

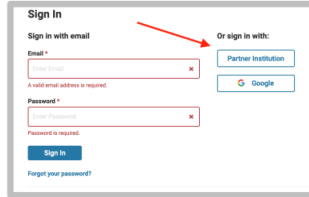
Senior Lecturer Promotion using Interfolio

Instructions for the Dean

There are two ways to logon to Interfolio

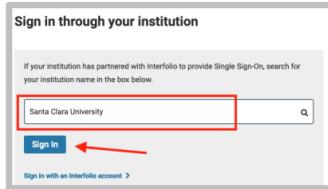
1. Faculty180: <https://www.scu.edu/interfolio>

Click the Partner Institution button.



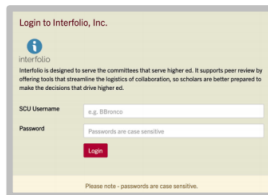
The screenshot shows the 'Sign In' page. On the left, there are fields for 'Email' and 'Password'. On the right, under 'Or sign in with:', there are two buttons: 'Partner Institution' and 'Google'. A red arrow points to the 'Partner Institution' button.

Search for "Santa Clara University" and click the Sign In button.



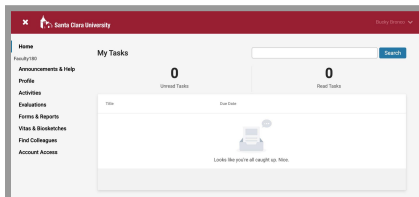
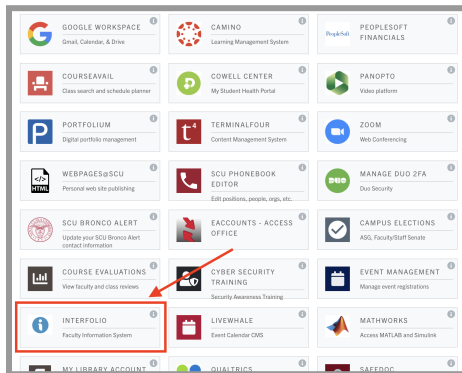
The screenshot shows the 'Sign in through your institution' page. A search box contains 'Santa Clara University'. Below the search box is a 'Sign In' button. A red arrow points to the 'Sign In' button.

Log in with your single sign-on credentials.



The screenshot shows the 'Login to Interfolio, Inc.' page. It has fields for 'SCU Username' and 'Password'. Below the password field is a 'Login' button. A red arrow points to the 'Login' button.

2. Click on the Interfolio tile on your SCU SSO page.

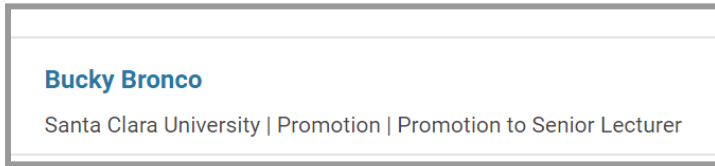


Check Your SCU Interfolio Dashboard

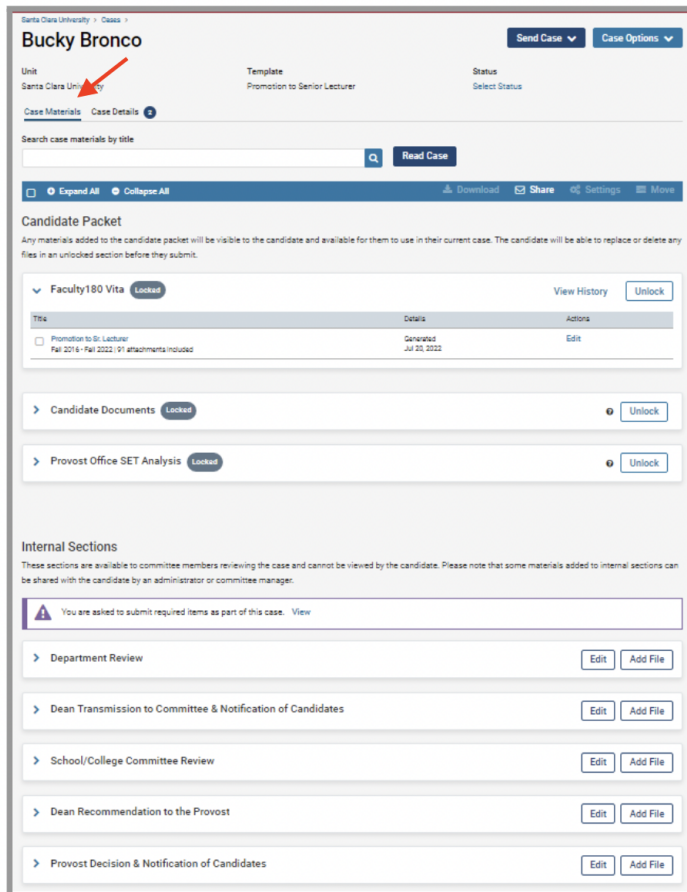
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this. If it doesn't, you may be logged in to another Interfolio account. Contact Pandora del Carmen (pdelcarmen@scu.edu) to help you troubleshoot.

