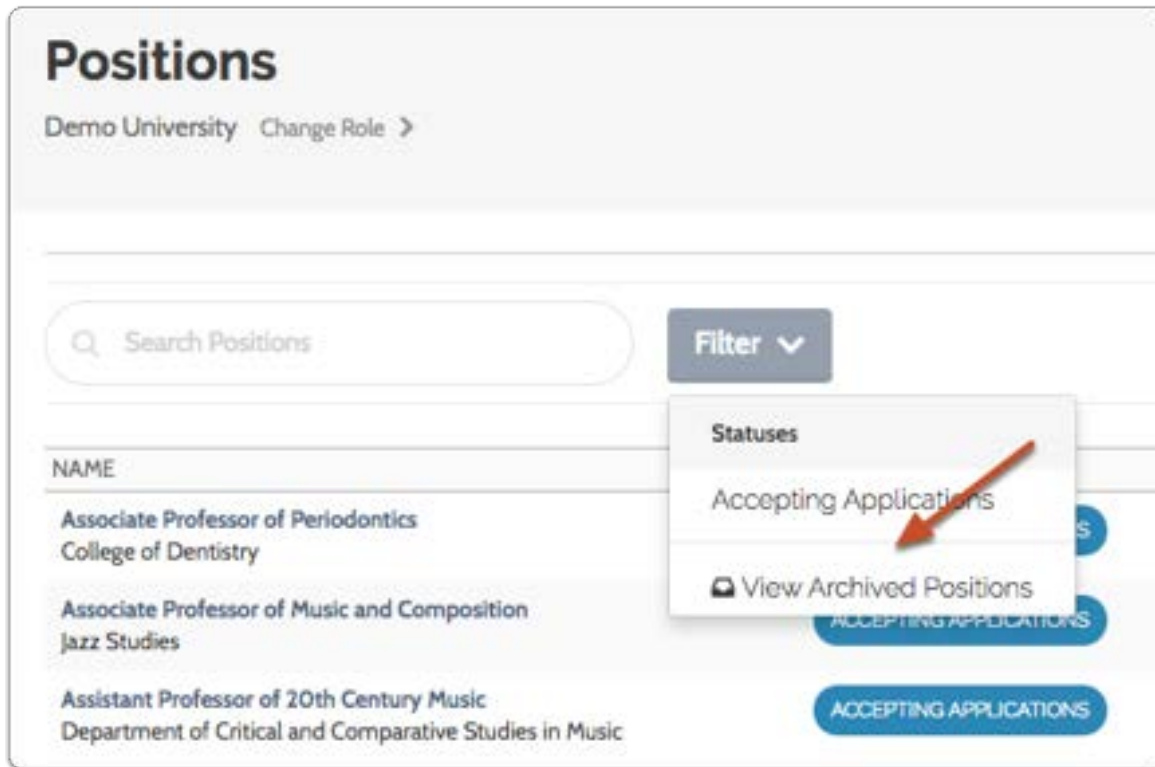
**Body**



## 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



The screenshot shows a web interface titled "Positions" for "Demo University". It includes a search bar labeled "Search Positions" and a "Filter" dropdown menu. The filter menu is open, showing options for "Statuses", "Accepting Applications", and "View Archived Positions". A red arrow points to the "Accepting Applications" option. Below the filter, a table lists positions with their names and departments. The first position is "Associate Professor of Periodontics" at the "College of Dentistry". The second is "Associate Professor of Music and Composition" in "Jazz Studies". The third is "Assistant Professor of 20th Century Music" in the "Department of Critical and Comparative Studies in Music". Each position has a blue button labeled "ACCEPTING APPLICATIONS" to its right.

To reopen the position, select it from the list of closed positions

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

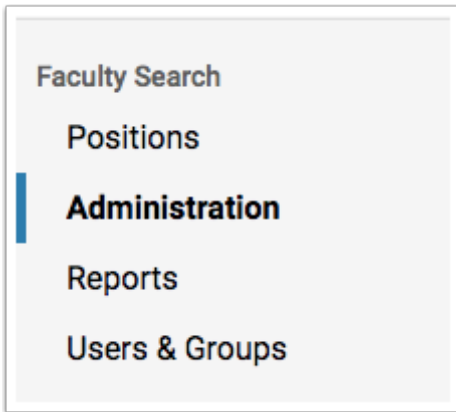
# View Referral Sources to See Where People are Finding Your Position

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.

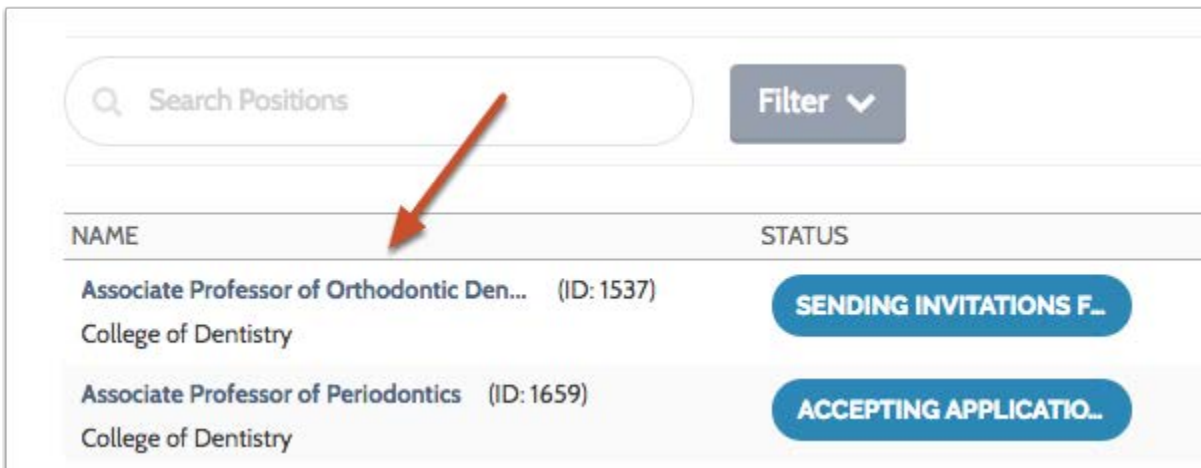
**!** Note that the number of visitors will be larger than the number of applicants to your position because more people will view the posting than will apply for a position.



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

Demo University > Positions >  
**Assistant Professor of Landscape Architecture**

Unit: Department of Architectural History | Status: Accepting Applications [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2015

**APPLICANTS** (5 of 5)

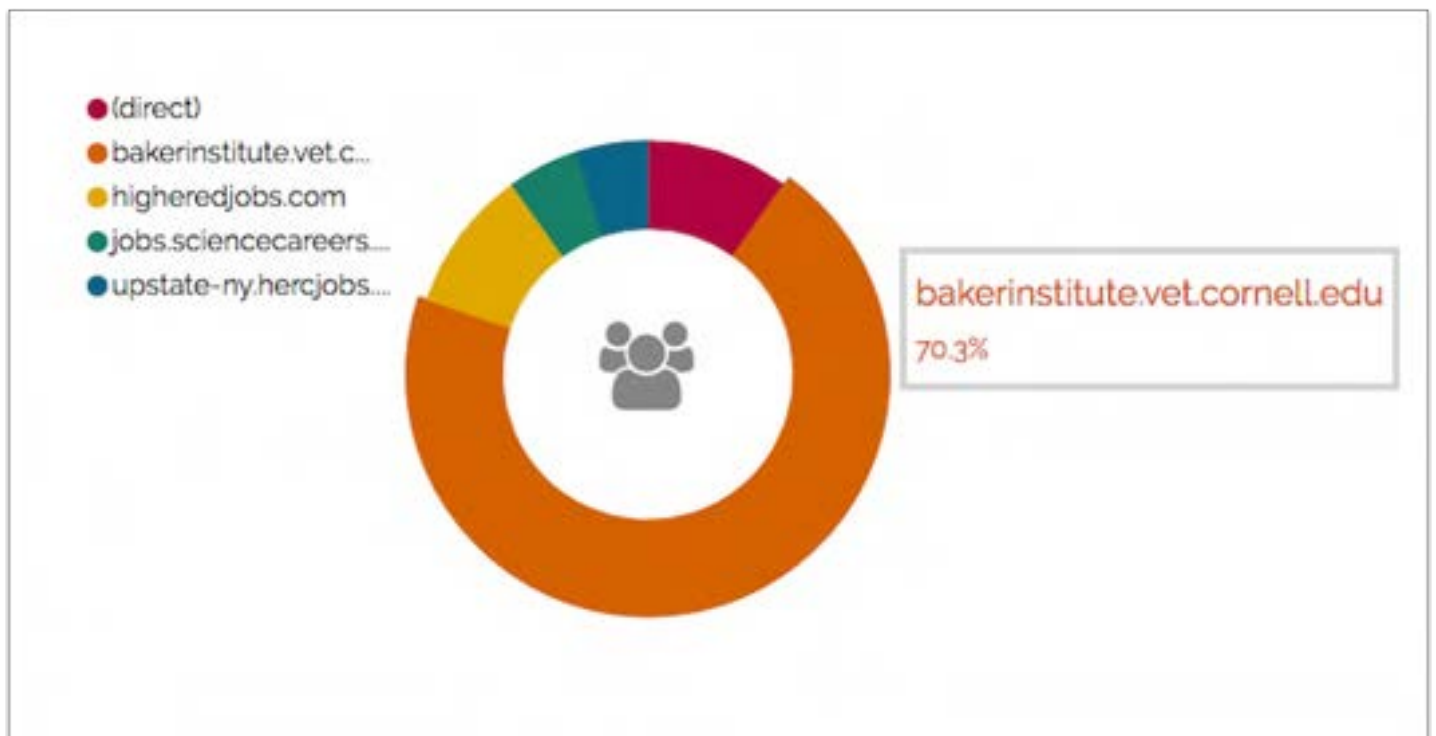
Keyword Search  [Filter](#)

Position Actions

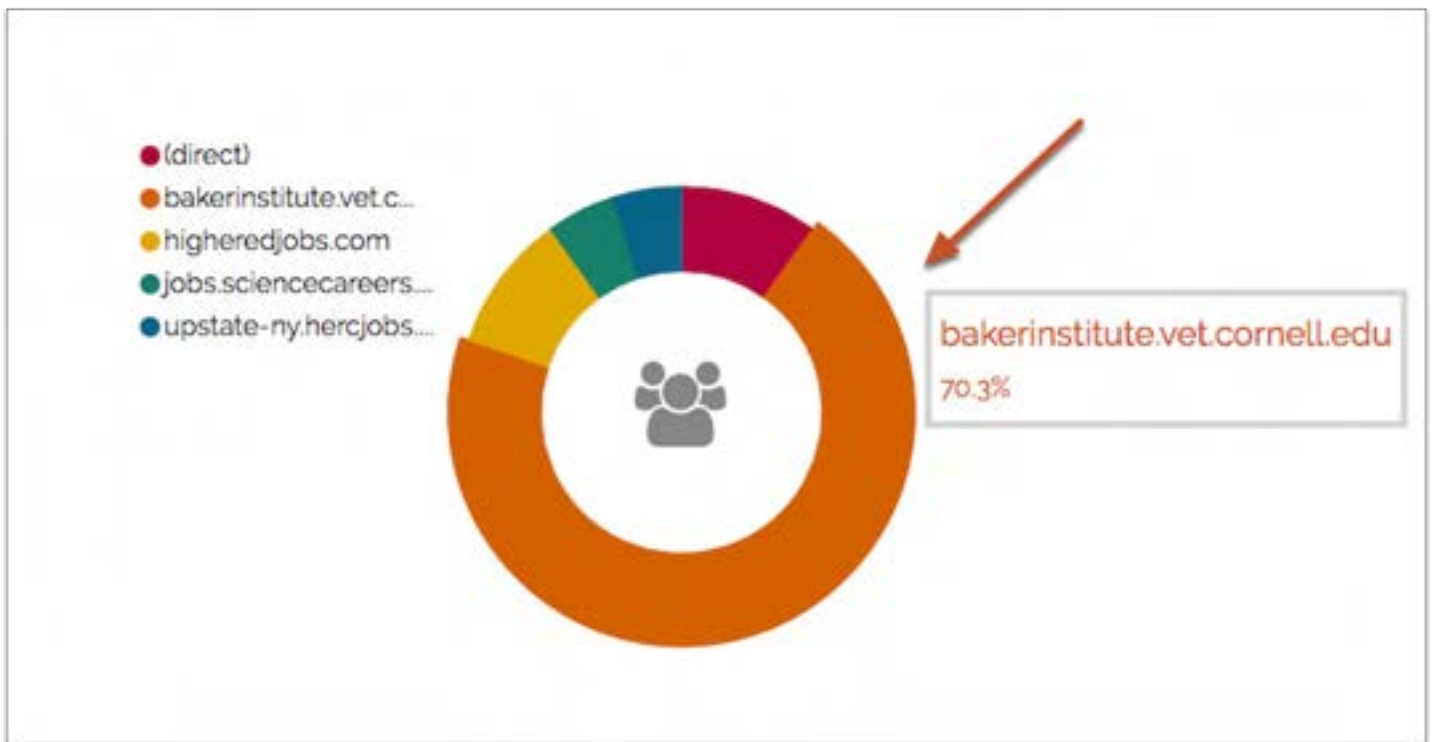
- Edit Position
- View committee
- View position details
- View referral sources**
- Tour this page
- Add new applicant
- Close position
- My Overall Rating

Applicant Name | Date Updated | Applicant Status | Tags

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.

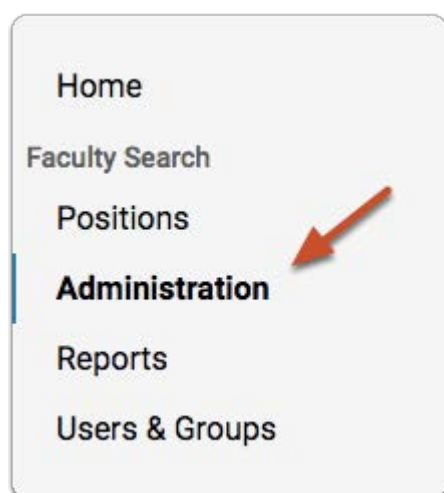
Position statuses are created on the "Administration" page of a unit in Faculty Search.

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.

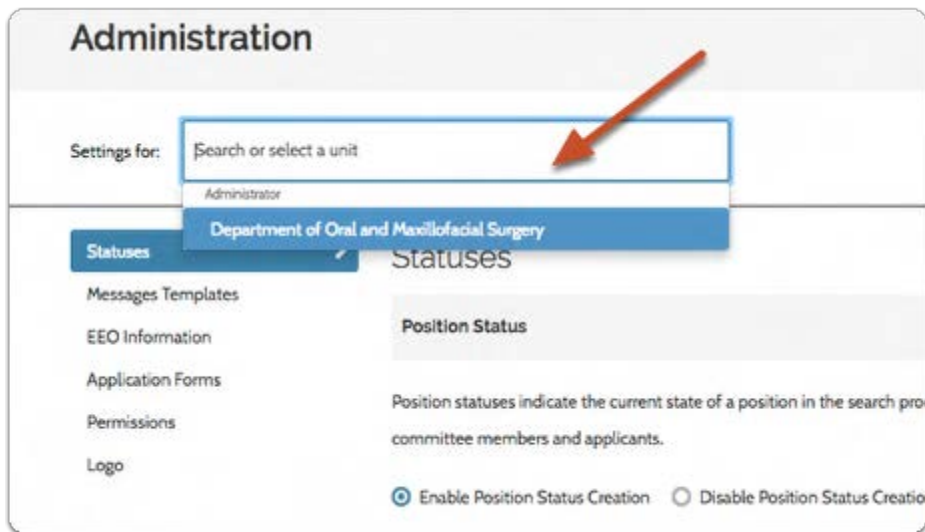
## 1. On the navigation bar select the Administrar option



## 2. Make sure you are editing settings for the correct unit

**i** 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.

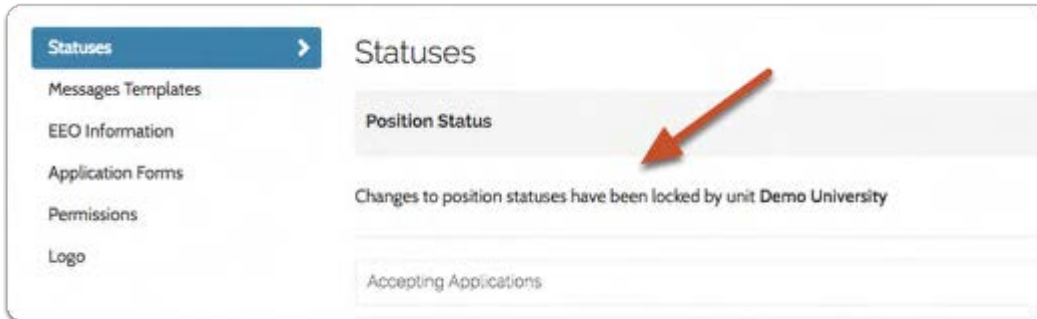
The changes you make here will apply to the current administrative unit, but you can also disable the creation of application statuses for lower units, and send application statuses or the set of application statuses down to lower units.




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



If position status is disabled, you will see a notice that changes to position statuses have been locked by a higher unit, as shown below:



#### 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.

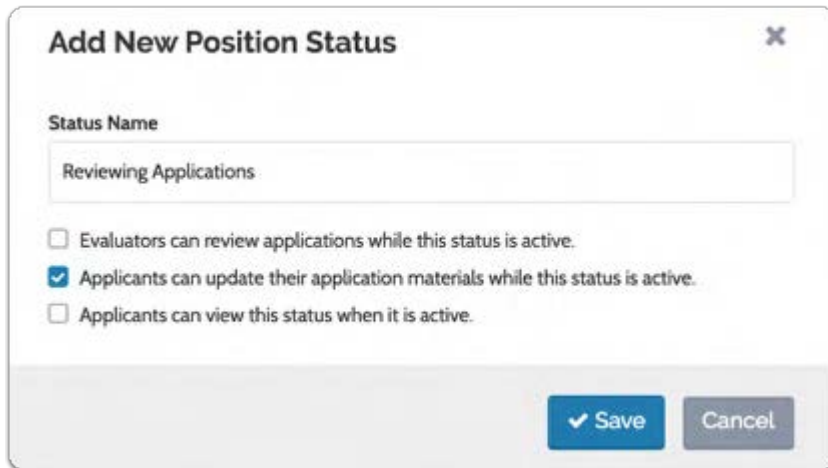


#### 5. Select "Add new status"



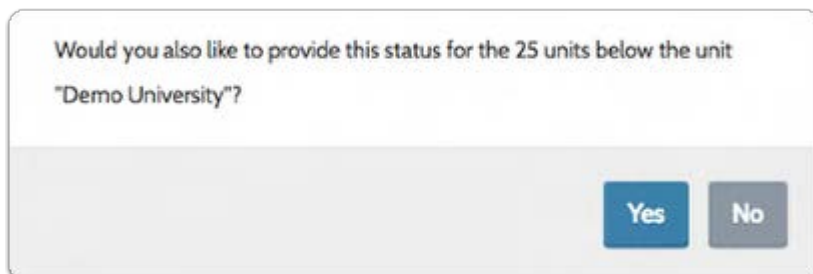
## 6. Enter the status name and indicate the permissions associated with the status

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.



