HELP FOR INTERFOLIO
FACULTY SEARCH
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Getting Started with Interfolio Faculty Search
Sign In to Interfolio Faculty Search, and Review, Promotion, and Tenure

Follow the instructions below to sign in to your Interfolio account.

If you get a message that "an account with this email already exists" when you try to create an account by clicking the "Sign Up" button, you probably have an existing Interfolio account you have forgotten about. In that case you will need to follow the instructions here.

Navigate to the sign in page

There are a number of ways to get to the sign in page; from our home page, a search engine etc.

One way is from the main page of our website:

Go to https://www.interfolio.com/ and click "Sign In" in the upper right corner of the main page:
Enter your email or username and password

💡 Note that you can sign in using your Google account or through one of our partner institutions.
Once on the sign in page, enter your email or username and password and click "Sign In"

-or- sign in with your Google account
To sign in through your institution:

Click the "Partner Institution" button

Search for or select your institution from the dropdown and click "Sign In"
If you get the error "An account with this email already exists" when setting up an account...

If you get the error message "An account with the email already exists" when trying to sign up for an Interfolio account, you probably have an existing account with us. In that case you will need to follow these instructions for resetting your password. Your new login information will be sent to the email you used to create your original Interfolio account.

If you get this error when creating your account:
1. Scroll back up to the top of the New Account page and click the "Sign In" button

2. Click "Forgot your password?"
3. Enter the email you want the password reset sent to and click the "Reset" button

4. We will send an email to the address associated with your original account with a link to "Request Password"
5. Enter and confirm your new password and click "Continue"

6. You will be taken to a confirmation screen with a link to sign in with your new password
7. Also, look for an email confirming the password reset

Your Password Has Changed Recently

Hi Michael Bishop,

The password for your Interfolio account has been changed successfully. If you have any questions, or if you did not change your password, please contact us.

Best,
The Interfolio Team

Questions? Check out our Help Center.

Get in Touch
help@interfolio.com | (877) 997-8807 | interfolio.com
Getting Help For Interfolio Faculty Search, and Review, Promotion, and Tenure

You can access detailed help for ByCommittee by signing in to your account and visiting our Help Center.

If your institution has partnered with us to provide Single Sign-On, follow this link to sign in through your institution.

Online Help Center

If you have questions about how to accomplish a specific task, sign in to your account, click on your name to select "Help" and try searching the extensive knowledge base of articles with step-by-step instructions at our online Help Center.

Scholar Services

You can also submit a help request via email to our Scholar Services team at help@interfolio.com.

-or- contact Scholar Services by telephone Monday-Friday, 9am-6pm, Eastern Standard at (877) 997-8807 (Toll Free).

We can also be reached via social media:

@interfolio on Twitter
@interfolio on Facebook
Interfolio Faculty Search: Best Practices for Managing a Search

If you’re managing a search this year, here are a few best practices to keep in mind:

1. **Logging In:** You can help your faculty access their account by resending the invitation to ByCommittee. That email will prompt your faculty member to create a new password and help them access their account. If your committee members experience any trouble, they can select "Forgot your password?" from the Interfolio home page.

2. **Requiring Confidential Letters of Recommendation:** Don’t forget! In order for an applicant to apply to your position, they need to complete all requirements before they can submit. That means, fulfilling each required document slot and completing all required form questions before they can submit their application.

3. **Collecting Additional Documents from a Subset of Applicants:** A common strategy for narrowing down a large applicant pool is a two-stage search. After you narrow down your applicant pool, you can request additional documents from the smaller list of applicants. Don’t forget to add additional document requirements (if necessary), and make sure to edit either the Position Status or the Application Status to permit those applicants to update their application materials.

4. (For Committee Managers) Don’t see the position you’re looking for? It’s possible that you may need to change your role so that you can toggle your scope within the institution, school, college or department. Learn more about our user roles here.

5. **Landing Page Analytics:** Wonder how your applicants are finding your positions? We now have a tool that shows a simple pie chart illustrating how your potential applicants are finding your positions.
applicants are accessing your position's “Apply Now” page. *This handy chart* can help you learn whether your recruitment dollars are paying off—why pay to post someplace that no one goes? If you aren't getting the applicant pool you expected for whatever reason (not diverse enough, not competitive enough), you can see which job boards are getting applicants and switch tack, if necessary.