PART 1 - Reviewing the Department Recommendation

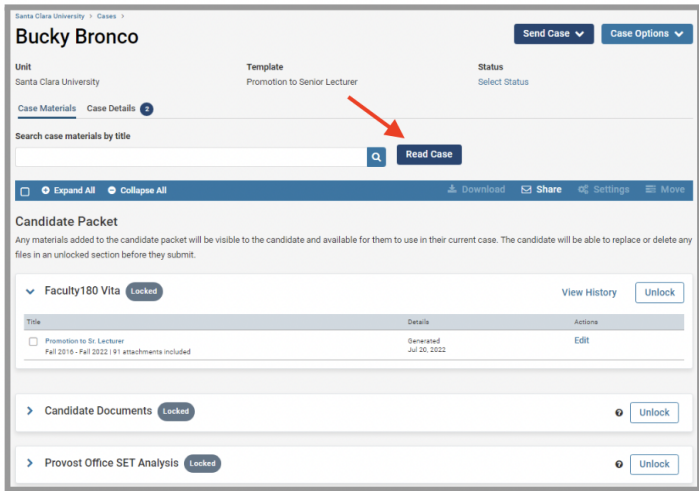
You can review the Department Recommendation when the case is shared with you. A trigger with the candidate's name will appear on your dashboard:



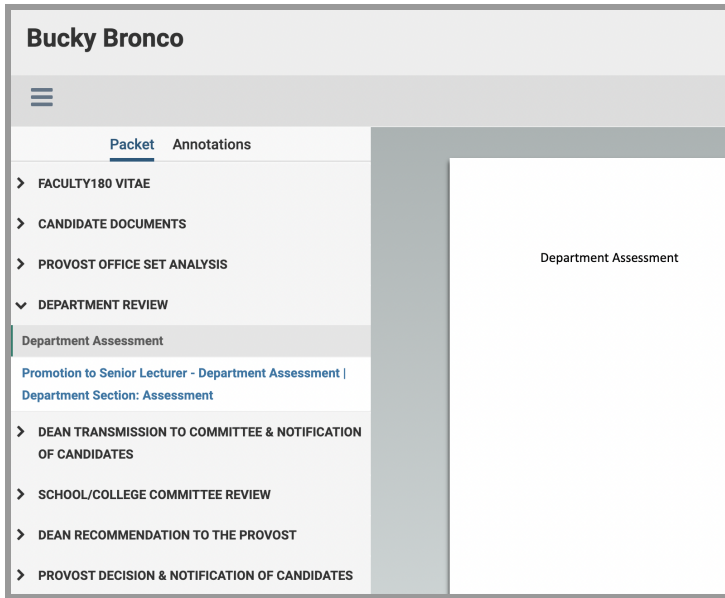
1. Click on the candidate's name in blue to bring you to the Candidate's packet.



2. The following sections are available at the Case Materials tab (upper left) of the Candidate packet:
 - a. Faculty180 Vita
 - b. Candidate Documents
 - c. Provost Office SET Analysis
 - d. Internal Sections - only available to individuals reviewing the case

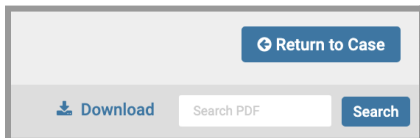


3. Click the **Read Case** button on the right to review the candidate's Promotion to Senior Lecturer packet and system-generated curriculum vitae for the period under review.



4. The left sidebar lists the sections of the candidate packet. Click on the › (caret) symbol next to Department Review to expand the section and view the contents. Click on the Department Assessment. You'll see the Department Assessment in the main window on the right.

