

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

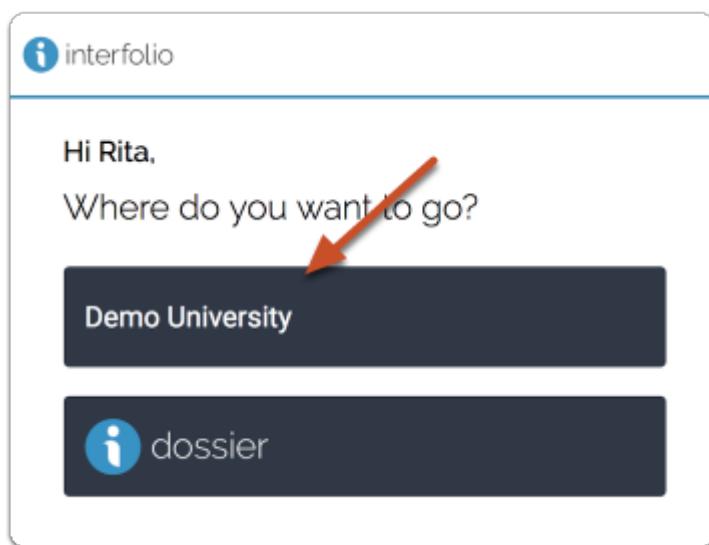
This article provides information on how to create a template for new cases in Interfolio Review Promotion & Tenure. Templates provide a basic starting point for a P&T case. Colleges, schools, and departments can use templates to save time when creating cases, and to establish a repeatable process as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

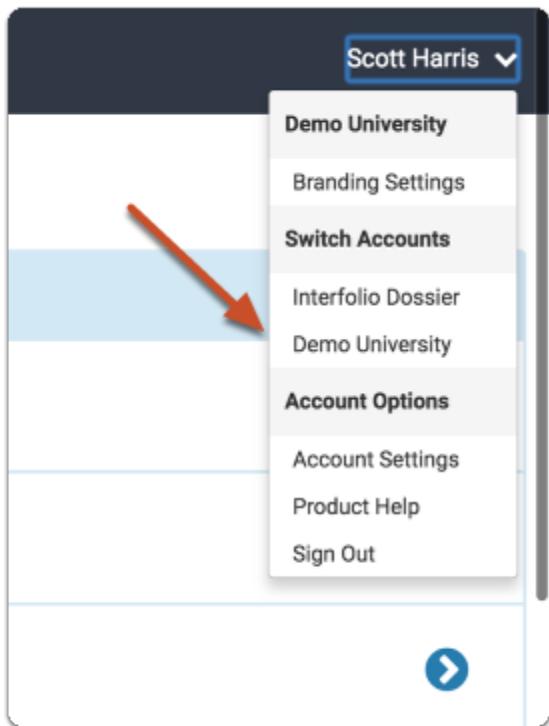
Templates can be created for any case type including, promotions, tenure reviews, annual reviews, appointments, reappointments, or sabbatical cases.

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.

The screenshot shows the 'Templates List (18)' page for 'Demo University'. The left sidebar has a 'Templates' link highlighted with a red arrow. The main area displays three template cards:

- Anthropology Promotion Cases (copy)**
Department of Anthropology
Use this for promotion in Department of Anthropology.
- Anthropology Promotion Cases (copy) (copy)**
Department of Anthropology
Use this for promotion in Department of Anthropology.
- Dental School Annual Review**
Demo University
This is for annual review cases in the dental school.

Click "Add Template"

The screenshot shows the 'Add Template' page. At the top right is a blue button labeled '+ Add Template'. Below it is a table with three rows:

Unit	Type	Dossier Visibility	Options
Department of Anthropology	No	No	Options
Department of Anthropology	No	No	Options
Demo University	Review	Yes	Options

Enter the title and description of the template

The screenshot shows a modal dialog box titled "New Template". It contains three input fields: "Title" with the value "School of Architecture Promotion Cases", "Description" with the value "A template for promotion cases in the School of Architecture.", and "Unit" with the value "School of Architecture". At the bottom are two buttons: a blue "Continue" button with a checkmark icon and a grey "Cancel" button.