Additionally, we have guide books for every user type where all relevant articles for your role are sourced for you. The fifth resource listed is a webinar our Client Success team hosted back in August 2016. It’s a comprehensive training covering how to create and manage a search in ByCommittee.

1. A Committee Manager’s guide to ByCommittee Faculty Search
2. An Evaluator’s guide to ByCommittee Faculty Search
3. An Applicant’s guide to applying to a ByCommittee position
4. Help evaluating applications
5. “Finding the Faculty” webinar

Still Stuck?

We’re here to help! Anyone can contact our Scholar Services team at help@interfolio.com or (877) 997-8807 Monday- Friday, 9:00-6:00 PM ET.
Managing Users and Settings
Set Up Your Institution's Hierarchy (Adding Organizational Units)

ByCommittee Faculty Search can be set up to exactly mirror the organizational hierarchy of your institution. For example, a university might contain colleges or schools, which in turn contain departments or programs. Any organizational structure is possible, and Administrators can add a unit at any point in the hierarchy. As an Administrator, you will have control of the settings for units at or below your level of access. This article explains how to set up ByCommittee Faculty Search to match your institution's hierarchy.

Your organizational hierarchy is created and edited from the Users & Units page

![Users & Units page](image-url)
To access Users & Units, click "Manage" on your account dashboard and select "Users & Groups"

-Or- click "User & Group Management" in the right hand navigation bar that appears on most screens in the program.
Once on the Users & Units page, click to open the "Units" tab.

Your organizational hierarchy is displayed on the Units page.
Click "Add Unit" to add a new unit to your organization

Enter the unit name and select the larger organizational unit to which it belongs from the dropdown menu, and click "Save"

In the example below, we have added a Department of German Language and Literature to the School of Arts and Sciences.
Enter as many units as you need to recreate the hierarchy of your institution

You can add as many organizational levels as necessary. For instance, the Department of German Language and Literature could contain a smaller unit such as a major area of study. In the example below we have added "20th Century German Literature" beneath the Department of German Language and Literature.
The units you add will show up in the list of units, each nested under the appropriate higher organizational unit.

If you need to edit a unit, click the blue edit pencil in the same row as the unit you want to change.

Once your hierarchy is built out, Administrators and Committee Managers will be able to access and manage the settings for each unit (and position) from the Administration page.

⚠️ Note: If you have more than one role in ByCommittee, or serve in more than one unit,
make sure you have the correct unit selected. For instance, if you are an Administrator in a unit, but also serve as a Committee Manager for a position, make sure you select the correct role.

Click "Change" to choose a unit or a position to administer
Select a unit

-Or- select a position

Note: If you have more than one role in ByCommittee, for instance, if you are an
Administrator, but you also serve as a Committee Manager, those roles will appear here as well.
There are four different types of users in ByCommittee Faculty Search: Administrators, Committee Managers, Evaluators, and EEO Officers. A user's role determines their capabilities in the program.

Evaluators are the ByCommittee users with the least access in the system. As members of a review committee, their role is generally limited to reviewing applicants and comes with no administrative capabilities. Evaluators can view applications, add labels to applicants, and—if given access—rate and comment on applications. All Evaluators are assigned to one or more search committees by an Administrator or Committee Manager.

Committee Managers supervise searches at the department level, therefore they have some administrative privileges. Committee Managers can edit settings and statuses, view reports, communicate with applicants, and evaluate applications.

Administrators have the most capabilities in ByCommittee Faculty Search, but their role is still limited by the organizational level to which they are attached. If a user is an Administrator on the college level, for instance, they can create, manage, and monitor searches at that college—the same goes for Administrators at a department. Institutional Administrators can control settings and view positions, applications, and reports across an entire institution.

The fourth category of user in ByCommittee Faculty Search is an Equal Employment Opportunity Officer. Generally, EEO Officers are staff from Human Resources, Institutional Diversity, or another campus office who are responsible for EEO standards and practices at your institution. EEO officers monitor and run EEO reports on open positions to which they have access. They also flag positions that may not meet an institution's diversity requirements.

In some cases, Administrators may also be granted EEO access, which allows them to perform some duties of an EEO Officer, such as viewing EEO reports and flagging positions.