The screenshot shows a dialog box titled "Add New Position Status" with a close button (X) in the top right corner. Below the title is a "Status Name" label and a text input field containing "Reviewing Applications". Underneath are three checkboxes with labels: "Evaluators can review applications while this status is active." (unchecked), "Applicants can update their application materials while this status is active." (checked), and "Applicants can view this status when it is active." (unchecked). At the bottom right are two buttons: "Save" (with a checkmark icon) and "Cancel".

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



The screenshot shows a confirmation dialog box with the text: "Would you also like to provide this status for the 25 units below the unit 'Demo University'?". At the bottom right are two buttons: "Yes" and "No".

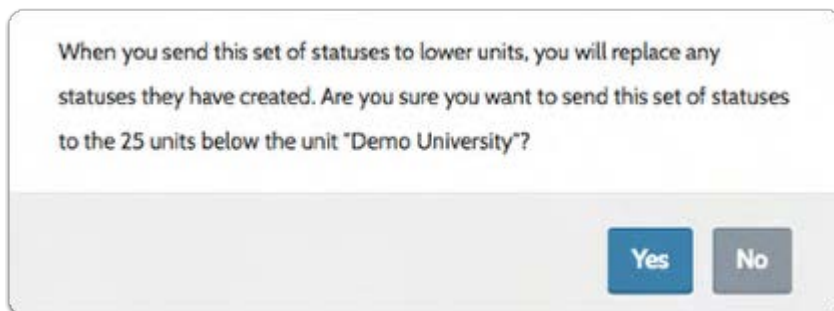
To send the entire set of position statuses down to lower units:

- ⚠ 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

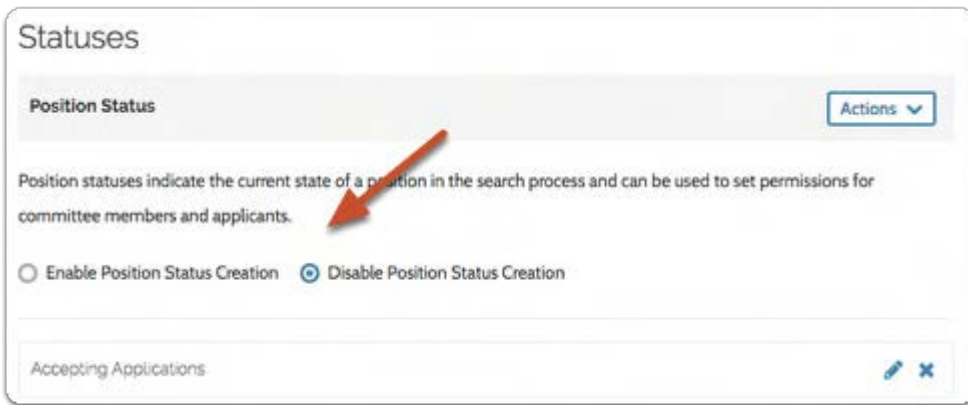


To enable or disable position status creation for lower administrative units:

Click to disable or enable status creation

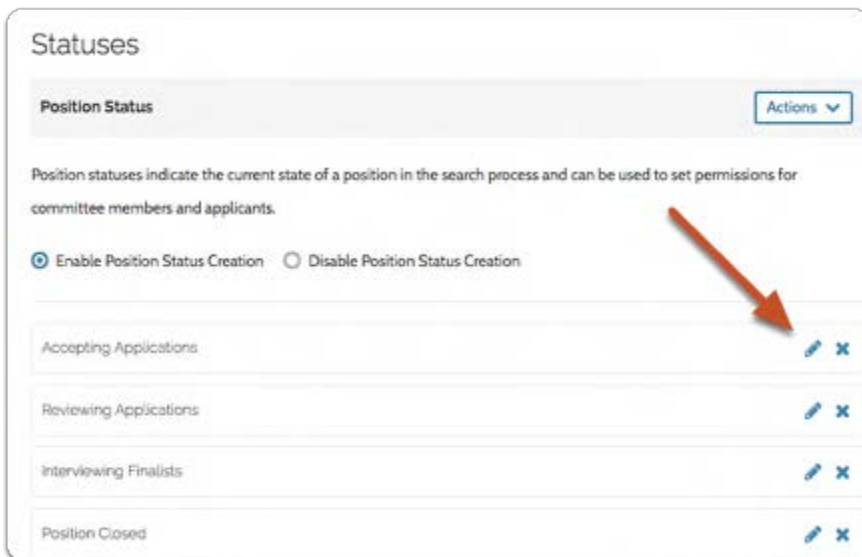
When disabled, units below cannot create, edit or delete statuses, but you can still create and edit statuses for the current unit.





To edit existing position statuses:

1. Click the edit pencil next to the status



## 2. Make your edits and click "Save"

### Edit Status ✕

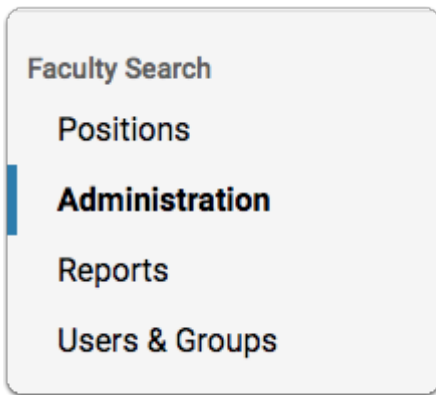
- Applicants can view this status when it is active.
- Applicants can update their application materials while this status is active
- Evaluators can review applications while this status is active.

# 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

NAME	STATUS
Associate Professor of Orthodontic Dentistry College of Dentistry	SENDING INVITATIONS FOR CAMPUS VISITS
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS
Associate Professor of Music and Composition Jazz Studies	
Assistant Professor of 20th Century Music Department of Critical and Comparative Studies in Music	ACCEPTING APPLICATIONS

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

Demo University > Positions >

### Assistant Professor of Landscape Architecture

Position Actions

Unit: Department of Architectural History | Status: Accepting Applications [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2018

#### APPLICANTS (5 of 5)

Keyword Search | Filter | Saved Views | Columns

**HIGHEST DEGREE EARNED:** No choices available.

**APPLICATION STATUS:**  Shortlist  Hired  Interview  Longlist

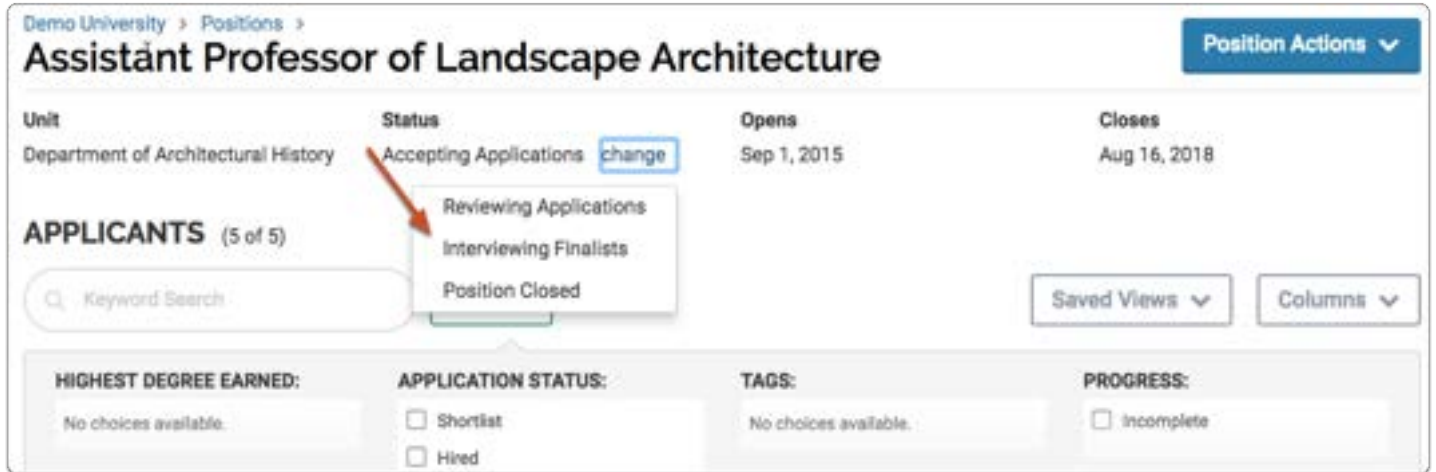
**TAGS:** No choices available.

**PROGRESS:**  Incomplete

**RATINGS:**  My Rating  Overall

## 4. Select a new status from the dropdown menu

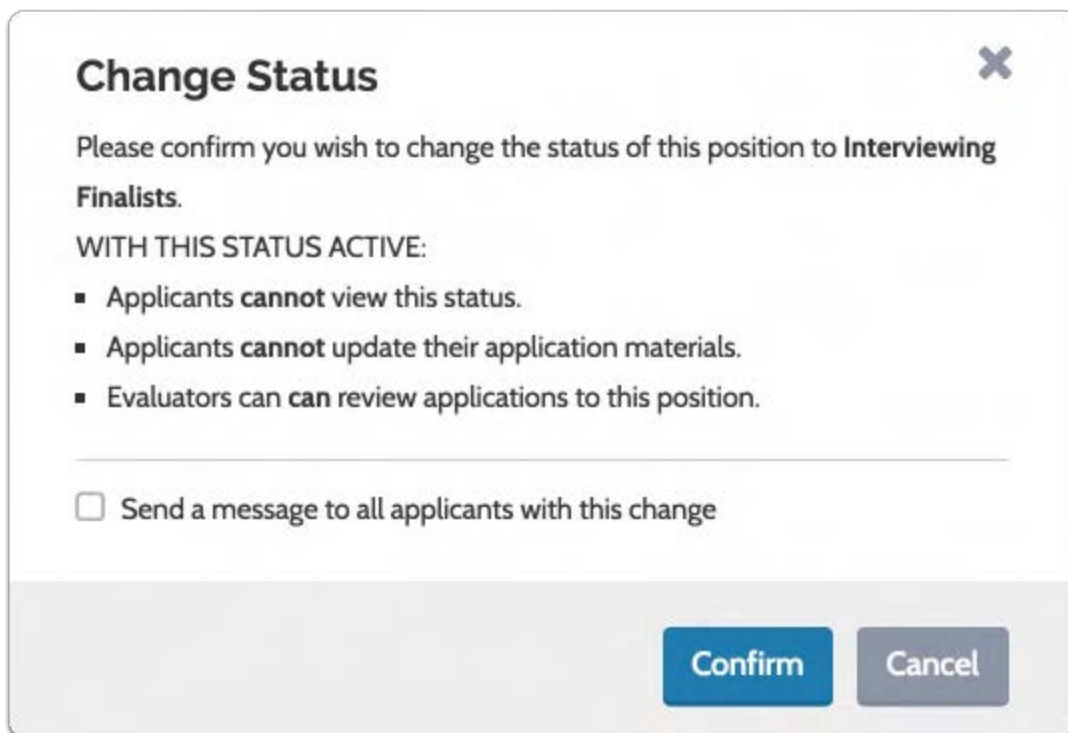
Note: Notice the "Close Position" status at the bottom of the list. See here for more information on [closing a ByCommittee search](#).



The screenshot shows the 'Assistant Professor of Landscape Architecture' position page. The status is currently 'Accepting Applications' with a 'change' button next to it. A dropdown menu is open, showing options: 'Reviewing Applications', 'Interviewing Finalists', and 'Position Closed'. The page also displays 'Unit: Department of Architectural History', 'Opens: Sep 1, 2015', and 'Closes: Aug 16, 2018'. There are 5 applicants. Below the dropdown, there are filters for 'HIGHEST DEGREE EARNED', 'APPLICATION STATUS' (Shortlist, Hired), 'TAGS', and 'PROGRESS'.

## 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.



The 'Change Status' window is a modal dialog with a close button (X) in the top right corner. The text reads: 'Please confirm you wish to change the status of this position to **Interviewing Finalists**. WITH THIS STATUS ACTIVE:'. Below this, there is a list of three bullet points: 'Applicants cannot view this status.', 'Applicants cannot update their application materials.', and 'Evaluators can review applications to this position.'. At the bottom, there is a checkbox labeled 'Send a message to all applicants with this change'. At the very bottom, there are two buttons: 'Confirm' and 'Cancel'.

To change position status from Review Position page:

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

## ByCommittee – Positions

Associate Professor of Orthodontic Dentistry  
Review Position

**THIS POSITION IS:** ⓘ

**Open to new applicants**

It opened on **Jan 31, 2016**. [change](#) | [clear](#)


It will close on **Jun 30, 2016**. [change](#) | [clear](#)

🔒 "Apply Now" page is **published**. [view](#) | [change](#)

**POSITION STATUS:** ⓘ

**Interviewing Finalists**

*With this status active:*

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

[change](#)

## 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

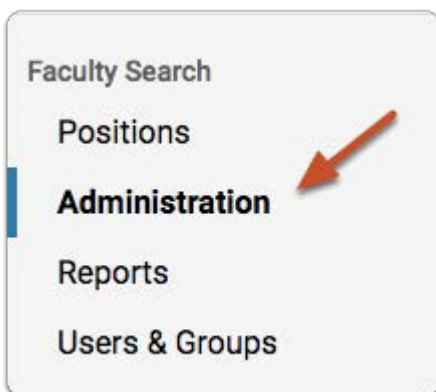
# Create and Manage Application Statuses

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"



## 2. Check to make sure you are editing settings for the correct unit

**i** 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.



Demo University >  
**Administration**

Settings for:  
Demo University

**Statuses** > Statures

- Messages Templates
- EEO Information
- Application Forms
- Permissions
- Logo
- Settings

**Position Status** Actions

Position statuses indicate the current state of a position in the search process and can be used to set permissions for committee members and applicants.

Enable Position Status Creation  Disable Position Status Creation

Accepting Applications	<a href="#">✎</a> <a href="#">✕</a>
Reviewing Applications	<a href="#">✎</a> <a href="#">✕</a>
Interviewing Finalists	<a href="#">✎</a> <a href="#">✕</a>
Under Final Review	<a href="#">✎</a> <a href="#">✕</a>

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

**Application Status** Actions

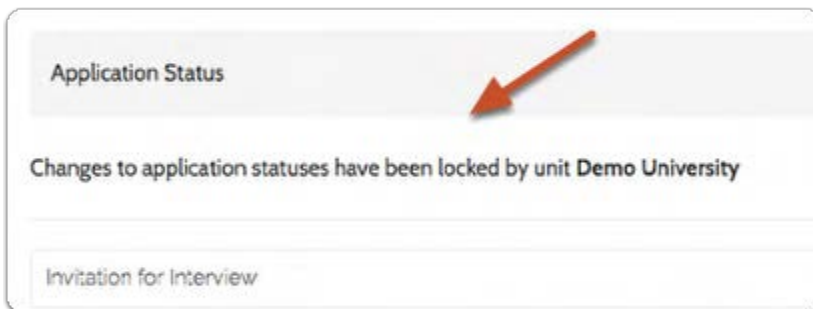
Application statuses indicate where an individual application is in the review process and can be used to set permissions for applicants.

Enable Application Status Creation  Disable Application Status Creation

New	<a href="#">✎</a> <a href="#">✕</a>
Longlist	<a href="#">✎</a> <a href="#">✕</a>
Shortlist	<a href="#">✎</a> <a href="#">✕</a>
Interview	<a href="#">✎</a> <a href="#">✕</a>
Offer Pending	<a href="#">✎</a> <a href="#">✕</a>
Hired	<a href="#">✎</a> <a href="#">✕</a>
Invited for Interview	<a href="#">✎</a> <a href="#">✕</a>
Invitation for On-Campus Meeting	<a href="#">✎</a> <a href="#">✕</a>

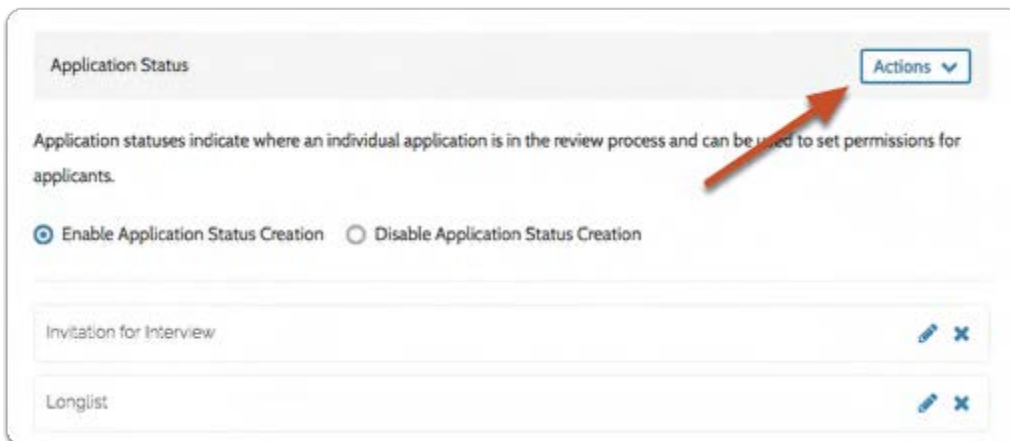


If position status is disabled, you will see a notice that changes to position statuses have been locked by a higher unit, as shown below"

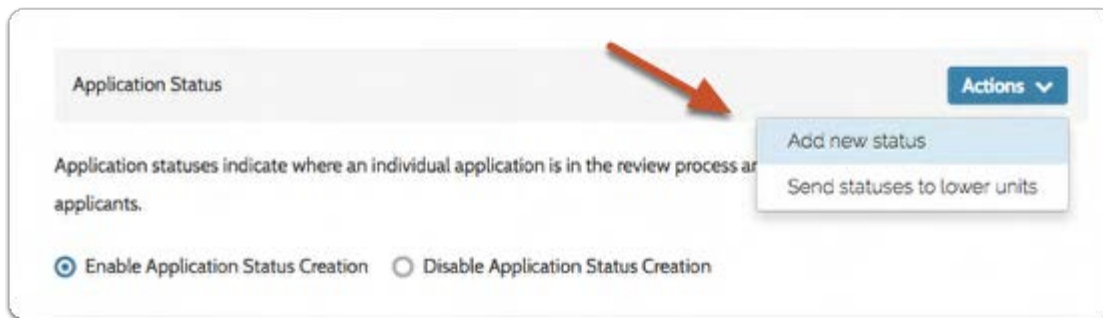


#### 4. Click "Actions"

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



## 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

The screenshot shows a dialog box titled 'Add New Application Status'. It has a close button (X) in the top right corner. Below the title is a text input field. Underneath the input field are two checkboxes: 'Applicants can view this status when it is active.' and 'Applicants can update their application materials while this status is active'. At the bottom of the dialog, there are two buttons: 'Save' (with a checkmark icon) and 'Cancel'.