New Template	
Title	School of Architecture Promotion Cases
Description	A template for promotion cases in the School of Architecture.
Unit	School of Architecture

Continue **Cancel**

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.

New Template

Title *
School of Architecture Promotion Cases

Description *
A template for promotion cases in the School of Architecture.

Unit *
School of Architecture

Instant Search *
Demo University

Copy *

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

Template Information

Unit *
Demo University

Type *
Promotion

Title *
Ecology Promotion Cases

Description *
A sample template for sample cases.

Case Data Forms
Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the [Administration](#) page.
[Add Case Data Form](#)

Creating a Template

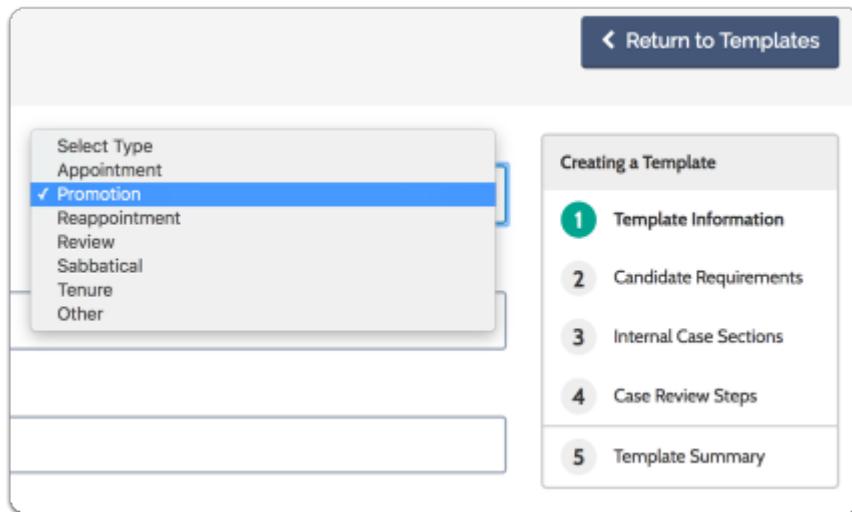
- 1 Template Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps
- 5 Template Summary

Continue

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](#).

Description (*)

A sample template for sample cases.

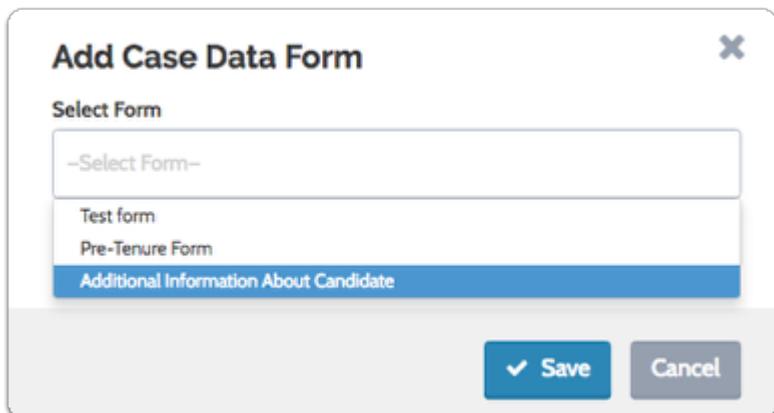
Case Data Forms

Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the [Administration](#) page.

