

How to use Interfolio's Dossier Platform

Thursday, October 3, 2019

10:54 AM

As CSUF faculty you get access to 2 interfolio products:

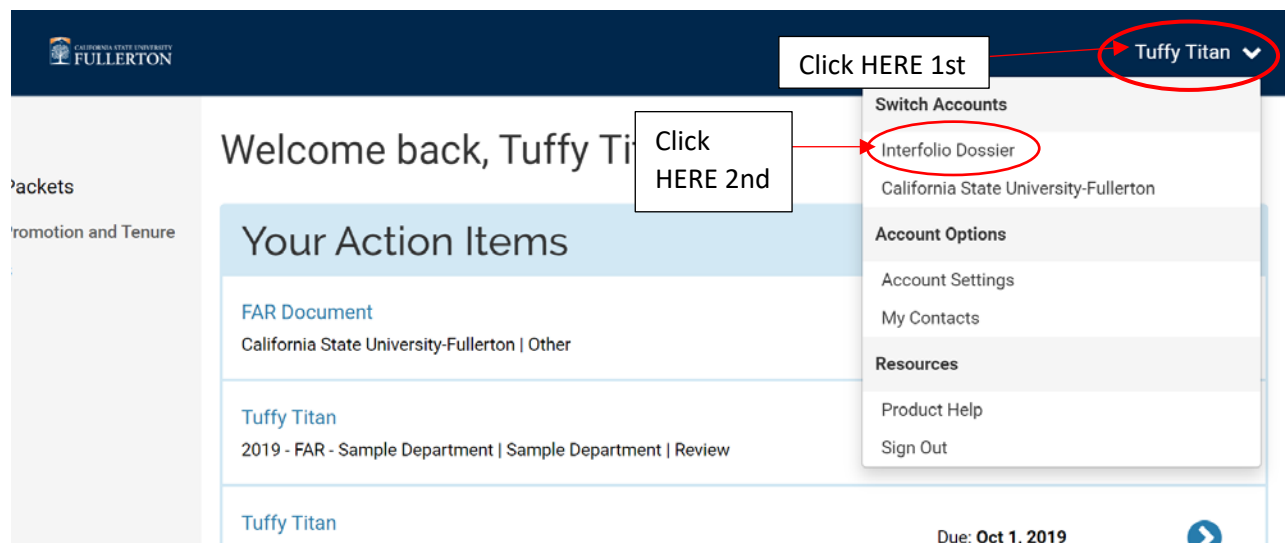
1. Review, Promotion, and Tenure = platform where you upload and submit documents for your required evaluations
 - a. When you log into Interfolio through the Titan Portal it is the option button with the CSUF logo
2. Dossier = this is a digital safe where you can upload and organize documents for upcoming reviews
 - a. It is also where your submitted documents live after you have submitted your review packets through the Review, Promotion, and Tenure platform
 - b. When you log into Interfolio through the Titan Portal is the option button with the word "dossier" on it

Please NOTE: any documents stored in Dossier are **NOT** automatically uploaded to your active Review Packets in the Review, Promotion, and Tenure platform. Your documents will still need to be uploaded by you, the user.

- Documents stored in Dossier **CANNOT** be seen by your review committees until they are uploaded and submitted through Review, Promotion, and Tenure platform.
 - For more in depth information on this please refer to the tutorial on How to add Previously Submitted Documents to a New Review Packet

To get to Dossier from the Review, Tenure, and Promotion platform:

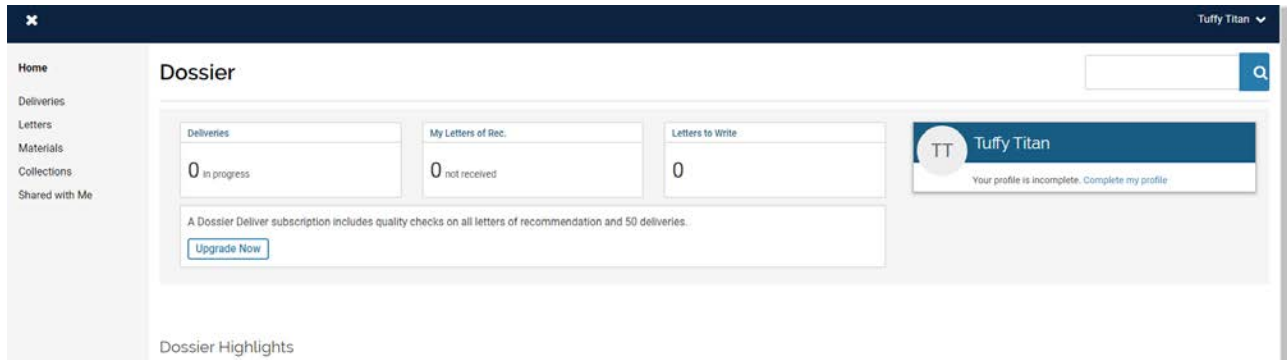
1. Go to your name, written in white text, at the top right-hand corner of the screen and click it.
 - a. A drop down menu should appear and you will need to select "**Interfolio Dossier**"



