

Step-by-Step Guide for Administrators AY23-24 Promotion and Tenure

Access at Departmental Materials Upload Step

You will receive an email to access at the first step of the review process along with the Departmental Case Facilitator and/or the College Case Facilitator.

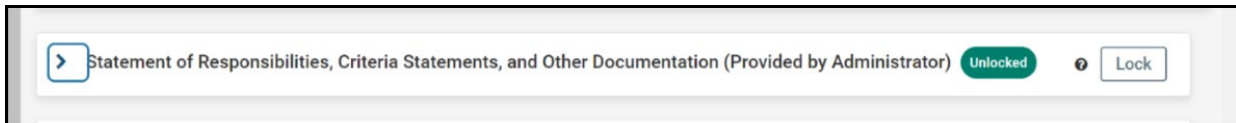
To review the different ways of accessing a candidate's case in Interfolio, please see the [Step-by-Step Interfolio Log In Guide](#).

At this first step of the review process, the candidate will be uploading all relevant materials for consideration in their Promotion and/or Tenure case.

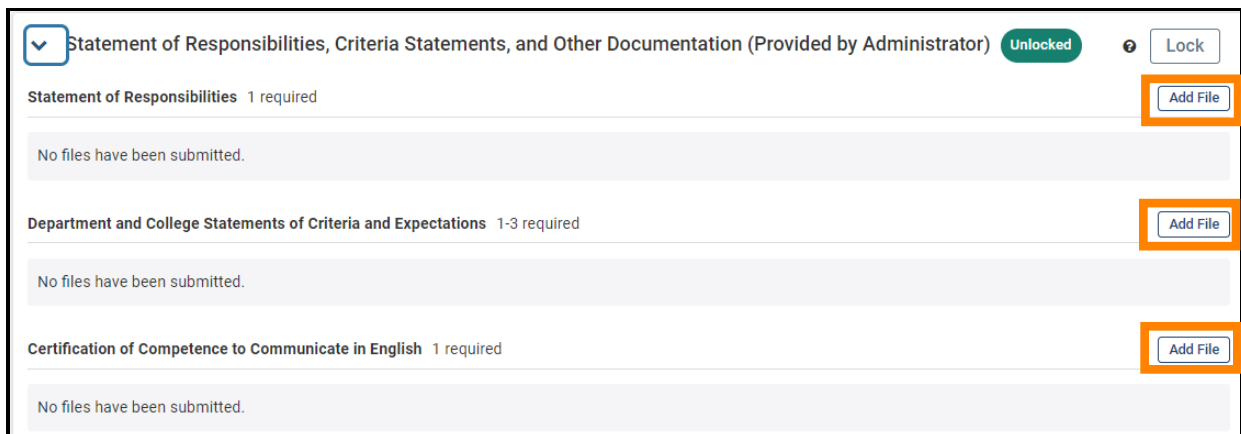
Simultaneously, you and the case facilitators will be providing any required documentation to the sections indicated as "Provided by Administrator."

Uploading a file

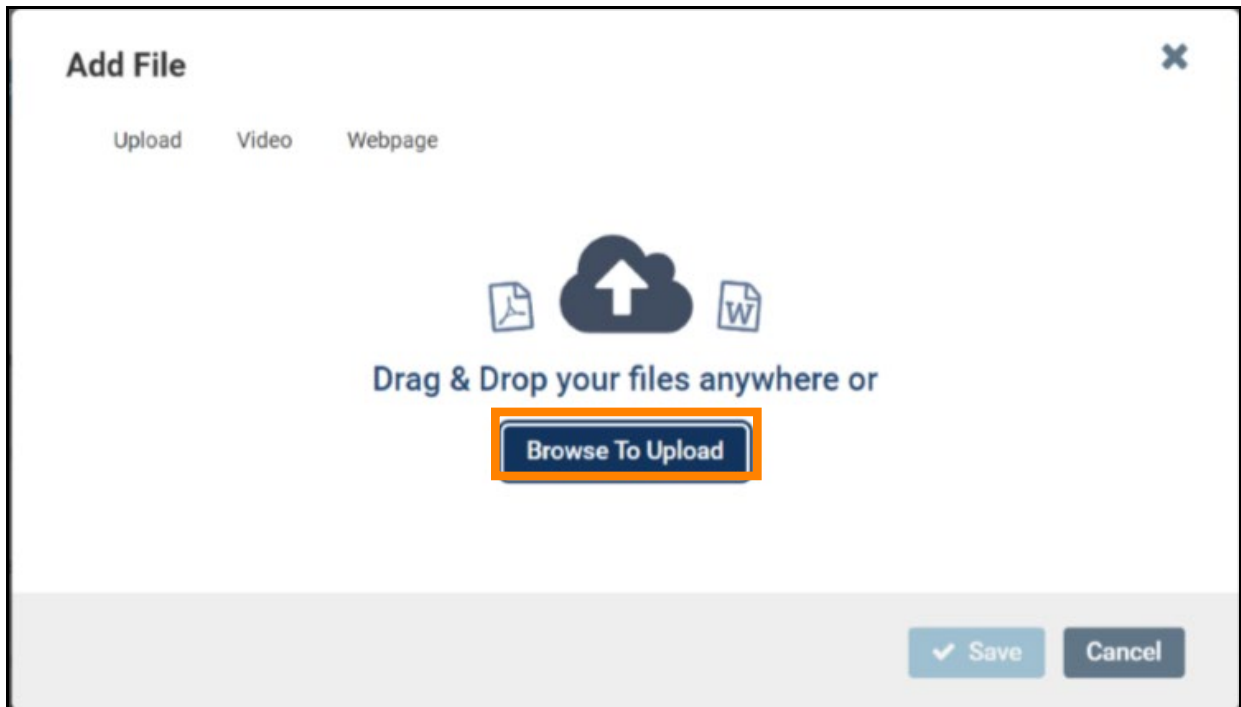
Scroll down to the section into which you would like to upload a document and click on the ">" button next to the section title to expand the section.