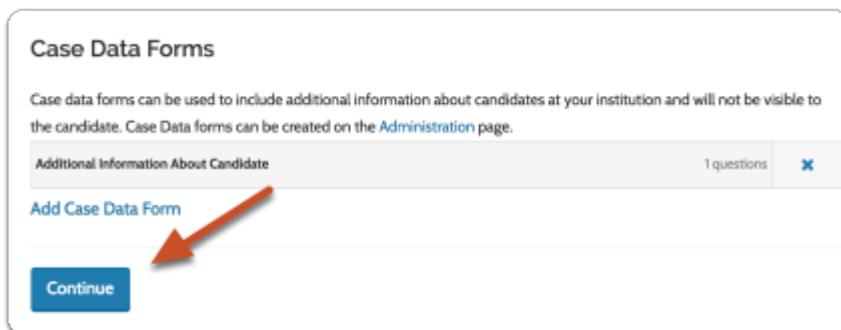
[Add Case Data Form](#)

[Continue](#)

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)

The screenshot shows a "Candidate Requirements" section within a template creation tool. At the top, there's a toolbar with various icons for text editing. Below the toolbar is a large text area where instructions can be typed. To the right of the text area is a sidebar titled "Creating a Template" with five numbered steps: 1. Template Information, 2. Candidate Requirements (which is currently selected and highlighted in green), 3. Internal Case Sections, 4. Case Review Steps, and 5. Template Summary.

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.

The screenshot shows the "Packet Requirements" section. It includes a descriptive text about creating packet sections for materials from candidates, a blue "Add Section" button, a dropdown menu set to "Candidate Documents", and a "Add Requirement" button. Below these are two buttons: a back arrow and a "Continue" button.

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"

The screenshot shows a user interface for managing packet requirements. At the top, there's a title 'Packet Requirements' with a sub-instruction: 'Create 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].'. Below this is a blue button labeled '+ Add Section' with a red arrow pointing to it. To the right of the button are two small icons: a blue square with a white plus sign and a blue pencil. Underneath the button is a dropdown menu labeled 'Candidate Documents' with a downward arrow icon. To the right of the dropdown are two more icons: a blue square with a white plus sign and a blue pencil. Below these are two checkboxes: one for allowing candidates to add their own sections and another for allowing them to add documents. At the bottom are two buttons: a dark blue back button with a left arrow and a light blue 'Continue' button with a right arrow.

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

The screenshot shows a modal dialog box titled 'Add Section'. It has four main input fields: 'Name' containing 'Document of Teaching Effectiveness', 'Description' containing 'Provide a list of courses taught during the evaluation period.', 'Due' containing 'Jun 24, 2016' with a calendar icon, and a checkbox labeled 'Candidates can add additional documents to this section.' at the bottom. At the very bottom are two buttons: a blue 'Save' button and a grey 'Cancel' button.

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

The screenshot shows a user interface for managing packet requirements. At the top, there's a header 'Packet Requirements' with a 'Save & Continue' button. Below it is a section titled 'Candidate Documents' with a dropdown arrow. To the right of this section is a button labeled 'Add Requirement' with a pencil icon. A large red arrow points from the left towards this 'Add Requirement' button. On the far right, there's a sidebar with the same 'Packet Requirements' title and a brief description. At the bottom, there are 'Save & Continue' and 'Skip Step' buttons.

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

This screenshot shows the 'Packet Requirements' page after adding a requirement. The 'Candidate Documents' section now contains an item named 'Documentation of Excellence in Teaching' with a due date of 'Jul 29, 2017'. Below this item is a note: 'Please include student evaluations, and peer observation reports, along with a teaching statement.' A red arrow points from the left towards the 'Add Requirement' button in the 'Candidate Documents' section. At the bottom, there are 'Back' and 'Continue' buttons.

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.

Add Requirement

Please provide your requirement with a name and designate how many of this requirement you expect to receive. You also have the option to include additional information that will be visible to the candidate.

Name

Description

Required
 Required Optional

Number

At Least No More Than No Limit

If the requirement you want to add is a form:

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

Add Requirement



Please provide your requirement with a name and designate how many of this requirement you expect to receive. You also have the option to include additional information that will be visible to the candidate.

