

# User's Guide to Interfolio Faculty Search

for Search Committees

School of Arts and Sciences,  
University of Pennsylvania

For information on conducting a fair and thorough search, please see: [Guide to Best Practices for Standing Faculty Searches in the School of Arts and Sciences](#)



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# User's Guide to Interfolio Faculty Search for Search Committees

Adapted from Interfolio's Evaluator's Guide to Faculty Search ([https://media.screensteps.com/exported/interfolio/3569/117293/Evaluator\\_s\\_Guide\\_to\\_Faculty\\_Search.pdf](https://media.screensteps.com/exported/interfolio/3569/117293/Evaluator_s_Guide_to_Faculty_Search.pdf)) and the Interfolio @Penn Faculty Recruiting Guide (<https://upenn.box.com/s/feeuu1cowy2ocmpjwvxo7huknt6xdakq>)

Please note: Interfolio refers to search committee members as evaluators.

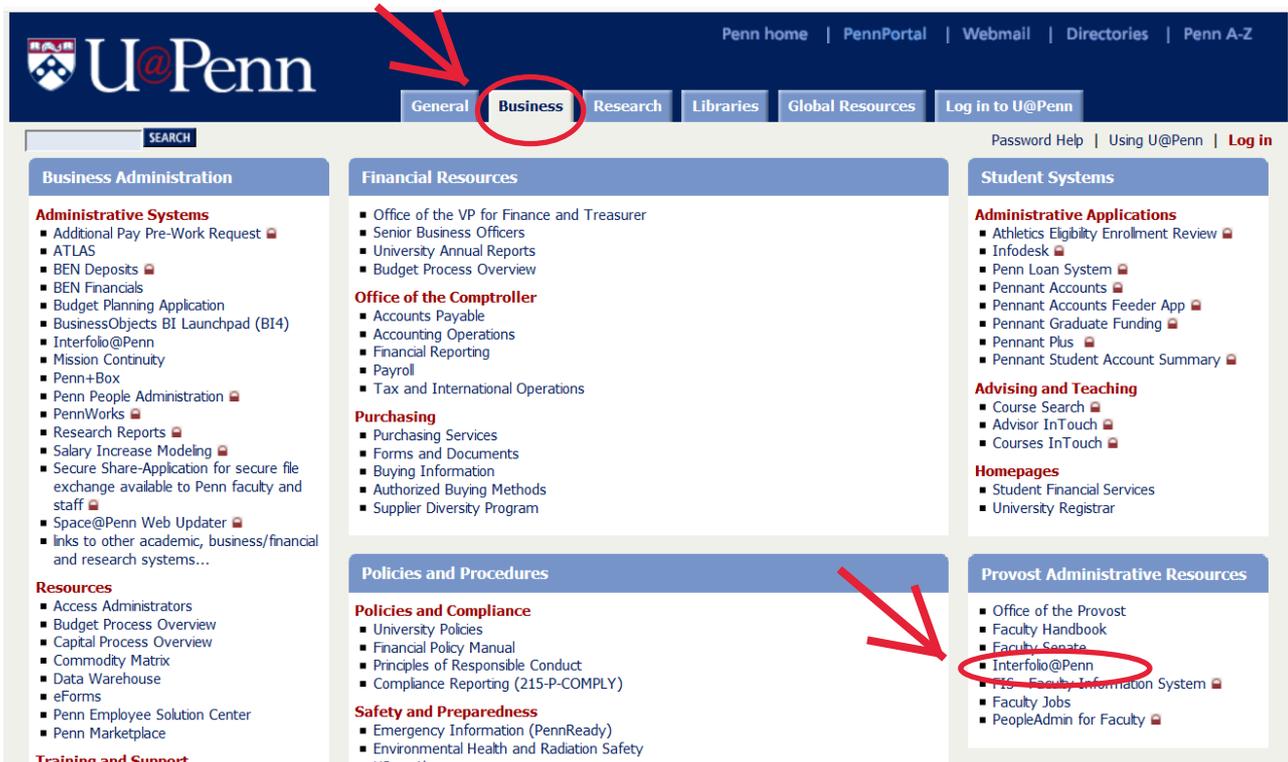
## The evaluator's role

Members of a search committee need to maintain a strict level of confidentiality to protect the privacy of the applicants and to preserve the integrity of the search process. It is each committee member's responsibility not to discuss any details of the search with non-committee members. **For more information on policies and best practices for search committees in SAS, please see: Guide to Best Practices for Standing Faculty Searches in the School of Arts and Sciences (<https://tinyurl.com/y2lh8bvb>)**

### 1. Accessing the search

Navigate to Interfolio@Penn from the Business tab on the U@Penn web page:

([https://portal.apps.upenn.edu/penn\\_portal/u@penn.php?tabid=732](https://portal.apps.upenn.edu/penn_portal/u@penn.php?tabid=732))



Positions are listed in a table that displays the position name, status, and open date.