How to Exit the Faculty180 Vitae Section

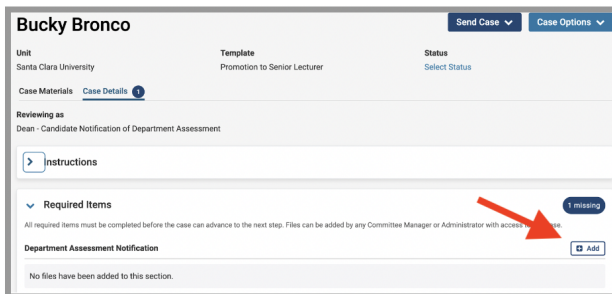


Click the blue **Return to Case** button in the top right to exit.

PART 2 - Submitting Candidate Notification of the Department Recommendation

When you have finished reviewing the department's recommendation letter, you will upload your letter notifying the candidate of the department's assessment.

Click the **Case Details** tab at the upper left. This section will reveal the Dean's required item:

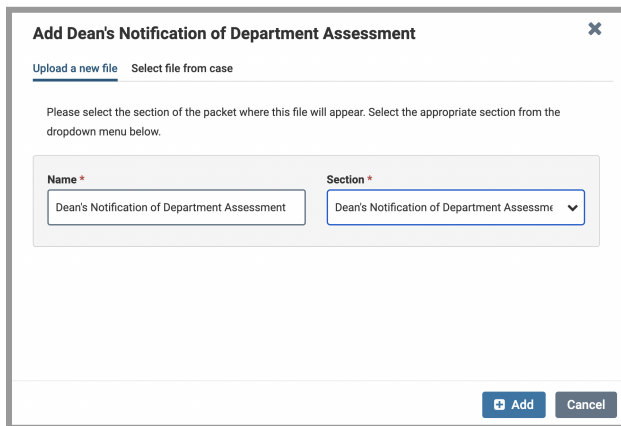


The screenshot shows the 'Bucky Bronco' interface. At the top, there are tabs for 'Case Materials' and 'Case Details' (which is selected). Below the tabs, there is a 'Reviewing as' section showing 'Dean - Candidate Notification of Department Assessment'. Underneath, there is an 'Instructions' section and a 'Required Items' section. The 'Required Items' section is expanded, showing a list of items. The first item is 'Department Assessment Notification', which has an 'Add' button next to it. A red arrow points to this 'Add' button. There is also a '1 missing' indicator next to the item.

1. Dean's Department Assessment Notification

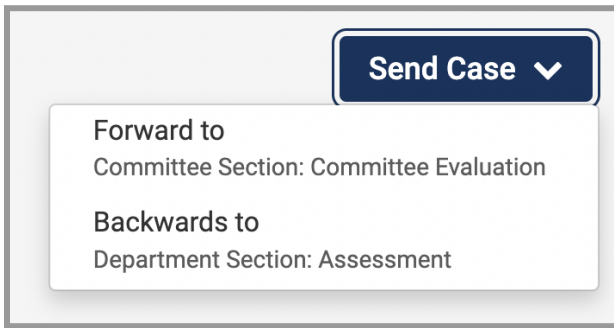
Step 1 - Upload Dean's Department Assessment Notification

Click on the **Add** button to upload the letter. A pop-up window will allow you to browse your computer for the letter.

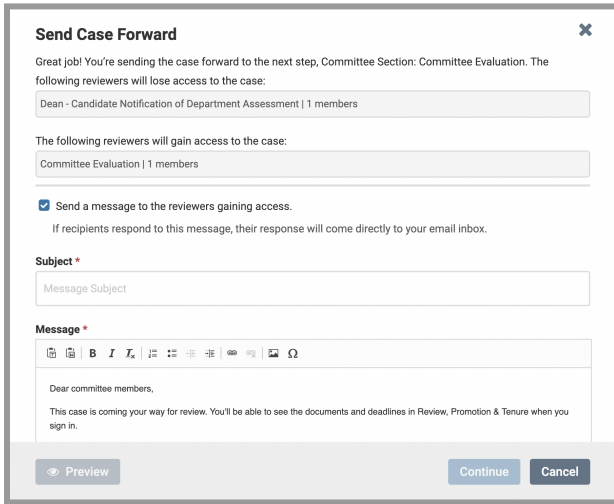


The screenshot shows a pop-up window titled 'Add Dean's Notification of Department Assessment'. At the top, there are two options: 'Upload a new file' and 'Select file from case'. Below this, there is a message: 'Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.' There are two input fields: 'Name' and 'Section'. Both fields contain the text 'Dean's Notification of Department Assessment'. At the bottom of the window, there are two buttons: 'Add' and 'Cancel'.