Name

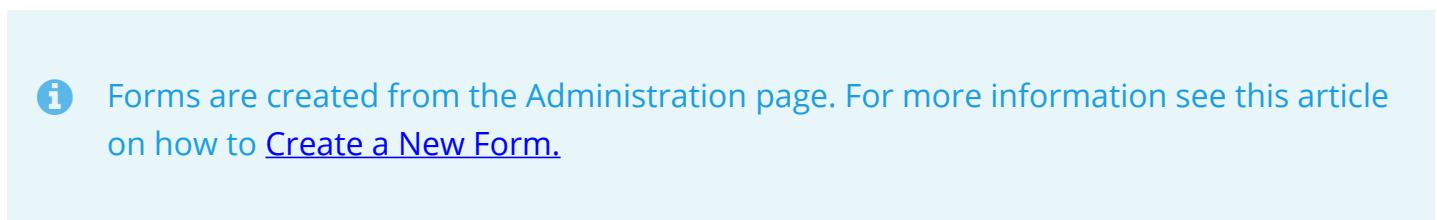
Description

Required
 Required Optional

Number

At Least No More Than No Limit

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



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.

i 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.

Internal Case Sections

Create sections to help committee members or individual users organize the materials they add as part of the review. The sections you create here will not be visible to the candidate. You can set up specific requirements for the reviewers of the case in the Case Review Steps. For examples or more guidance, see [Required Documents for Review Steps](#).

Add Section

Committee Documents

Creating a Template

- 1 Template Information
- 2 Candidate Requirements
- 3 Internal Case Sections**
- 4 Case Review Steps

Name, and add a description of the section

Add Section

Name *

Description

Save **Cancel**

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 evaluation section from the template or case.

See the article [Requesting External Evaluations](#) to learn more about the process.

External Evaluations

This section allows you to request external evaluations through the system. See [Request External Evaluations](#) to learn more about the process.

SPECIAL SECTION

External Evaluations

X

< Continue

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

Case Review Steps

[Return to Templates](#)



Creating a Template

- 1 Template Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps
- 5 Template Summary

Getting Started

Create a series of case review steps to match the process of review at your institution. Each step should mirror a stage in your organization's process of review. (Example: Step 1-Departmental Review Committee, Step 2-Department Chair Evaluation, Step 3-Dean's Review, etc...)

Each step must have at least one committee or one individual user assigned to it. For examples and more guidance, see the help article [Creating Review Steps](#).

+ Add Step

< Continue

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

Add Case Review Step

Name * (arrow pointing to this field)

Due Date (calendar icon)

Who is reviewing the case at this step?

Standing Committee Ad-hoc Committee 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.

Standing committee name (magnifying glass icon) Select or search for an existing committee

(plus icon) Add (cancel icon) Cancel

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.

Add Case Review Step

Name *

Due Date 

Who is reviewing the case at this step?

Standing Committee Ad-hoc Committee 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.

Standing committee name  Select or search for an existing committee 

 Add  Cancel

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

Template Review Steps 

 General Studies Department Review 

1 Due Date: May 28, 2017 

 Sample College Level Committee (1)  

No Instructions No Required Documents

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

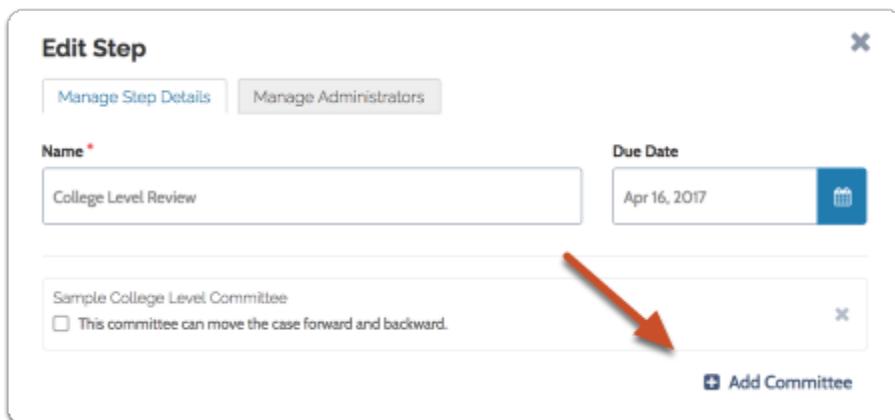
Edit Step

Manage Step Details | Manage Administrators

Name *: College Level Review | Due Date: Apr 16, 2017

Sample College Level Committee
 This committee can move the case forward and backward.