The screenshot shows the 'Positions' page on 'The College of Interfolio'. It features a search bar and filter buttons. Below the search bar are three dropdown menus for 'Type' (All Types), 'Status' (All Statuses), and 'Active or Closed?' (Active). A table below shows a list of positions. The first entry is 'Assistant Professor of Graphic Arts' with the status 'Accepting Applications' and '7 applications'. The 'Open from' date is circled in red and annotated with a red box and arrow: 'Note that positions in SAS do not specify end dates.'

Position ^	Status ↕	Application Information ↕
Assistant Professor of Graphic Arts Department of Art   Faculty   ID:3519	Accepting Applications	7 applications Open from: Feb 2, 2017 - May 1, 2019

Click the position title to access the applications for a position.

This screenshot shows the same 'Positions' page. A red arrow points to the title 'Adjunct Professor of English' in the table, indicating that clicking this title leads to the applications for that position.

Position ^
Adjunct Professor of English Department of English   Faculty   ID:4082
Assistant Professor of Graphic Arts Department of Art   Faculty   ID:3519

## 2. Viewing the applicant list

Once you are in the page for the position, you will see applications displayed in a table that lists:

- **Applicant name:** click the applicant's name to view their application materials, or check the boxes next to the names to select more than one applicant.
- **Application status,** which is managed by the search chair and department administrator, indicates the place of the applicant in the search process. This status regularly lags behind search committee's process in order to ensure that all applicants are given consideration.
- **Tags** are labels that committees can develop and use to sort and mark applications for a variety of purposes. For example:
  - Search chairs can use tags to
    - identify applications to be discussed at a committee meeting or indicate a proposed short list of applicants for the dean and DSA to review and approve
    - indicate to the search administrator which applicants to identify as short-listed (i.e. applicants whose *application status* should be changed to "Short List.").
  - Search chairs and committee members can develop and use tags to
    - assign applications to certain committee members
    - indicate completion of a review
    - sort applications for further consideration.

### Please note:

- Committees should agree on how tags will be used, if at all, prior to reviewing applications.
- Tags are specific to searches, and do not carry over to any other search.
- Tags can be seen by anyone with access to applications.

The list of applicants can be viewed and filtered based on the evaluator's preferences. Applications are listed in a table that includes the applicant name, the date the application was last updated, applicant status and, if permissions allow, tags and a rating summary. If desired, users can add highest degree earned, application progress (complete or incomplete) as well as elect to show archived applications and save their preferred view(s). To customize your view of the applicant list, display the applicant page:

The "Filter" button allows the user select to display any or all of the filterable fields. To retain a custom view, click "Save" and assign a name to the view. Saved Views displays the user's list of custom views. Columns allows the user to customize the columns that are displayed, showing column headings already selected and available to select.

Applicants

Search by name, education, or status

Incomplete  Save Clear Filters

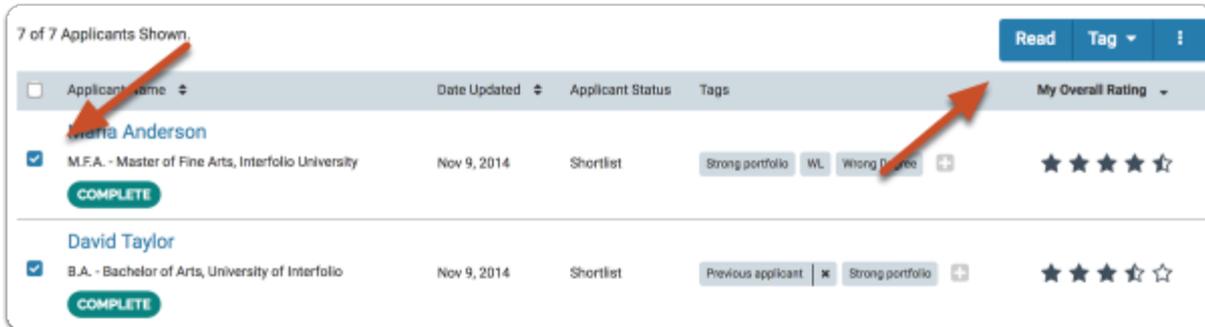
2 of 2 Applicants Shown.

