

Adding Documents to a Review Packet Using Interfolio Tools

Once you have opened your active review packet in from either your Interfolio Home page or "Your Packets" page it is time to start uploading your materials for evaluation.

For more in-depth information on how to Log in to Interfolio or how to find your Interfolio review packet please refer to their corresponding tutorials available in previous chapters.

Tips for making uploading documents easier

- Have all your documents organized on your hard drive or in the Interfolio product Dossier **BEFORE** you start uploading
- Upload documents in small batches
 - This is particularly useful for SOQ data, so if files need to be rearranged they are in a manageable load
- Start uploading documents to your active Interfolio Review packets well in advance of the submission deadline.

Please **NOTE** the following:

- The Interfolio platform has an automatic save function built-in
 - Documents do not need to be all uploaded at once and when they are uploaded they are automatically saved
- Any document type, Word Doc, Excel Table, etc. can be uploaded to Interfolio, the uploading process will take longer, depending on file size because Interfolio will automatically convert it to a PDF.
- Documents are uploaded into the Interfolio platform by order of **File SIZE**, **not File NAME**.
 - The smallest documents will be uploaded first and the largest last
- **MP3** and **MP4** files are **not** supported by the Interfolio Platform
 - Video files can be submitted for evaluation, but they must be hosted on YouTube
 - More information on this uploading process below

Uploading Documents with Interfolio Tools:

There are several tools built into the Interfolio platform that that help and speed up the document uploading process, especially for repeat Interfolio users.

To access these tools the steps are very similar to the ones for adding documents from your computer's hard drive. It is actually when you are using the tools that the process differs.

Tools Available:

- All Materials
- Collections (Great for Dossier users)
- Packets (Great for repeat Interfolio users)

Process:

- 1) Step 1: Log in to Interfolio
- 2) Step 2: Click on your active review packets
 - a) When you open an active review packet in Interfolio you are automatically redirected to that packet in "**Overview**" mode
- 3) Step 3: Click either Packet or Edit to get into "edit mode" to upload documents
- 4) Step 4: Once in "edit" mode scroll to the section you wish to add documents to and click the "Add" button

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- 5) Step 5: Select the "Choose Existing" option in the Add Document Dialog box
 - a) Under the "Choose Existing" option there are three tools for you to choose from
 - i) All Materials (Default)
 - ii) Collections
 - iii) Packets
- 6) Step 6: Click the "+Add" button, when you are done selecting

California State University-Fullerton > Your Packets >

2020 - FAR - Sample Department - Timetable #2

Unit: Sample Department | Type: Review | Candidate Instructions: View Instructions

Overview **Packet**

Below you will find an overview of the packet requirements for this page. This page will be updated as you make progress toward your packet. To learn more, read the Candidate Instructions.