After uploading the letter from your computer, this screen will pop-up. In the Section field, select "Dean's Notification of Department Assessment." Then click the blue **Add** button (bottom right) to submit. The Provost's Office will take the next step of sharing your uploaded notification letter with the candidate, through Interfolio.



Click on the dark blue **Send Case** button in the upper right corner to move the case to the School Committee.

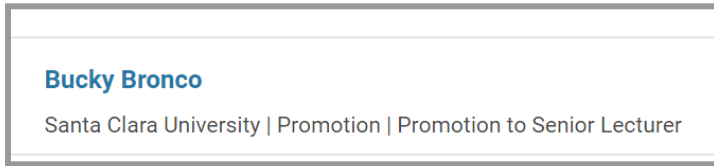


The blue Continue button will be inactive (faded) until you fill in the email Subject field. After filling in the Subject, edit your message if you wish and click the now active/blue **Continue** button.

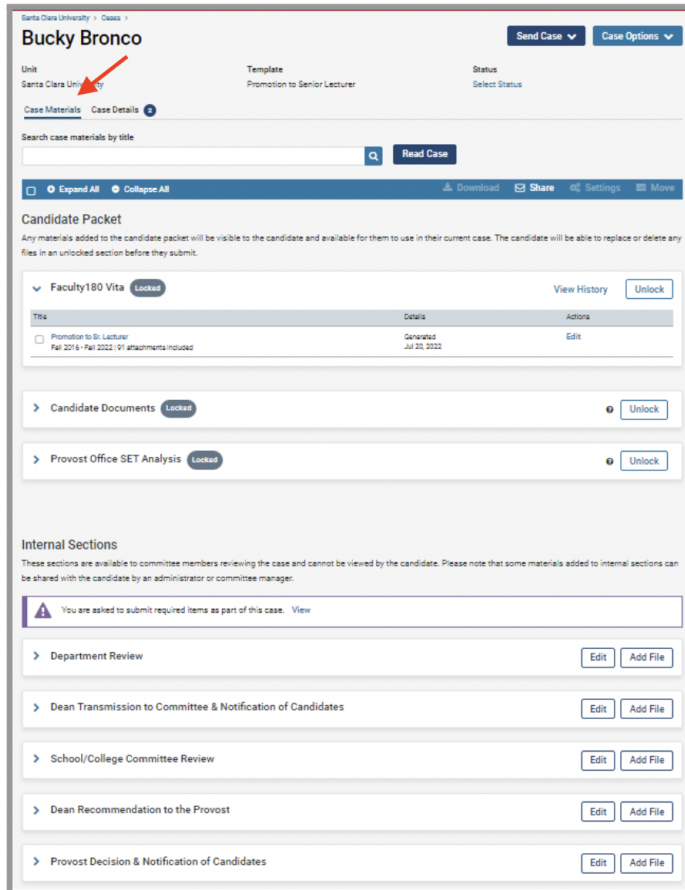
You have completed the submission.

PART 3 - Reviewing the School/College Recommendation

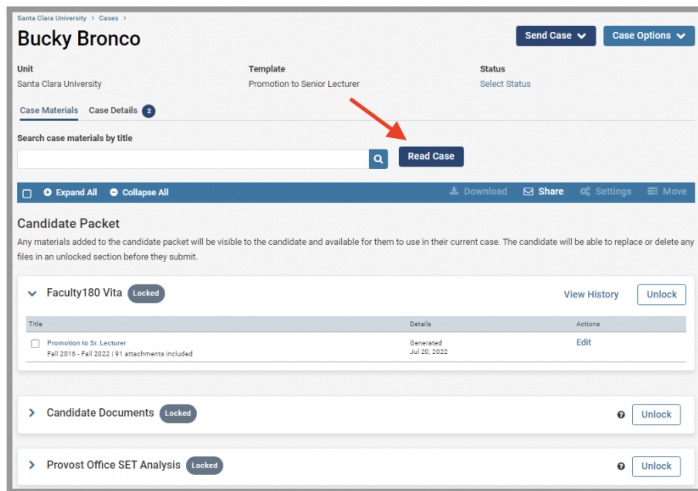
You can review the School/College Recommendation when the school Committee returns the case to you. A trigger with the candidate's name will appear on your dashboard:



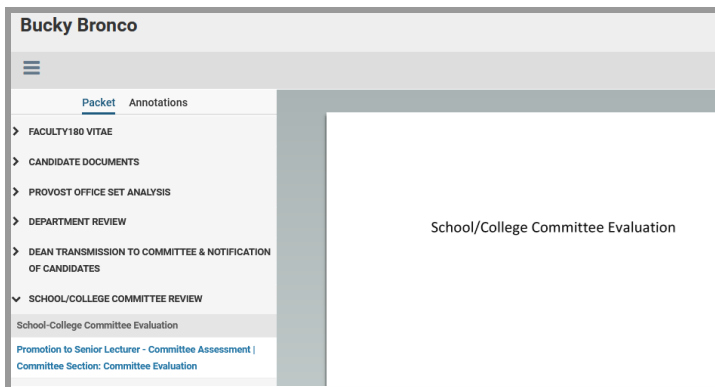
1. Click on the candidate's name in blue to bring you to the Candidate's packet.



2. The following sections are available at the Case Materials tab (upper left) of the Candidate packet:
 - a. Faculty180 Vita
 - b. Candidate Documents
 - c. Provost Office SET Analysis
 - d. Internal Sections - only available to individuals reviewing the case

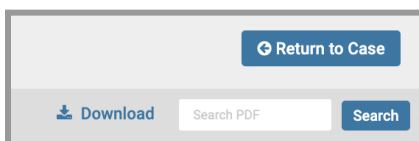


3. Click the **Read Case** button on the right to review the candidate's Promotion to Senior Lecturer packet and system-generated curriculum vitae for the period under review.



4. The left sidebar lists the sections of the candidate packet. If you need to reference the candidate's materials, click on the › (caret) symbol next to Department Review to expand the section and view the contents in the main window. Click on the School/College Committee Evaluation report. You'll see the Committee Evaluation in the main window on the right.

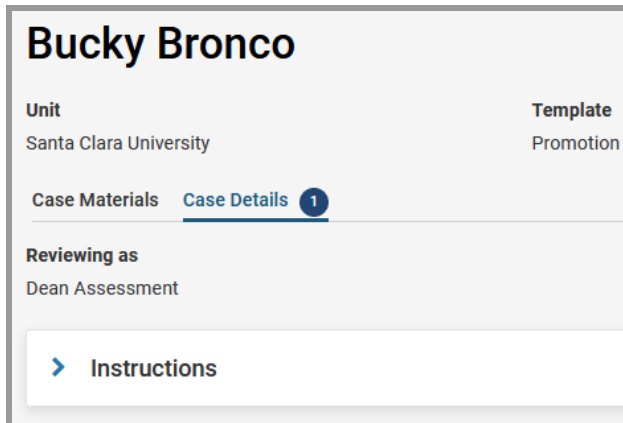
How to Exit the Faculty180 Vitae Section



Click the blue **Return to Case** button in the top right to exit.

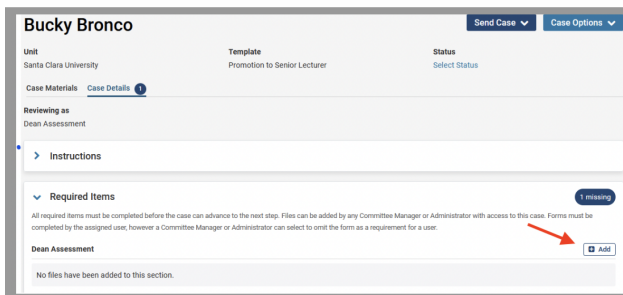
PART 4 - Submitting the Dean's Recommendation to the Provost

When you have finished reviewing the College/School Committee's recommendation letter, you will submit your recommendation letter to the Provost.



The screenshot shows the Bucky Bronco interface. At the top, it says "Bucky Bronco". Below that, "Unit" is "Santa Clara University" and "Template" is "Promotion". There are two tabs: "Case Materials" and "Case Details", with "Case Details" being the active tab and having a "1" notification badge. Underneath, it says "Reviewing as Dean Assessment". At the bottom, there is a button with a right-pointing arrow and the text "Instructions".