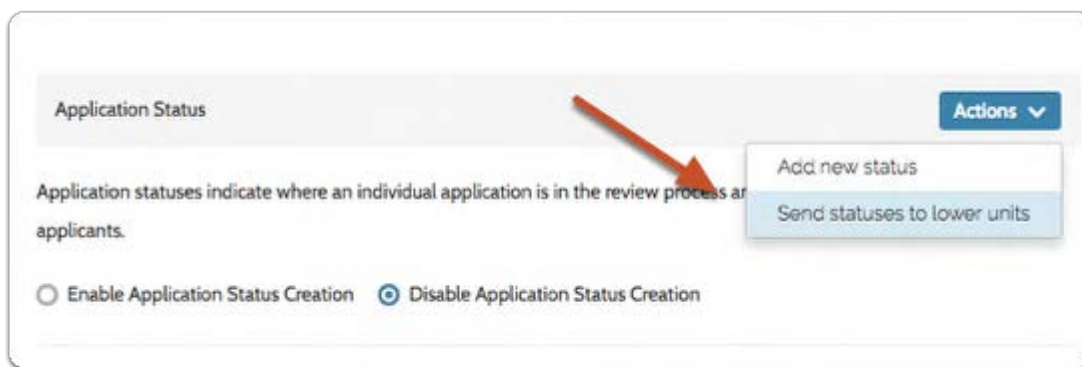
## 7. You will be given the option to provide this status for any units that are below the unit you are editing

The screenshot shows a confirmation dialog box. The text inside reads: 'Would you also like to provide this status for the 6 units below the unit "College of Dentistry"?'. At the bottom of the dialog, there are two buttons: 'Yes' and 'No'.

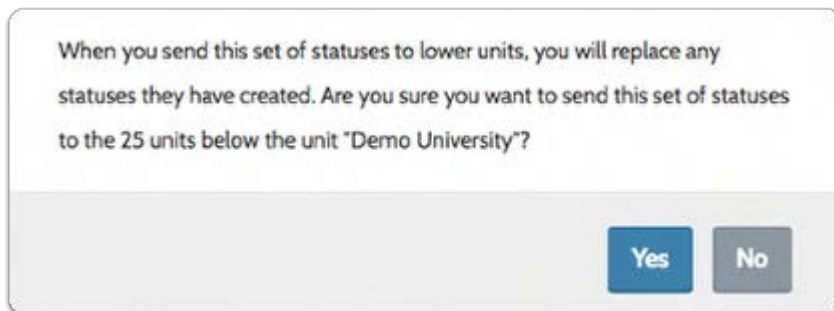
To send the entire set of application statuses down to lower units:

! 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"



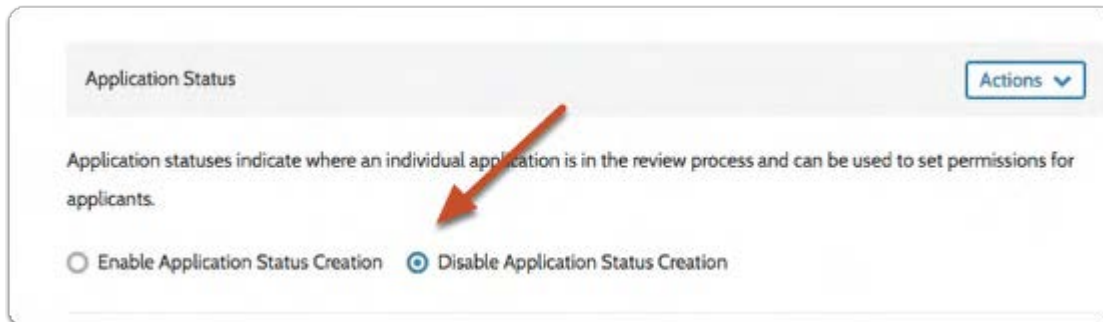
Confirm that you want to replace any statuses the lower units have created



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 ✕

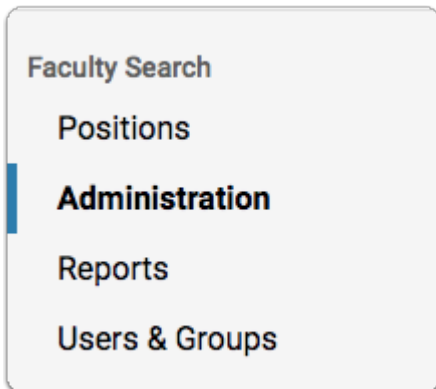
- Applicants can view this status when it is active.
- Applicants can update their application materials while this status is active



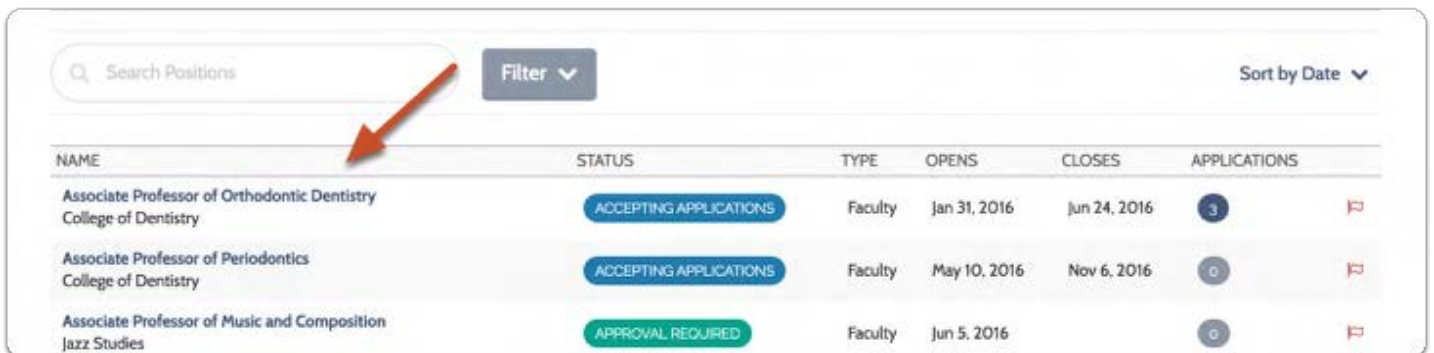
# Assign or Change an Application Status

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



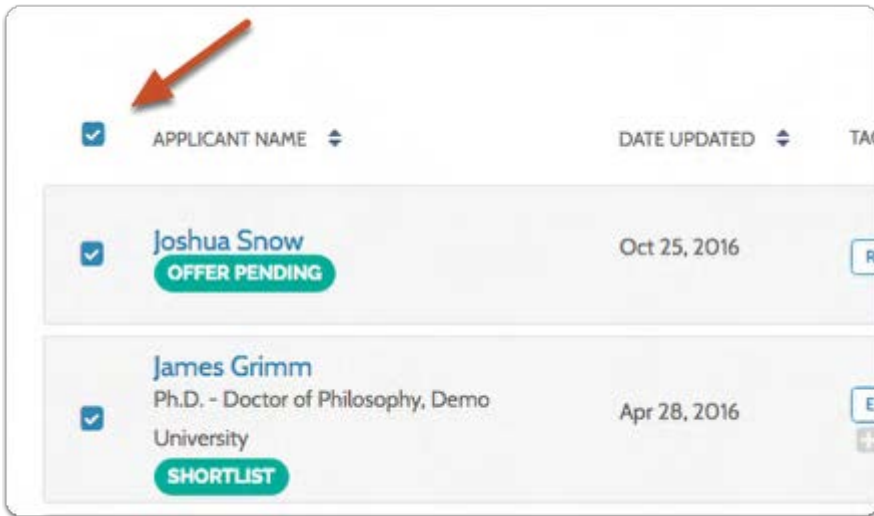
## Click the position title



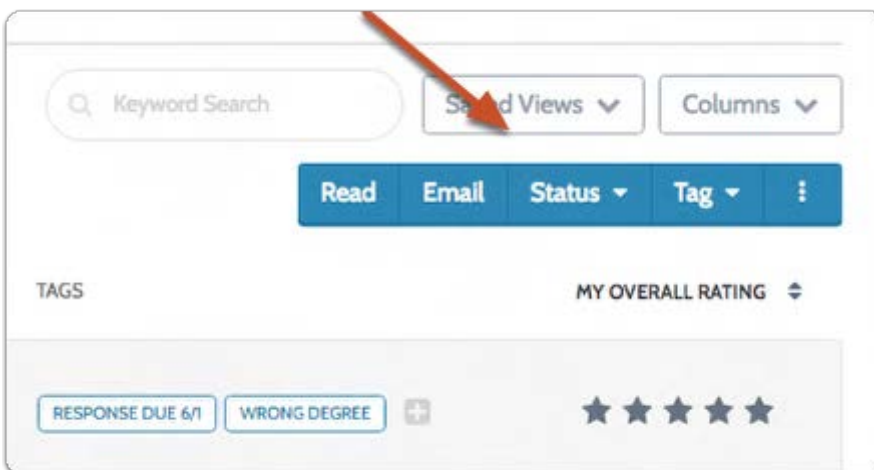
The screenshot shows the Interfolio Faculty Search interface. At the top, there is a search bar labeled 'Search Positions' and a 'Filter' dropdown menu. To the right, there is a 'Sort by Date' dropdown menu. Below these is a table with the following columns: NAME, STATUS, TYPE, OPENS, CLOSES, and APPLICATIONS. The table contains three rows of data. A red arrow points to the first row's 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



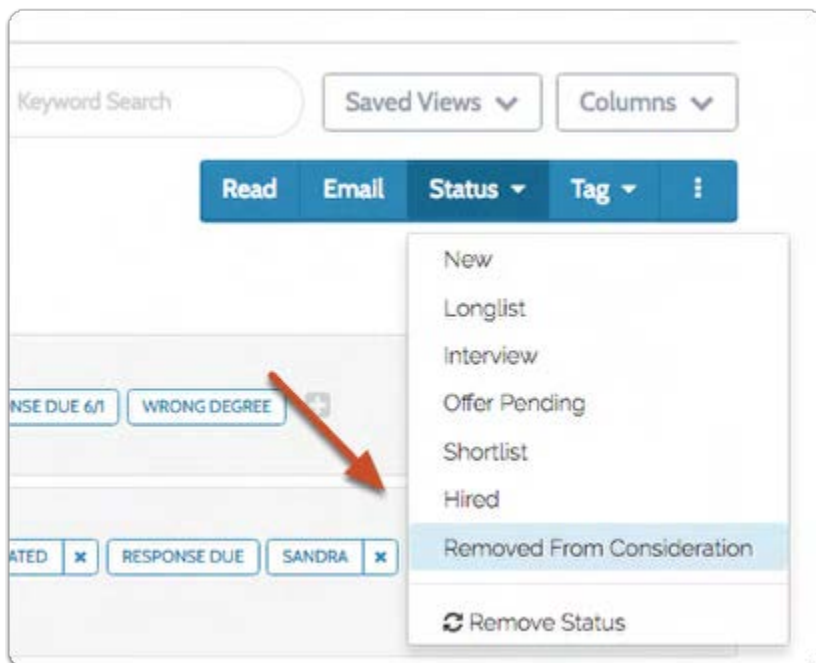
Click the "Status" button that appears to the right of the page



Select the appropriate status to apply to the selected applications

 You can also remove a status this way





## Confirm and notify applicants

- i** In the "Change Status" window you can compose and send an email to the selected applicants about the change.

**Change Status**

Please confirm you wish to change the status of the selected applications to **Interview**.

With this status active:

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

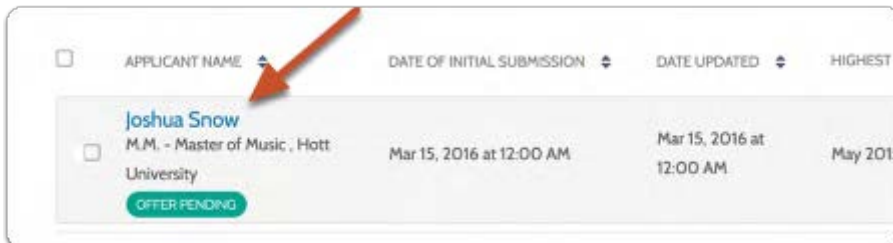
Send message to selected applicants with this change.

**Subject**

**Message**

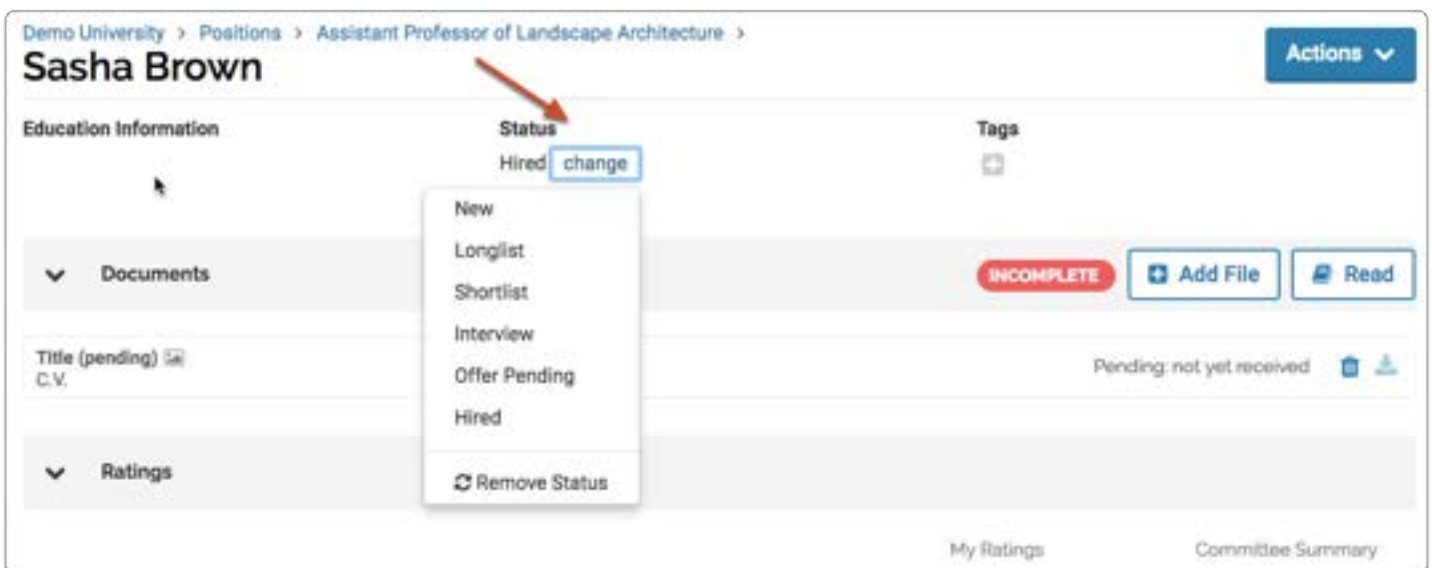
You can also assign or change an application status from the Applicant Profile page:

Click the applicant's name to open the Applicant Profile



<input type="checkbox"/>	APPLICANT NAME	DATE OF INITIAL SUBMISSION	DATE UPDATED	HIGHEST D
<input type="checkbox"/>	<a href="#">Joshua Snow</a> M.M. - Master of Music, Hott University <span>OFFER PENDING</span>	Mar 15, 2016 at 12:00 AM	Mar 15, 2016 at 12:00 AM	May 2015

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



Demo University > Positions > Assistant Professor of Landscape Architecture > **Sasha Brown** Actions

Education Information

**Status**  
Hired change

Tags

INCOMPLETE Add File Read

Title (pending) C.V. Pending: not yet received

Documents

Ratings

My Ratings Committee Summary

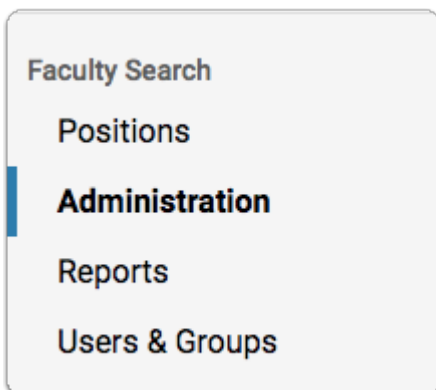
- New
- Longlist
- Shortlist
- Interview
- Offer Pending
- Hired
- Remove Status

# Managing Applications

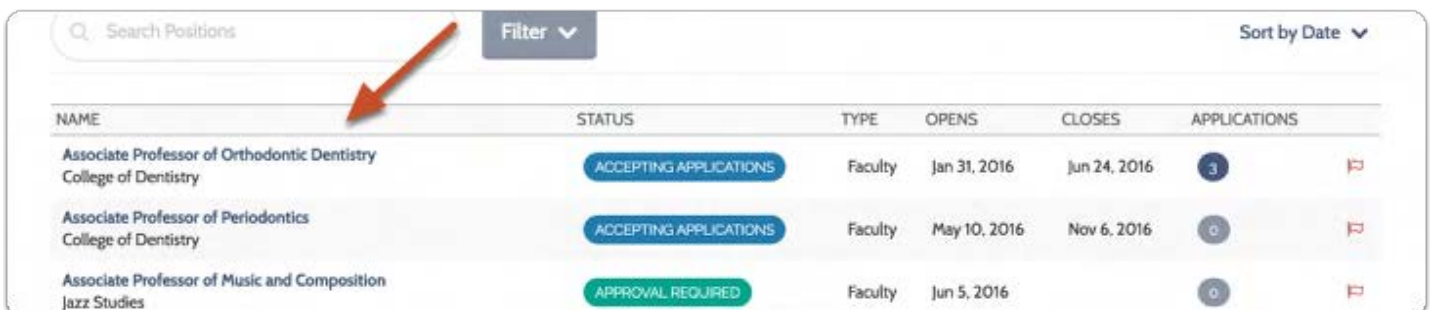
# Add Materials on Behalf of an Applicant

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



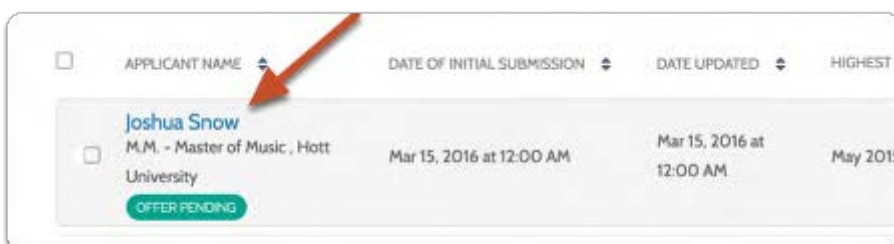
Click the position title



A screenshot of a table titled 'Search Positions' with a search bar and a 'Filter' dropdown. The table has columns for NAME, STATUS, TYPE, OPENS, CLOSES, and APPLICATIONS. An orange arrow points to the first row's 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

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



A screenshot of a table titled 'APPLICANT NAME' with columns for DATE OF INITIAL SUBMISSION, DATE UPDATED, and HIGHEST D. An orange arrow points to the first row's name.

