Create a Template To Use as a Starting Point for New Cases

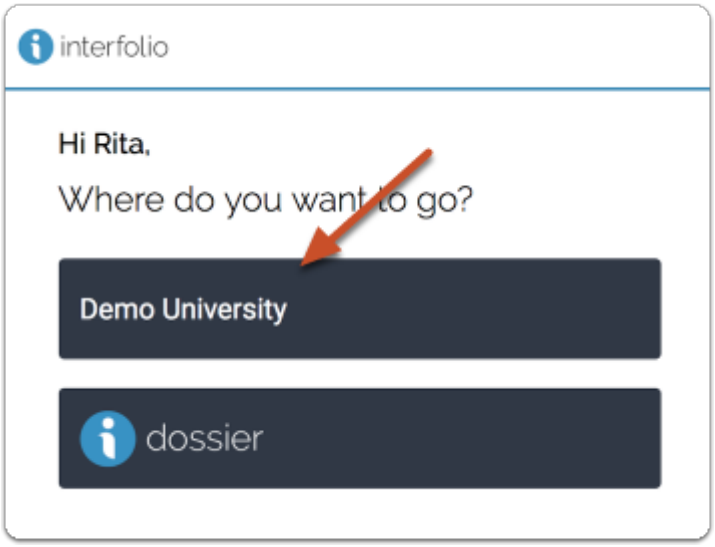
This article provides information on how to create a template for new cases in Interfolio Review Promotion & Tenure. Templates provide a basic starting point for a P&T case. Colleges, schools, and departments can use templates to save time when creating cases, and to establish a repeatable process as they conduct their reviews in Interfolio.

Administrators can create a template filled out with instructions, forms, document requirements and case review steps that can be automatically included as a part of every case built using the template. Templates can be attached to any organizational unit, and can be used for cases created by that unit, or by lower administrative units.

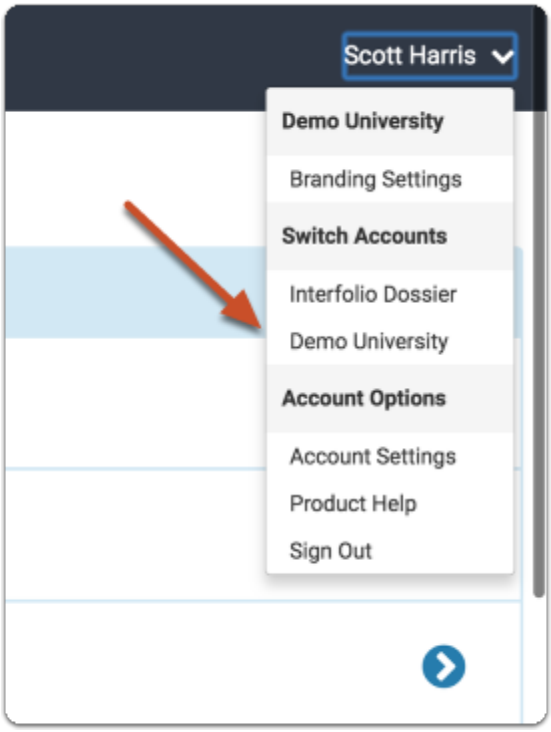
Templates can be created for any case type including, promotions, tenure reviews, annual reviews, appointments, reappointments, or sabbatical cases.

Administrators at institutions who have Enterprise Dossier can choose to publish the instructions and requirements for a template as "Guidelines" to help users at their institution prepare for upcoming reviews.

Log in to Interfolio and navigate to your institutional account

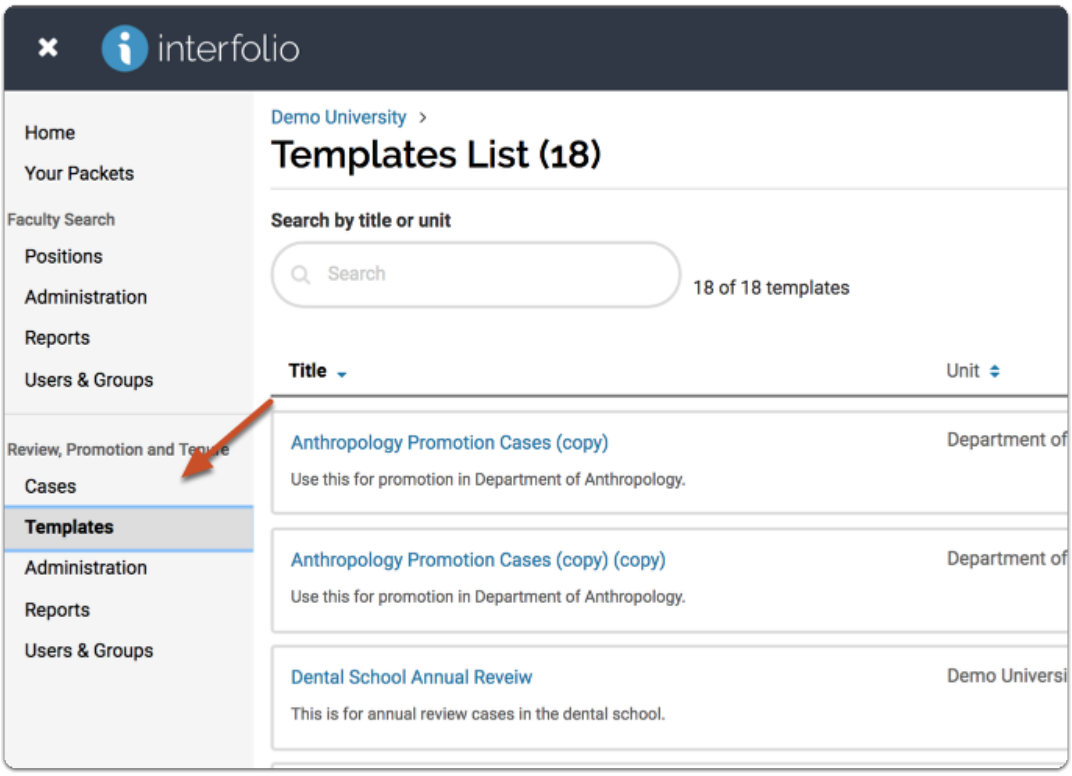


You may need to open the account switcher in the right hand user menu and select to switch to your institutional account.



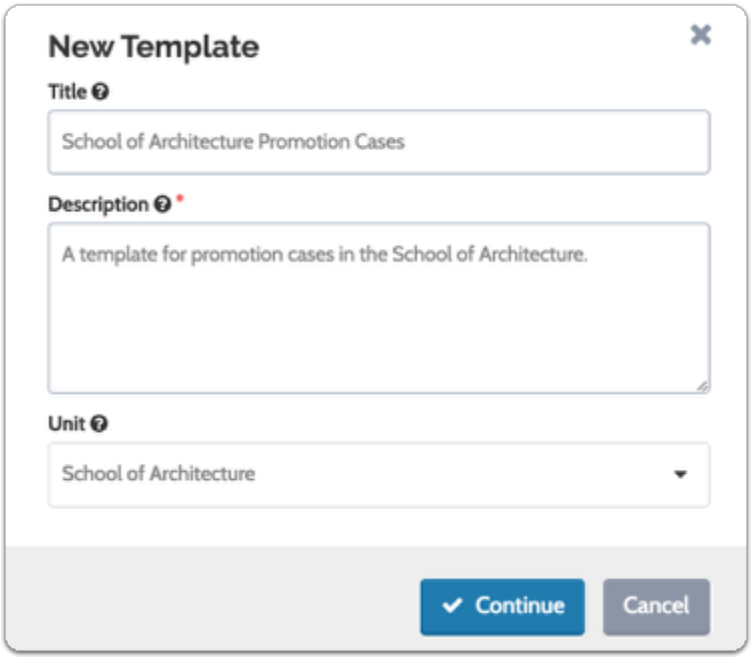
Select "Templates" under Review, Promotion and Tenure on the left hand menu

This will open a list of available templates.



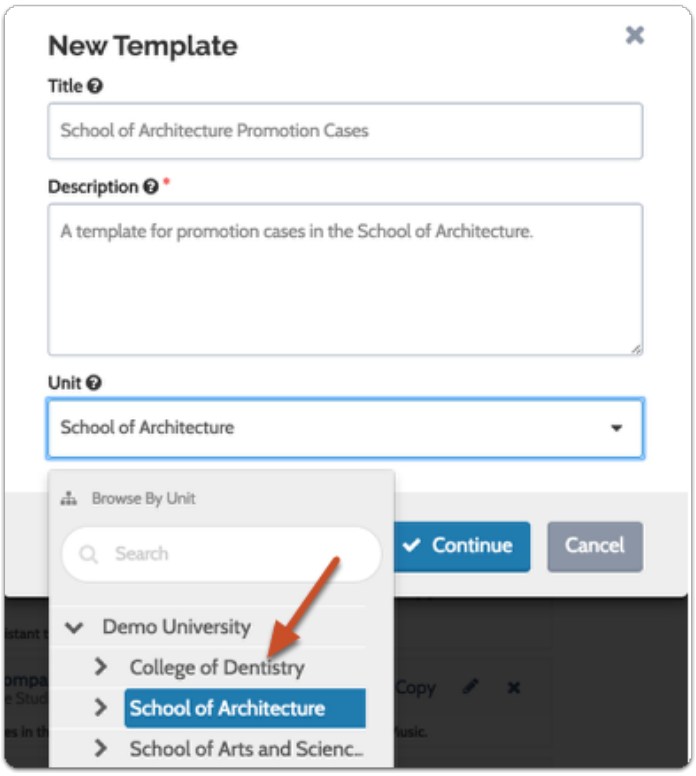
Click "Add Template"

Enter the title and description of the template

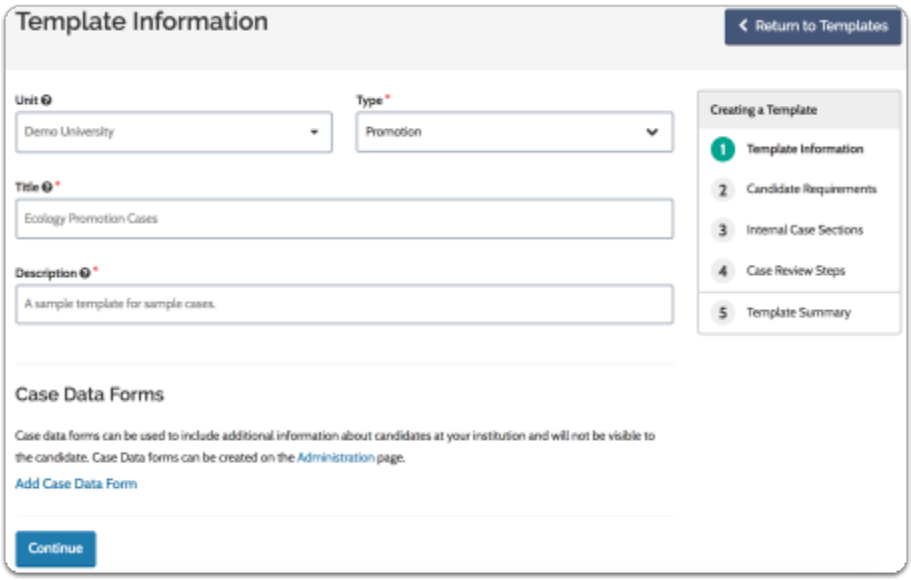


Select a unit for the template from the dropdown menu, and click "Continue" when you are finished

Remember, you can add a template to any organizational unit such as a university, school, college, or department, and that template will be available as a starting point for cases created within that organizational unit or by units beneath it in the hierarchy.