Search Committee Evaluators

- Evaluators are assigned to one or more search committees by a Committee Manager or Administrator
- Evaluators can view, add labels, and—if this feature is activated—rate and comment on applications
Committee Managers

- Committee Managers supervise searches at the departmental level
- Committee Managers can edit settings and statuses, view reports, communicate with candidates, and evaluate applications

Administrators

- Administrators create, manage, and monitor searches at the organizational level to which they have access
- Institutional Administrators can control settings and view positions, applications, and reports across an entire institution. Departmental Administrators perform similar functions at the level of a department, school, or college within a larger institutional system
- Administrators may also be granted EEO access, which allows them to perform some duties of an EEO Officer such as viewing EEO reports and flagging positions

EEO Officers

- Equal Employment Opportunity Officers are generally staff from Human Resources, Institutional Diversity, or another campus office responsible for EEO standards and practices
- EEO officers monitor and run EEO reporting on open positions to which they have access. They also flag positions that may not meet an institution’s diversity requirements

Adding users to ByCommittee Faculty Search

Users are added to ByCommittee Faculty Search from the Users & Units page.

- In order to add someone to a search committee, they must first be added into your system as a ByCommittee user.
- When a user is first created, they are automatically assigned the role of Evaluator but they can be assigned multiple roles in multiple units
Useful Articles for Getting Started

Add Users

Change a User's Role
Customize ByCommittee to Match the Branding of Your Institution

Institutional Administrators for Faculty Search or Promotion & Tenure can upload a logo and set a custom color to match ByCommittee to the branding of their institution. This article explains how to set the custom institution branding directly from the Account Dashboard. Changes made to branding from the Account Dashboard will be applied to both Faculty Search and Promotion & Tenure.

Click the settings icon on your Interfolio Account Dashboard
Drag and drop or upload an image file (jpg, png, gif) of your logo

Click the "Change Logo" link if you need to upload a different logo
Choose a primary color from the pallet or enter a hex code that matches the colors of your institution

The color you choose will appear in the header and buttons of your site as well as on emails sent from the program.

Click "Site" to open a preview mode of how your site will display to users or "Email" to preview how your emails will appear.
Clicking "Site" opens a preview mode of how your site will display to users.

Clicking "Email" will display how your outgoing branded emails will appear.
At anytime you can reset the branding to the ByCommittee defaults
Add A Logo to the Landing Page of Your Position

Administrators can upload custom logos to ByCommittee Faculty Search that will appear on positions posted for an organizational unit. Logos are set on the Administration page of each administrative tier or position. Note that a logo can be added or changed anywhere there is an Administration page, including for individual positions. This means you can have separate logos for a university, a college within the university, a department within the college, or for any individual position you create.

This article explains how to add a logo to the landing page of a specific position.

Navigate to the Administration page of the position
Once on the Administration page, make sure you are editing the settings for the correct position

Click "Change"

Open the "Positions" tab and select the correct position
Open the "Logo" tab and click "Change"

Select an image file of the logo to upload it to the program

💡 Logos are displayed on a white background on position landing pages. For best results, use a logo with a white or transparent background.
Your new logo will display on the landing page of the position or positions created by the administrative unit.

Demo University
Dean of Students
Location: Wachapreague, Virginia
Closes: Jul 20, 2017 at 11:55 PM Eastern Time (GMT-4 hour)
Add A Logo for an Administrative Unit

Administrators can upload custom logos to ByCommittee Faculty Search that will appear on positions posted for an organizational unit. Logos are set on the Administration page of each administrative tier or position.

Note that a logo can be added or changed anywhere there is an Administration page, including for individual positions. This means you can have separate logos for a university, a college within the university, a department within the college, or for any individual position you create.

This article explains how to add a logo that will appear on the landing page of positions created by a particular administrative unit.

Navigate to the Administration page of the unit
Once on the Administration page, make sure you are editing the settings for the correct unit

Click "Change"

Open the "Units" tab and select the correct unit
Open the "Logo" tab and click "Change"

Select an image file of the logo to upload it to the program

💡 Logos are displayed on a white background on position landing pages. For best results, use a logo with a white or transparent background.
Your new logo will display on the landing page of positions created by the administrative unit

Demo University: College of Dentistry: Department of Oral and Maxillofacial Surgery
Lecturer on Periodontal Surgery
Location: Richmond, Virginia
Closes: May 31, 2018 at 11:59 PM Eastern Time (EDT-5 hours)
Add New Users - Faculty Search

Committee Managers and Administrators can add users to ByCommittee Faculty Search. All potential search committee members must be added as ByCommittee users before they are able to review applicants.

