Interfolio Guide

Creating a Position
Contents

• Action 1: Logging in to Interfolio
  • Step 1a: Interfolio.com
  • Step 1b: gibson.tulane.edu
  • Step 2: Single Sign On

• Action 2: Creating a New Position
  • Step 3: Positions Page
  • Step 4: New Position
  • Step 5: Create New or Create From Existing
  • Step 6: Enter Position Details
    • Step 6a: Title, Location, Type, & Dates
    • Step 6b: Position Description & Qualifications
    • Step 6c: Application Instructions
  • Step 7: Required Forms
  • Step 8: Evaluation Criteria
  • Step 9: Forms
  • Step 10: Search Committee
  • Step 11: IRC Number
  • Step 12: Position Summary/Overview

• Action 3: Posting the Position
  • Step 13: Position URL
  • Step 14: Submit for Approval
  • Step 15: Position Status – “Accepting Applications”
  • Step 16: Publishing

• Action 4: Returning After Logging Out
  • Step 17: Repeat Steps 1-3
  • Step 18: Select Position
  • Step 19: Position Actions – Edit Position

• Contact Info
Action 1: Logging in to Interfolio

Step 1a: https://account.interfolio.com/sso

Select Tulane University from the drop down menu and click “Sign In”
You may also sign in using the Gibson portal. To do this, go to “gibson.tulane.edu” and click “Sign in” at the top left corner.

On the following page, enter your single sign on credentials and click “Sign In”.

![Sign in to Gibson portal](image)
Step 1b: gibson.tulane.edu

Now that you’re signed in, click the your respective link at the top of the screen. “Staff” is used in the example below. Depending on your permissions, you may see different options on this top bar.

Next, select “Interfolio” from the menu on the left side of the screen.
Through either option, you will be redirected to a Tulane-branded page. Enter your username (part of the email without the “@tulane.edu”) and regular Tulane email password. Click “Sign In”. You will be redirected back to Interfolio’s landing page after sign in.

If you experience difficulties signing in, contact Joey Couvillon (acouvil@tulane.edu) or 504-314-2816.
Action 2: Creating a New Position

Step 3: Click "Positions"

You should see a page that looks similar to the picture below. Depending on your access, permissions, and history, you may see slightly different options.

For example, the “Review, Promotion and Tenure” menu on the left may not appear if you do not participate in the RPT process.
Action 2: Creating a New Position

Step 4: Click "+New Position"

You will be taken to the “Positions” page. On this page you will see all positions to which you have access.

To create a new position, click “+ New Position”.

![Screenshot of the positions page with the "+ New Position" button highlighted.](image-url)
**Action 2: Creating a New Position**

**Step 5: Click ”Create New Position“**

Depending on your permissions, you may have to select the department in which you wish to post the position.

For Example, staff in Deans’ Offices may be able to create faculty or postdoc fellow searches in multiple departments in their school, whereas staff in the department may not see this step at all because they can only create a position for their department.

Select the appropriate department and click “Create New Position”.

If there is a prior, archived position that you wish to use as a template, you can select it from the drop down menu under “Create from Existing Position” and then modify it accordingly.
Step 6a: Enter Title, Location, Type, & Dates

The next page will display the first six steps to creating the position in Interfolio. Any fields that are required will be designated appropriately (“*”).

For "Position Title", if in the Tenured/Tenure Track, please indicate that at the beginning. All other faculty tracks do not need to be included in the Position Title. Then List the title of the position and the specialization (if appropriate).

Examples:
- Tenure Track, Assistant Professor, 20th Century United States History
- Tenured, Associate or Full Professor, Genetics
- Professor of Practice, Costume and Set Design

Location: use city and state, can also include campus

Position Type: ‘Faculty’ for faculty positions and ‘Fellowship’ for Postdoc positions

Position Opens: Date when you wish to allow candidates to begin applying. Please make this date the same as the open date in HCM/iRec.

Position Closes: Optional, date when you no longer wish to receive new applications. Please make this date the same as the close date in HCM/iRec.
Action 2: Creating a New Position

Step 6b: Enter Description & Qualifications

Scroll down to “Position Description”. This is the main text of your ad and is a required field.

Qualifications: Optional. For example, “Successful candidates should have a PhD or equivalent degree in a relevant field as well as a record of excellence in teaching and scholarship.”
**Action 2: Creating a New Position**

**Step 6c: Enter Application Instructions**

**Application Instructions**: Optional. For example, “Candidates must apply in Interfolio and provide the following materials for submission: CV, Sample Syllabi of Courses Taught, Teaching Evaluations from Courses Taught, and Three Confidential Letters of Recommendation.”

**Equal Employment Opportunity Statement**: Do not modify or delete! This language is standardized for all Tulane positions and should not be changed. Simply skip over this section. Click “Save & Continue”
Action 2: Creating a New Position

Step 7: Add Required Documents

The next page should say “Required Documents”. This is where you add the documents you wish for each candidate to submit in order for them to complete their application materials.

Click “+ Add Requirement” and select the appropriate document type from the drop down menu.
Action 2: Creating a New Position

Step 7: Add Required Documents  

Select the appropriate document types, designate the number desired, and add any notes to the candidate. Then click “Save”. Repeat until all documents are added to the requirements.

Click “Save & Continue”.

You can modify requirements by clicking the pencil or delete requirements by clicking the “X”.