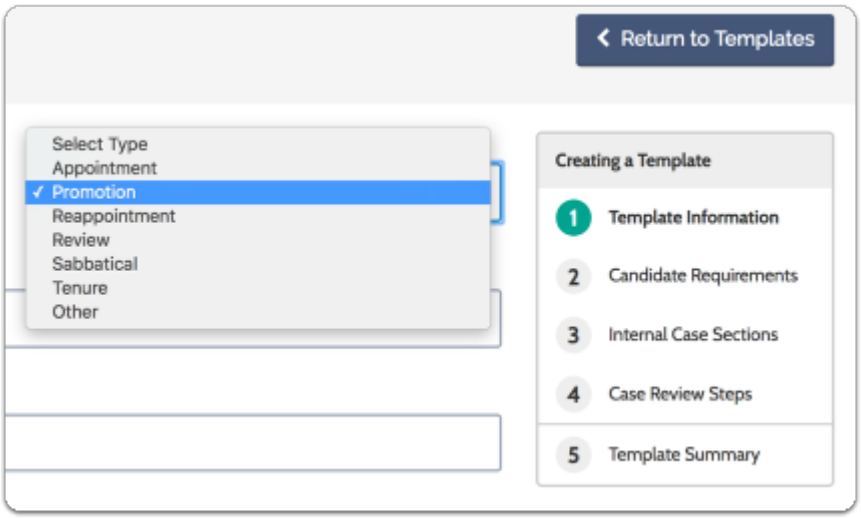
You will be taken to the "Template Information" page shown below:



Enter Template Information:

Select the case type of the template you are creating (required)

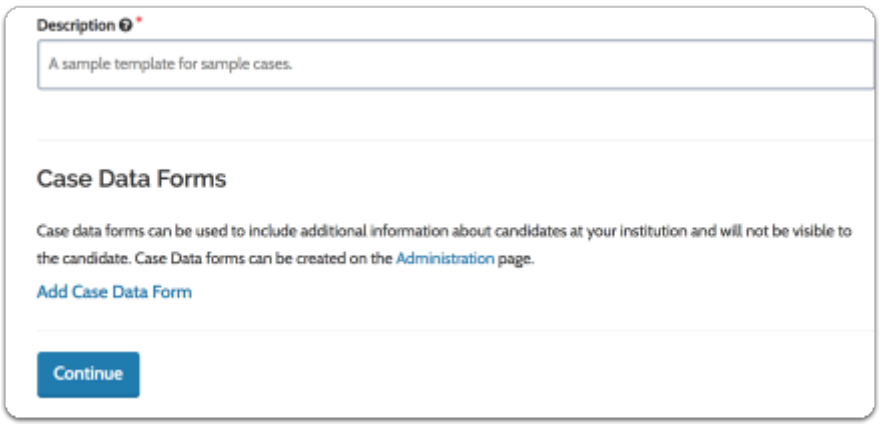
You can create templates for appointments, promotions, reappointments, reviews, sabbaticals, tenure cases, and others.



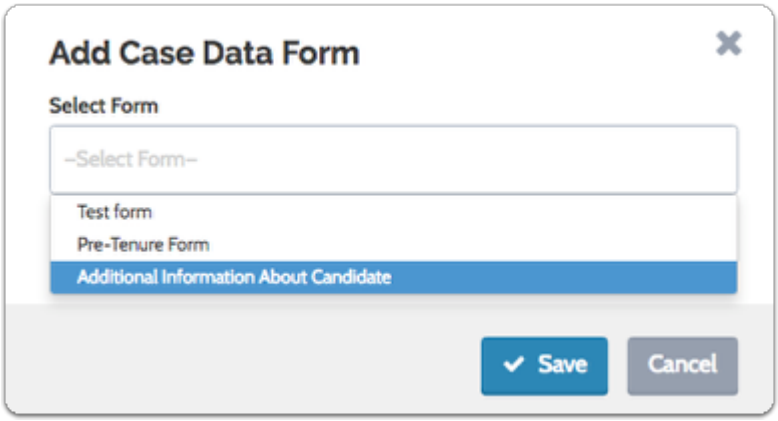
Add case data form requirements to the template if necessary

You can add a requirement for case data forms that must be completed about a candidate or case when using the template. Candidates will never see the questions or answers of a case data form.

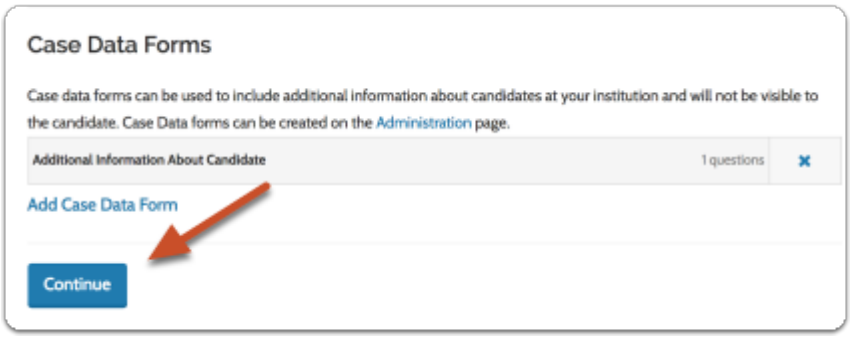
> Case data forms must be created by an Administrator from the Administration page, and can be filled out by an Administrator when creating a case. For more information see this article on creating case data forms.



To add a case data form to the template, click the link, select a form and click "Save"



Click "Continue"

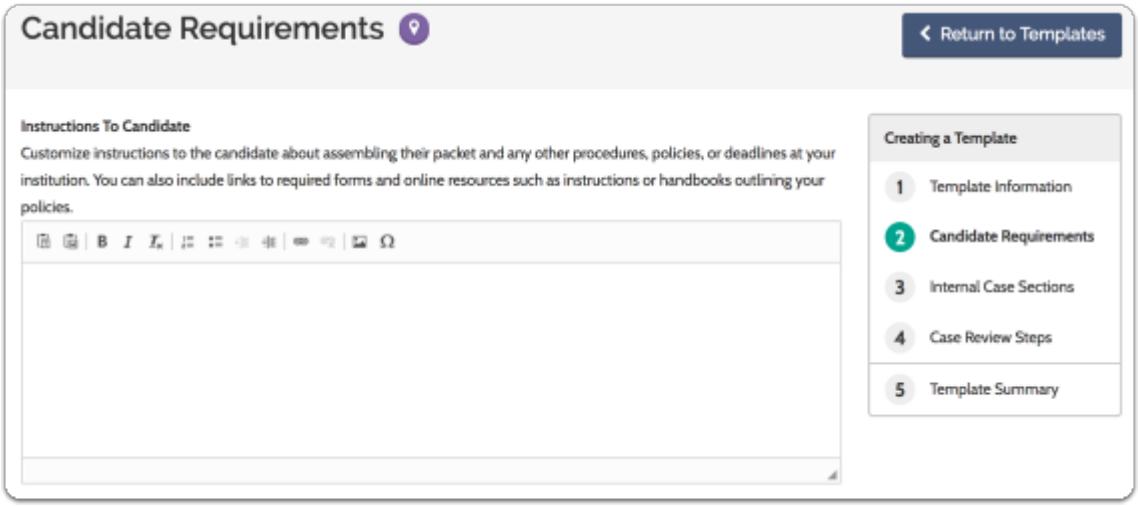


Create Candidate Requirements:

This section can include specific instructions to the candidate about assembling their packet and any other procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources such as instructions or handbooks outlining your policies.

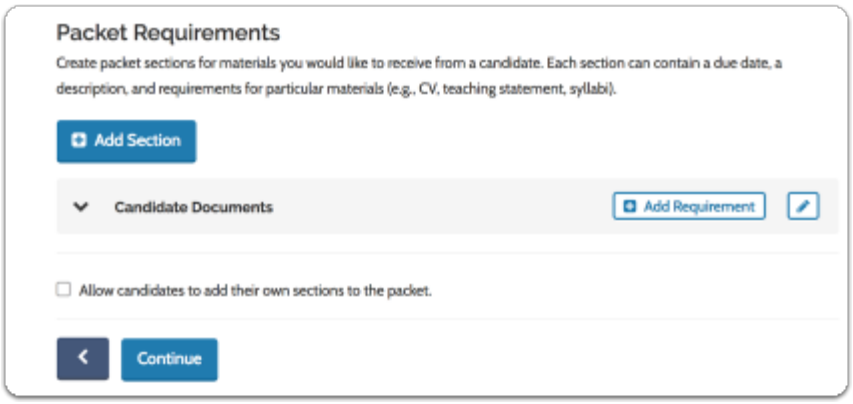
> ⚠ Note that when building a case from the template, users can edit this section if they need to make specific changes.