Add Committee



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

Edit Step

Manage Step Details | Manage Administrators

Name *: General Studies Department Review | Due Date: May 28, 2017

Sample College Level Committee
 This committee can move the case forward and backward.

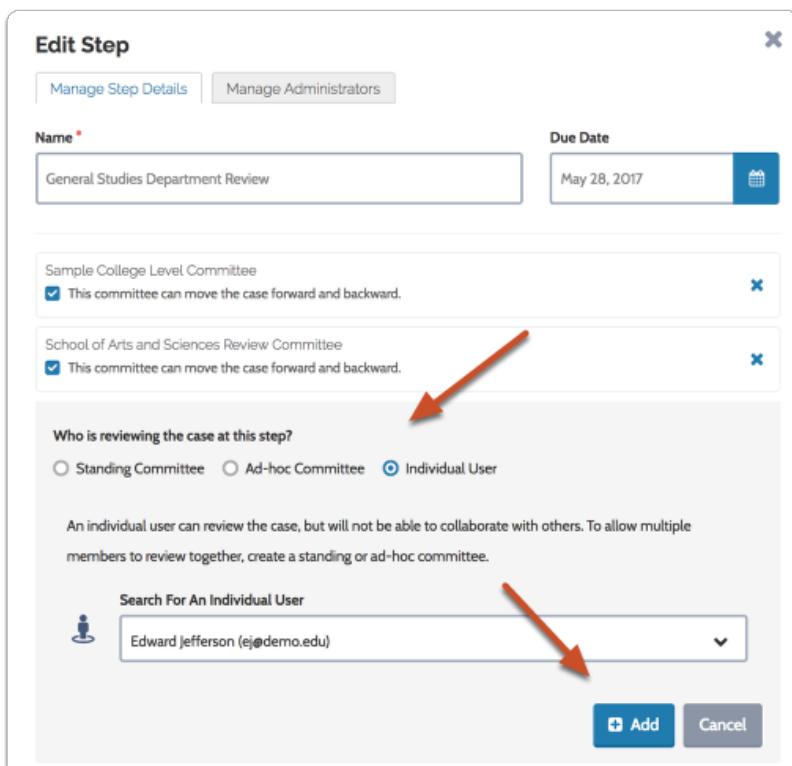
School of Arts and Sciences Review Committee
 This committee can move the case forward and backward.

Who is reviewing the case at this step?
 Standing Committee | Ad-hoc Committee | Individual User

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.

Search For An Individual User
Edward Jefferson (ej@demo.edu)

Add | **Cancel**



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.

Edit Step

[Manage Step Details](#) [Manage Administrators](#)

Name *

Due Date
 [Calendar](#)

Sample College Level Committee	<input checked="" type="checkbox"/> This committee can move the case forward and backward.	X
School of Arts and Sciences Review Committee	<input checked="" type="checkbox"/> This committee can move the case forward and backward.	X
Edward Jefferson	<input checked="" type="checkbox"/> This committee can move the case forward and backward.	X

[+ Add Committee](#)

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

The screenshot shows the 'Edit Step' dialog box. At the top, there are two tabs: 'Manage Step Details' and 'Manage Administrators'. The 'Manage Administrators' tab is highlighted with a red arrow pointing to it. Below the tabs, there are fields for 'Name *' (College Level Review) and 'Due Date' (Apr 16, 2017). Under 'Committees', there are two sections: 'Sample College Level Committee' (checked: This committee can move the case forward and backward) and 'Provost's Review Committee' (unchecked: This committee can move the case forward and backward). A blue 'Add Committee' button is at the bottom.