Click the **Case Details** tab at the upper left. This section will reveal the Dean's required item:

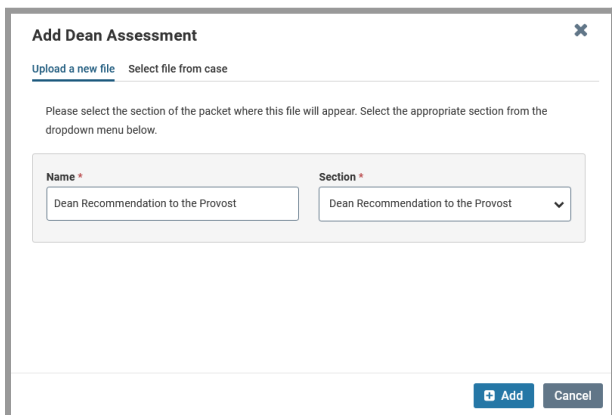


This screenshot shows the "Required Items" section of the Bucky Bronco interface. It indicates that 1 item is missing. Below this, there is a section titled "Dean Assessment" with the text "No files have been added to this section." and a blue "Add" button. A red arrow points to the "Add" button.

1. Dean's Recommendation Letter to the Provost
2. Required Form

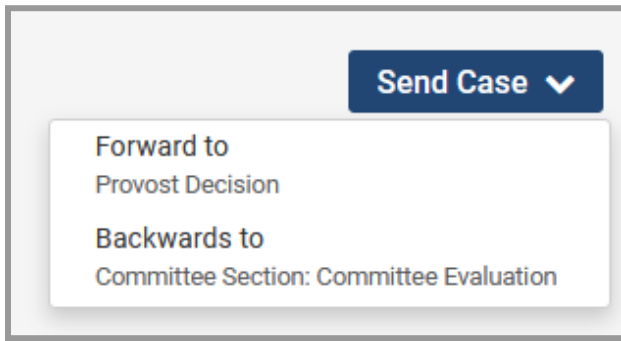
Step 1 - Upload Dean's Recommendation Letter

Click on the **Add** button to upload the letter. A pop-up window will allow you to browse your computer for the report.

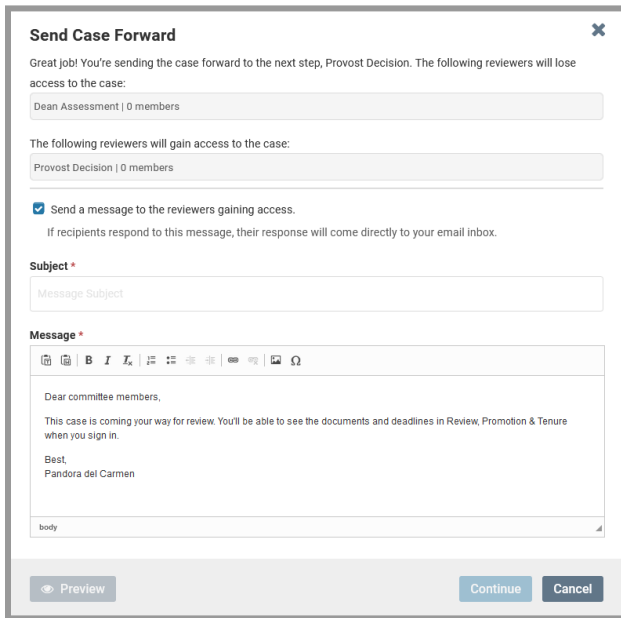


The screenshot shows a pop-up window titled "Add Dean Assessment". It has a close button (X) in the top right corner. Below the title, there are two options: "Upload a new file" (which is selected) and "Select file from case". A message says: "Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below." There are two input fields: "Name" with the text "Dean Recommendation to the Provost" and "Section" with a dropdown menu also showing "Dean Recommendation to the Provost". At the bottom right, there are two buttons: "Add" and "Cancel".

After uploading the report from your computer, this screen will pop-up. In the Section field, select "Dean Recommendation to the Provost." Then click the blue **Add** button (bottom right) to submit.



Click on the dark blue **Send Case** button in the upper right corner to move the case to the Provost.



The blue Continue button will be inactive (faded) until you fill in the email Subject field. After filling in the Subject, edit your message if you wish and click the now active/blue **Continue** button.

You have completed the submission.