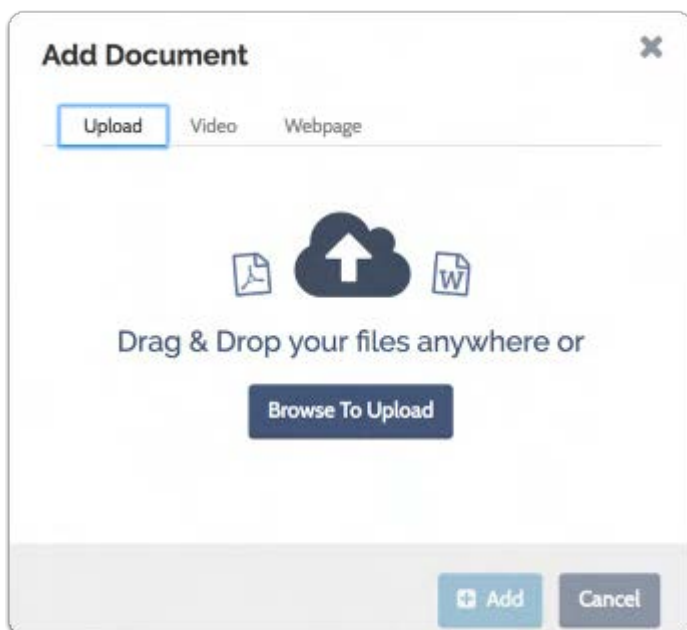
APPLICANT NAME	DATE OF INITIAL SUBMISSION	DATE UPDATED	HIGHEST D
Joshua Snow M.M. - Master of Music, Hott University OFFER PENDING	Mar 15, 2016 at 12:00 AM	Mar 15, 2016 at 12:00 AM	May 2015

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

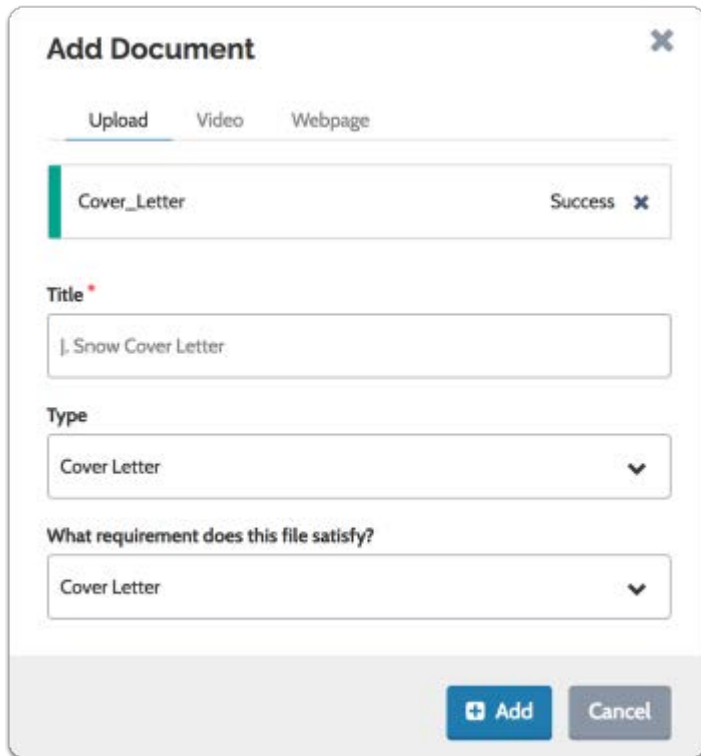
Scroll down to the "Documents" section and click "Add File"



You can drag & drop or browse to upload document files



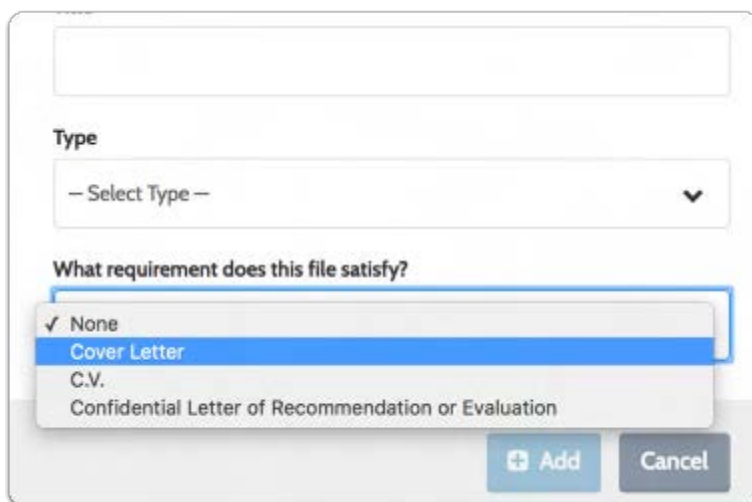
Give the document title, and identify the type (cover letter, C.V., etc)



The screenshot shows a modal window titled "Add Document" with a close button (X) in the top right corner. Below the title are three tabs: "Upload" (selected), "Video", and "Webpage". A green progress bar is visible on the left side of the form. The form contains the following elements:

- A text input field containing "Cover\_Letter" with a "Success" message and a close button (X) to its right.
- A "Title" label with a red asterisk, followed by a text input field containing "J. Snow Cover Letter".
- A "Type" label followed by a dropdown menu with "Cover Letter" selected and a downward arrow.
- A label "What requirement does this file satisfy?" followed by a dropdown menu with "Cover Letter" selected and a downward arrow.
- At the bottom right, there are two buttons: "Add" (with a plus icon) and "Cancel".

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



This screenshot shows the same "Add Document" form, but with the "What requirement does this file satisfy?" dropdown menu open. The menu lists the following options:

- None (with a checkmark)
- Cover Letter (highlighted in blue)
- C.V.
- Confidential Letter of Recommendation or Evaluation

The "Add" and "Cancel" buttons are visible at the bottom right of the form.

Click "Add" to upload the document

**Add Document** [X]

Upload Video Webpage

Cover\_Letter Success [X]

**Title**\*

J. Snow Cover Letter

**Type**


Cover Letter [v]

**What requirement does this file satisfy?**

Cover Letter [v]

[+ Add] Cancel

## Add video files:

-  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

**Add Document**

Upload **Video** Webpage

You can add videos hosted on YouTube and Vimeo on behalf of the applicant. Simply paste the YouTube or Vimeo URL in the space below.

**Title \***

Video Test ✓

**URL \***

https://player.vimeo.com/video/143803930 ✓

**Description ⓘ**

This is a video...

**What requirement does this file satisfy?**

Cover Letter ▼

**Add** **Cancel**

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

**What requirement does this file satisfy?**

Cover Letter ▼

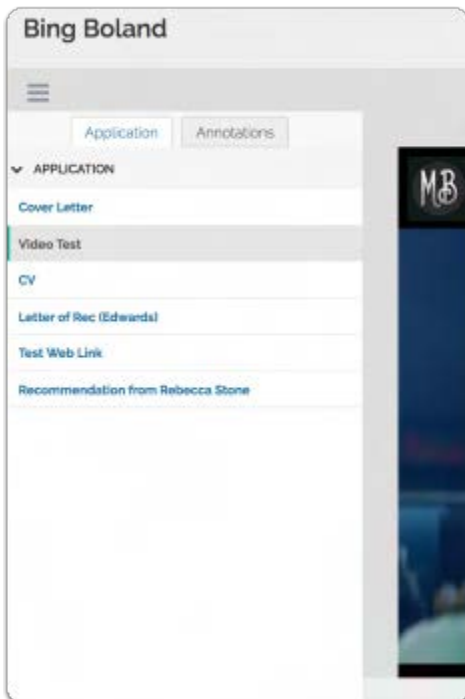
**Add** **Cancel**



The video will be added to the application materials



Evaluators can view the video in the materials reader



Add Webpages:

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

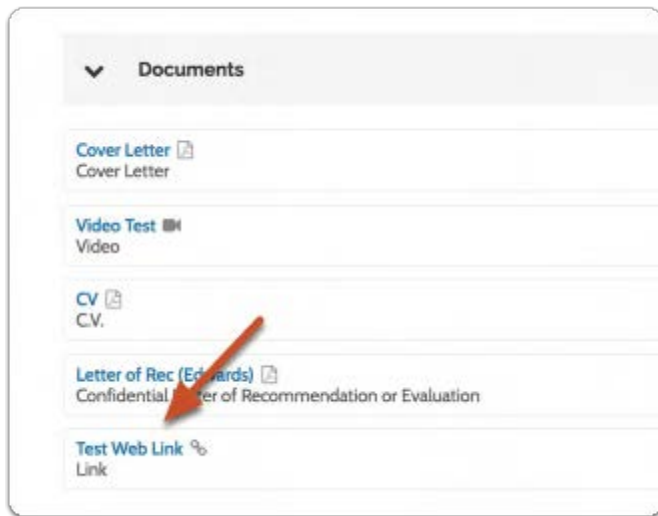
Select the "Webpage" tab, give the webpage a title, add the url and a description of the page

The screenshot shows a dialog box titled "Add Document" with a close button (X) in the top right corner. Below the title are three tabs: "Upload", "Video", and "Webpage", with "Webpage" being the active tab. A short instruction reads: "You can include links to webpages on behalf of the applicant. When a reviewer clicks the link, the webpage will open in a new tab." The form contains three input fields: "Title" with the placeholder text "Test Web Link" and a green checkmark; "URL" with the placeholder text "http://www.interfolio.com/" and a green checkmark; and "Description" with the placeholder text "This is a description of the webpage...". Below these fields is a dropdown menu labeled "What requirement does this file satisfy?" with "None" selected. At the bottom right are two buttons: "Add" (with a plus icon) and "Cancel".

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

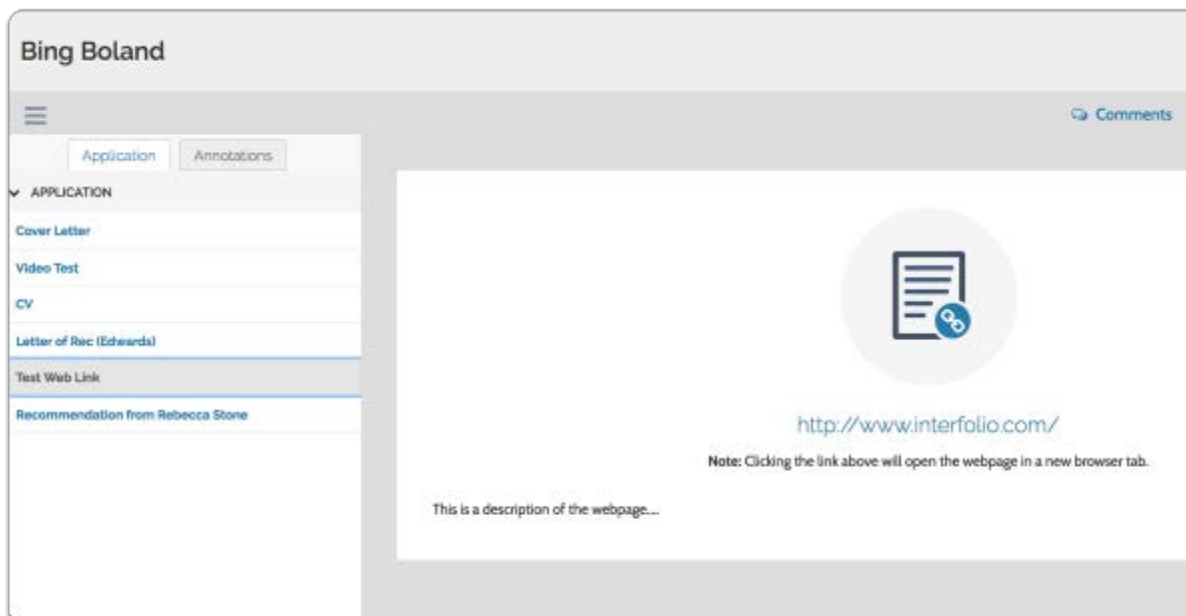
This is a close-up of the dropdown menu from the previous screenshot. The label "What requirement does this file satisfy?" is positioned above the dropdown. The dropdown menu is open, showing "Cover Letter" as the selected option. At the bottom right of the dialog box, the "Add" and "Cancel" buttons are visible.

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

**i** Note: Clicking the link will open the webpage in a new browser tab.



Click the Actions button and then Mark application as complete

# Sasha Brown

Actions 

Education Information

Status

Hired [change](#)

Tags



- Share application
- Email applicant
- Download Documents
- Mark application complete
- Request recommendation

 Documents

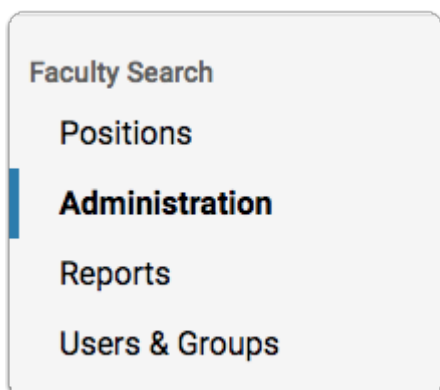
INCOMPLETE

ad

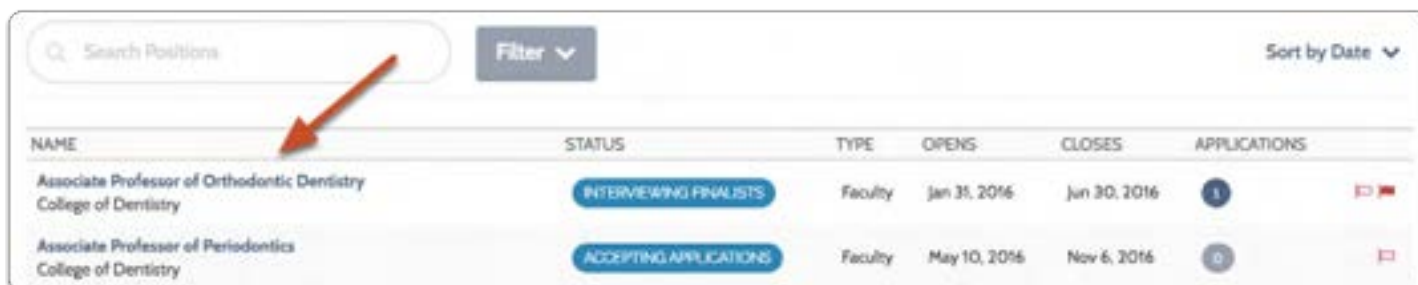
# Create an Application on Behalf of an Applicant

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



The screenshot shows a search interface with a search bar, a filter dropdown, and a 'Sort by Date' dropdown. Below is a table with columns: NAME, STATUS, TYPE, OPENS, CLOSES, and APPLICATIONS.

NAME	STATUS	TYPE	OPENS	CLOSES	APPLICATIONS
Associate Professor of Orthodontic Dentistry College of Dentistry	INTERVIEWING FINALISTS	Faculty	Jan 31, 2016	Jun 30, 2016	1
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS	Faculty	May 10, 2016	Nov 6, 2016	0

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

Demo University > Positions >  
**Assistant Professor of Landscape Architecture**

Unit: Department of Architectural History | Status: Accepting Applications [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2015

**APPLICANTS** (5 of 5)

Keyword Search  [Filter](#)

Position Actions dropdown menu:  
- Edit Position  
- View committee  
- View position details  
- View referral sources  
- Tour this page  
- **Add new applicant** (indicated by a red arrow)  
- Close position

Table headers: Applicant Name, Date Updated, Applicant Status, Tags, My Overall Rating

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

### Add New Application

Add information for the new application you're adding to this position.

**Applicant First Name \***

**Applicant Last Name \***

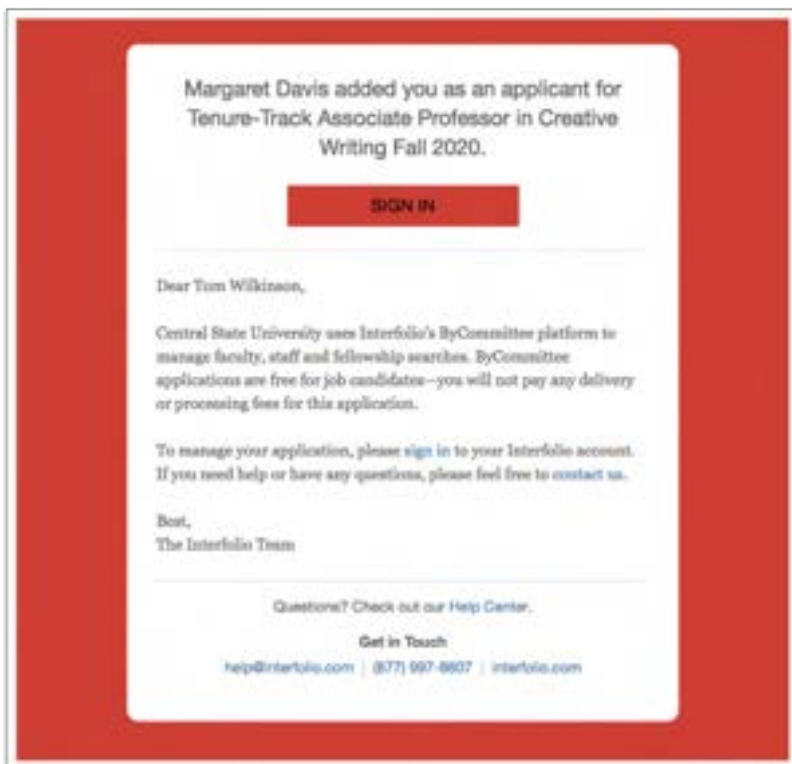
**Email \***

[Add](#) [Cancel](#)

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

<input type="checkbox"/> APPLICANT NAME	DATE OF INITIAL SUBMISSION	DATE UPDATED
<input type="checkbox"/> Franklin Minicz	Jun 30, 2016 at 12:00 AM	Jun 30, 2016 at 12:00 AM
<input type="checkbox"/> Bing Boland	Jun 30, 2016 at 12:00 AM	Jun 30, 2016 at 12:00 AM

Applicants will receive a standard email after being added

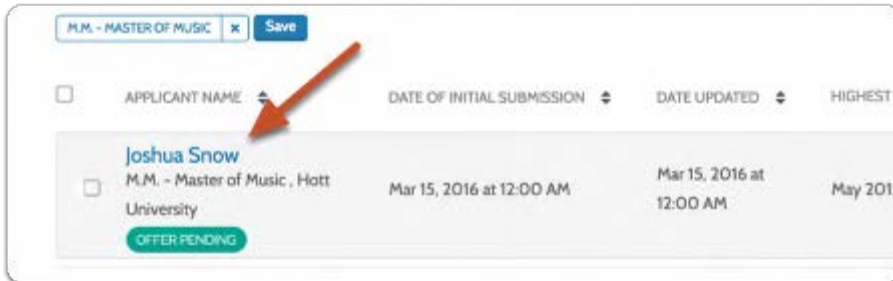


⚠ Administrators and Committee Managers CANNOT fill out forms (EEO or Custom) on behalf of applicants.