Users are managed from the Users & Units page
To access Users & Units, click "Manage" on your account dashboard and select "Users & Groups"

-Or- click "User & Group Management" in the right hand navigation bar that appears on most screens in the program
Click the "Add User" button to the right of the Users & Units page

Fill out the "Add User" form with the user's name and email address
You can choose to add an additional message to the new user. Click preview to see how the message will appear in the inbox of the user.

Preview and click "Send" when you are ready.

Important: You can resend this invitation email at any time. For more information see the article Resend the Bycommittee Faculty Search Invitation Email.
Add the new user to one or more units, and assign them roles in each unit

When a user is added, the "Edit User" window opens where you can add the user to one or more units, and set their role in each unit to which they are added.

By default, new users are added to the program with the role of Evaluator, however, an administrative user can grant any user a role equal to or lesser than their own role in any unit they administer.

For instance, an Administrator in Faculty Search can add a user to the program and assign that user the role of Administrator or Committee Manager for any of the units in their organizational hierarchy. Committee Managers can add a user to the program, and grant that user the role of Committee Manager or Evaluator in any administrative unit for which they serve as a Committee Manager, but cannot add a user and make them an Administrator.
Assign the user to a unit from the dropdown list

Select a role for the user and click "Add"
If necessary, add the user to another unit and assign them a role in the new unit to which they are added.

In the example below, the user has been added as an Administrator with EEO access in the College of Dentistry, but they can be added to as many units as necessary and assigned a different role in each.
Click "Update" when you are finished editing the user

The user will appear in the list of users listed with their unit and role
Change a User's Role

User roles are set when adding or editing a user. By default, new users are added to the program with the role of Evaluator, but that can easily be changed when necessary by a user with the appropriate permissions in the program. Users can be assigned roles in multiple units. An administrative user can assign a user a role lesser than or equal to their own in any unit in their administrative hierarchy. This article explains how to edit a user's role once they have been added to the program.

Users are managed from the Users & Units page

![Users & Units](image)
To access Users & Units, click "Manage" on your account dashboard and select "Users & Groups"

-Or- click "User & Group Management" in the right hand navigation bar that appears on most screens in the program
To assign a user a new unit and/or role:

Click the blue edit pencil in the same row as the user you want to edit

The "Edit User" window will open where you can add a new unit and/or role for the user
Select a unit from the dropdown list

Select a role for the user in the unit
Click "Add"

Repeat the process above to assign the user additional units and roles
To change a user's existing unit or role:

Click the blue edit pencil in the same row as the user you want to edit

Delete the role you want to change by clicking the X

Select a new unit and role for the user and click "Add"

The user will be granted permissions for the unit and role you select.
Edit User

First Name *
Stephanie

Last Name *
Bigsley

Email *
sbbb@demo.edu

[Check Box] Update  [Cancel]

Resend Invitation

UNITS

Demo University            Committee Manager
College of Dentistry      Administrator (EEO Access)

[Dropdown] – Select Unit –  [Dropdown] – Select Role –

[Add]
Assign a User the Committee Manager Role

Committee Managers supervise searches at the department level. Among other functions, Committee Managers can create users, edit settings and statuses, view reports, communicate with candidates, and evaluate applications. A new user can be added to the program with the role of Committee Manager, or an existing user can be edited to have their role changed to that of Committee Manager.

When made a Committee Manager, a user becomes available to manage search committees at or below the organizational unit to which they have been assigned.

This article explains how to make an existing user a Committee Manager by editing their role in the program, but the process of assigning the Committee Manager role is the same when "Adding New Users" to Faculty Search.