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Just Testing				☆☆☆☆☆
<input type="checkbox"/>	A.A. - Associate in Arts, Interfolio University	Apr 1, 2019	Interview Round 1	Shortlist approved by JG <input type="checkbox"/> +	☆☆☆☆☆
<input type="checkbox"/>	Just2 Testing	Apr 17, 2019	Not Selected	+ <input type="checkbox"/>	☆☆☆☆☆

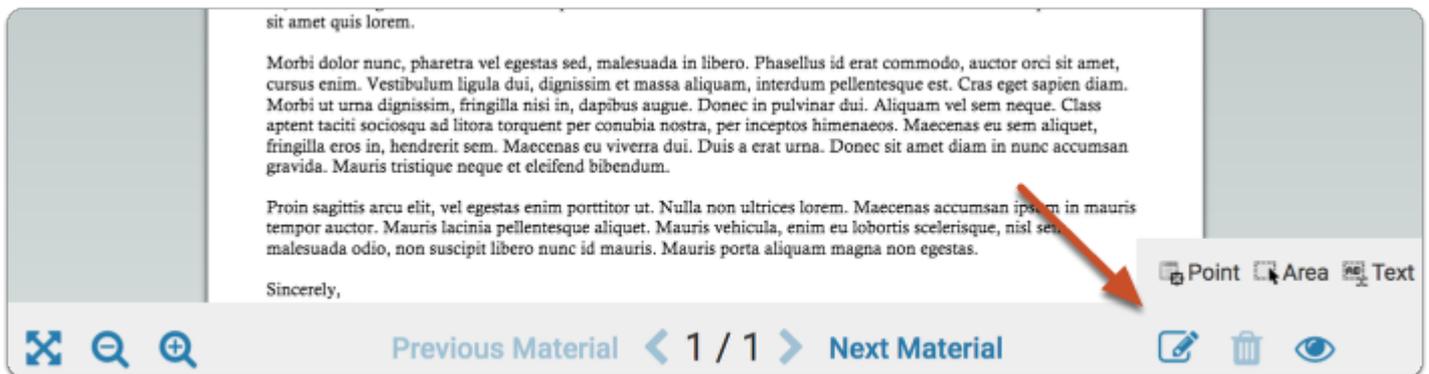
Please note: Interfolio's rating feature is not currently in use in SAS. If your committee would like to use it, please contact the Dean's Office.

### 3. Reviewing application materials online

Check the name of one or more applicants in the list to review their submitted materials, then click "Read" to open applications in Interfolio's online reader. This will allow you to scroll through applications and search for terms in .pdf documents that are part of the application. You can also add comments accessible only to you.



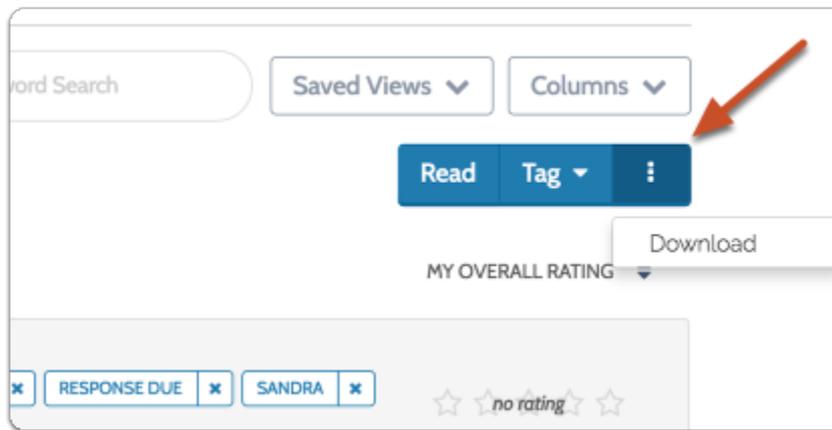
You can leave notes/annotations on the material from the lower right of the viewer.



- "Point notes" are virtual stickies that point to something in the document
- "Area notes" allow you to select a section of text in a document
- "Text notes" highlight passages of selected text

 Only you can view the notes you leave on an application.