Add instructions to the candidate (these instructions will appear for any case built using this template)



Create candidate packet requirements for a packet of required materials and forms

The packet requirements you create here will become available for any case built using this template.

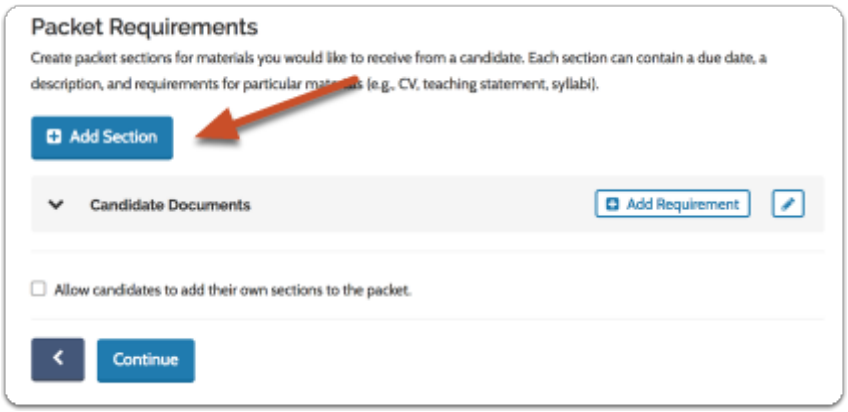


A single packet section labeled "Candidate Documents" appears by default, but you can create new custom packet sections for materials you would like to receive from a candidate.

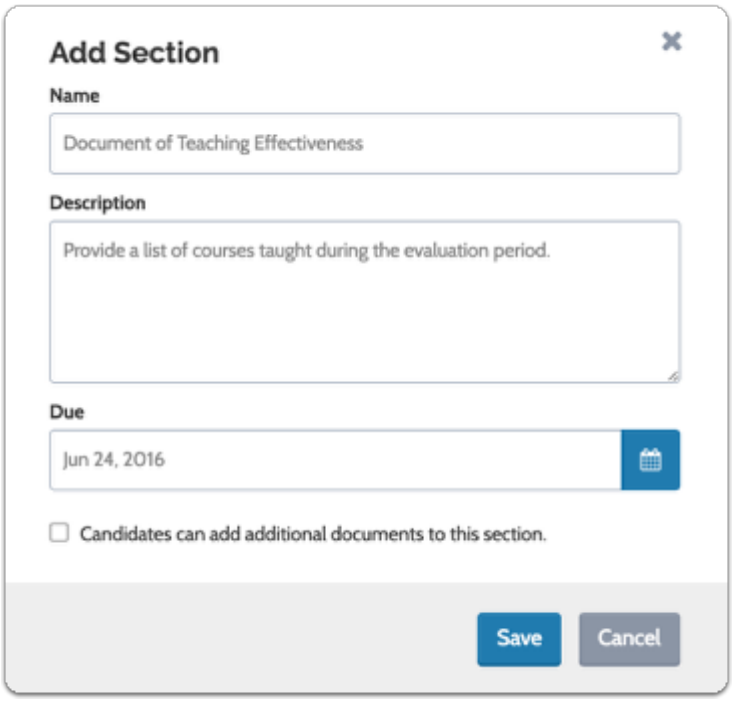
Each section can contain a due date, a description, and requirements for particular materials (e.g., CV, teaching statement, syllabi).

To create custom packet sections:

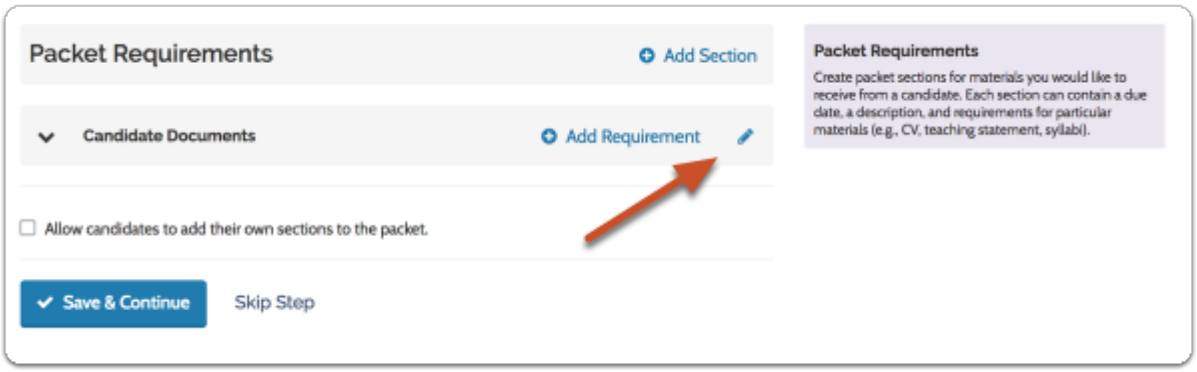
Click "Add Section"



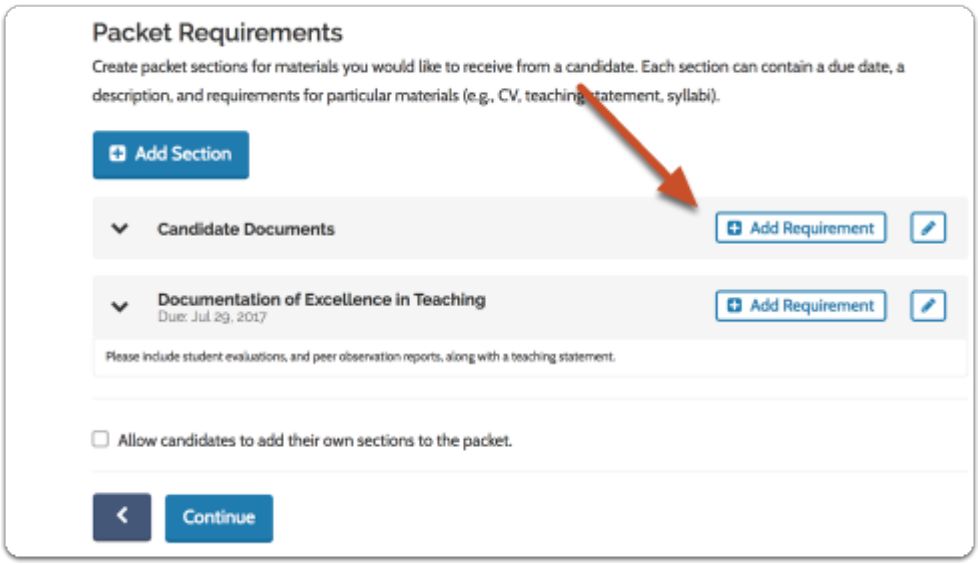
Enter the name, description, and due date for the packet section, and indicate whether or not candidates can add additional documents to the section



Once created, you can click the blue edit pencil to change the name, description and set the due date of a packet section.

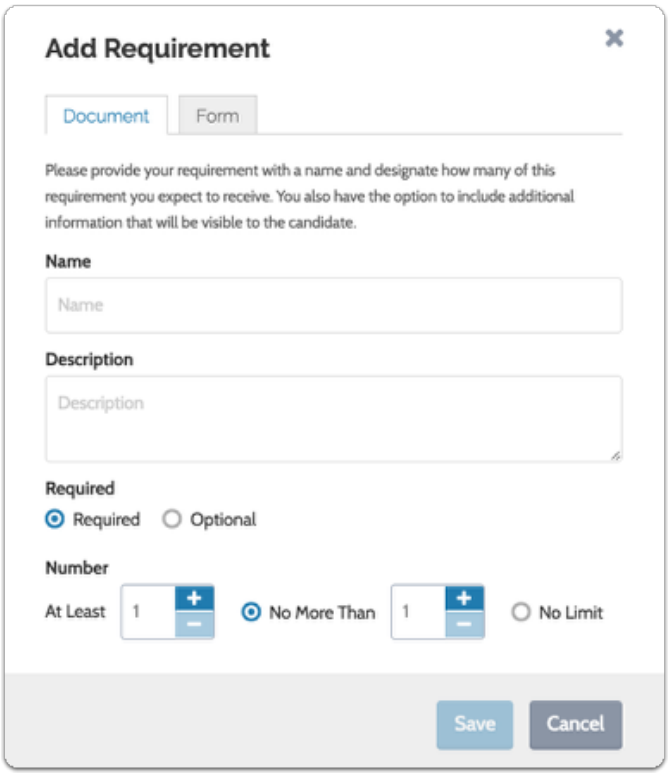


Click "Add Requirement" to add a document or form requirement to a packet section



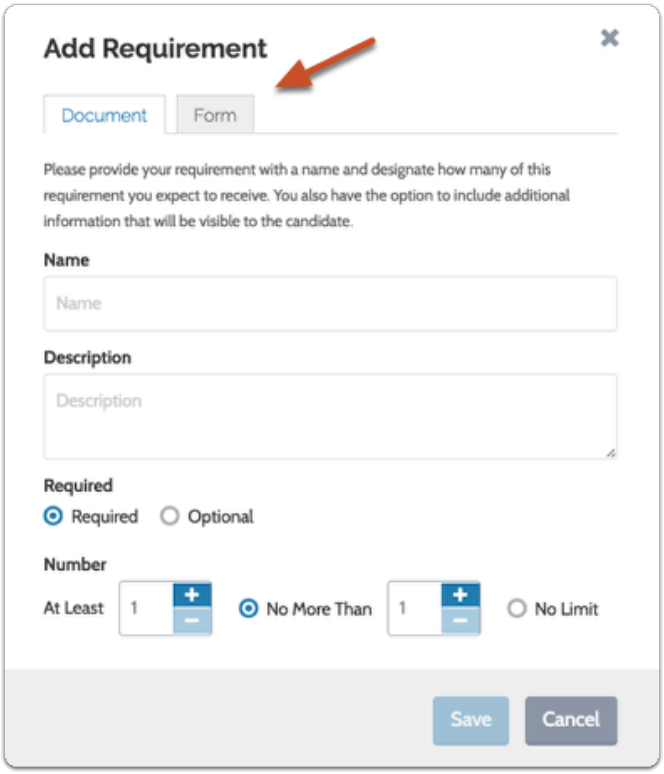
If the requirement you want to create is a document or other material:

1. Enter the name
2. Add any notes about the requirement
3. Indicate if the document is required or optional
4. Enter a number of documents. This can be a specific number, a range, or have no limit.