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.

The screenshot shows the 'Edit Step' dialog box. At the top, there are two tabs: 'Manage Step Details' and 'Manage Administrators'. The 'Manage Administrators' tab is selected. It displays a message: '3 people can administer the case at this step. Administrators can edit workflows, committees, and other key aspects of a case.' Below this, there are three administrator entries: 'Demo University' (DP, Demo Personae, kat+demoinstitution@interfolio.com), 'Blothar Brown' (BB, Blothar Brown, blothar.brown@interfolio.com), and 'School of Arts and Sciences' (EF, Eve Furgason, effs@demo.edu). A red arrow points to the recusal icon (a small circle with a slash) next to Blothar Brown's name.

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

Edit Step

Manage Step Details Manage Administrators

2 people can administer the case at this step.
Administrators can edit workflows, committees, and other key aspects of a case.

Demo University

DP	Demo Personae Recused kat=demoinstitutionia@interfolio.com	+	BB	Blother Brown blother.brown@interfolio.com	Ø
----	---	---	----	---	---

School of Arts and Sciences

EF	Eve Furgason effs@demo.edu	Ø
----	-------------------------------	---

Add or edit committee instructions:

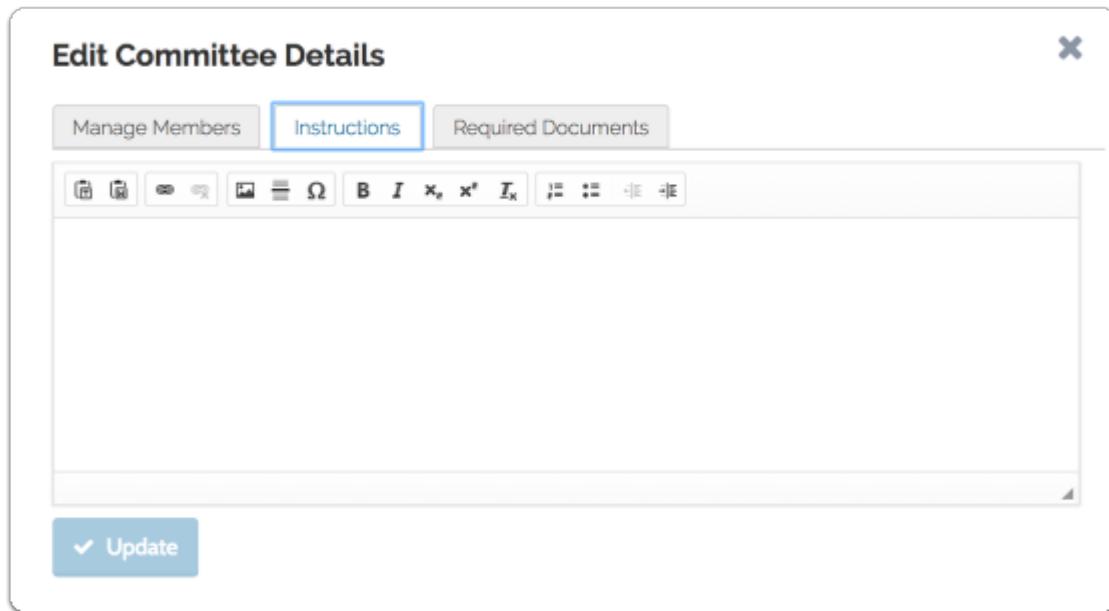
Click "Edit Details"

1 General Studies Department Review

Due Date: May 28, 2017

	Sample College Level Committee (1)	Edit Details
	School of Arts and Sciences Review Committee (6)	Edit Details
	Edward Jefferson (ej@demo.edu)	Edit Details