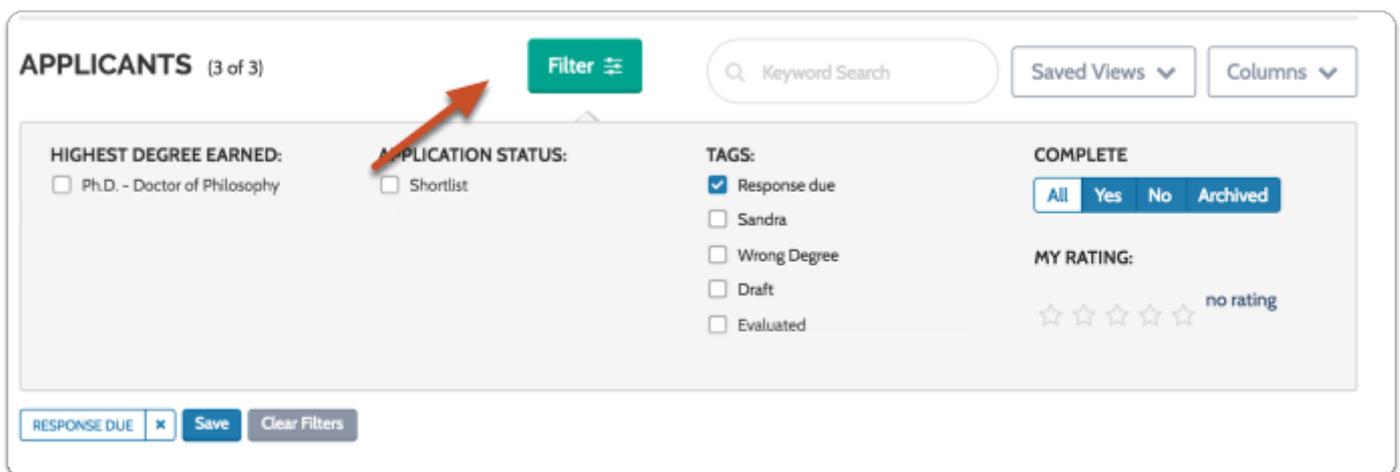
To download .pdf copies of all selected applications, click the "More Options" icon and select "Download." Please be sure to download to a secure location and, if needed, share securely.



#### 4. Managing and filtering a list of applications

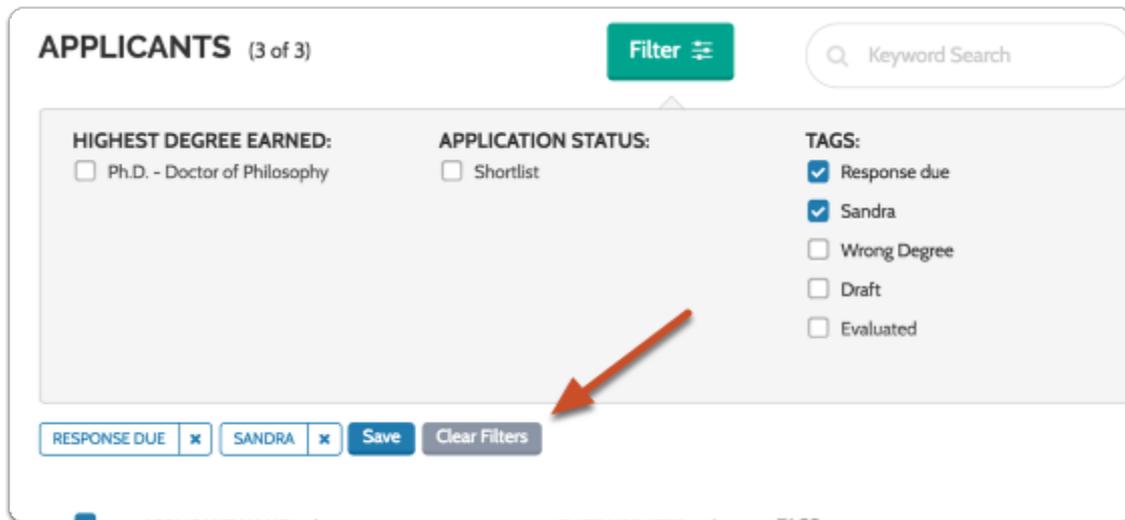
The list of applications for a position is often very long. Interfolio offers features to search, sort, organize, and customize the list of applicants and to save your views of the list so you can recall your work when going through applications.

Click the "Filter" button at the top of the list to open a set of options for filtering the list. You can filter the list of applications by data points including highest degree earned, application status, completion status, or, if approved, tags or ratings.



**i** The list will be filtered according to your settings and the filters will appear above the list.

💡 Note that you can easily remove the filters you add either one at a time, or by hitting the button tagged "Clear Filters."



## 5. Tagging applications

As noted above (p. 3), committees should agree on how tags will be used, if at all, prior to reviewing applications.