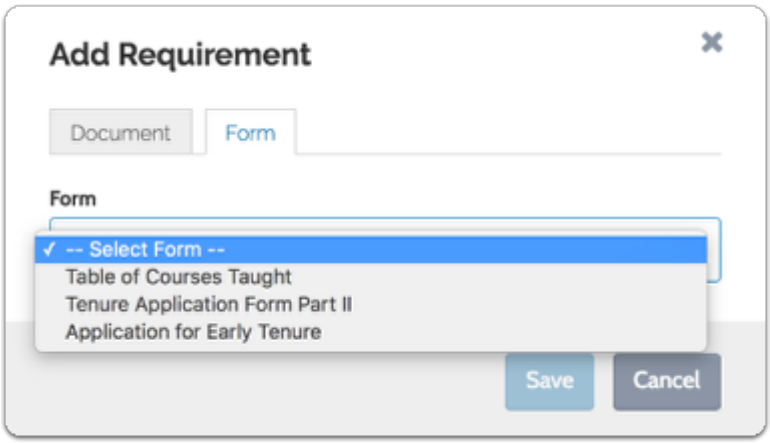
If the requirement you want to add is a form:

Click the "Form" button at the top of the window



Select the form from the dropdown menu and click "Save"

> Forms are created from the Administration page. For more information see this article on how to Create a New Form.



Click "Save & Continue" when you are finished adding packet requirements

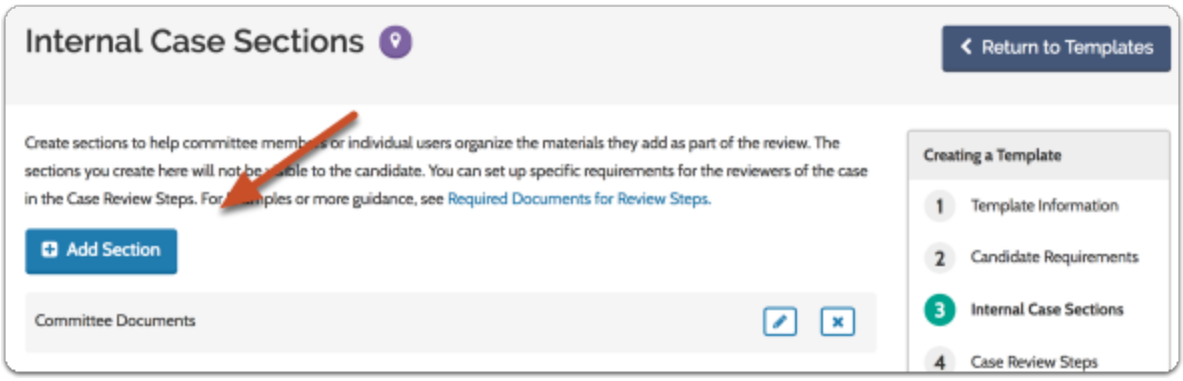
Add Internal Case Sections:

You can create internal case sections to help committee members or individual users organize documents that will be added during the process of reviewing a case. Internal case sections will not be visible to the candidate. Sections added here should correspond with larger groups of materials that will be organized together.

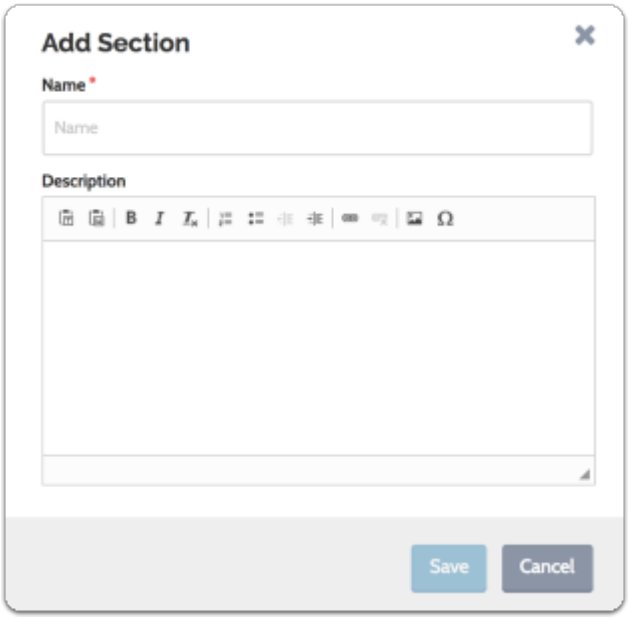
> **Note:** With internal case sections, you are creating a space for documents added to the case by committees and reviewers. You can create *specific document requirements* for reviewers of the case when adding case review steps. For more information see the article; Require Documents for Review Steps.

Click "Add Section"

A single packet section labeled "Committee Documents" appears by default. You can edit or delete this section.



Name, and add a description of the section

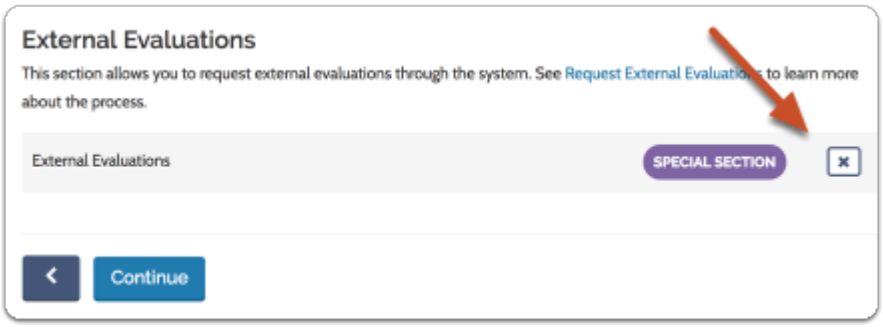


Choose whether or not to include a special internal facing section for external evaluations

By default, we include an internal facing section for requesting and collecting external evaluations through the system.

Click X if you want to remove the external evalutation section from the template or case.

See the article Requesting External Evaluations to learn more about the process.



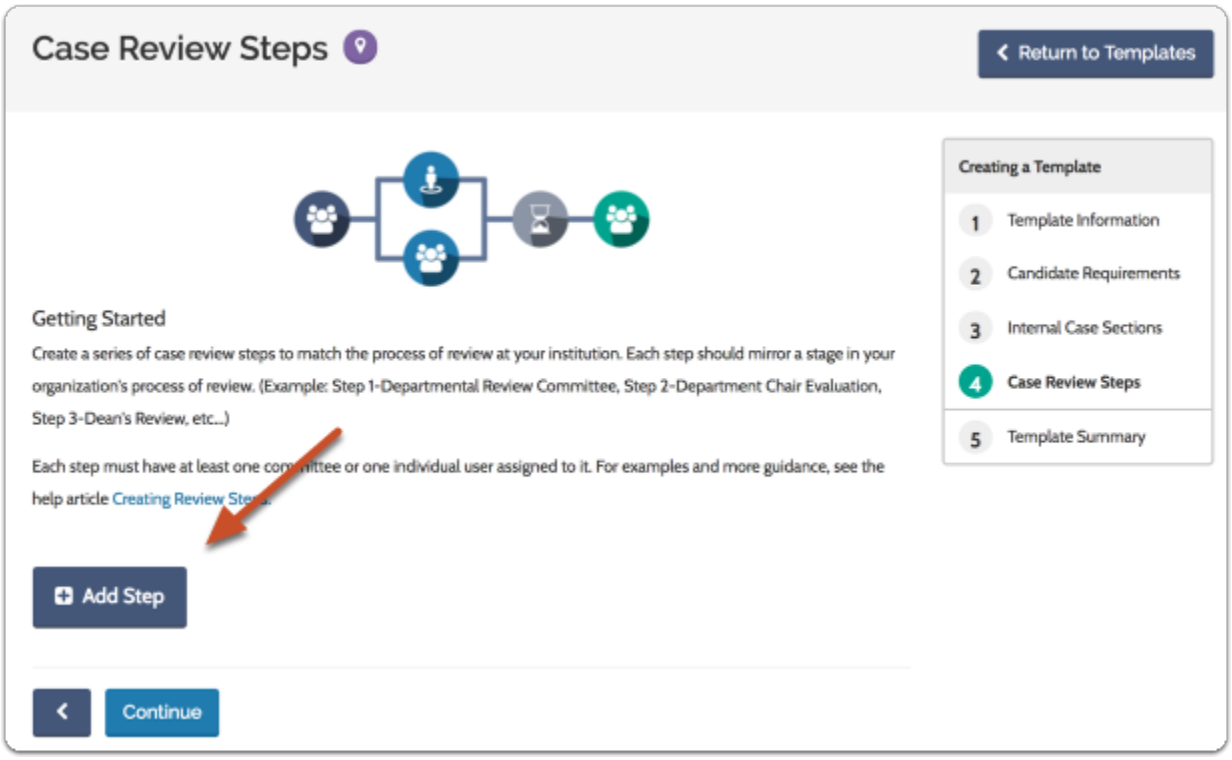
Create a workflow of case review steps as a starting point for cases built using this template

The case review steps you add will form a preconfigured workflow for cases built using this template. These steps should match the particular review process of your organization.