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



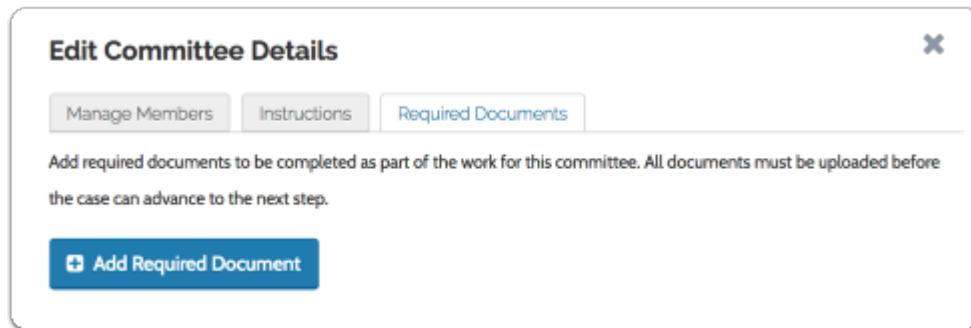
Add required documents to a review step:

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

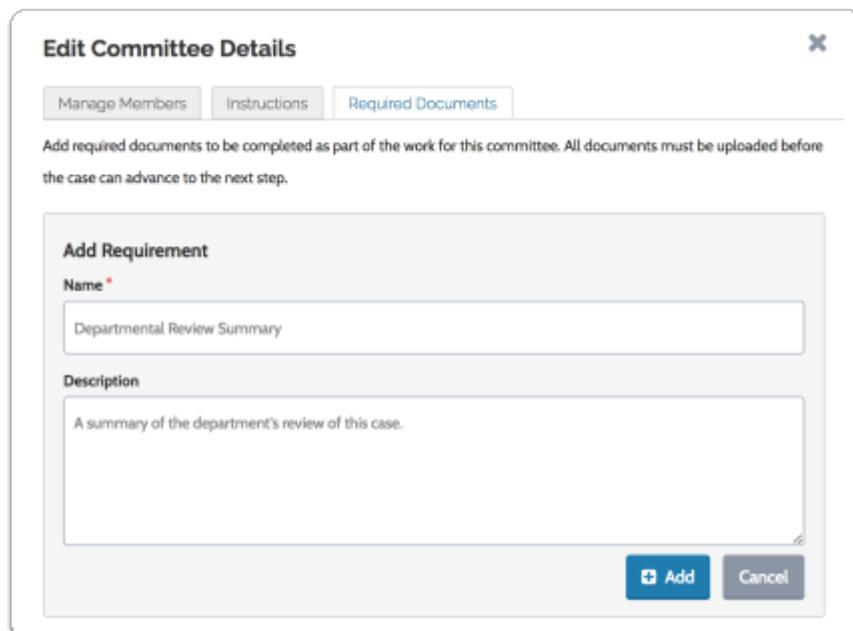
Click to "Edit Details"

A screenshot of a review step configuration page for 'General Studies Department Review' due on May 28, 2017. It lists three items: 'Sample College Level Committee (1)' (status: No Instructions, No Required Documents), 'School of Arts and Sciences Review Committee (6)' (status: No Instructions, No Required Documents), and 'Edward Jefferson (ej@demo.edu)' (status: No Instructions, No Required Documents). Each item has a blue 'Edit Details' button to its right. A red arrow points to the 'Edit Details' button for the first committee entry.

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

The screenshot shows a template editor interface. At the top right are 'Collapse Steps' and 'Reorder' buttons. Below is a list of steps:

- 1 General Studies Department Review** (Due Date: May 28, 2017)
 - Edward Jefferson (ej@demo.edu)
No Instructions No Required Documents [Edit Details](#)
 - General Studies Department Review (0)
No Instructions No Required Documents [Edit Details](#)
- 2 School of Arts and Sciences Review**
 - School of Arts and Sciences Review Committee (6)
No Instructions No Required Documents [Edit Details](#)
 - School Level Ad-hoc Committee (0)
No Instructions No Required Documents [Edit Details](#)

At the bottom left is a blue 'Add Step' button.

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.