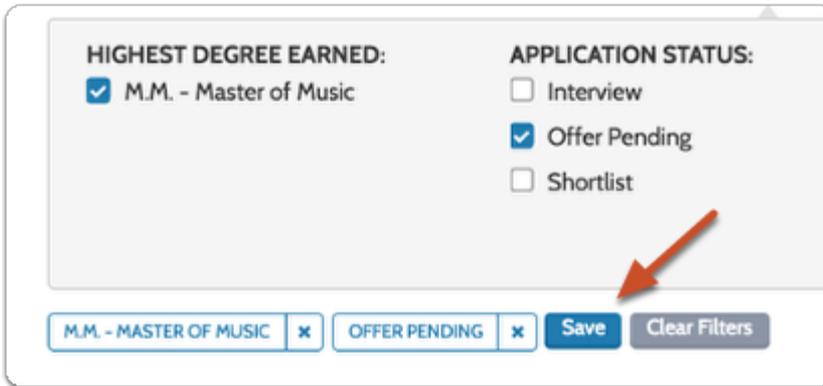
1. With one or more applicants selected in the list, click the "Tag" button and select an existing tag or create a new one
2. By default, tags will appear listed in the applicant table (See below for instructions on configuring the columns displayed in the list)

	Read	Email	Status	Tag	
<input type="checkbox"/>					My Overall Rating
<input type="checkbox"/>					
<input checked="" type="checkbox"/>					
<input type="checkbox"/>					

The table displays applicant information with columns for 'Applicant Name', 'Date Updated', 'Applicant Status', 'Tags', and 'My Overall Rating'. The 'Tag' column has a dropdown menu. The 'My Overall Rating' column shows a star rating. A red circle with the number '1' is next to the 'Tag' dropdown, and a red circle with the number '2' is next to the '+' button in the 'Tags' column for the first applicant.

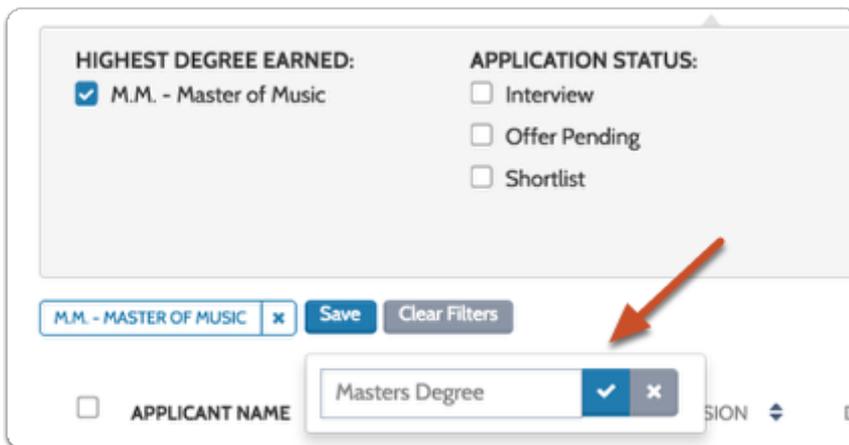
## 6. Saving views of applicant lists

Click "Save"



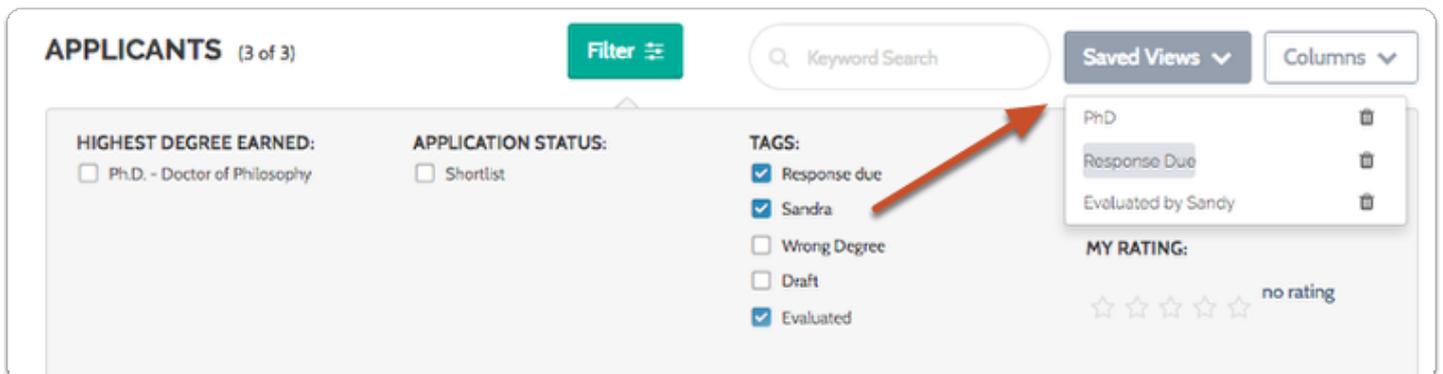
The screenshot shows a filter panel with two sections: "HIGHEST DEGREE EARNED:" and "APPLICATION STATUS:". Under "HIGHEST DEGREE EARNED:", the checkbox for "M.M. - Master of Music" is checked. Under "APPLICATION STATUS:", the checkboxes for "Interview" and "Shortlist" are unchecked, while "Offer Pending" is checked. At the bottom of the panel, there are two filter tags: "M.M. - MASTER OF MUSIC" and "OFFER PENDING", each with a close button (x). To the right of these tags are two buttons: "Save" (highlighted with a red arrow) and "Clear Filters".