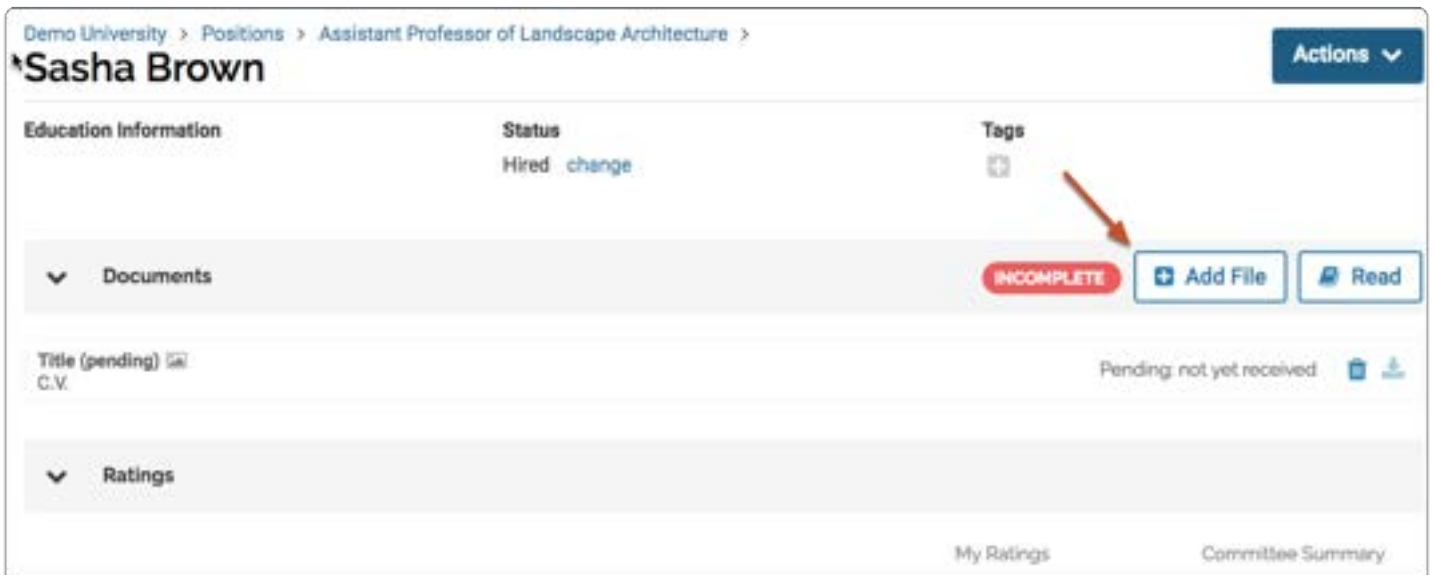
Applicants must be notified to complete any form responses, and to do so the application must allow for updates. For more information on how to accomplish this, reference our resources on [Messaging Applicants](#) and [Creating a Position Status](#).

To add materials to the application:

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



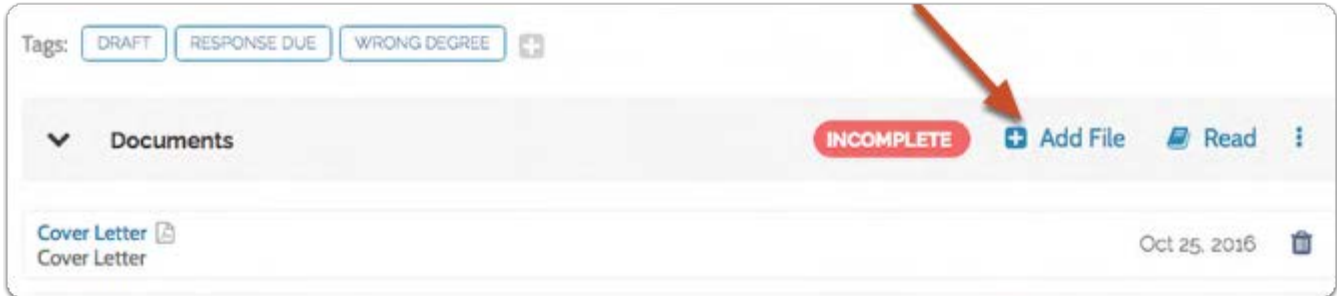
Scroll down to the "Documents" section and click "Add File"



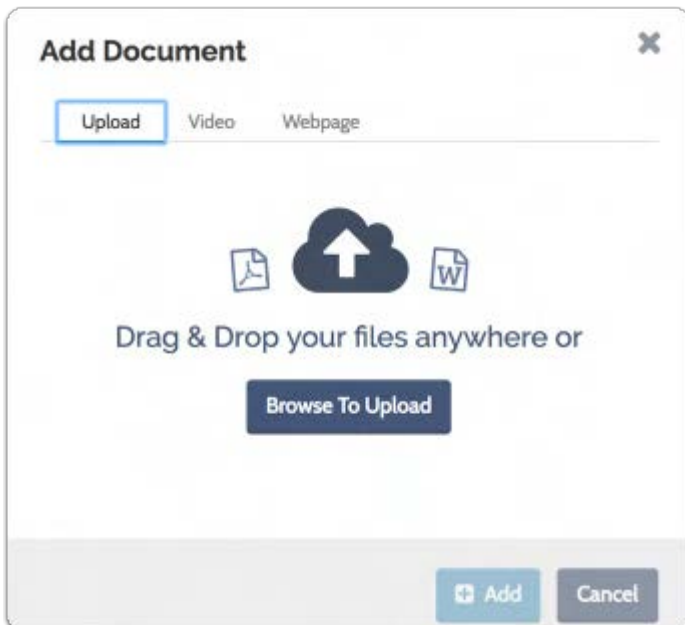


Add document files (pdf, .doc, etc):

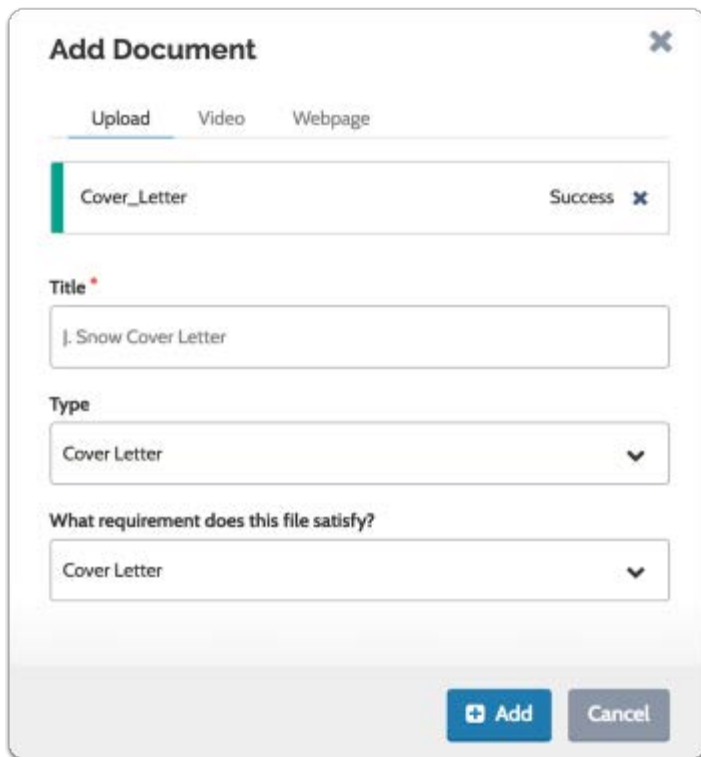
Scroll down to the "Documents" section and click "Add File"



You can drag & drop or browse to upload document files

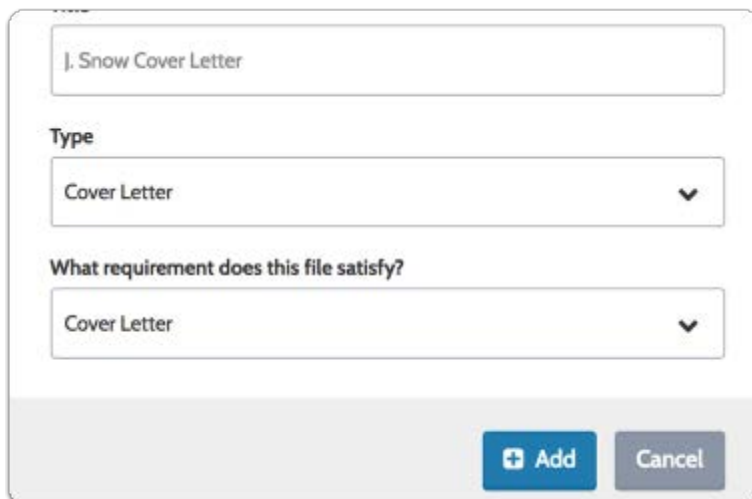


Give the document title, and identify the type (cover letter, C.V., etc)



The screenshot shows a modal window titled "Add Document" with a close button (X) in the top right corner. Below the title are three tabs: "Upload", "Video", and "Webpage", with "Upload" being the active tab. A green progress bar is visible on the left side of the upload area. The file name "Cover\_Letter" is displayed in the center, and the word "Success" with a close button (X) is on the right. Below this, there are three input fields: "Title" (with a red asterisk indicating it is required) containing "J. Snow Cover Letter", "Type" containing "Cover Letter", and "What requirement does this file satisfy?" containing "Cover Letter". At the bottom right, there are two buttons: "Add" (blue with a plus icon) and "Cancel" (grey).

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



This screenshot is a cropped version of the "Add Document" dialog box, focusing on the input fields. It shows the "Title" field with "J. Snow Cover Letter", the "Type" dropdown menu set to "Cover Letter", and the "What requirement does this file satisfy?" dropdown menu also set to "Cover Letter". The "Add" and "Cancel" buttons are visible at the bottom right.

Click "Add" to upload the document

**Add Document** [X]

Upload Video Webpage

Cover\_Letter Success [X]


**Title \***  
J. Snow Cover Letter

**Type**  
Cover Letter [v]

**What requirement does this file satisfy?**  
Cover Letter [v]

[+] Add Cancel

Add video files:

-  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

**Add Document** [X]

Upload **Video** Webpage

You can add videos hosted on YouTube and Vimeo on behalf of the applicant. Simply paste the YouTube or Vimeo URL in the space below.

**Title \***  
Video Test ✓

**URL \***  
<https://player.vimeo.com/video/143803920> ✓

**Description** ⓘ  
This is a video...

**What requirement does this file satisfy?**  
Cover Letter ▼

[Add] [Cancel]

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

**Add Document** [X]

Upload **Video** Webpage

You can add videos hosted on YouTube and Vimeo on behalf of the applicant. Simply paste the YouTube or Vimeo URL in the space below.

**Title \***  
Video Test ✓

**URL \***  
<https://player.vimeo.com/video/143803920> ✓

**Description** ⓘ  
This is a video...

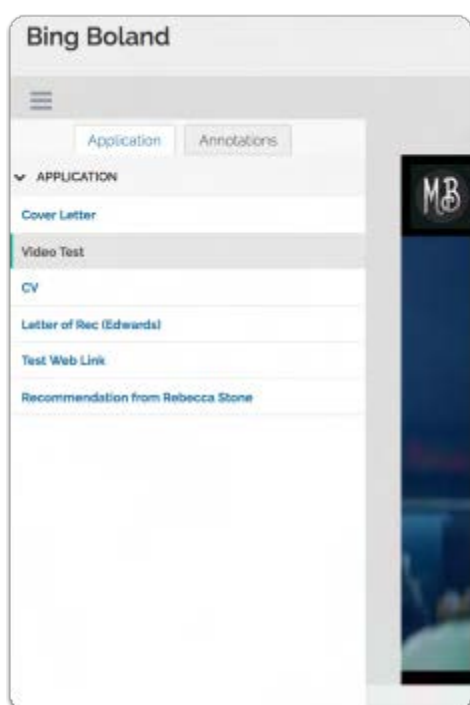
**What requirement does this file satisfy?**  
Cover Letter ▼

[Add] [Cancel]

The video will be added to the application materials



Evaluators can view the video in the materials reader



Add Webpages:

**i** 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

**Add Document**

Upload Video Webpage

You can include links to webpages on behalf of the applicant. When a reviewer clicks the link, the webpage will open in a new tab.

**Title** \*

Test Web Link ✓

**URL** \*

http://www.interfolio.com/ ✓

**Description** #

This is a description of the webpage... [ ]

What requirement does this file satisfy?

None ▾

**Add** **Cancel**

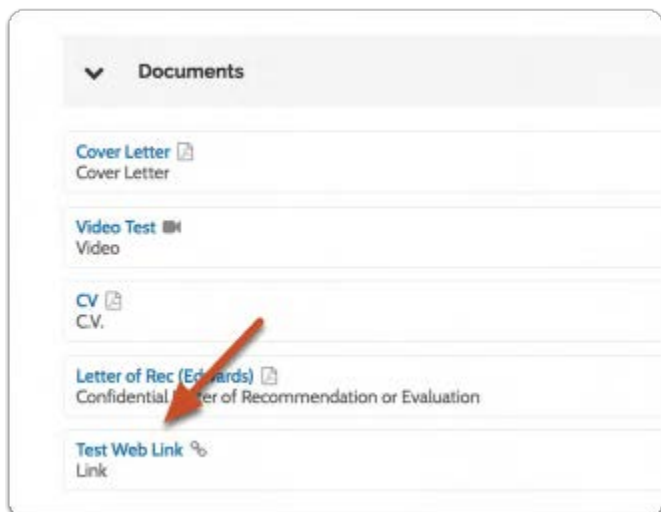
If the webpage satisfies a requirement, indicate which requirement it satisfies

What requirement does this file satisfy?

Cover Letter ▾

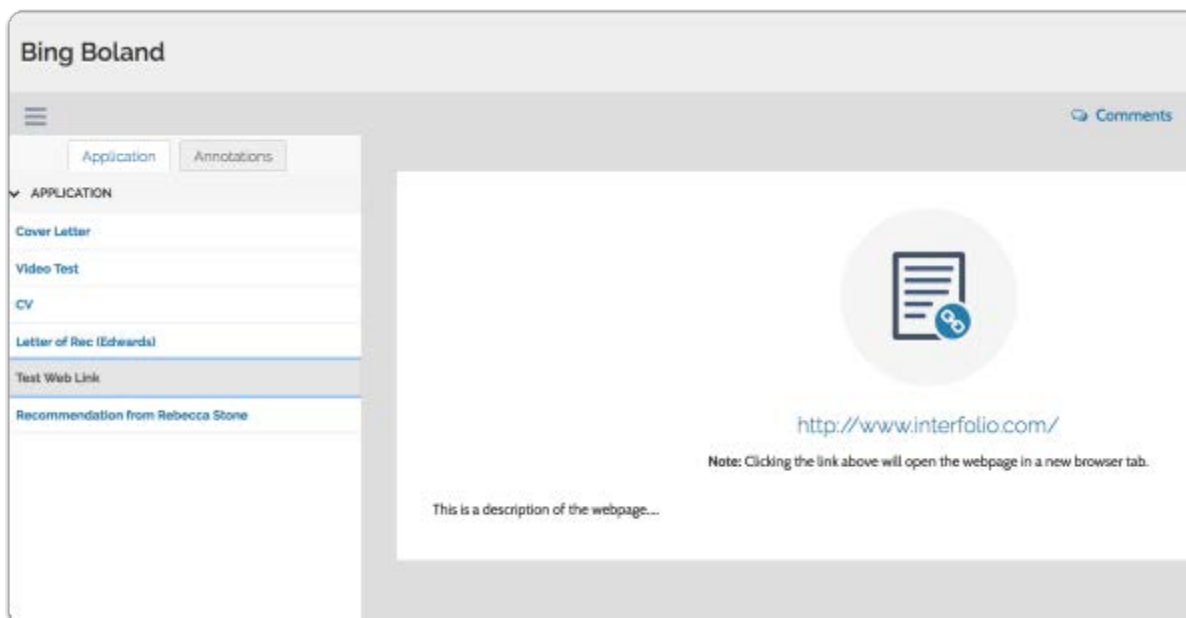
**Add** **Cancel**

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.



Mark the application as complete

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

# Sasha Brown

Actions ▾

Education Information

Status

Hired [change](#)

Tags



- Share application
- Email applicant
- Download Documents
- Mark application complete
- Request recommendation

▾ Documents

INCOMPLETE

ad

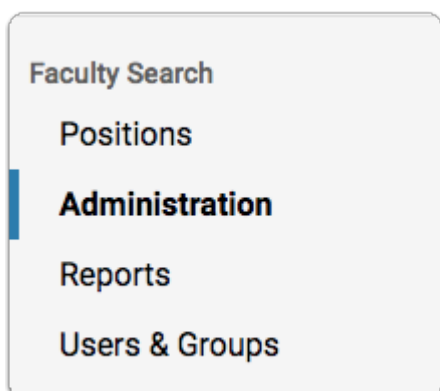


# Request a Letter of Recommendation on Behalf of an Applicant

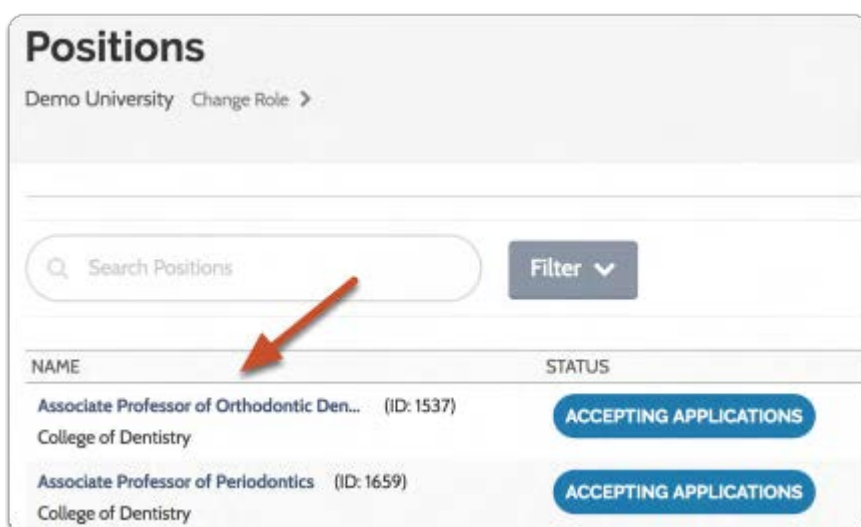
Committee Managers and Administrators can request confidential letters of recommendation directly from recommenders on behalf of an applicant. This allows, for instance, a committee to request recommendations from a list of potential recommenders suggested by the applicant without involving the applicant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

Navigate to the applicant's profile page

Click Positions from the navigation bar



Click the name of the position



## Select the applicant

<input type="checkbox"/>	APPLICANT NAME	DATE UPDATED	TAGS
<input type="checkbox"/>	Bing Boland <b>SHORTLIST</b>	Oct 25, 2016	DRAFT RESPONSE DUE
<input type="checkbox"/>	James Grimm Ph.D. - Doctor of Philosophy, Demo University <b>SHORTLIST</b>	Apr 28, 2016	EVALUATED * RESPO

## Click the Actions button and then select Request recommendation

Demo University > Positions > Assistant Professor of Landscape Architecture >

### Sasha Brown

Education Information      Status: Hired [change](#)      Tags:

**Documents**

Title (pending) C.V.      Pending: not yet received

**Ratings**

**Actions**

- Share application
- Email applicant
- Download Documents
- Mark application complete
- Request recommendation**

**INCOMPLETE**

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

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

**Recommendation Request for Bing Boland** ✕

Use this message to request confidential recommendations on behalf of the applicant from one or more recommenders. Your request can include a personal message and materials to aid in their review. Note that you can create one message to request recommendations from multiple recommenders.