1.0 Table of Contents
Not Yet Submitted Unlocked

Type	# Required	# Added
1.0 Table of Contents	1 required	0

Expand All Collapse All

4.0 Portfolio Vita
Not Yet Submitted Unlocked

Submit 0 of 1 Required Files

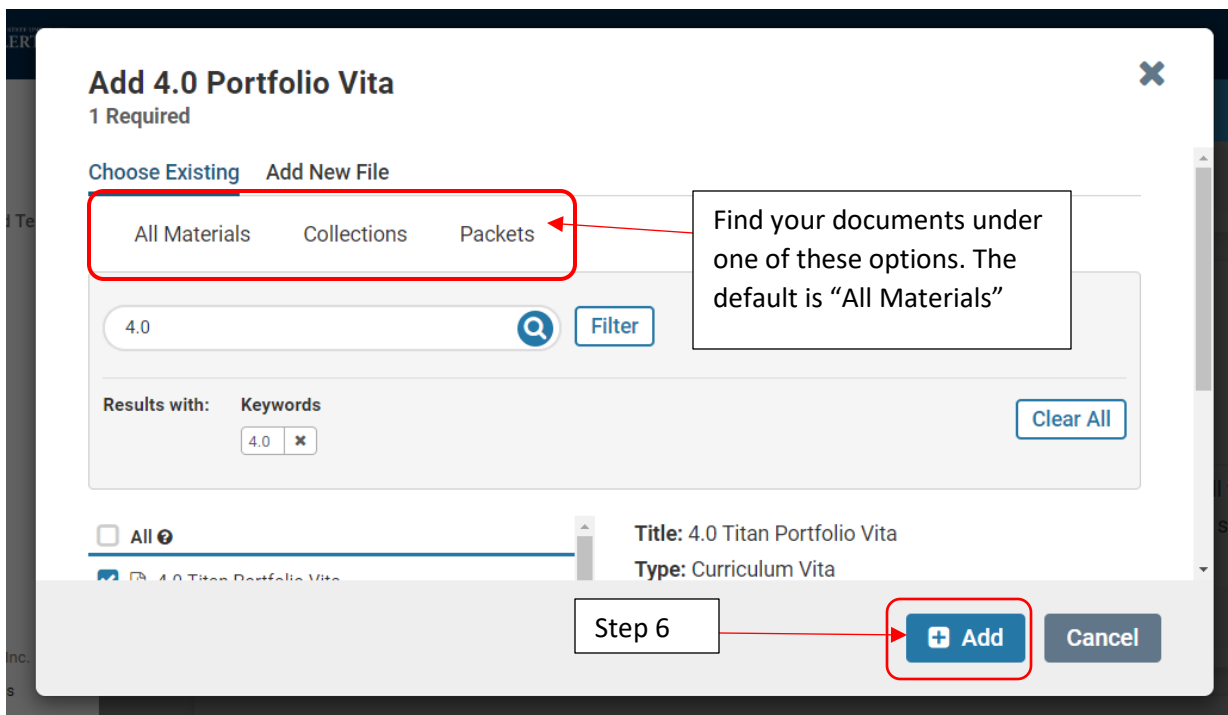
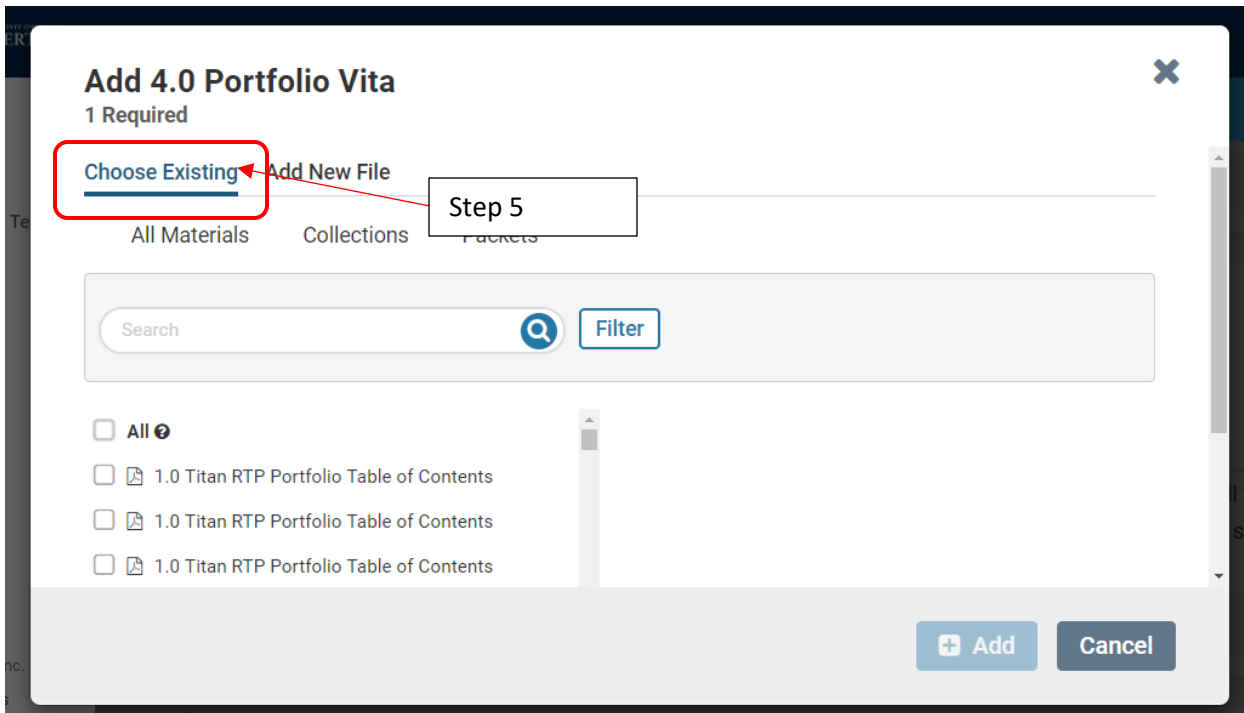
4.0 Portfolio Vita 1 required, 0 Added