Enter a name for that view and click the check mark.



The screenshot shows the same filter panel as above. The "Save" button is now highlighted with a red arrow, and a small dialog box is open over it. The dialog box contains the text "Masters Degree" and a checkmark button (highlighted with a red arrow) and a close button (x). Below the dialog box, the "APPLICANT NAME" filter is visible with a dropdown menu showing "Masters Degree" and a checkmark button.

Click "Saved Views" to recall the view of the list using the filters you have set.

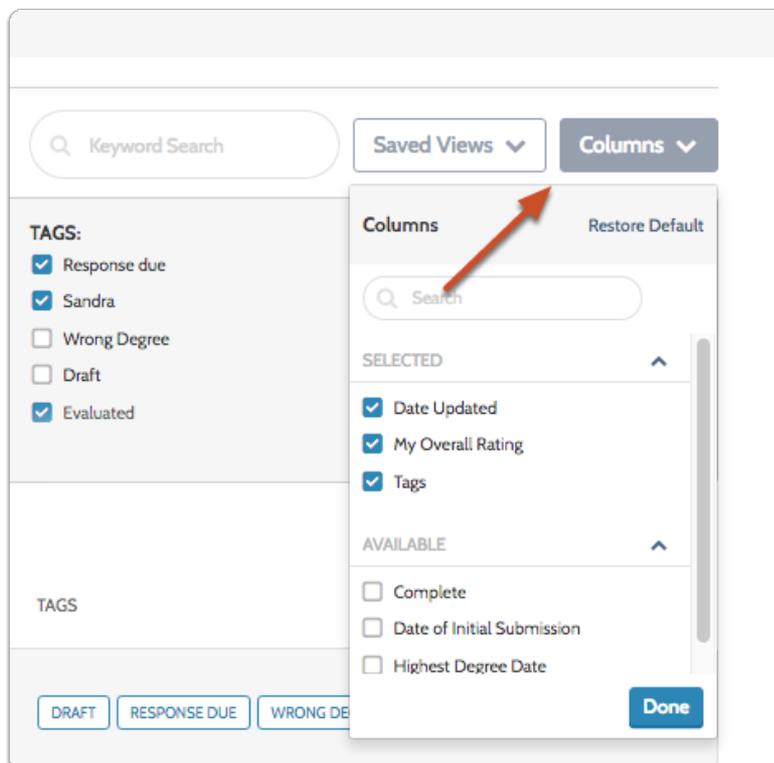


The screenshot shows the "APPLICANTS (3 of 3)" interface. At the top, there is a "Filter" button, a "Keyword Search" input field, and a "Saved Views" dropdown menu (highlighted with a red arrow). Below the "Saved Views" menu, there are three saved views: "PhD", "Response Due", and "Evaluated by Sandy", each with a trash icon. Below these views is a "MY RATING:" section with five stars and the text "no rating".

## 7. Customizing columns

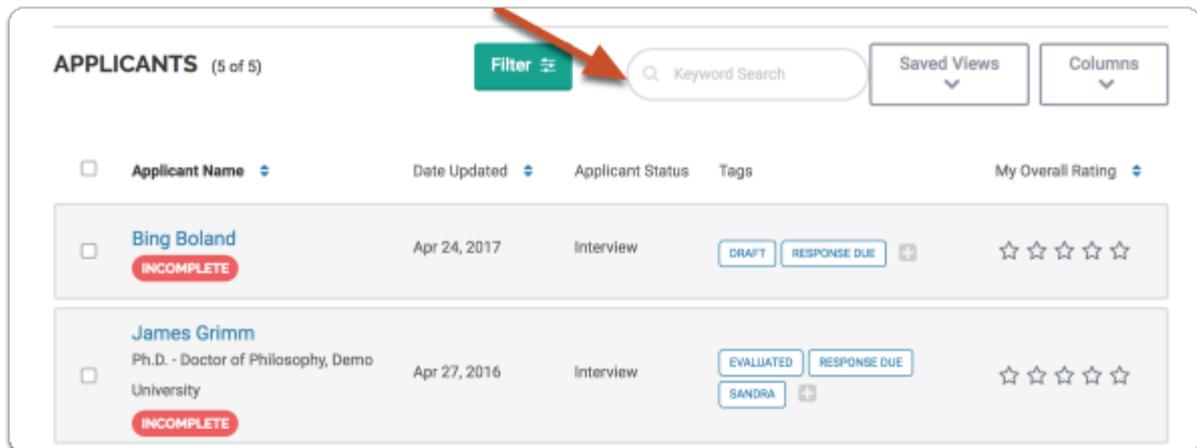
Click the "Columns" button and select the columns of information you want to display. The default columns that will display are applicant name, date updated, tags, and overall average rating (if enabled). You can add columns for complete status, date submitted, highest degree earned and highest degree date, and your overall ratings. Note that you can restore the default columns at any time.