Recommender First Name	Recommender Last Name	Recommender Email
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="first@interfolio.com"/>
<b>+ Add Another Recommender</b>		

**Deadline** 📅

**Message**

Rich text editor toolbar: Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Image, Table, Full Screen, Print, Help.

**Help with Messaging**

If you are requesting recommendations from more than one recommender, and you want the message to include a personal salutation, use the variables below to automatically fill in the first and last name of each recommender receiving the message.

Recommender First Name = `{NLN_First%}`

Recommender Last Name = `{NLN_Last%}`

**Files** + Add


Preview Send Cancel

You can request recommendations from multiple letter writers at once

**Recommendation Request for Bing Boland**

Use this message to request confidential recommendations on behalf of the applicant from one or more recommenders. Your request can include a personal message and materials to aid in their review. Note that you can create one message to request recommendations from multiple recommenders.

Recommender First Name	Recommender Last Name
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>
<b>+ Add Another Recommender</b>	



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



The screenshot shows a message editor interface. The main text area contains the following content:

Dear %LW\_First% %LW\_Last%,

We would like to request a letter on behalf of Bing Boland who is an applicant for the position of

At the bottom left, there is a "Files" section with a question mark icon and a "+ Add" button.

On the right side, there is a "Help with Messaging" sidebar. It contains the following text:

Help with Messaging

If you are requesting recommendations from more than one recommender, and you want the message to include a personal salutation, use the variables below to automatically fill in the first and last name of each recommender receiving the message.

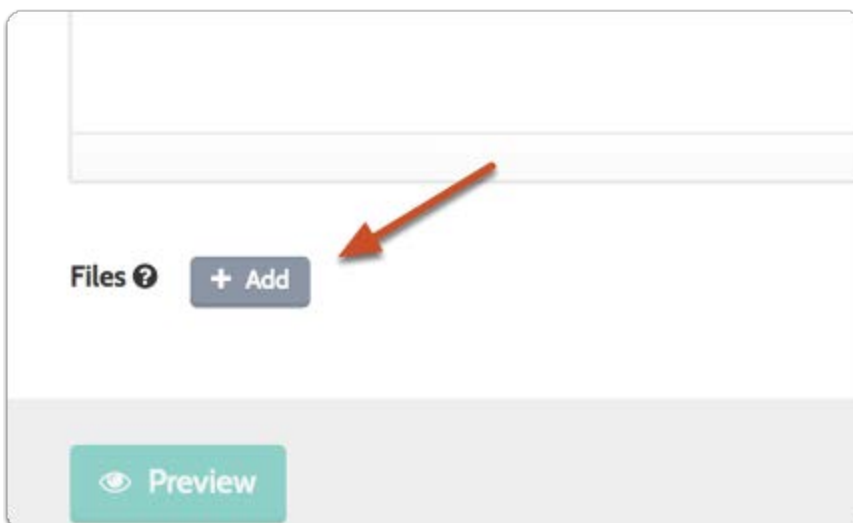
Recommender First Name = %LW\_First%

Recommender Last Name = %LW\_Last%

An orange arrow points from the text in the sidebar to the variables in the main text area.

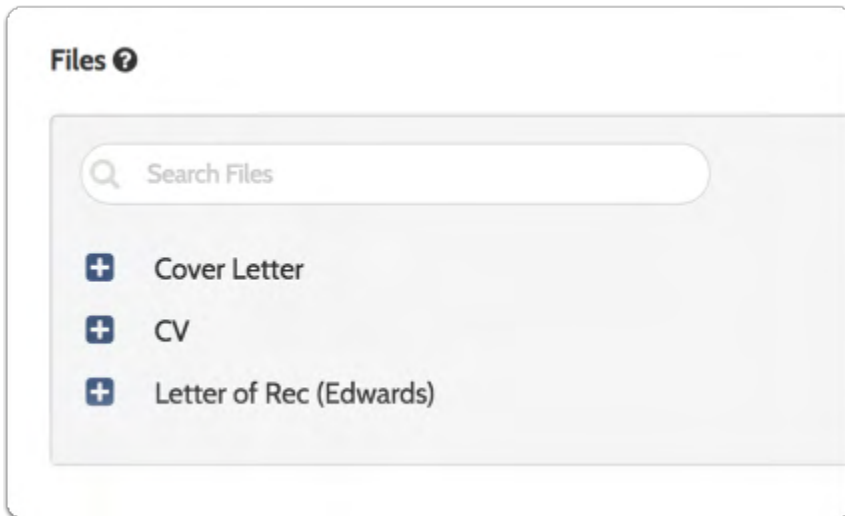
You can also attach files from the materials submitted by the applicant

Click "Add"



This image is a close-up of the file attachment section. It shows a "Files" label with a question mark icon, followed by a blue "+ Add" button. An orange arrow points directly to the "+ Add" button. Below this section, there is a "Preview" button with an eye icon.

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



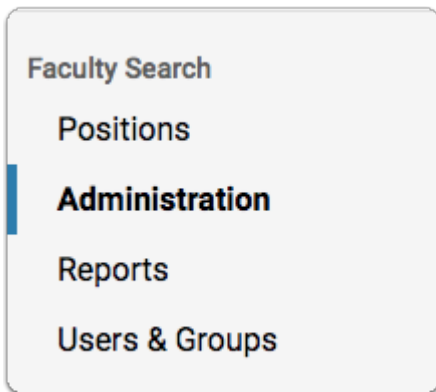
Once received, the recommendation will appear in the "Documents" section of the Applicant Profile page

# 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

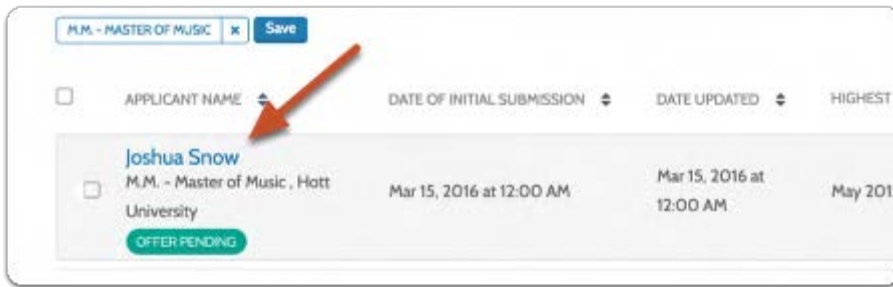


## Click the position title

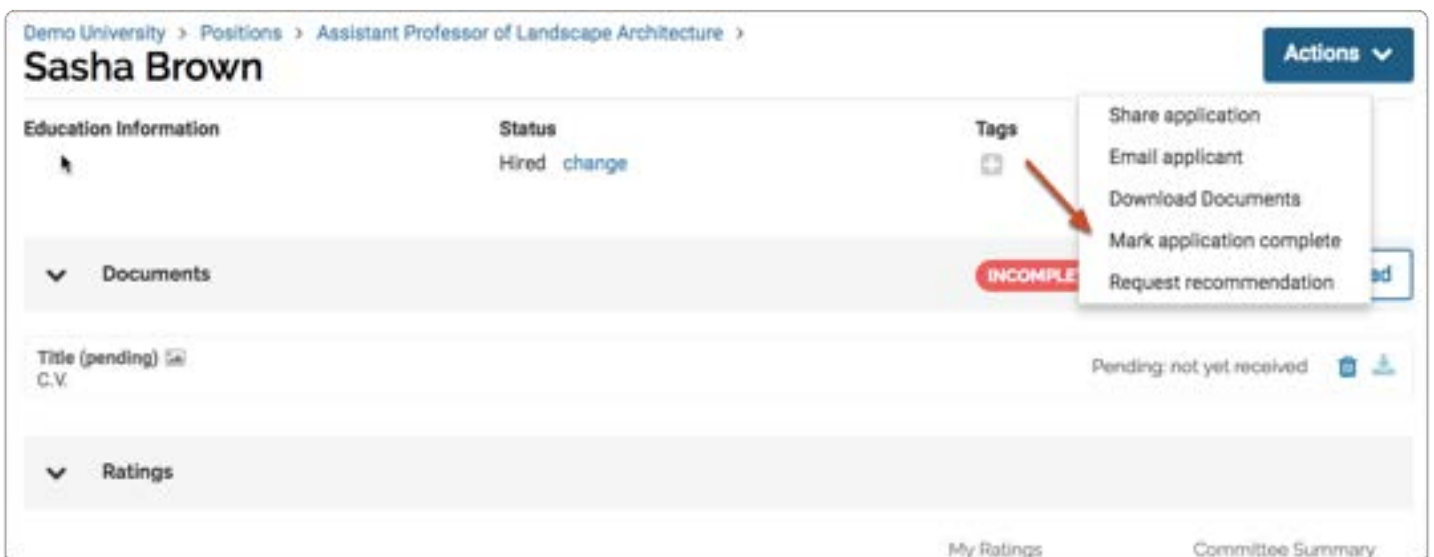
The screenshot shows the Interfolio Faculty Search interface. At the top, there is a search bar labeled 'Search Positions' and a 'Filter' dropdown menu. On the right, there is a 'Sort by Date' dropdown menu. Below these is a table with the following columns: NAME, STATUS, TYPE, OPENS, CLOSES, and APPLICATIONS. A red arrow points to the 'NAME' column header. The table contains three rows of data:

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

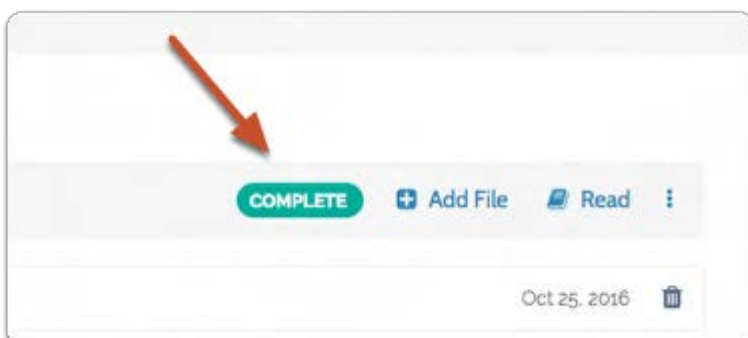
Click the applicant's name to open the Applicant Profile page




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



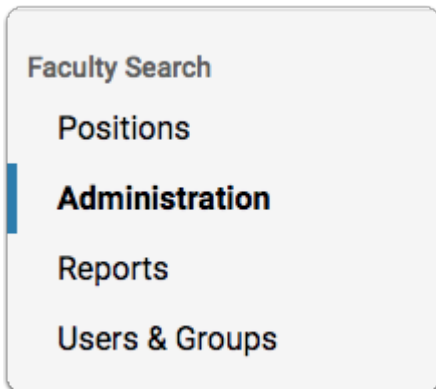
 You can mark an application as complete, but it will be listed as "Complete Pending Letters" until any outstanding letters of recommendation are received.



# 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



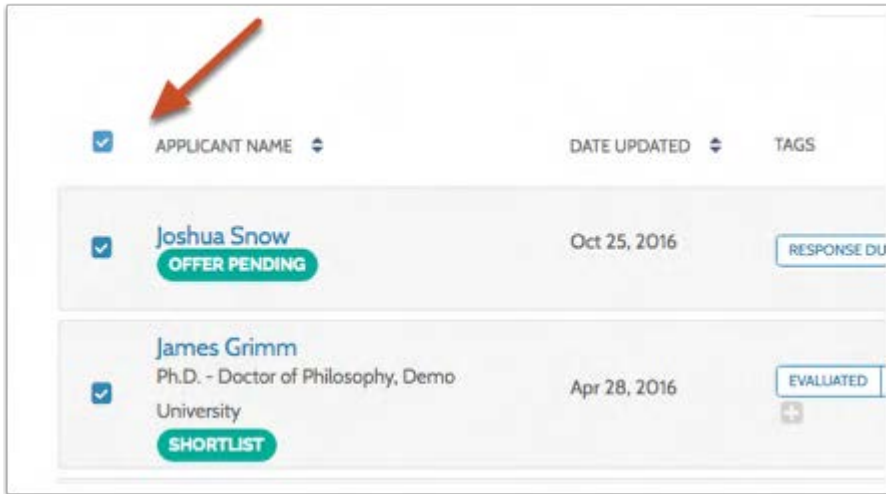
Click the position title to access applications for the position



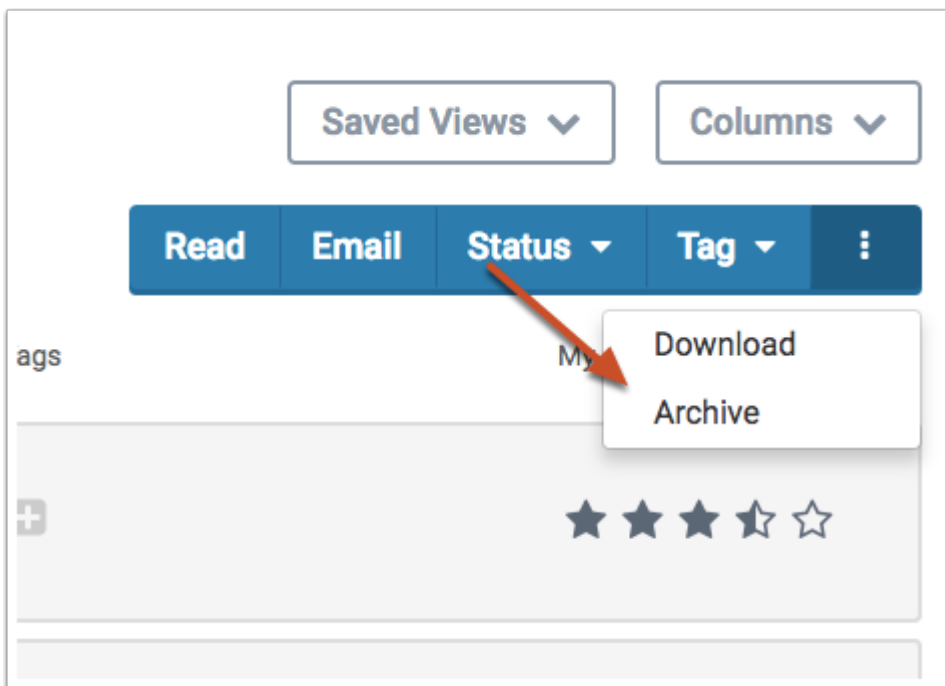
A screenshot of a table with two columns: 'NAME' and 'STATUS'. The table contains two rows of data. An orange arrow points to the first row's name. The first row's name is 'Associate Professor of Orthodontic Dentistry, College of Dentistry' and its status is 'INTERVIEWING FINALISTS'. The second row's name is 'Associate Professor of Periodontics, College of Dentistry' and its status is 'ACCEPTING APPLICATIONS'.

NAME	STATUS
Associate Professor of Orthodontic Dentistry College of Dentistry	INTERVIEWING FINALISTS
Associate Professor of Periodontics College of Dentistry	ACCEPTING APPLICATIONS

Select the application(s) to archive

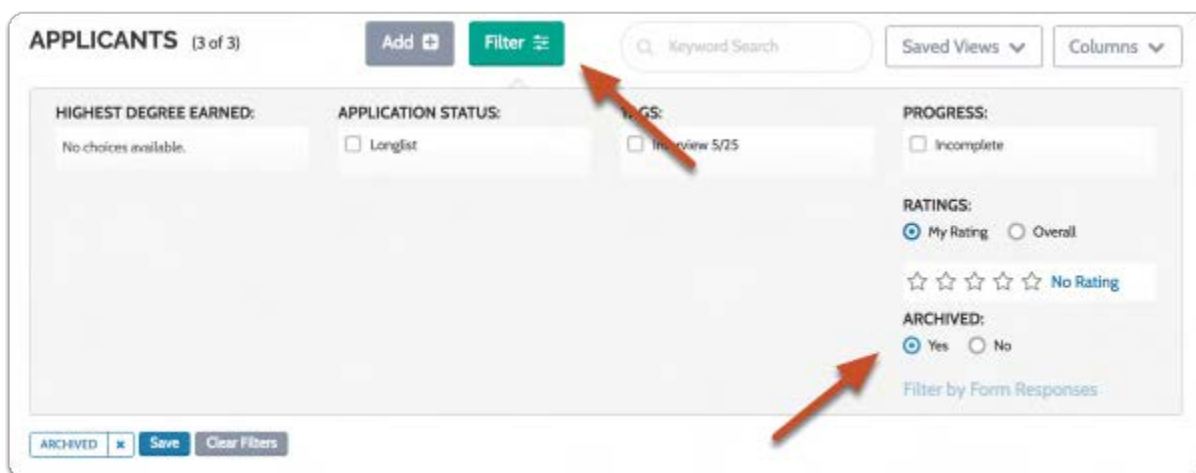


Click the "Additional Options" icon (to the right of the page) and select "Archive" to archive the selected applications

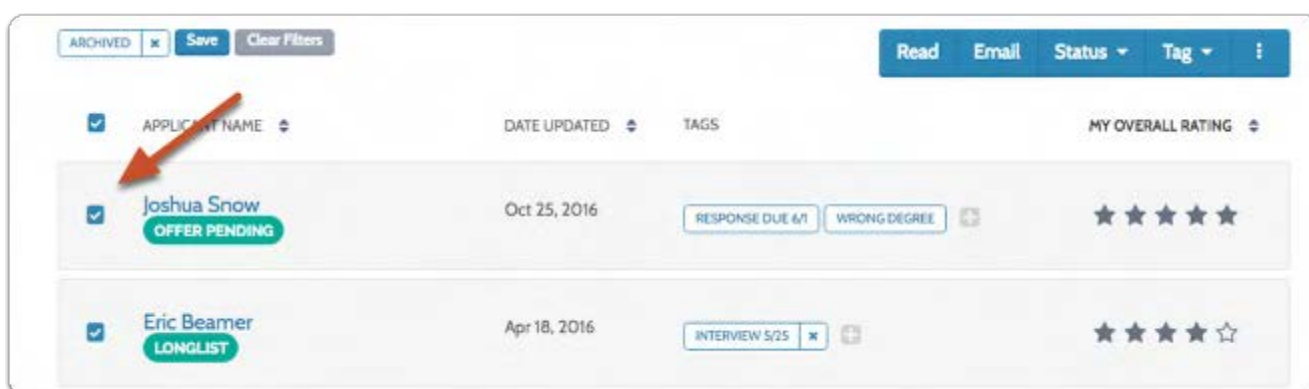


To unarchive an application, click the "Filter" button and select "Archived" to the right of the page

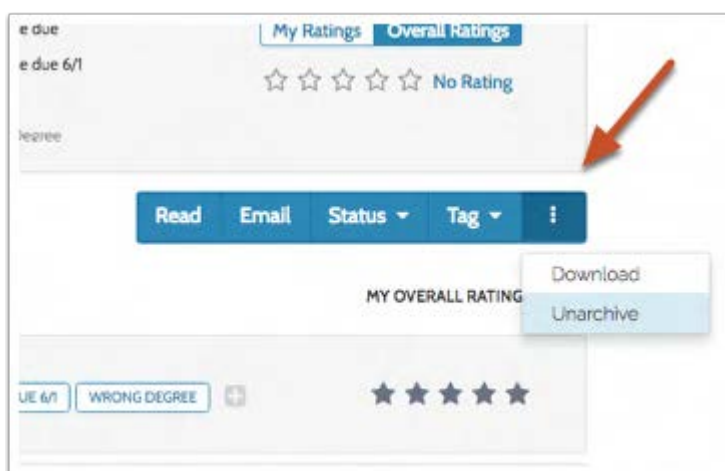
This will filter the list to display only archived positions.