The screenshot shows the top navigation bar of the Interfolio platform. On the left is the California State University Fullerton logo. On the right, the user's name 'Tuffy Titan' is displayed in white text on a dark blue background, with a dropdown arrow. A red circle highlights this name, with a callout box labeled 'Click HERE 1st'. Below the name, a dropdown menu is open, listing options: 'Switch Accounts', 'Interfolio Dossier', 'California State University-Fullerton', 'Account Options', 'Account Settings', 'My Contacts', 'Resources', 'Product Help', and 'Sign Out'. A red circle highlights 'Interfolio Dossier', with a callout box labeled 'Click HERE 2nd'. The main content area below shows a 'Welcome back, Tuffy Titan' message and a 'Your Action Items' section with three items: 'FAR Document', 'Tuffy Titan', and another 'Tuffy Titan' item. The bottom right corner shows 'Due: Oct 1, 2019' and a refresh icon.

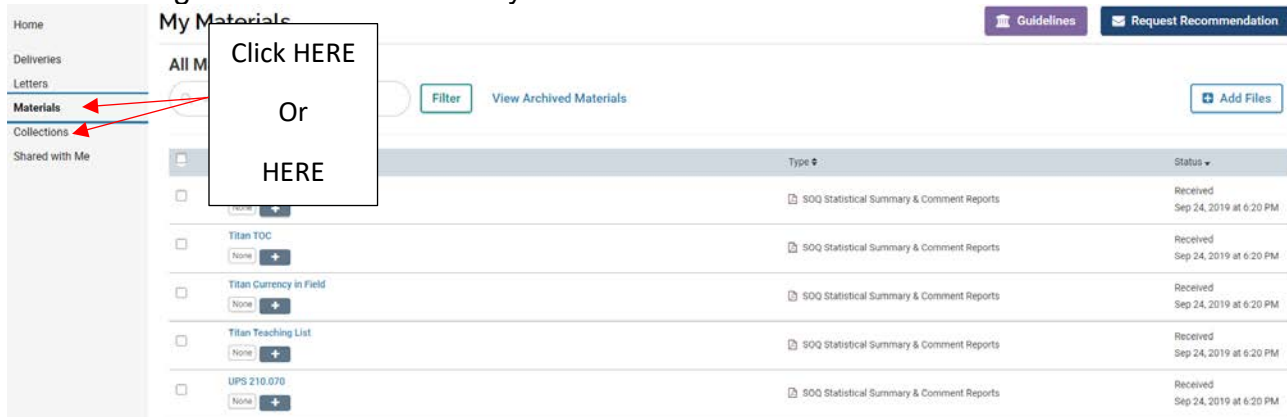
2. Clicking "Interfolio Dossier" will redirect you to the Dossier home screen

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To start organizing your materials for current or future reviews click either "Materials" or "Collections" option available in the left-hand menu in the Dossier Home page.