 You can also add answers to custom form questions as column headers in the display.



## 8. Searching the applicant list and saving searches

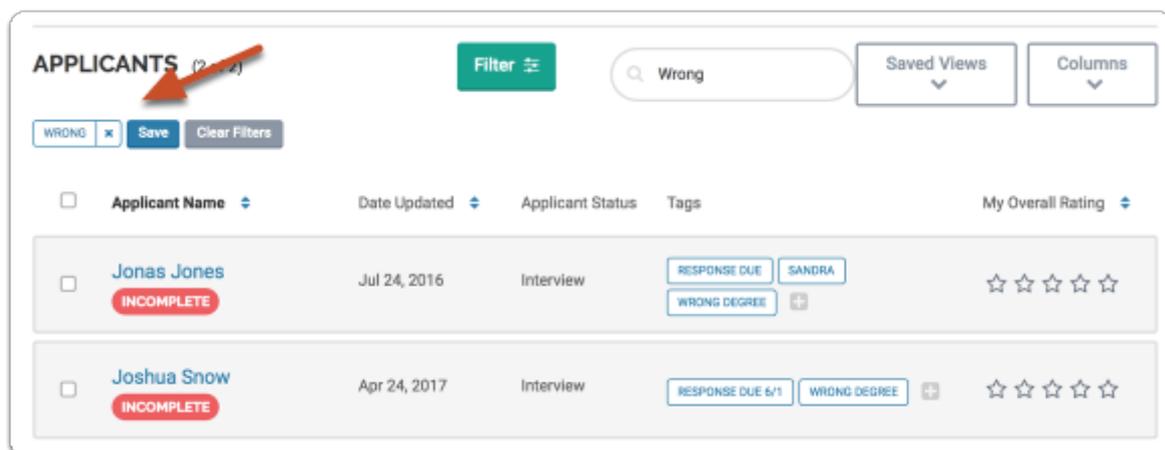
Enter a keyword in the box to search the list.



The screenshot shows the 'APPLICANTS (5 of 5)' interface. At the top right, there is a 'Filter' button with a funnel icon, a 'Keyword Search' input field, and 'Saved Views' and 'Columns' dropdown menus. Below this is a table with columns: Applicant Name, Date Updated, Applicant Status, Tags, and My Overall Rating. Two applicants are listed: Bing Boland (Interview, Apr 24, 2017) and James Grimm (Interview, Apr 27, 2016). Both have 'INCOMPLETE' status and five star ratings. An orange arrow points to the 'Filter' button.

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Bing Boland <b>INCOMPLETE</b>	Apr 24, 2017	Interview	DRAFT RESPONSE DUE	☆☆☆☆☆
<input type="checkbox"/>	James Grimm Ph.D. - Doctor of Philosophy, Demo University <b>INCOMPLETE</b>	Apr 27, 2016	Interview	EVALUATED RESPONSE DUE SANDRA	☆☆☆☆☆

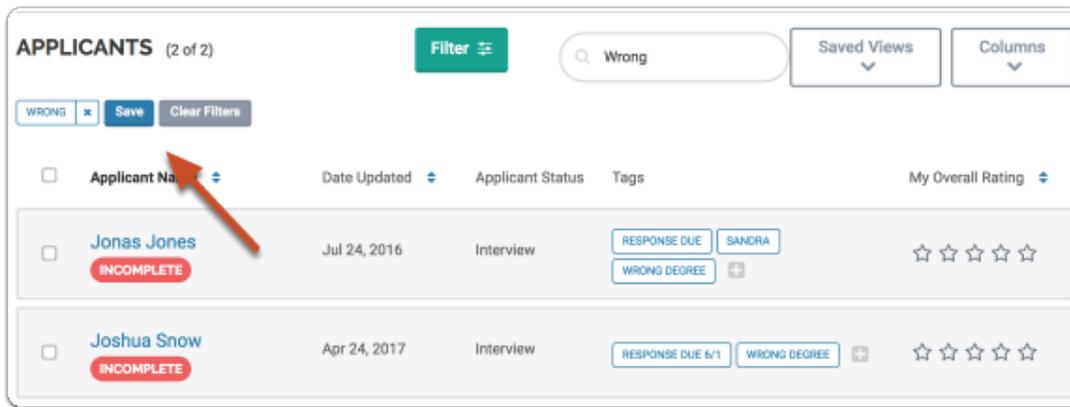
The results display and the search term appears above the list.