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

Wrono D

ARCHIVED x Save Clear Filters

APPLICANT NAME  DATE UPDATED  TAGS

<input type="checkbox"/>	APPLICANT NAME	DATE UPDATED	TAGS
<input type="checkbox"/>	Jonas Jones SHORTLIST	Jul 24, 2016	RESPONSE DUE

25 v

# 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

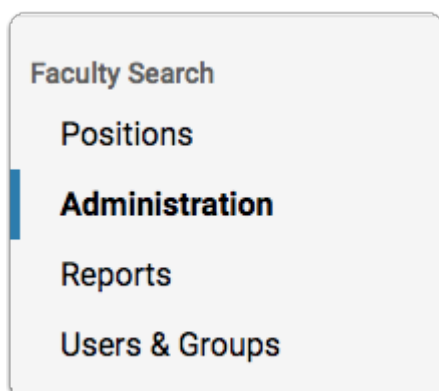
# Email Applicants

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

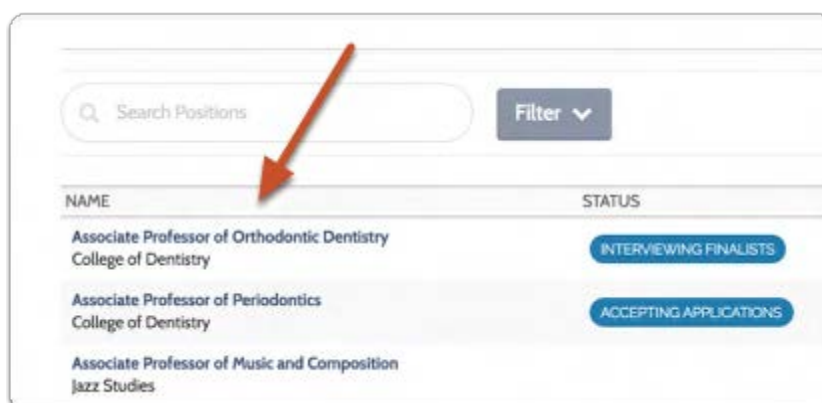
**!** **Note:** When messaging more than one applicant, recipients will never see the names or email addresses of other applicants being contacted.

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

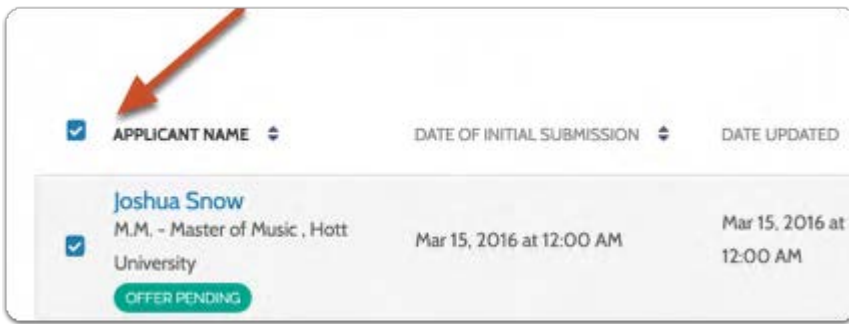


## To email multiple applicants at the same time:

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

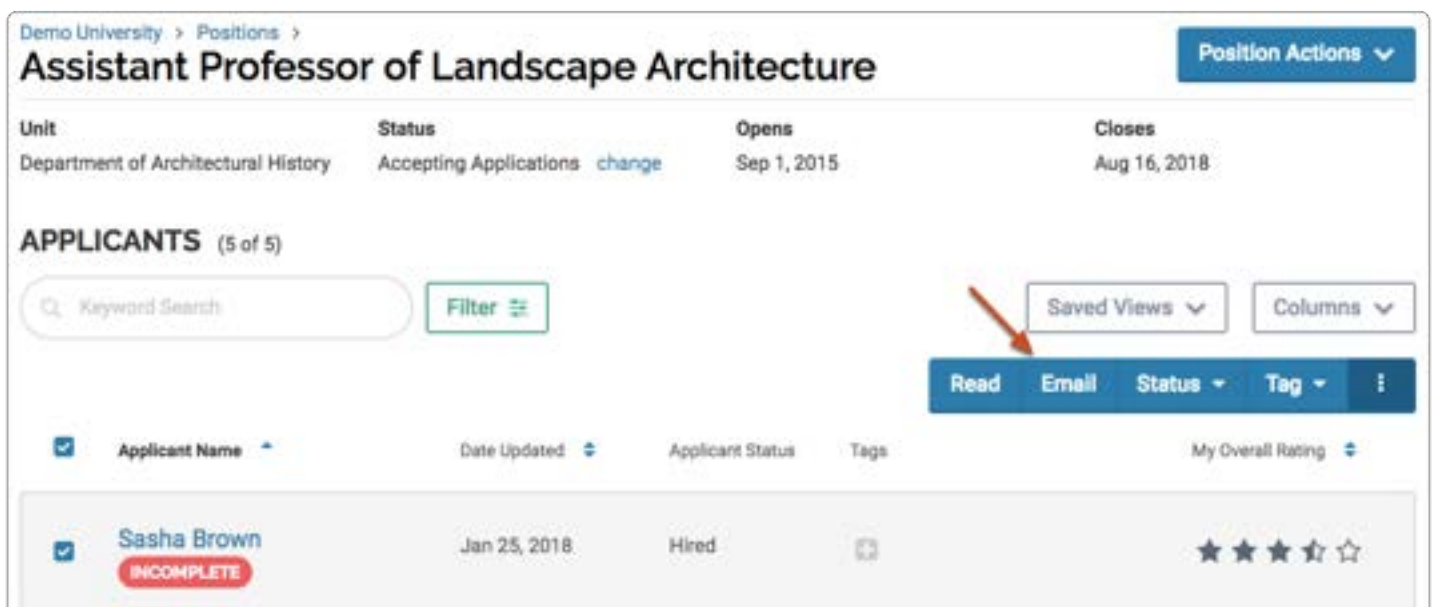
### 1. Check the box next to the name(s) of applicants you want to email

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



<input checked="" type="checkbox"/>	APPLICANT NAME	DATE OF INITIAL SUBMISSION	DATE UPDATED
<input checked="" type="checkbox"/>	Joshua Snow M.M. - Master of Music , Hott University <span>OFFER PENDING</span>	Mar 15, 2016 at 12:00 AM	Mar 15, 2016 at 12:00 AM

### 2. Click "Email" to open a window where you can type your message to all selected applicants



Demo University > Positions > Assistant Professor of Landscape Architecture

Unit: Department of Architectural History | Status: Accepting Applications | Opens: Sep 1, 2015 | Closes: Aug 16, 2018

**APPLICANTS (5 of 5)**

Keyword Search:  Filter

Position Actions: **Read** **Email** Status Tag

<input checked="" type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/>	Sasha Brown <span>INCOMPLETE</span>	Jan 25, 2018	Hired		★★★★☆



3. Enter your message, click "Preview" to see how it will appear to the recipients, and send when you are ready

**Email Applicants**

**Recipients**

Eric Beamer                      James Grimm  
Franklin Minicz

**Subject \***

Invitation for Campus Visit

**Message \***

It is my pleasure to invite you to come to our school for an interview.

[Preview](#)      [Send](#)      [Cancel](#)

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

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

<input type="checkbox"/> APPLICANT NAME	DATE OF INITIAL SUBMISSION	DATE UPDATED
<a href="#">Joshua Snow</a> M.M. - Master of Music, Hott University <a href="#">OFFER PENDING</a>	Mar 15, 2016 at 12:00 AM	Mar 15, 2016 at 12:00 AM

## 2. Click on the Actions button and select Email applicant

Demo University > Positions > Assistant Professor of Landscape Architecture >

### Sasha Brown

Education Information      Status: Hired [change](#)      Tags: [tag icon]

Documents

**INCOMPLETE**

Title (pending) [C.V.](#)      Pending: not yet received [trash](#) [download](#)

**Actions** ▾

- Share application
- Email applicant
- Download Documents
- Mark application complete
- Request recommendation

## 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.

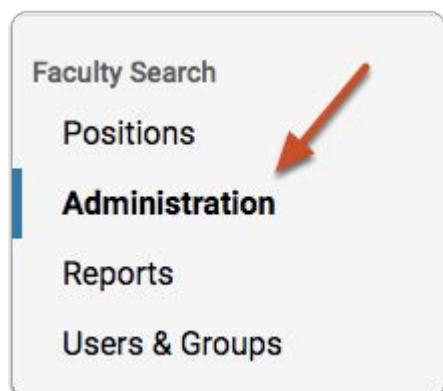
Message templates are created on the "Administration" page. When changing the status of an applicant or position, you can select one of the message templates you've created and send it out to applicants notifying them of the change. Of course, you will always have the opportunity to edit and confirm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

See here for [a list of sample message templates](#).

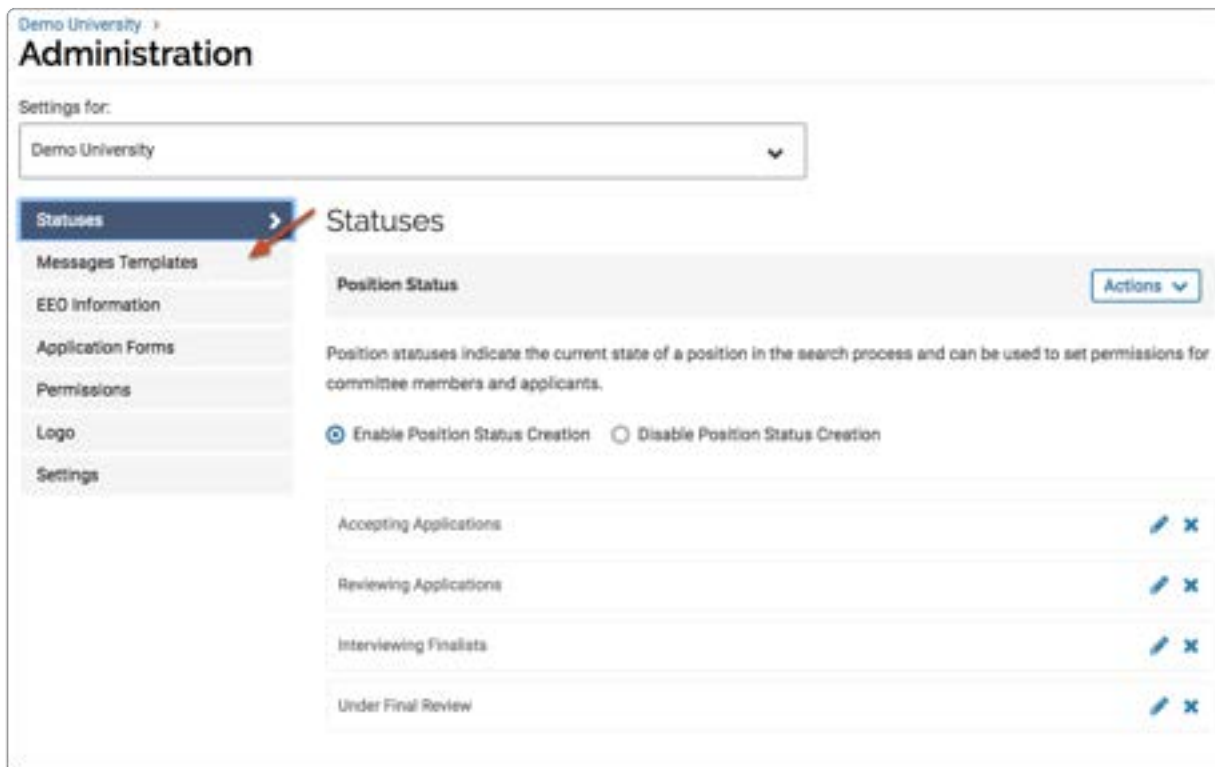
This article explains:

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



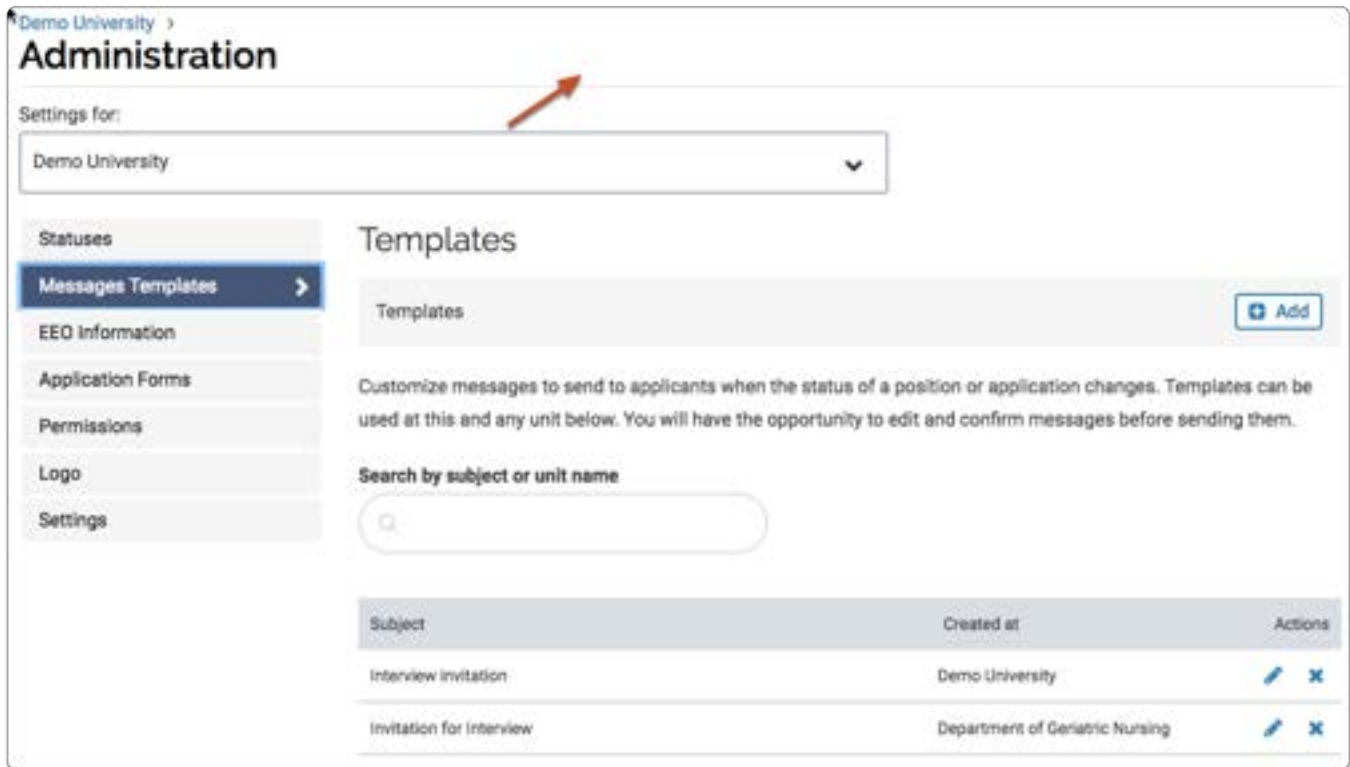
## 2. Open the "Message Templates" tab of the "Administration" page



The screenshot displays the "Administration" page for "Demo University". The page title is "Administration" and the settings are for "Demo University". A sidebar on the left contains several menu items: "Statuses", "Messages Templates", "EEO Information", "Application Forms", "Permissions", "Logo", and "Settings". The "Statuses" menu item is highlighted in blue and has a red arrow pointing to it. The main content area is titled "Statuses" and features a "Position Status" section with an "Actions" dropdown menu. Below this, there is a description: "Position statuses indicate the current state of a position in the search process and can be used to set permissions for committee members and applicants." There are two radio buttons: "Enable Position Status Creation" (selected) and "Disable Position Status Creation". At the bottom, there is a table of position statuses:

Accepting Applications	 
Reviewing Applications	 
Interviewing Finalists	 
Under Final Review	 

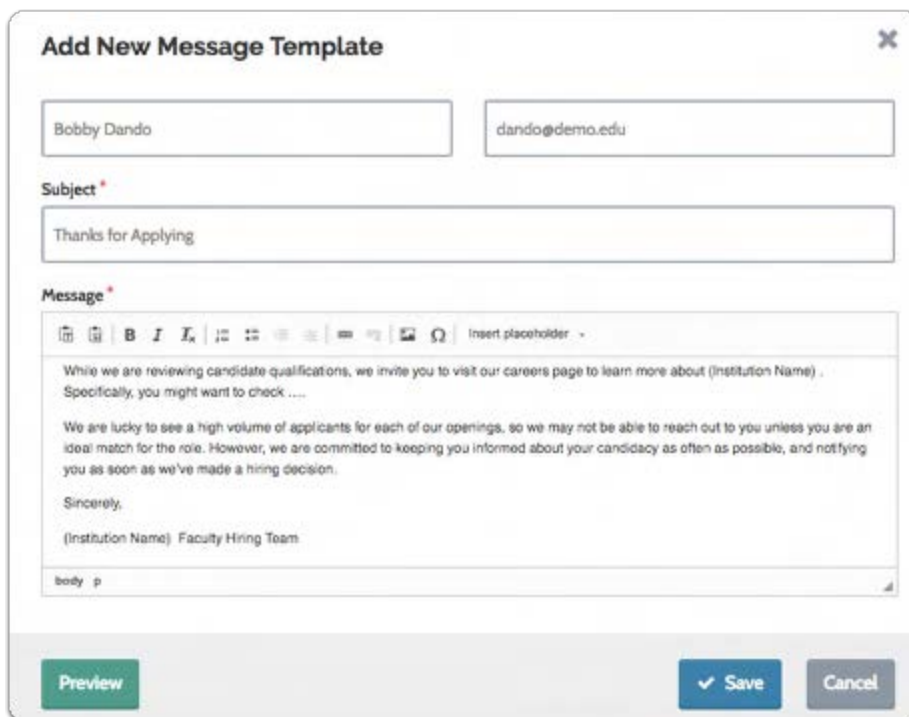
### 3. Click "Add" to create a new message template



The screenshot shows the 'Administration' page for 'Demo University'. The 'Messages Templates' menu item is selected in the left sidebar. The main content area is titled 'Templates' and features an 'Add' button in the top right corner, which is highlighted by an orange arrow. Below the 'Add' button is a descriptive paragraph: 'Customize messages to send to applicants when the status of a position or application changes. Templates can be used at this and any unit below. You will have the opportunity to edit and confirm messages before sending them.' A search bar labeled 'Search by subject or unit name' is present. Below the search bar is a table with two rows of templates:

Subject	Created at	Actions
Interview invitation	Demo University	<a href="#">Edit</a> <a href="#">Delete</a>
Invitation for interview	Department of Geriatric Nursing	<a href="#">Edit</a> <a href="#">Delete</a>

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



The 'Add New Message Template' dialog box is shown. It contains the following fields and content:

- From Name:** Bobby Dando
- Reply To:** dando@demo.edu
- Subject:** Thanks for Applying
- Message:** A rich text editor containing the following text:

While we are reviewing candidate qualifications, we invite you to visit our careers page to learn more about (Institution Name) . Specifically, you might want to check ....