Vita that covers entire academic and professional employment history and lists accomplishments in all three areas of review. Peer-reviewed activities shall be listed separately from non-peer-reviewed activities. Activities should be listed in reverse chronological order.

No files have been added yet.

Step 4

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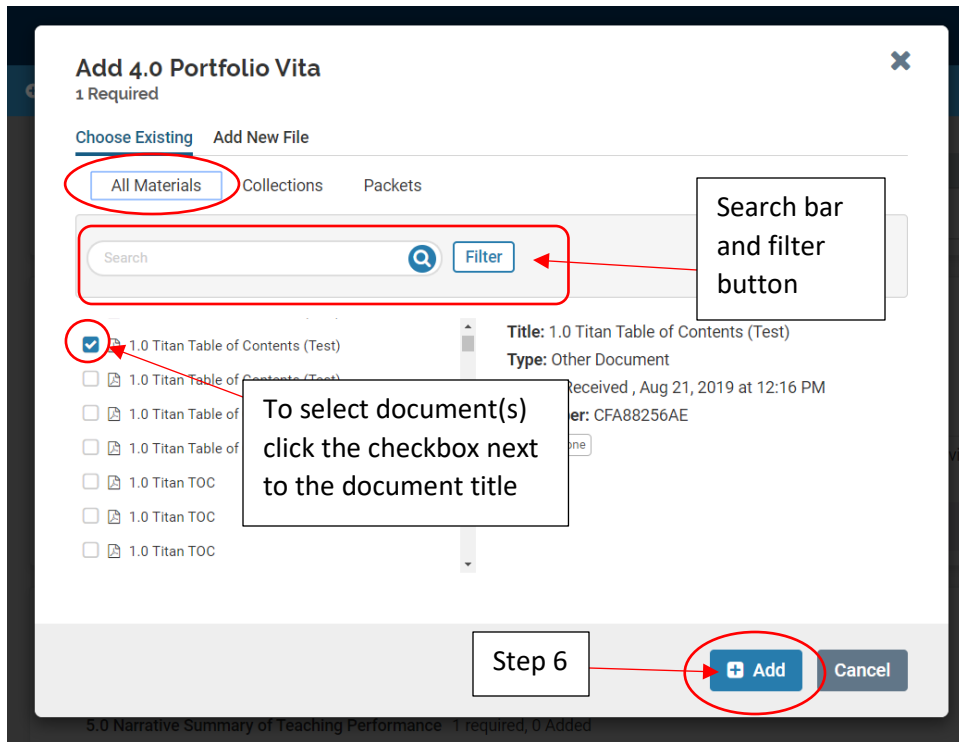


All materials

This option contains all previously submitted materials arranged in Alpha-Numeric order regardless of submission date

- This option also has a search bar and filtering capabilities to narrow possibilities