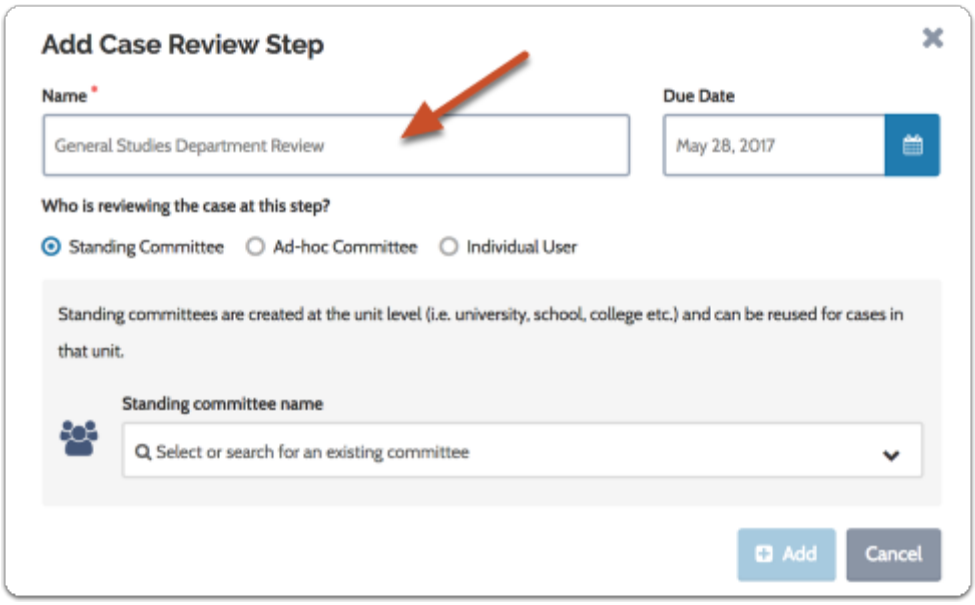
Users may need to add other steps to the process, or more committees or individuals to a step when they are creating a case based on the template.

You can assign additional committees if multiple committees require access to the packet at the same step.

Click "Add Step" to begin setting up the workflow of case review steps for the template

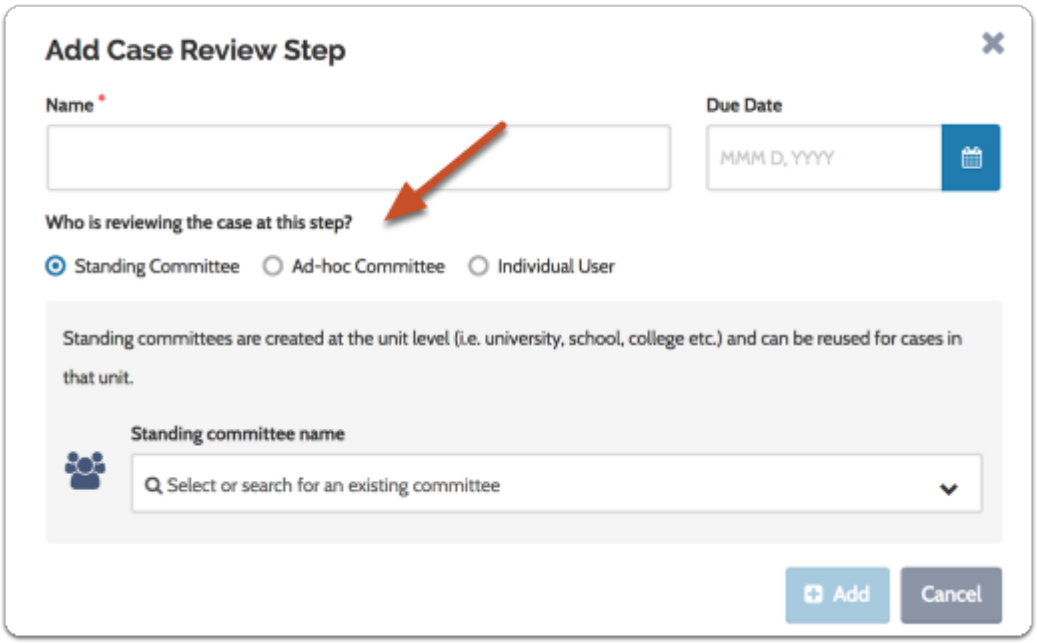


Name the case review step, set a due date for when the step must be completed (optional)



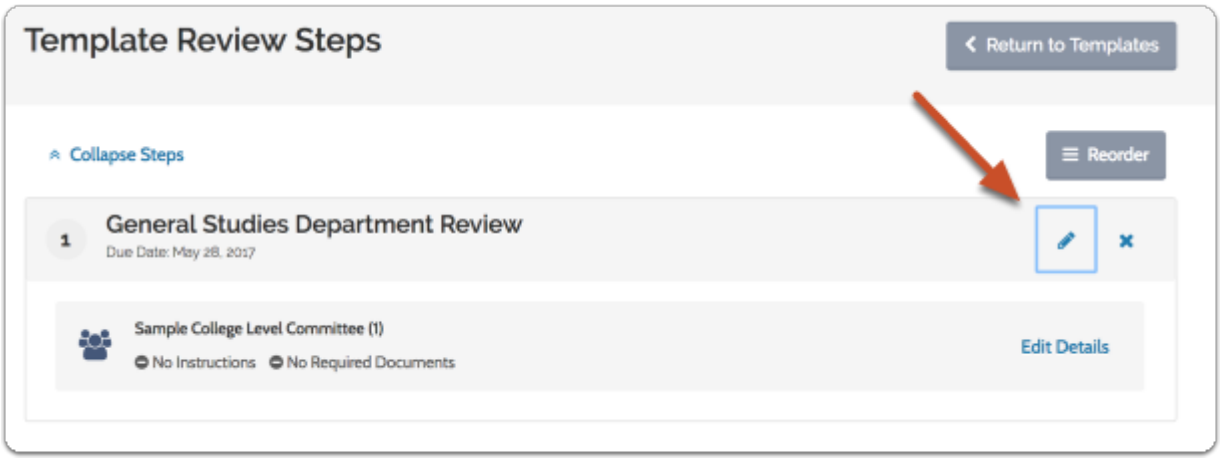
Select who will review the case at this step; a standing committee, ad-hoc committee, or individual user

- Standing committees are created at the unit level (i.e. university, school, college etc.) and can be reused for cases in that unit.
- Ad-hoc committees are created on a per case basis. An admin will need to add members to this committee before a case can be initiated.
- An individual user can review the case, but will not be able to collaborate with others. To allow multiple members to review together, create a standing or ad-hoc committee.

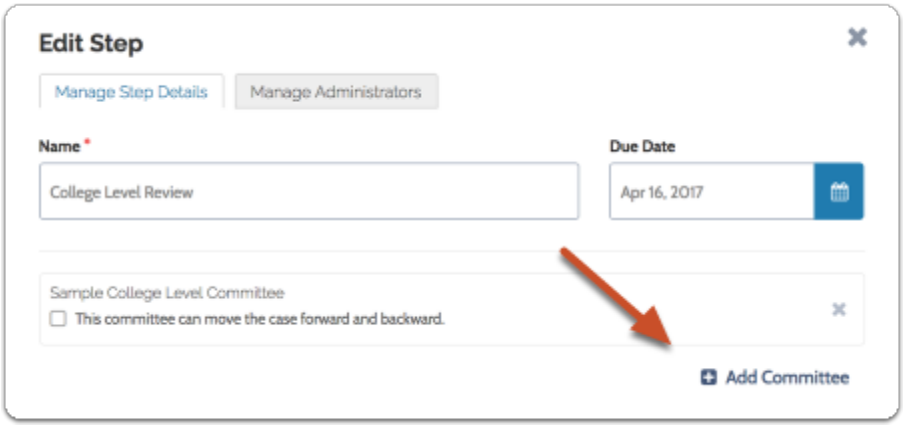


If you need to add more than one committee to a step in the template:

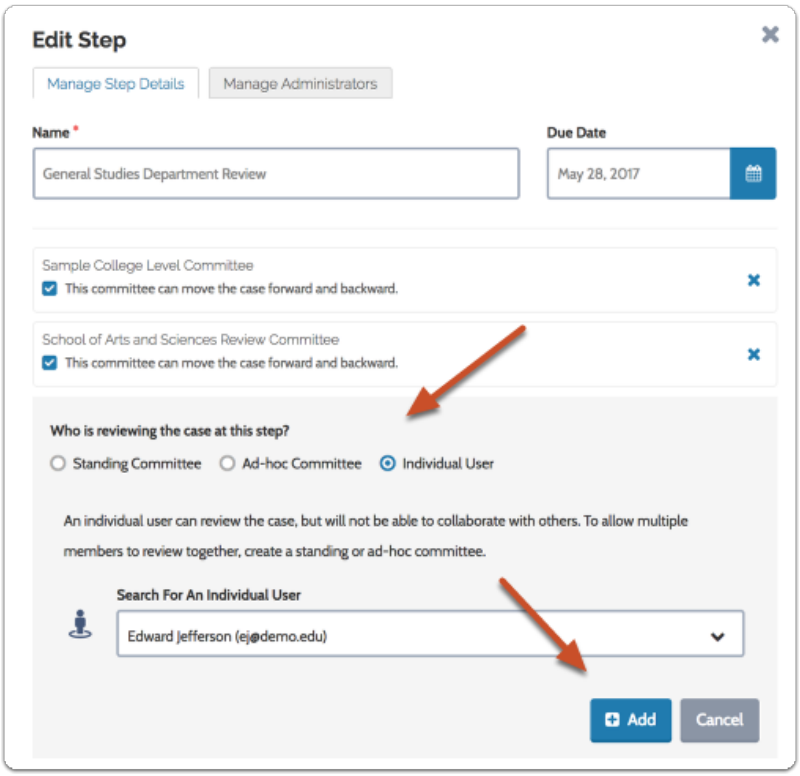
Click the edit pencil to the right of the step



Click "Add Committee" to give another committee or individual access when cases reach this step