We are lucky to see a high volume of applicants for each of our openings, so we may not be able to reach out to you unless you are an ideal match for the role. However, we are committed to keeping you informed about your candidacy as often as possible, and notifying you as soon as we've made a hiring decision.

Sincerely,

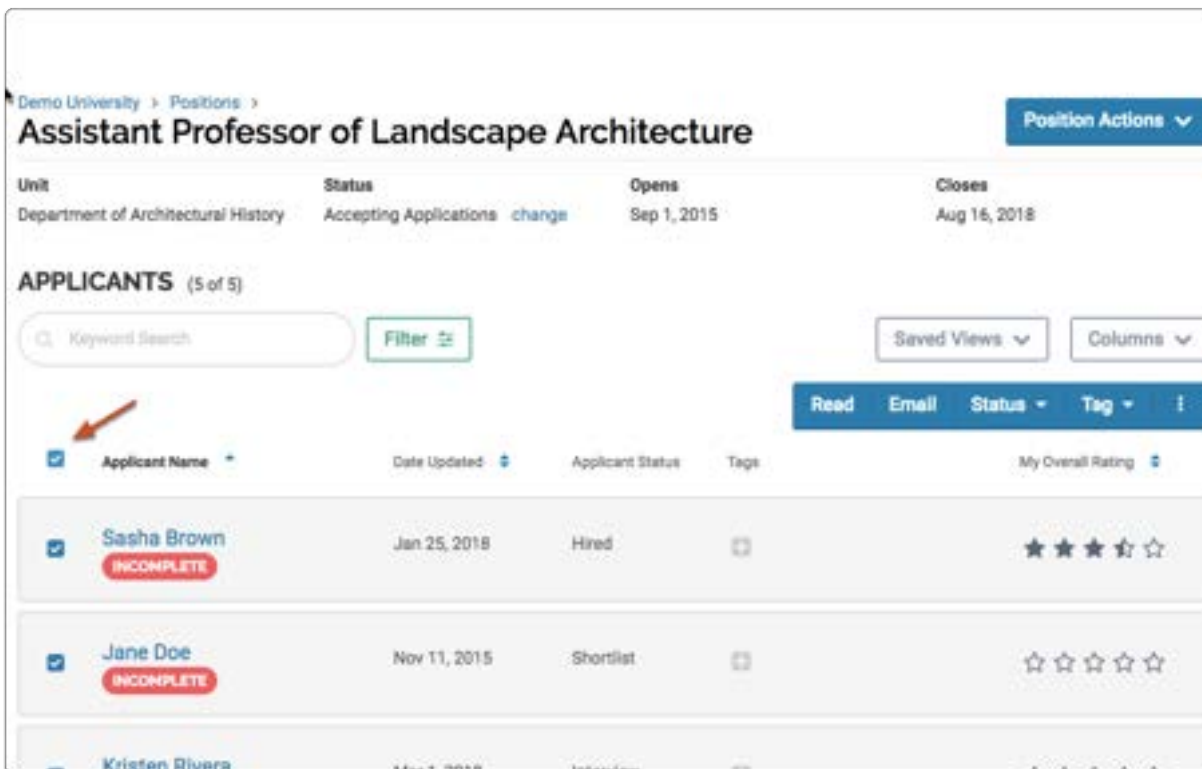
(Institution Name) Faculty Hiring Team

At the bottom of the dialog box are three buttons: 'Preview', 'Save', and 'Cancel'.

# 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

Demo University > Positions >

### Assistant Professor of Landscape Architecture

Unit: Department of Architectural History | Status: Accepting Applications | Opens: Sep 1, 2015 | Closes: Aug 16, 2018

**APPLICANTS** (5 of 5)

Keyword Search

Position Actions

Reviewing Applications  
Interviewing Finalists  
Position Closed

Read | Email | Status | Tag | i

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
Sasha Brown <b>INCOMPLETE</b>	Jan 25, 2016	Hired		★★★★☆
Jane Doe <b>INCOMPLETE</b>	Nov 11, 2015	Shortlist		☆☆☆☆☆

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

### Change Status

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

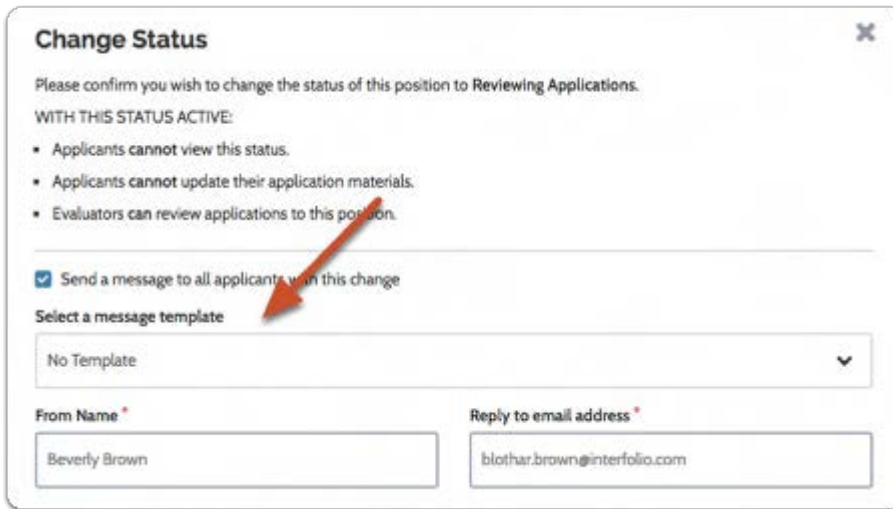
WITH THIS STATUS ACTIVE:

- 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

Confirm Cancel

#### 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

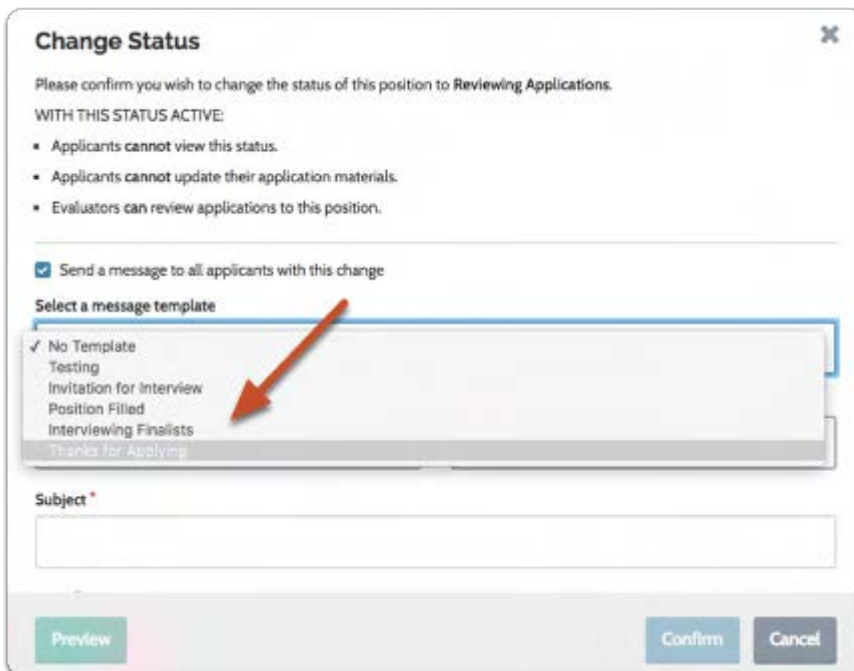
Select a message template

No Template ▼

From Name \*

Reply to email address \*

#### 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 \*



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

**Change Status** [X]

Select a message template  
Thanks for Applying [v]

From Name \* Bobby Dando  
Reply to email address \* dando@demo.edu

Subject \* Thanks for Applying

Body \*  
[Rich text editor toolbar]  
We really appreciate that you took the time to consider (Institution Name) in your career search. We know there are a lot of organizations hiring out there, and recognize the effort it took to apply for a role at (Institution Name) .  
While we are reviewing candidate qualifications, we invite you to visit our careers page to learn more about (Institution Name) . Specifically, you might want to check ....  
We are lucky to see a high volume of applicants for each of our openings, so we may not be able to reach out to you unless you are an

Preview Confirm Cancel

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

**Change Status** [X]

interfolio

We really appreciate that you took the time to consider (Institution Name) in your career search. We know there are a lot of organizations hiring out there, and recognize the effort it took to apply for a role at (Institution Name) .

While we are reviewing candidate qualifications, we invite you to visit our careers page to learn more about (Institution Name) . Specifically, you might want to check ....

We are lucky to see a high volume of applicants for each of our openings, so we may not be able to reach out to you unless you are an

Edit Confirm Cancel

## 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

The screenshot shows the application management interface for the position "Assistant Professor of Landscape Architecture" at Demo University. The page includes a header with the position title and a "Position Actions" dropdown. Below the header, there are fields for Unit (Department of Architectural History), Status (Accepting Applications), Opens (Sep 1, 2015), and Closes (Aug 16, 2018). The main section is titled "APPLICANTS (5 of 5)" and features a search bar, a filter button, and dropdowns for Saved Views and Columns. A table lists the applicants with columns for Applicant Name, Date Updated, Applicant Status, and Tags. A dropdown menu is open over the table, showing options: New, Longlist, Shortlist, Interview, Offer Pending, Hired, and Remove Status. An orange arrow points to the checkbox for Sasha Brown, who is currently in the "Hired" status.

Applicant Name	Date Updated	Applicant Status	Tags
<input checked="" type="checkbox"/> Sasha Brown <b>INCOMPLETE</b>	Jan 25, 2018	Hired	
<input type="checkbox"/> Jane Doe <b>INCOMPLETE</b>	Nov 11, 2015	Shortlist	
<input checked="" type="checkbox"/> Kristen Rivera <b>INCOMPLETE</b>	Mar 1, 2018	Interview	

## 2. Select the new application status

Demo University > Positions > Assistant Professor of Landscape Architecture

Unit: Department of Architectural History | Status: Accepting Applications [change](#) | Opens: Sep 1, 2015 | Closes: Aug 16, 2018

**APPLICANTS** (5 of 5)

Keyword Search:  Filter

Saved Views Columns

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	Overall Rating
<input checked="" type="checkbox"/>	Sasha Brown <b>INCOMPLETE</b>	Jan 25, 2018	Hired		★☆☆☆
<input type="checkbox"/>	Jane Doe <b>INCOMPLETE</b>	Nov 11, 2015	Shortlist		☆☆☆☆
<input checked="" type="checkbox"/>	Kristen Rivera <b>INCOMPLETE</b>	Mar 1, 2018	Interview		☆☆☆☆

Read | Email | **Status** | Tag |

- New
- Longlist
- Shortlist
- Interview
- Offer Pending
- Hired
- Remove Status

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

**Change Status**

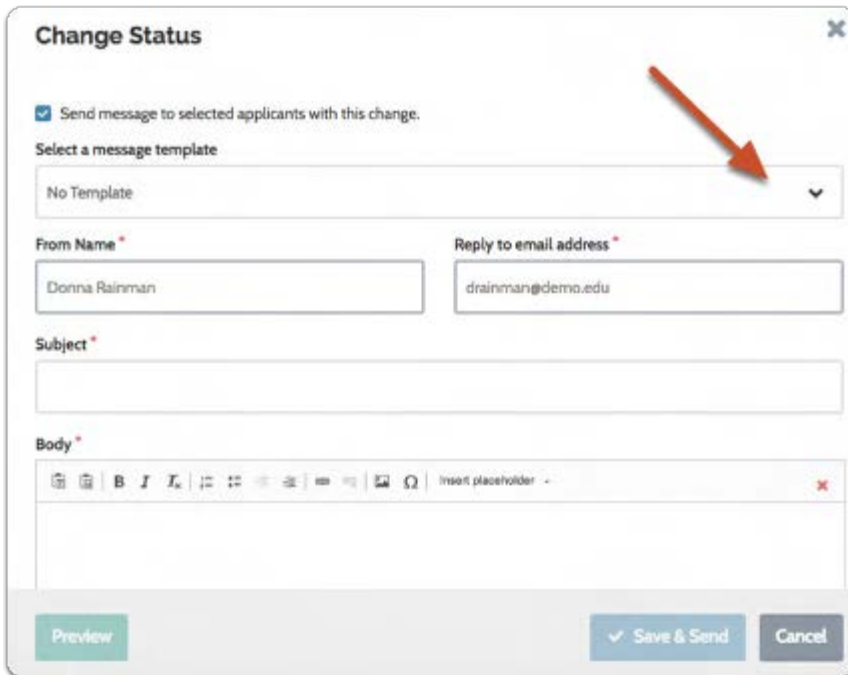
Please confirm you wish to change the status of the selected applications to Interview.

With this status active:

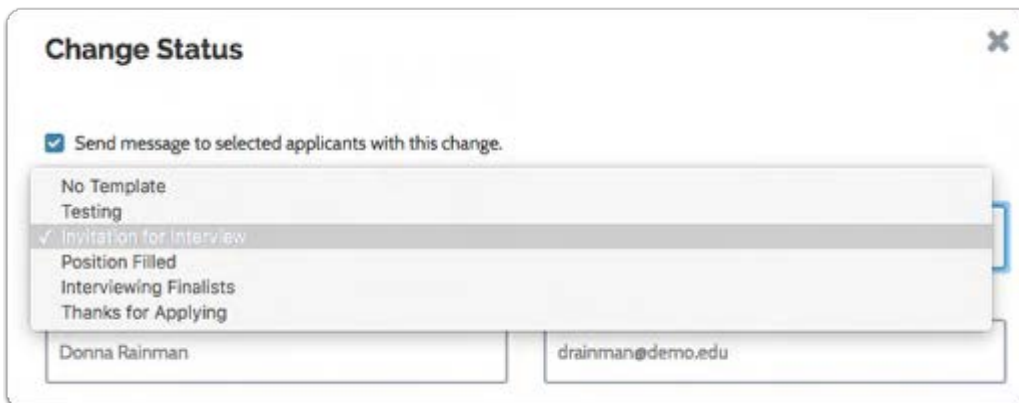
- Applicants cannot view this status.
- Applicants cannot update their application materials.

Send message to selected applicants with this change.

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

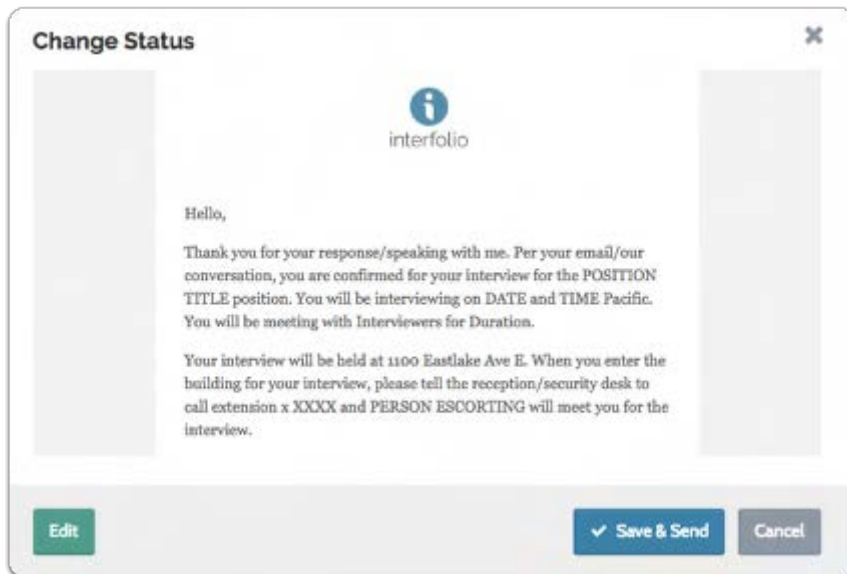


The screenshot shows a 'Change Status' dialog box. At the top, there is a checkbox labeled 'Send message to selected applicants with this change.' which is checked. Below this is a label 'Select a message template' followed by a dropdown menu. The dropdown menu is open, showing a list of options: 'No Template', 'Testing', 'Invitation for Interview', 'Position Filled', 'Interviewing Finalists', and 'Thanks for Applying'. An orange arrow points to the dropdown arrow icon. Below the dropdown are two input fields: 'From Name' with the value 'Donna Rainman' and 'Reply to email address' with the value 'drainman@demo.edu'. There is also a 'Subject' field and a 'Body' field with a rich text editor toolbar. At the bottom, there are three buttons: 'Preview', 'Save & Send', and 'Cancel'.




This screenshot shows the same 'Change Status' dialog box, but the dropdown menu is open and the option 'Invitation for Interview' is selected, indicated by a checkmark and a blue highlight. The other elements of the dialog box, including the checked 'Send message' checkbox, the 'From Name' field (Donna Rainman), and the 'Reply to email address' field (drainman@demo.edu), remain the same.

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




**Change Status** ✕

  
interfolio

Hello,

Thank you for your response/speaking with me. Per your email/our conversation, you are confirmed for your interview for the POSITION TITLE position. You will be interviewing on DATE and TIME Pacific. You will be meeting with Interviewers for Duration.

Your interview will be held at 1100 Eastlake Ave E. When you enter the building for your interview, please tell the reception/security desk to call extension x XXXX and PERSON ESCORTING will meet you for the interview.

 See here for [a list of sample message templates.](#)