Users are managed from the Users & Units page
To access Users & Units, click "Manage" on your account dashboard and select "Users & Groups"

-Or- click "User & Group Management" in the right hand navigation bar that appears on most screens in the program
Click the blue edit pencil in the same row as the user you want to make a Committee Manager

The "Edit User" window will open where you can add a new unit and/or role for the user
Select a unit from the dropdown list

Select the role "Committee Manager"
Click "Add"

The user will be added as a Committee Manager in the unit you designated and will come up as a potential Committee Manager for search committees assembled when creating or editing positions at or below that unit.
Resend the Invitation Email to ByCommittee Faculty Search

When adding users to the program, Administrators and Committee Managers have the option to send a personalized email message welcoming them to ByCommittee Faculty Search and inviting them to activate their new account, or login if they already have an account with Interfolio. If this email is lost, or if for any other reason an Administrator needs to send it again, the invitation email can be re-sent from the Edit User window that is accessed from the Users & Units page. This article explains how to resend the invitation email if necessary.

Users are managed from the Users & Units page

<table>
<thead>
<tr>
<th>USER</th>
<th>EMAIL</th>
<th>UNIT &amp; ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stephanie Bigsley</td>
<td><a href="mailto:sbibs@demo.edu">sbibs@demo.edu</a></td>
<td>Evaluator</td>
</tr>
<tr>
<td>Blothar Brown</td>
<td><a href="mailto:blothar.brown@interfolio.com">blothar.brown@interfolio.com</a></td>
<td>Demo University (Administrator)</td>
</tr>
<tr>
<td>Frank Brown</td>
<td><a href="mailto:fbb@demo.edu">fbb@demo.edu</a></td>
<td>Department of Oral and Maxillofacial Surgery (Administrator)</td>
</tr>
</tbody>
</table>
To access Users & Units, click "Manage" on your account dashboard and select "Users & Groups"

-Or- click "User & Group Management" in the right hand navigation bar that appears on most screens in the program.
Click the blue edit pencil in the same row as the user you want to make a Committee Manager

Find the link to "Resend Invitation" in the "Edit User" window

Add an optional message to the invitation email
Click "Preview" to see how the message will appear in the new user's inbox
Demo University has invited you to join ByCommittee Faculty Search.

This link will expire in 30 days. After 30 days, you can reactivate the account by requesting a new password.

Hi Stephanie,

I am resending the activation email....

Powered by Interfolio's ByCommittee | Interfolio Support

Send Edit Cancel

Preview and click "Send" when you are ready
Require Approval to Post New Positions

Administrators of a given organizational unit in ByCommittee Faculty Search can require approval and designate an approver for positions created by that unit. When the option to require approval is selected, all positions created by that unit must be approved before the position will be posted.

Administrators can change the approval settings and designate an approver from the Administration page of the organizational unit they are managing.

This article explains how to require approval to post new positions, and explains briefly what happens when this option is enabled. See here for more information on how to submit a new position for approval.

Click "Manage" and select "Administration" from the dropdown menu

Or select the "Administration" link in the right sidebar of most screens in the program.
Check to make sure you are editing the settings for the correct unit

Click "Change"

Select the appropriate unit
Open the "Communications" tab

Check "New positions require approval"
Select an approver from the dropdown box

The names that appear in the dropdown box will be Administrators of the unit.

Click "Save" to confirm the change
What happens when approval is required for new positions?

The creator of a new position will be prompted to submit the position for approval.

An email notification will be sent to the person named as approver.

The new position will appear in the list of positions with the status "Approval Required".
Note: Until it is submitted for approval, a position will appear in the positions list with the status "Position Being Created."

The position creator will still be able to review and make changes to the position while awaiting approval.

The designated approver can approve the position or elect to send the position back for changes.

If changes are required, the approver will send further instructions to the person who submitted the position for approval.
The person who submitted the position will receive an email listing the changes and be prompted to update the position.

Once it is approved the position will appear in the list of positions with the status "Approved."

Warren Pease has requested that you make changes to your position (Lecturer in Trumpet Performance) before it is approved.

Please add the following text to the position qualifications section:

"Other preferred qualifications will include proficiency on a musical instrument or voice, and ability to teach courses on topics in non-Western music and/or early music as needed."
Approve a Position or Send It Back for Changes

If you are an Administrator who has been named to approve positions for a unit, you will receive an email notifying you when a position has been created that requires your approval. You can either approve the position or send it back for changes along with a message describing the changes that need to be made. This article explains how to approve a new position or send it back for changes if necessary. It may also be useful to become familiar with the process of submitting a new position for approval, and the process of requiring approval to post new positions.

You will receive an email when a position is submitted for your approval

Follow the link to review and approve the position or send it back for changes.

Bloothar Brown has created a new position in ByCommittee that requires your approval.