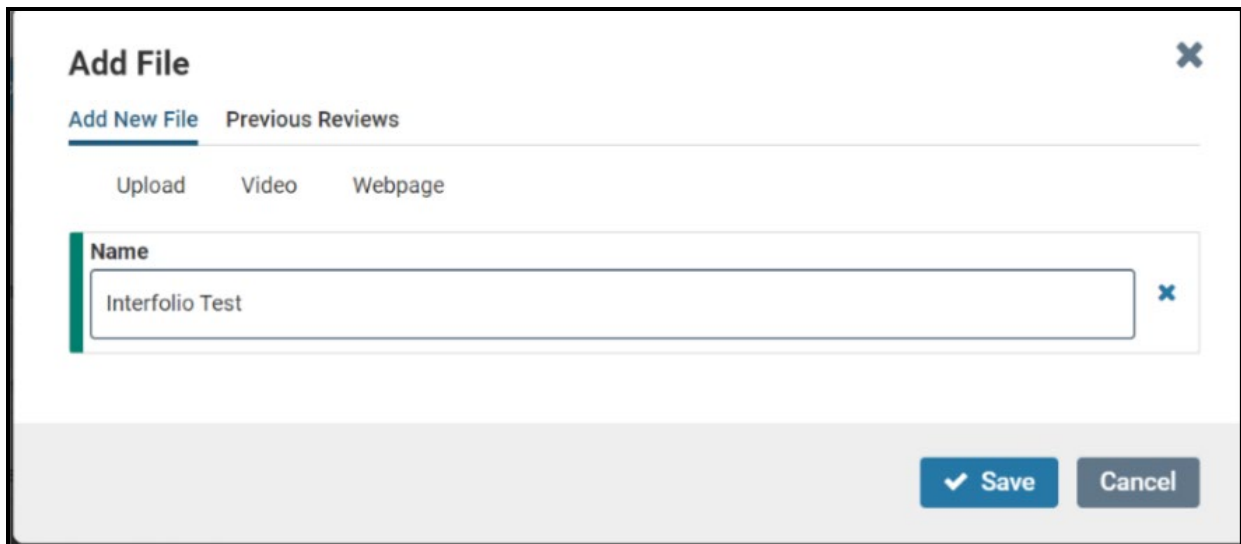
The section will expand so that you can see all the subsections within it. Next to the section into which you would like to add a file, click the "Add File" button, boxed in orange.



Within the resulting pop-up, select “Browse to Upload,” boxed in orange below, to view files saved on your device or from another storage location to which you have access.



Choose the document that you would like to upload and select “open” to continue upload. As an example, a successful upload will look like this:



Select “Save” to save your upload. The saved and uploaded document will now appear under the section to which it was uploaded. For example, in the picture below, Megan Gast successfully uploaded “Interfolio Test” to the “Statement of Responsibilities” section.

Statement of Responsibilities, Criteria Statements, and Other Documentation (Provided by Administrator) **Unlocked** [Lock](#)

Statement of Responsibilities 1 required [Add File](#)

Title	Details	Actions
<input type="checkbox"/> Interfolio Test	Added by Megan Gast Mar 3, 2023	Edit

Department and College Statements of Criteria and Expectations 1 required [Add File](#)

Title	Details	Actions
<input type="checkbox"/> Interfolio Test	Added by Megan Gast Mar 3, 2023	Edit

Locking and Unlocking Sections

Once all required and necessary documents in a “Provided by Administrator” section have been added, the section should be locked. Locking a section disables the ability for a candidate to add, edit, or delete documents for that section.

To do this, yourself, the Department Case Facilitator, and/or the College Case Facilitator will click on the “Lock” option located to the right of the section headings. The lock button for the “Statement of Responsibility, Criteria Statements and Other Documentation (Provided by Administrator)” section is boxed in orange below.

Once a section is locked, it can be unlocked again by yourself, the Departmental Case Facilitator, and/or the College Case Facilitator but not by the candidate.

Statement of Responsibilities, Criteria Statements, and Other Documentation (Provided by Administrator) **Unlocked** [Lock](#)

Statement of Responsibilities 1 required [Add File](#)

Title	Details	Actions
<input type="checkbox"/> Interfolio Test	Added by Megan Gast Mar 3, 2023	Edit

Department and College Statements of Criteria and Expectations 1 required [Add File](#)

Title	Details	Actions
<input type="checkbox"/> Interfolio Test	Added by Megan Gast Mar 3, 2023	Edit

When you have uploaded all the required materials

The departmental and/or college case facilitators will verify that the dossier is complete by completing a required checklist form. Once both facilitators have completed their respective forms, the case will be advanced to faculty affairs.