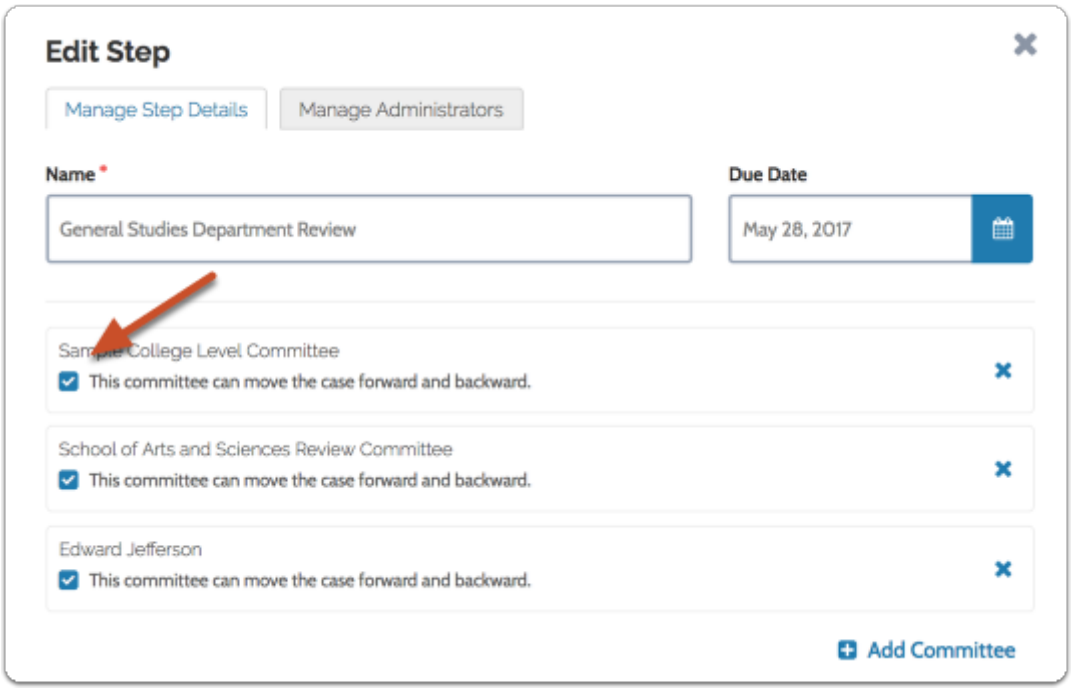


Select who will review the case at this step; a standing committee, ad-hoc committee, or individual user, and click "Add"



Set whether or not each committee or individual can move the case forward or backward

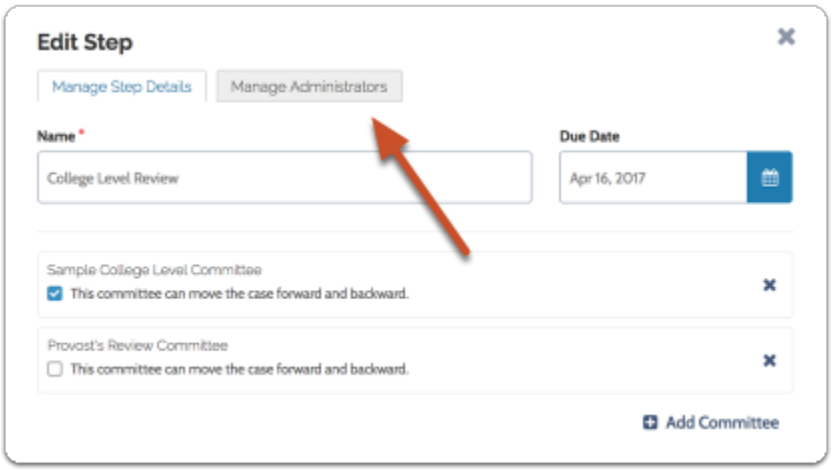
If checked, the manager of the committee, or the individual reviewer can move the case forward or backward in the workflow of case review steps.



Manage the Administrators who will have access to cases built on the template at a given workflow step:

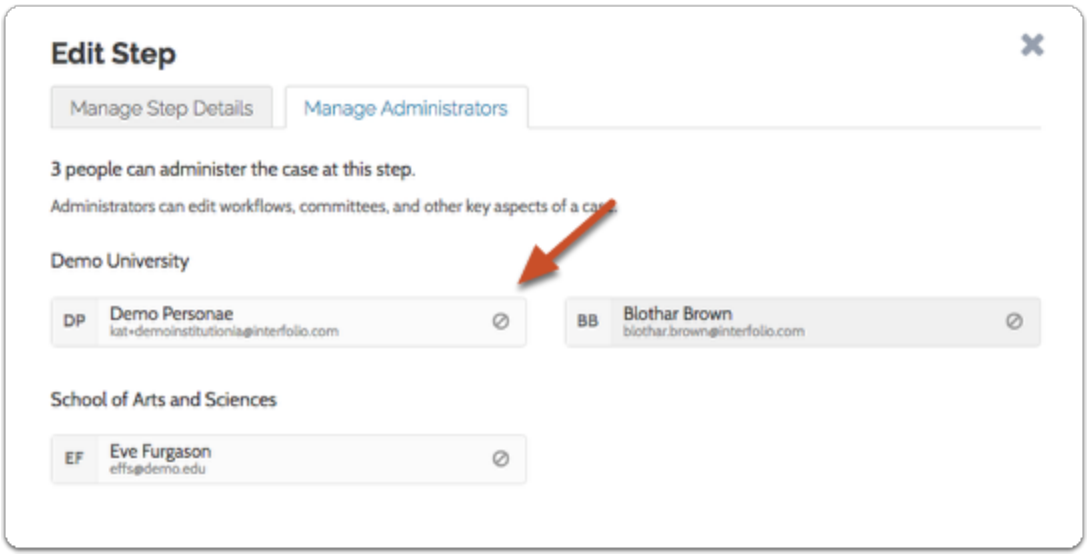
When creating a template, you can recuse administrators who should not have access to cases built on the template at a particular workflow step.

Click the "Manage Administrators" tab

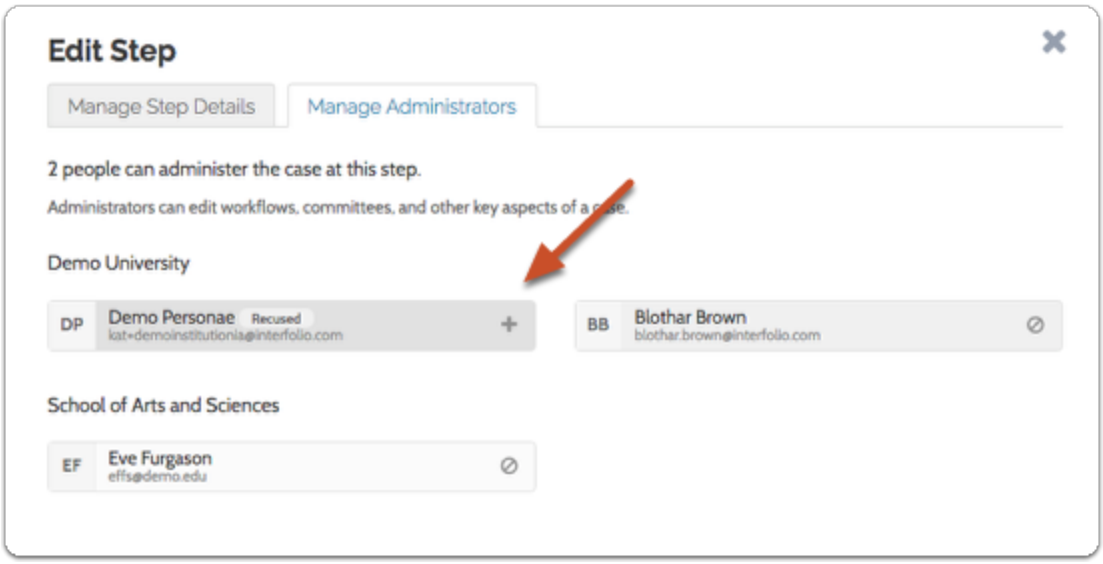


Click the recusal icon to recuse an Administrator from cases at this case review step

You will see a list of Administrators who have access at this step. Click the recusal icon to recuse an Administrator. Once recused, the Administrator will not be able to view or access the case at this step.

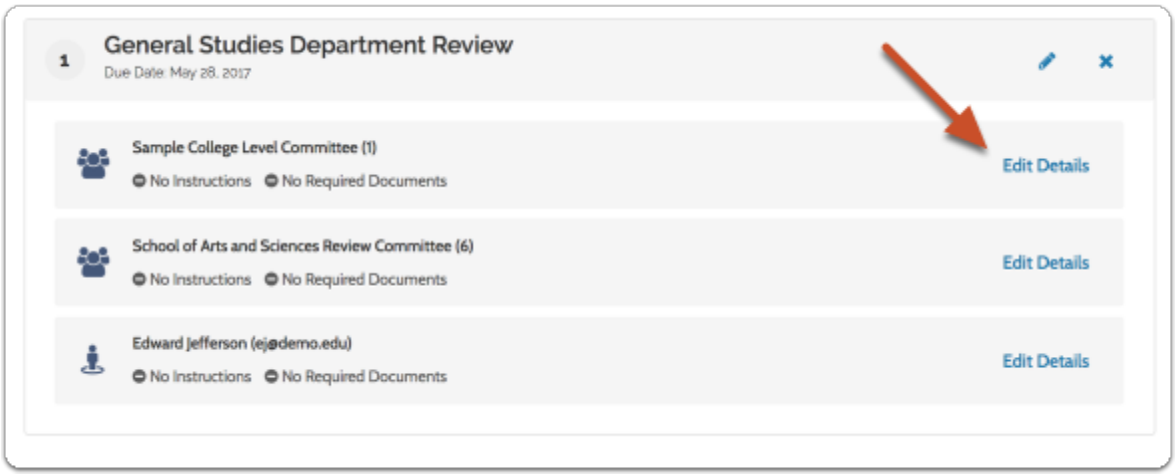


If necessary, you can click the addition sign to add the Administrator back

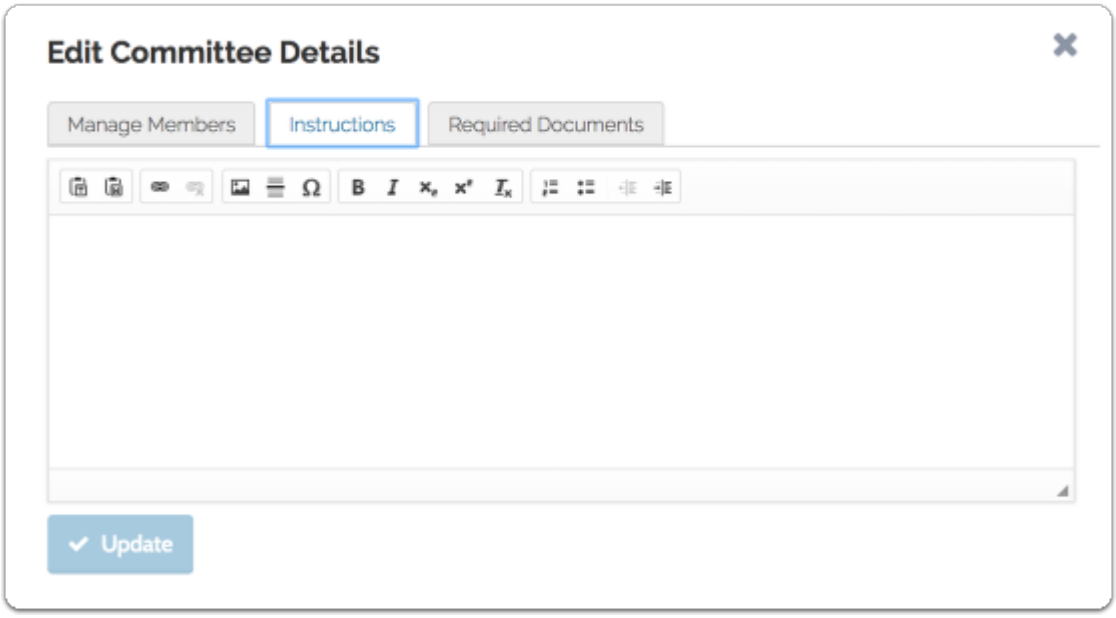


Add or edit committee instructions:

Click "Edit Details"



Click to open the "Instructions" tab and enter instructions for the committee

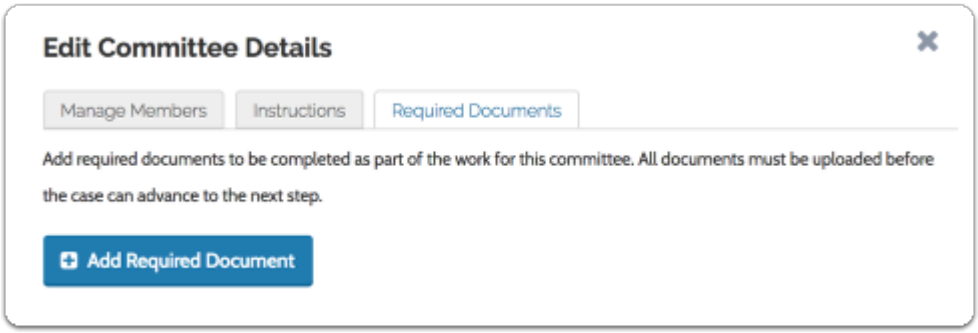


Add required documents to a review step:

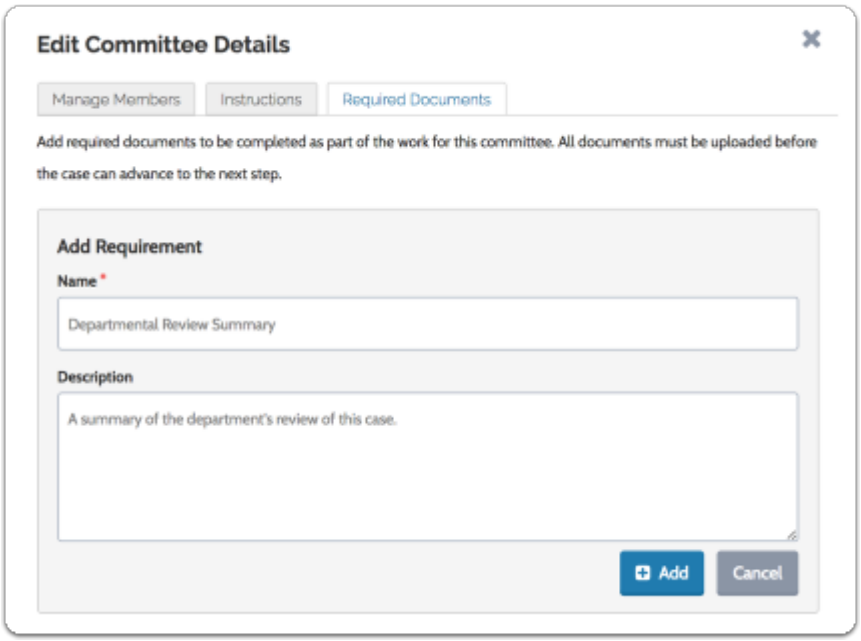
You can require that the committee or individual submit particular documents before the case can move to the next review step in the workflow.

Click to "Edit Details"

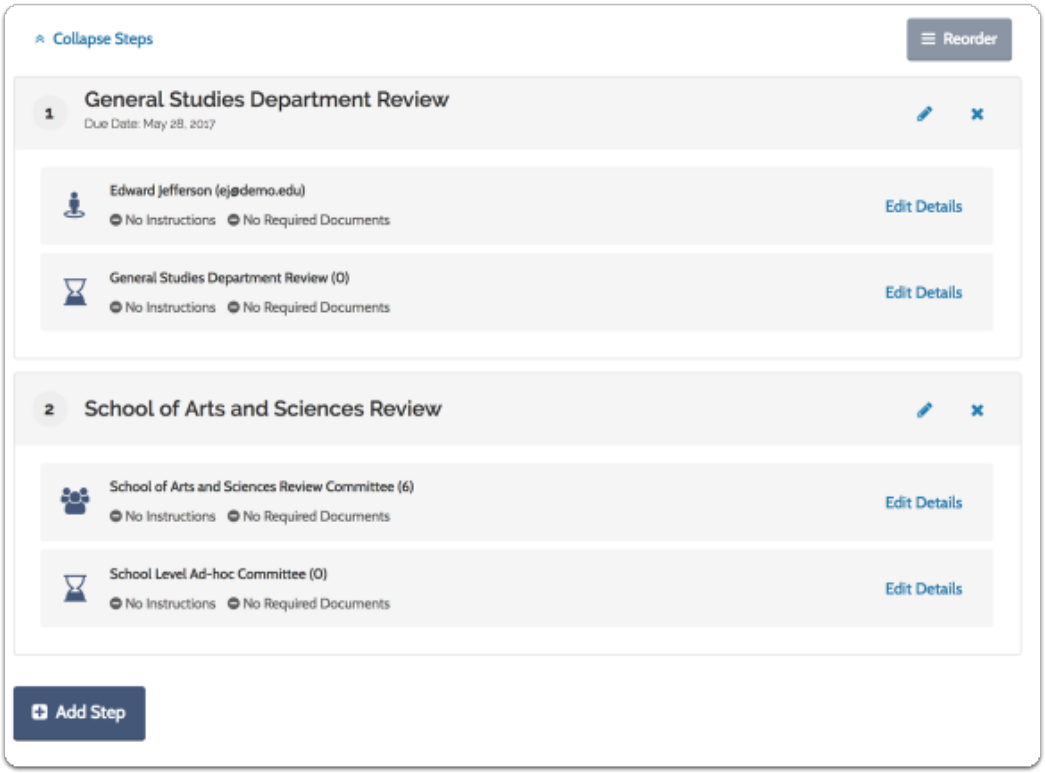
Open the "Required Documents" tab and click "Add Required Document"



Enter a title and description for the required document and click "Add"



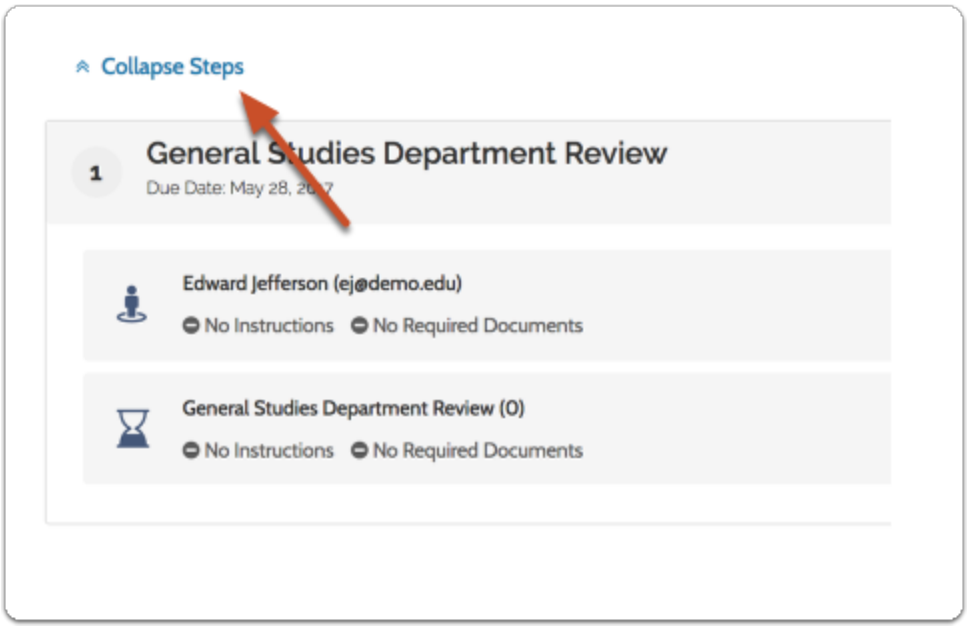
Keep adding steps until you have built out the steps you want to include in the template



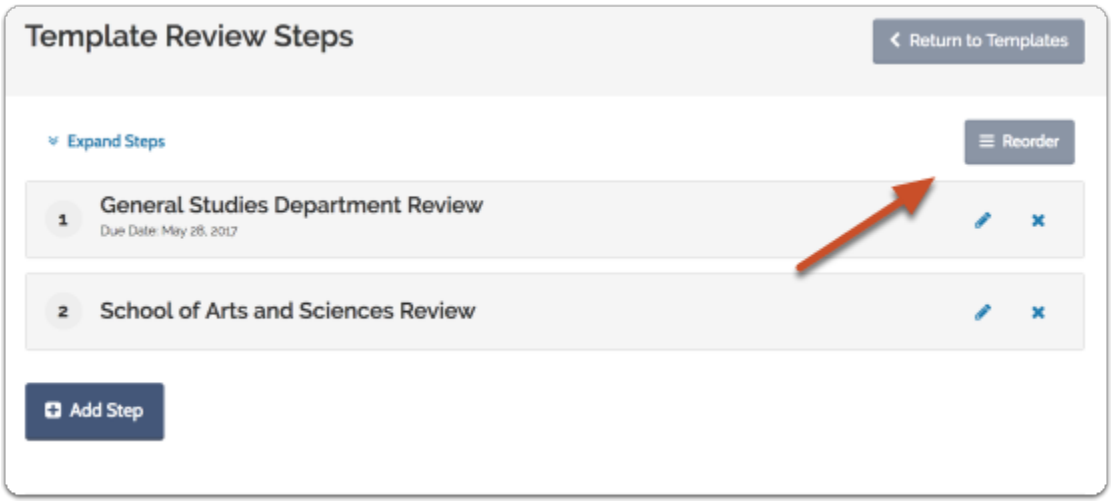
If you need to change the order in which the steps appear in the template:

Click "Collapse Steps" at the upper left of the page

It is easier to move the steps around if they are collapsed.