You can also choose to email applicants automatically after application submission. Select this box and draft a generic message – (“Dear Applicant”)

Note that you can allow applicants to add additional documents, should you want to give them that freedom, by clicking this box.
Any criteria by which your search committee may evaluate a candidate can be added here. Click “+ Add Criterion” and type the name of the criterion you wish to add. You must have at least one criterion in order to rate candidates in Interfolio using their star rating system.

It is strongly recommended to keep “Blind Review” checked (default setting) so that evaluators on the search committee cannot see the ratings of other members of the search committee.
Action 2: Creating a New Position

Step 9: Add Desired Forms

If you have a specific form or questionnaire you want candidates to complete as part of their application, you would add the form here.

Please note that you cannot create forms while creating a position. You must create the form separately and then go into the position to add it.

Two forms are required for all positions:
1. The Tulane EEO form. You cannot turn off, modify, or fill out this form for a candidate.
2. Candidate Additional Information Form

To add a form click the “+Add Form” button and select a form from your list.
Step 10: Add Search Committee Members & Managers

Click “+ Add Member” and then start typing either the first or last name. Interfolio’s smart search will find letter combinations that match in either the first or last name fields.

If you cannot find a person, that means they probably do not have an Interfolio account yet. Please contact Joey Couvillon (acouvil@tulane.edu or 314-2816) for assistance.

Note: Only users designated as “Committee Manager” appear under “+ Add Manager.” “Administrator” users will only appear in “+ Add Member” and have all the access of a “Committee Manager.”
Action 2: Creating a New Position

Step 10: Add Search Committee Members & Managers continued...

Note that, depending on the permissions of the person’s user account, they can be added as either an evaluator or as a committee manager (search chair). Select the appropriate option.

If the person needs to be the committee manager but doesn’t have those permissions, contact Joey Couvillon (acouvil@tulane.edu) for assistance.

Continue Adding users until the search committee is complete.
Action 2: Creating a New Position

Step 11: Enter the IRC Number

All fields on this page are optional as per Interfolio’s requirements. HOWEVER, Tulane requires that the first field, “Position ID or Requisition Number”, be populated with the appropriate and matching IRC number from the iRec vacancy that must also be created at the same time the position is being created in Interfolio. This allows us to match candidates in Interfolio to positions in iRec.

It’s okay if you don’t have the IRC number yet. Click “Save & Continue” to go to a summary page, and you can come back and fill in that field at a later time.
Action 2: Creating a New Position

Step 12: Review the Position

After the Internal Notes section, you will be taken to the “Review Position” page. If you need to edit any information, select “Edit” under the appropriate section.
Step 13: Retrieve the Position URL

Click the position title above “Review Position”.

Next, select “View Position Details” from the “Position Actions” drop down menu.
Step 13: Retrieve the Position URL continued...

This link is unique and generated by Interfolio. It should be used on “How to Apply” instructions in iRec and should be included in all position advertisements.

Once you have the link, click the “X” or “Close” buttons to go back to the position details.
Action 3: Posting the Position

Step 14: Submit for Approval

The status of the position is "Being Created." If you feel that your position is ready to go live, and you have submitted your corresponding iRec vacancy in HCM, select “Submit for Approval”.

This notifies the Provost’s Office that a faculty/postdoc position is ready for review. After approval by the Provost’s Office, the creator of the position will receive a notification email.
Action 3: Posting the Position

Step 15: Position Status – ”Accepting Applications“

On the position page, click “Position Actions” and select “Edit Position” from the drop down menu.

You are now at the “Review Position” page. Select “change” under the “Position Status” section.

A confirmation window will appear explaining what affect the status change will have. In this window, you can also edit these effects by checking or unchecking the boxes next to each effect.

Select “Accepting Applications” from the drop down menu.
When you change your Position Status to “Accepting Applications”, the default settings are:

- Applicants can view this status.
- Applicants can update their application materials.
- Evaluators can review applications to this position.

We recommend checking the last box: “Evaluators can review applications while this status is active.”

If you don’t check that box, your search committee members will not be able to start reviewing applications until after you are no longer accepting new candidates. That may be fine if there is a short application period, but if your position is open until filled with no end date, your search team will never be able to review applicants unless this box is checked.

Click “Save” to return to the Review Position page.
Action 3: Posting the Position  

**Step 16: Publish the Position**

On the “Review Position” page, at the bottom of the “This Position is:” section, you will see “Apply Now” page is not published.” Click the blue ”change” button bellow to publish the page.

If you skip this step, your Position URL to which you want to direct people to apply, will not work. It will be a dead link and applicants will see the message bellow, so this step is important.

The page you are trying to access is unavailable. The position does not exist or has not been published by the institution.
Action 4: Returning After Logging Out

Step 17: Repeat Steps 1-3

Step 1:
Go to https://account.interfolio.com/sso
Choose Tulane University from the dropdown menu and click “Sign In”

Or

Sign in using the Gibson portal as described in "Step 1: gibson.tulane.edu"

Step 2:
Sign on using your Tulane Credentials

Step 3:
Click “Positions”
Welcome back to the “Positions” page! Again, on this page you will see all positions for which you have access.

Find your desired position among those listed and click the position title.
After your position is approved, you will be taken to the “Applicants” page by default.

Click ”Position Actions” in the top left corner and select “Edit Position.”
Action 4: Returning After Logging Out

Step 19: Return to & Edit the Position continued...

You have now returned to the “Review Position” page. Click the “Edit” button next to any of the sections or choose from the list of pages on the right to make changes.
Questions?

Contact:
Joey Couvillon
acouvil@tulane.edu
(504)314-2816

Or

Alysia Loshbaugh
akravitz@tulane.edu
(504)862-8209