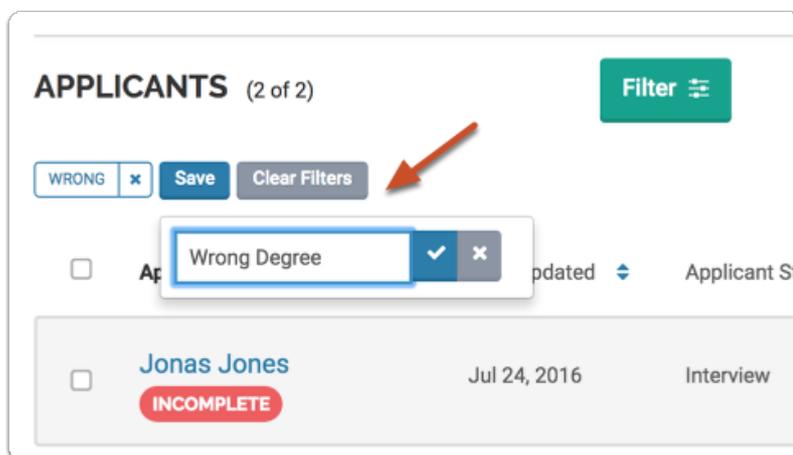
The screenshot shows the 'APPLICANTS (2 of 2)' interface after a search. The 'Keyword Search' field now contains 'Wrong'. Below the search bar, there are buttons for 'WRONG', 'Save', and 'Clear Filters'. The table below shows two results: Jonas Jones (Interview, Jul 24, 2016) and Joshua Snow (Interview, Apr 24, 2017). Both have 'INCOMPLETE' status and five star ratings. An orange arrow points to the 'APPLICANTS (2 of 2)' text.

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Jonas Jones <b>INCOMPLETE</b>	Jul 24, 2016	Interview	RESPONSE DUE SANDRA WRONG DEGREE	☆☆☆☆☆
<input type="checkbox"/>	Joshua Snow <b>INCOMPLETE</b>	Apr 24, 2017	Interview	RESPONSE DUE 6/1 WRONG DEGREE	☆☆☆☆☆

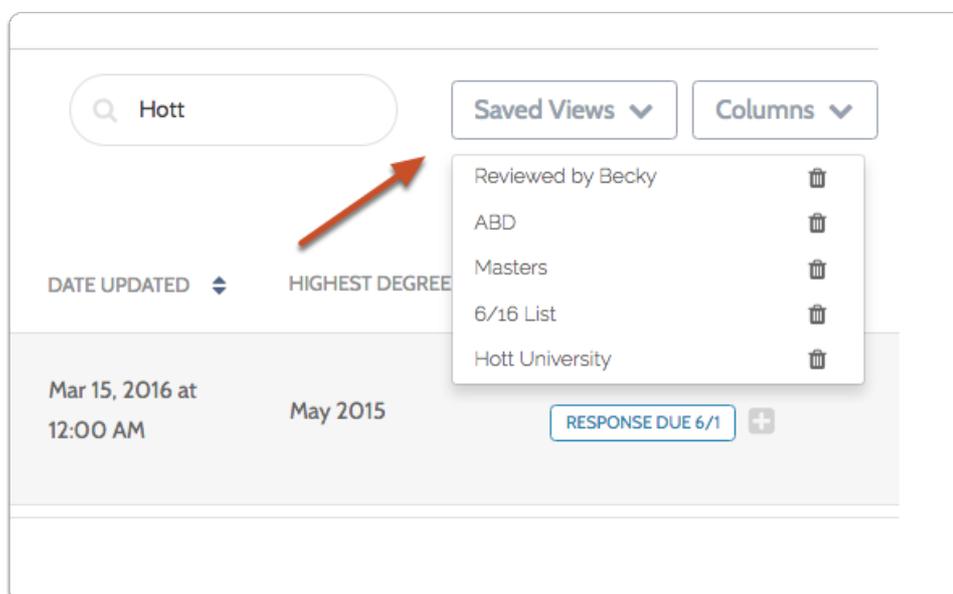
Click "Save" to save and name the view of the list filtered according to your search results.



Enter a name for your view and click the check to save it.



Click "Saved views" to recall the saved view of the list.



## 9. Setting the pagination of the applicant list

**i** By default the list displays 25 applications at a time, but you can set the pagination to display 50, 100, 200, or all applications. Look to the bottom left of the page to set the number of applicants displayed at one time.



**💡** Remember that changes you make to the filters, columns, searches and pagination will be remembered during your session. To save the searches and filtered views of the list, click the "Save" button and give the current view a name.