1. Clicking Materials will redirect you here:

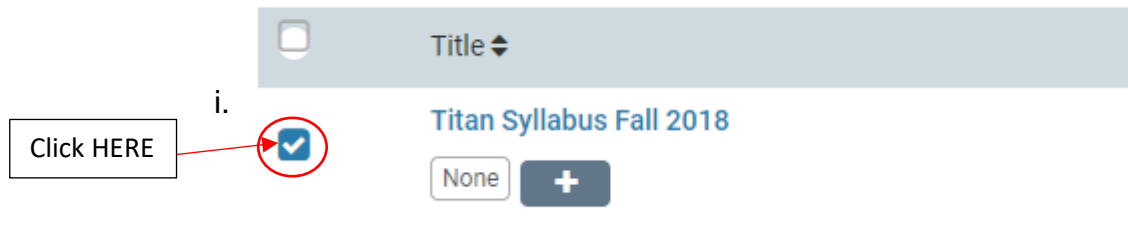


- b. Within the Materials Screen you can do the following
- i. Add files, by clicking the button below



- ii. The procedure for adding new files is the same as the one for adding new files to your Review Packet in the Retention, Promotion, and Tenure Platform
- iii. Tag, archive, and Add files to collections
 1. To perform these functions you must:
 - a. Click the check or tick box next to a file name

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b. Then select the action from the corresponding buttons

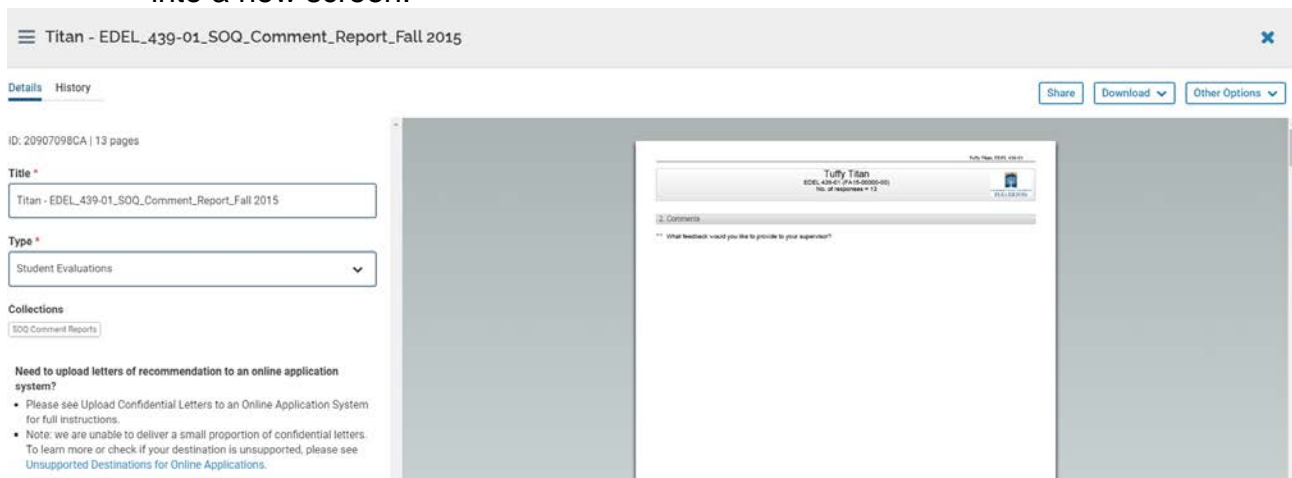


i. Filter documents, search for documents you have added, or view your archived documents

All Materials (265)



c. Clicking on a hyperlinked title name within Materials will open the document into a new screen:



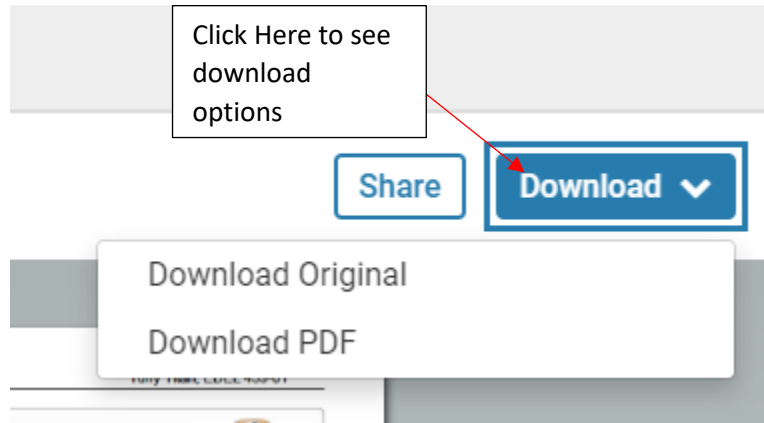
i. On this screen you can:

1. Change the document title
2. Share the document

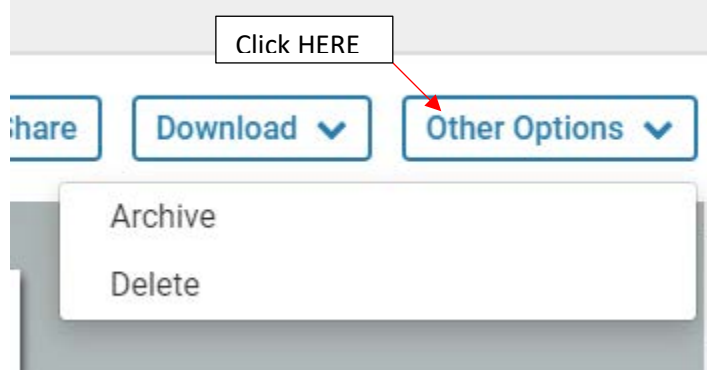


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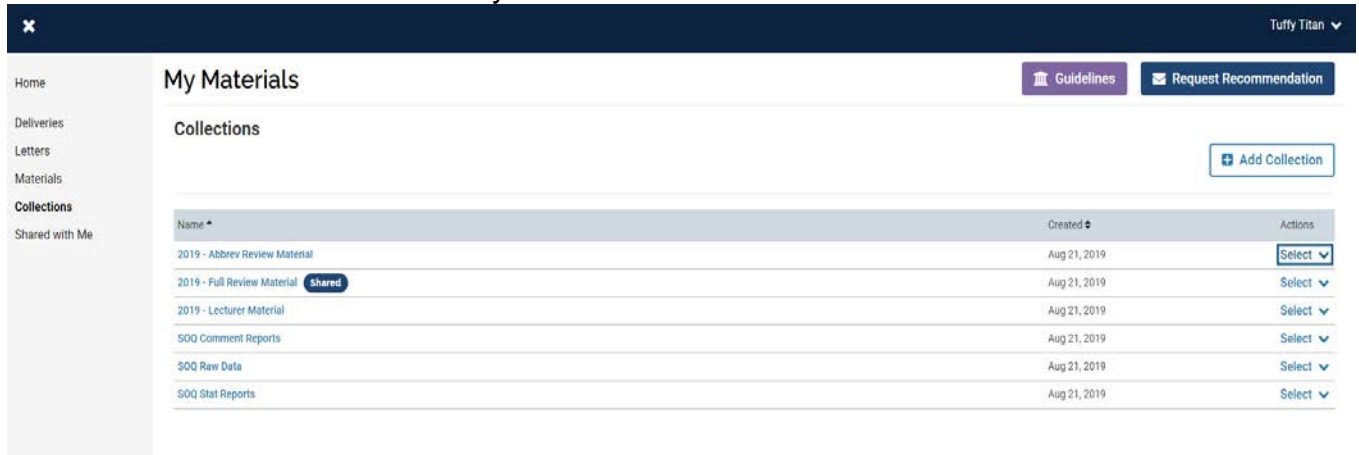
3. Download the document



4. Archive or Delete the Document by clicking "Other Options"



2. Click Collections will redirect you here:



b. Within the Collections screen you can do the following:

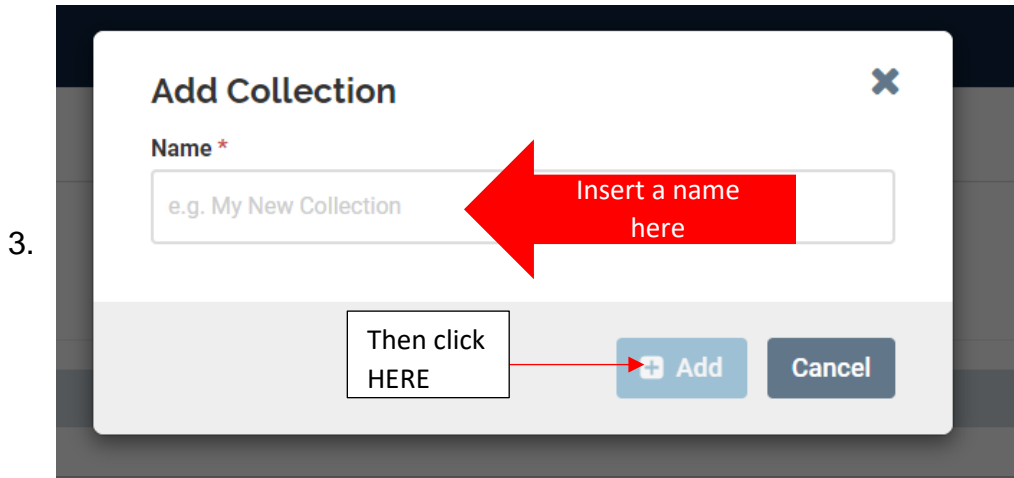
- i. Add new collections by clicking the button below:

1.