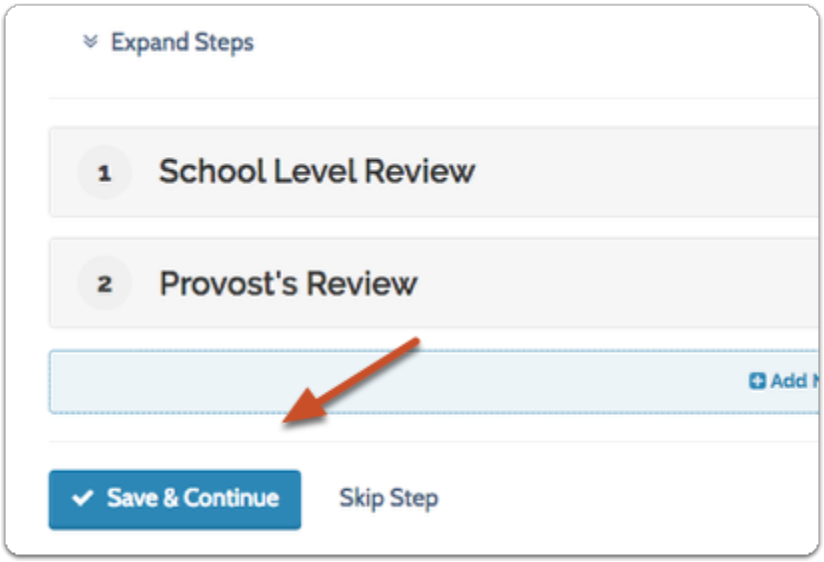


Click "Reorder" at the top right

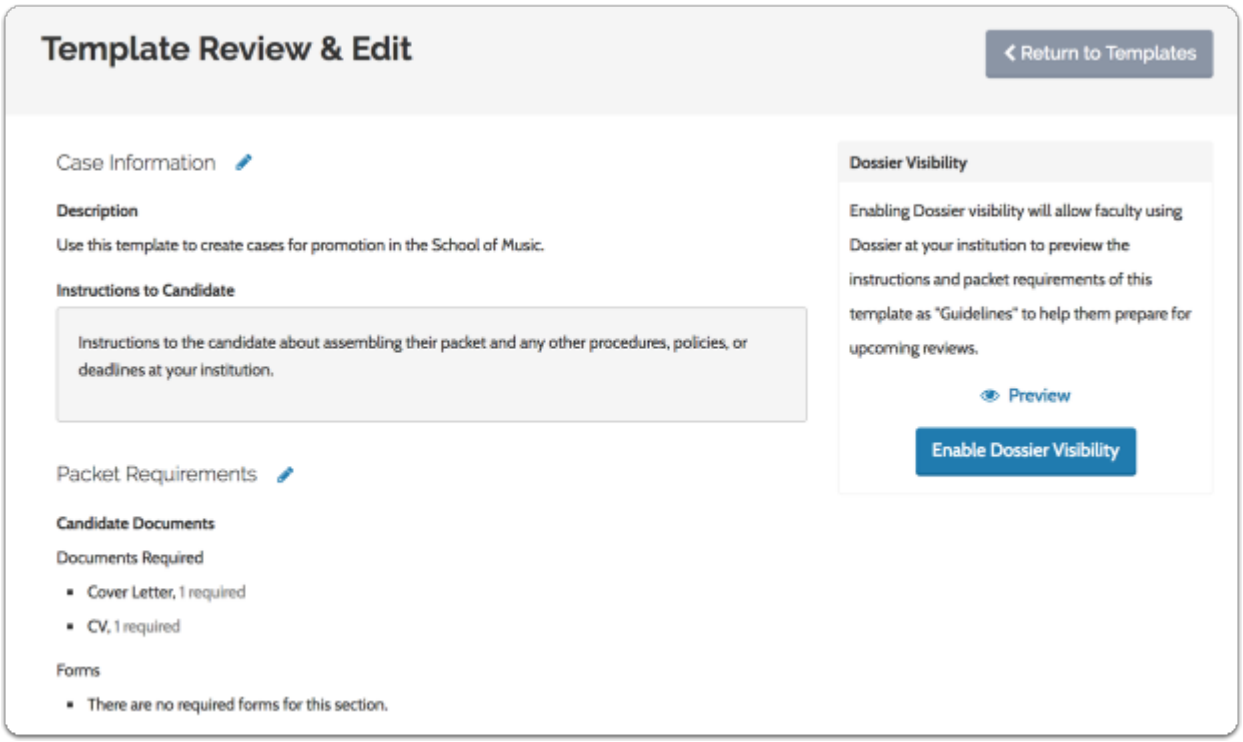


Drag and drop steps to change the order for the template and click "Done" to commit the change

Click "Save and Continue" when you are finished adding steps to the template



Review the template you've created

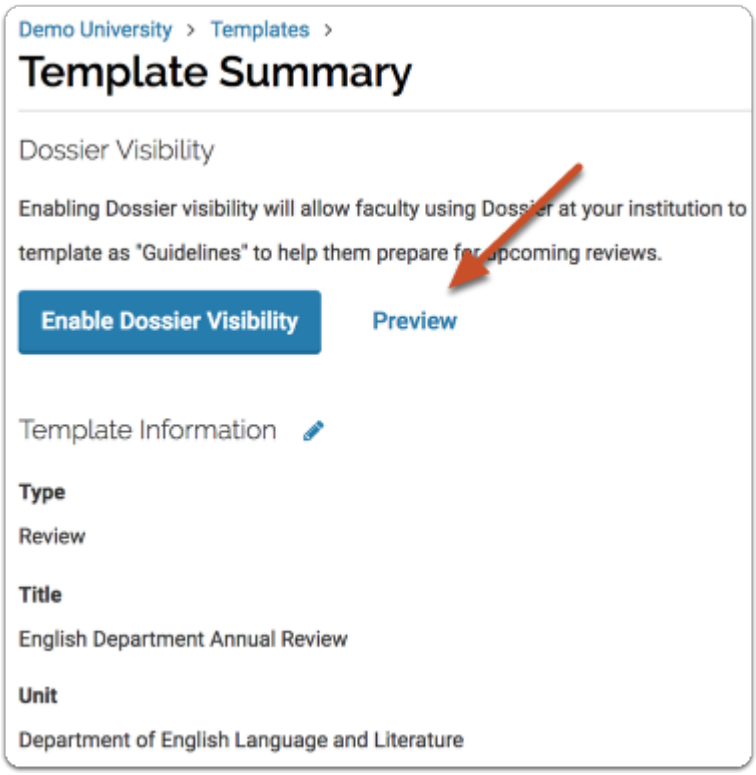


If you are an have Dossier Institution, you can choose to allow Dossier users at your institution to view "Guidelines," i.e. the

description, candidate instructions, and packet requirements for cases built using this template

Viewing Guidelines can help users prepare for upcoming reviews.

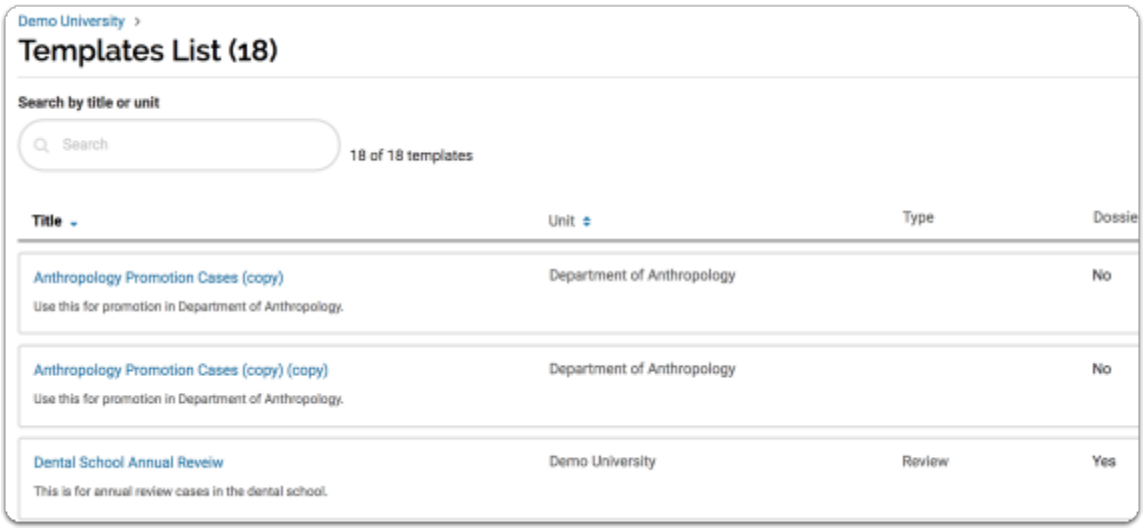
Click "Preview" to see how the information that will appear to Dossier users at your institution



The template will appear in your list of available templates

The template in the example can now be used as a starting point for any case created under the School of Music, and will include the instructions, forms, required documents, and workflow steps you added.

See here for information on creating a case using a template.


Demo University >
Templates List (18)
Search by title or unit
Search
18 of 18 templates
Title
Unit
Type
Dossie
Anthropology Promotion Cases (copy)
Use this for promotion in Department of Anthropology.
Department of Anthropology
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Anthropology Promotion Cases (copy) (copy)
Use this for promotion in Department of Anthropology.
Department of Anthropology
No
Dental School Annual Reveiw
This is for annual review cases in the dental school.
Demo University
Review
Yes