[Collapse Steps](#)

General Studies Department Review

Due Date: May 28, 2017



Edward Jefferson (ej@demo.edu)

[No Instructions](#) [No Required Documents](#)



General Studies Department Review (0)

[No Instructions](#) [No Required Documents](#)

Click "Reorder" at the top right

Template Review Steps

[Return to Templates](#)

[Expand Steps](#)

[Reorder](#)

1 General Studies Department Review

Due Date: May 28, 2017



2 School of Arts and Sciences Review



[Add Step](#)

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

Drag and drop the steps in the list below to change the order for the template.

[Done](#)

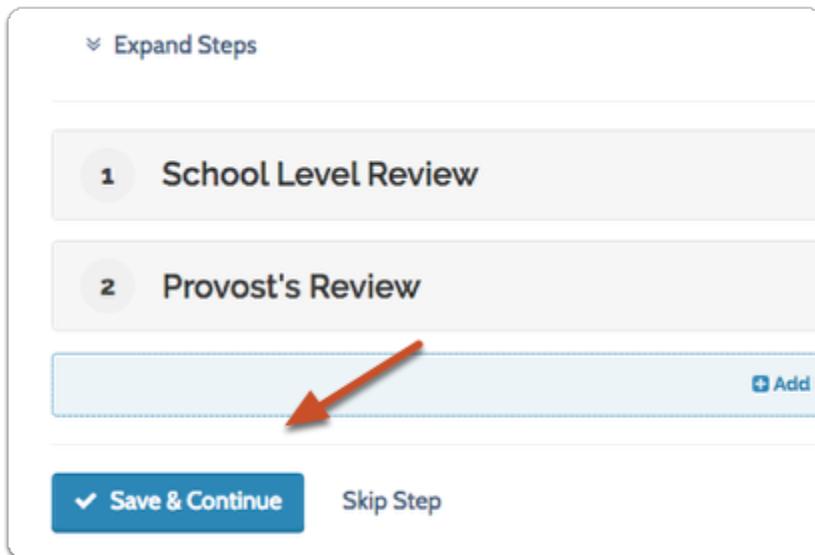
1 School Level Review



2 Provost's Review



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



Review the template you've created

The screenshot shows the 'Template Review & Edit' page. At the top left is the title 'Template Review & Edit'. At the top right is a 'Return to Templates' button. The page is divided into several sections:

- Case Information**: Includes a 'Description' section with the text 'Use this template to create cases for promotion in the School of Music.'
- Instructions to Candidate**: A box containing the text 'Instructions to the candidate about assembling their packet and any other procedures, policies, or deadlines at your institution.'
- Dossier Visibility**: A box with the text 'Enabling Dossier visibility will allow faculty using Dossier at your institution to preview the instructions and packet requirements of this template as "Guidelines" to help them prepare for upcoming reviews.' It includes a 'Preview' button and an 'Enable Dossier Visibility' button.
- Packet Requirements**: A box with the text 'Candidate Documents' and 'Documents Required':
 - Cover Letter, 1 required
 - CV, 1 required
- Forms**: A box with the text 'There are no required forms for this section.'

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.

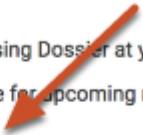
Click "Preview" to see how the information that will appear to Dossier users at your institution

Demo University > Templates >

Template Summary

Dossier Visibility

Enabling Dossier visibility will allow faculty using Dossier at your institution to template as "Guidelines" to help them prepare for upcoming reviews.

 [Enable Dossier Visibility](#) [Preview](#)

Template Information 

Type
Review

Title
English Department Annual Review

Unit
Department of English Language and Literature

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](#).

Templates List (18)

Search by title or unit

 Search

18 of 18 templates

Title	Unit	Type	Dossier
Anthropology Promotion Cases (copy) Use this for promotion in Department of Anthropology.	Department of Anthropology		No
Anthropology Promotion Cases (copy) (copy) Use this for promotion in Department of Anthropology.	Department of Anthropology		No
Dental School Annual Review This is for annual review cases in the dental school.	Demo University	Review	Yes