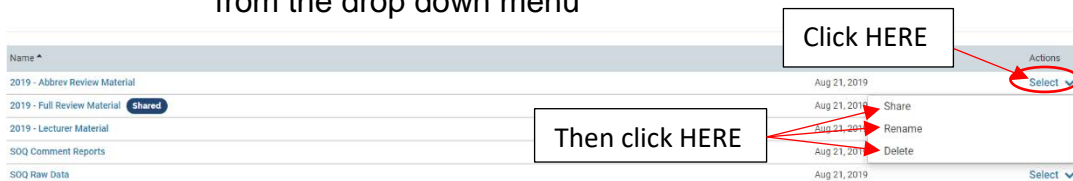


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2. Give the Collection a name and click "+Add"

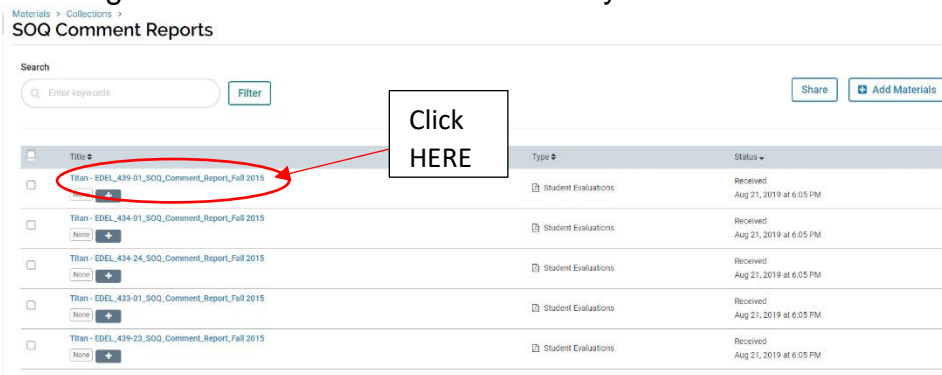


- ii. Once a collection has been created and named you can"
 1. Share your collection with others
 2. Rename you collection
 3. Or Delete your collection if you are not happy with it
 4. To perform all these functions click "select" and choose an option from the drop down menu



- c. To add materials to a Collection, click on its name to open it

- i. Clicking on a collection name will redirect you here



- ii.

- iii. Once in a collection you can:

1. Add materials, and the processes is the same as adding new materials to a review packet in the Review, Promotion, and Tenure platform

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a.

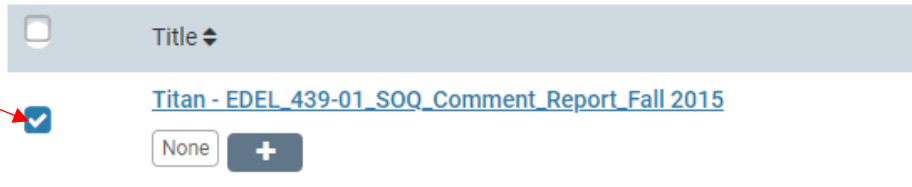


2. Tag, remove, and archive materials

a. To perform these functions you must:

a. Click the check or tick box next to a file name

Click HERE



b. Then select the action from the corresponding buttons

i.