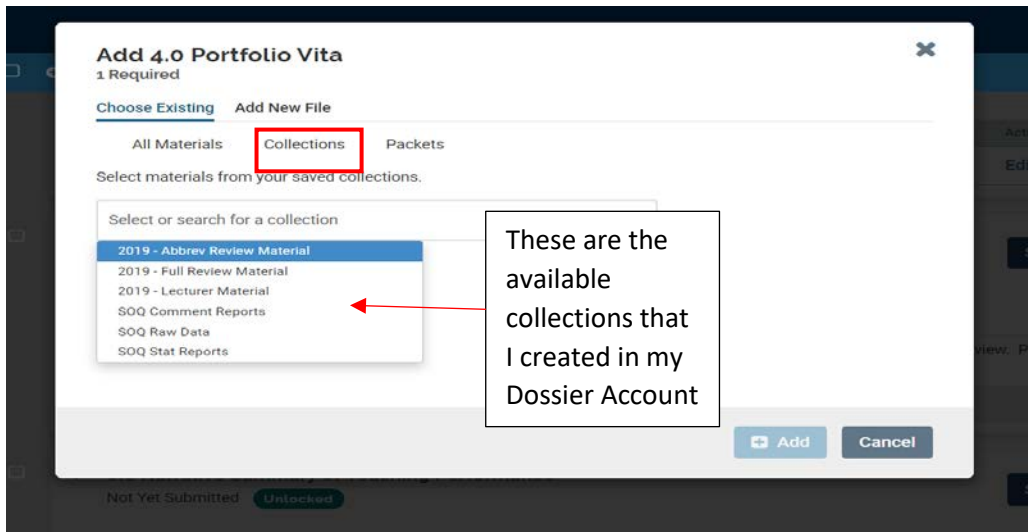
CONTINUE TO NEXT PAGE, FOR NEXT STEP



Collections

If you have set-up document collections in **Dossier** this option will allow you to choose specific materials from a selected collection

- Once you have selected a Collection, the search bar and filter capabilities become available like they are in All Materials



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Add 4.0 Portfolio Vita
1 Required

Choose Existing Add New File

All Materials Collections Packets

Select materials from your saved collections.

SOQ Stat Reports ← This is the collection I selected

Search

search Filter

All Titan - EDEL_433-01_SOQ_Statistical_Report_Fall 2015 ← This is the document that I selected from that collection

Titan - EDEL_434-01_SOQ_Statistical_Report_Fall 2015
 Titan - EDEL_434-24_SOQ_Statistical_Report_Fall 2015
 Titan - EDEL_439-01_SOQ_Statistical_Report_Fall 2015

Title: Titan - EDEL_433-01_SOQ_Statistical_Report_Fall 2015
 Type: Student Evaluations
 Status: Received , Aug 21, 2019 at 6:07 PM
 ID Number: 114F823392
 Tags: None

Step 6 **Add** Cancel

Packets

Allows you to select specific review packets that were submitted previously and then choose materials from those packets to upload to your current case

Add 4.0 Portfolio Vita
1 Required

Choose Existing Add New File

All Materials Collections Packets

Select a packet to view and add file(s) from that review.

Packet	Type	Completed
California State University-Fullerton	Other	Jan 23, 2019
Sample Department	Review	Mar 21, 2019
2019-2020 RTP Template (proposal)		
Sample Department	Review	May 22, 2019
2019-FAR-Sample Department		
Sample Department	Review	Mar 26, 2019
2019-FAR-Sample Department-Abbreviated		
Sample Department	Review	Mar 26, 2019
2019-FAR-Sample Department (Ineligible C		
Sample Department	Review	Sep 19, 2019
2019 - FAR - Sample Department		
Sample Department	Review	Aug 20, 2019
2019 - FAR - Sample Department - Ab		
Sample Department	Review	Aug 20, 2019
2019 - FAR - Sample Department - PT		

← All of these hyperlinked titles are packets that have been submitted previously

Add Cancel

CONTINUE TO NEXT PAGE, FOR NEXT STEP

Add 4.0 Portfolio Vita
1 Required

Choose Existing Add New File

All Materials Collections Packets

2019-FAR-Sample Department
Sample Department
Type: Review
Completed: May 22, 2019

[Select a different review](#)

All documents in this review in a single PDF

1.0 Table of Contents

1.0 Titan Table of Contents (Test)

2.0 Table of Contents of Appendix

2.0 Table of Contents for the Appendix

3.0 Department Personnel Standards or UPS 210.000

3.0 UPS 210.002

3.10 Prospectus

Step 6

This is the document I selected from a previously submitted packet

Click here to go to a different review packet