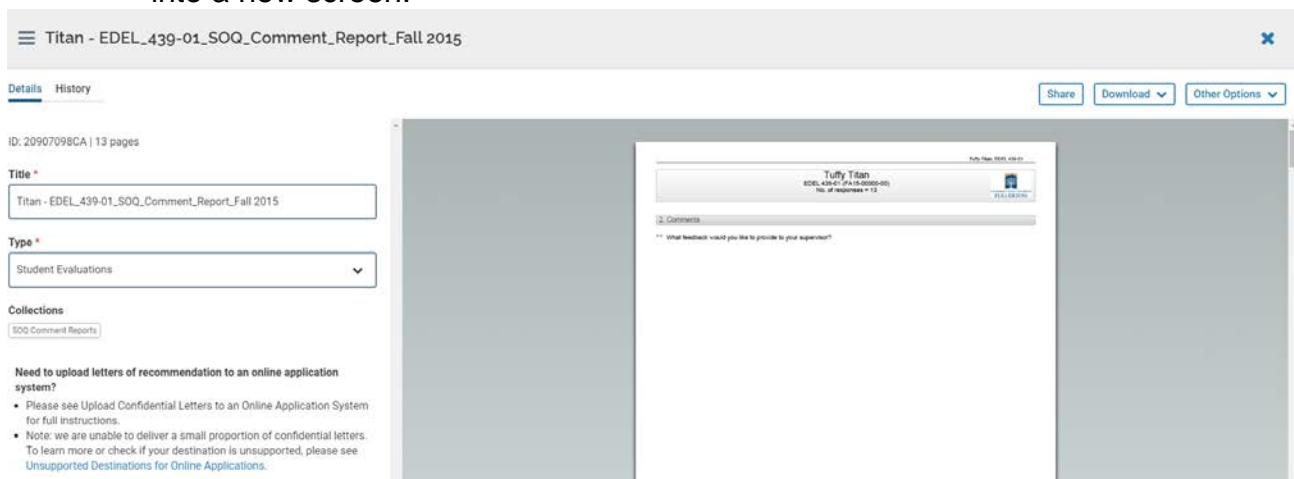
3. Filter documents or search for documents you have added

Search

1.



d. Clicking on a hyperlinked title name within Collections will open the document into a new screen:

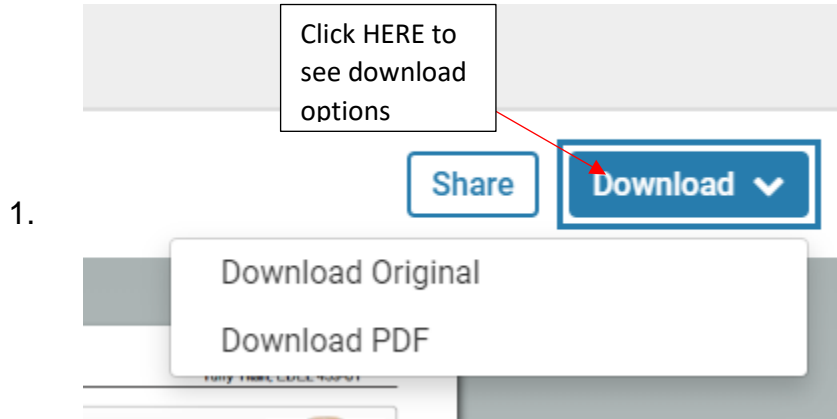


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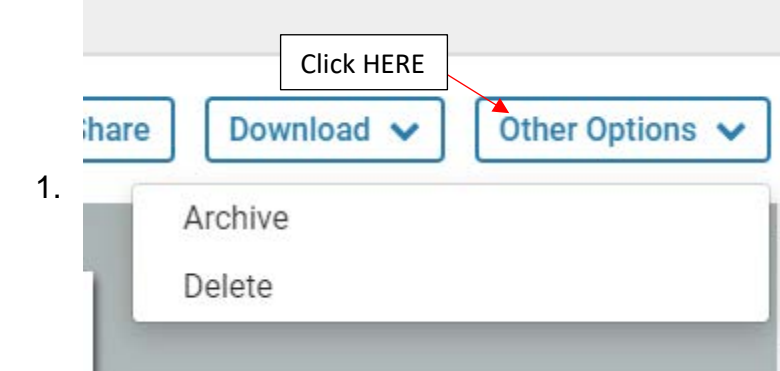
- i. On this screen you can:
 - 1. Change the document title
 - 2. Change the document tag or type
 - 3. Share the document



- 4. Download the document



- 5. Archive or Delete the Document by clicking "Other Options"



- 3. To get back to the Review, Promotion and Tenure platform go up to where your name is written in white text in the upper right-hand corner of the screen and click it
 - a. Then select "California State University - Fullerton" from the drop down menu

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