Position: Associate Professor of Music and Composition
Unit: Jazz Studies

Questions? Check out our Help Center.

Get in Touch
help@interfolio.com | (877) 997-8807 | interfolio.com
The position awaiting your approval will appear in the list of positions with the status "Approval Required"

<table>
<thead>
<tr>
<th>NAME</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate Professor of Orthodontic Dentistry</td>
<td>ACCEPTING APPLICATIONS</td>
</tr>
<tr>
<td>College of Dentistry</td>
<td></td>
</tr>
<tr>
<td>Associate Professor of Periodontics</td>
<td>ACCEPTING APPLICATIONS</td>
</tr>
<tr>
<td>College of Dentistry</td>
<td></td>
</tr>
<tr>
<td>Associate Professor of Music and Composition</td>
<td></td>
</tr>
<tr>
<td>Jazz Studies</td>
<td></td>
</tr>
<tr>
<td>Jazz Performance Instructor</td>
<td></td>
</tr>
<tr>
<td>Jazz Studies</td>
<td></td>
</tr>
<tr>
<td>New Music Ensemble Director</td>
<td>APPROVAL REQUIRED</td>
</tr>
<tr>
<td>School of Music</td>
<td></td>
</tr>
<tr>
<td>Visiting Assistant Professor/Instructor in American Literature</td>
<td></td>
</tr>
<tr>
<td>Department of English Language and Literature</td>
<td></td>
</tr>
</tbody>
</table>

Click on the position name
Click "Get Started" to review the position

New Music Ensemble Director (Needs Approval)
School of Music
Opens: Jul 1, 2016 | Closes: Jun 3, 2017

APPROVAL REQUIRED
Position sent for approval by Blotar Brown on June 27, 2016.
This position requires approval before it is published and open to applicants. To begin reviewing the position, click "Get Started."

Review the position information

POSITION INFORMATION
DESCRIPTION & DATES Edit
Position Title New Music Ensemble Director
Location Green Tp, VA
Position Type Staff
Open Date Jul 1, 2016
Close Date Jun 3, 2017
Position Description Describe the position
REQUIRED DOCUMENTS Edit
EVALUATION SETTINGS Edit
APPLICATION FORMS Edit
SEARCH COMMITTEE Edit
INTERNAL NOTES Edit
Select to approve the position or send it back for changes

Clicking "Send Back For Changes" opens a window where you can write a message explaining what changes need to be made.
The person who submitted the position will receive an email listing the changes and be prompted to update the position.

Warren Pease has requested that you make changes to your position (Lecturer in Trumpet Performance) before it is approved.

UPDATE POSITION

Please add the following text to the position qualifications section:

"Other preferred qualifications will include proficiency on a musical instrument or voice, and ability to teach courses on topics in non-Western music and/or early music as needed."

The person who submitted the position will be notified once the position is approved.

Your position (Professor of Chemistry) has been approved!

Sign in to ByCommittee to view your position.

VIEW POSITION

Questions? Check out our Help Center.

Get in Touch
help@interfolio.com  |  (877) 997-8807  |  interfolio.com
Creating a Position
Create a Position

What is a "position?" In ByCommittee, the term "position" refers to a faculty, staff or fellowship opportunity. The position is the object of the search.

So, what is a "search?" You can think of a search in ByCommittee as an academic, staff or fellowship position that gathers together application materials to be evaluated by a committee. A search is a single place to collect, store, view, and review applicant materials.

Creating a search is a guided step-by-step process that involves adding information about your search and instructions for applicants, creating a set of requirements for your position, appointing a search committee, and creating a landing page with a unique URL that will serve as the on-line application for your open position.

It may be useful to familiarize yourself with the process from an applicant's point of view. See our Job Applicant's Guide to ByCommittee Faculty Search for more information on the applicant experience of applying to a ByCommittee position.

Positions can be created for any organizational unit in the program. For instance, a position can be created by the unit Demo University or by any lower organizational unit within that university, such as a school or department, or any unit within the school or department and so on.

Administrators can add positions to any organizational unit at or below the unit they have been assigned to administer, and Committee Managers can create positions for any unit at or below the unit for which they have been assigned as a Committee Manager.

When applications are no longer being considered, either because a hire was made or some other reason, Committee Managers and Administrators can close a position and indicate which applicants were selected to fill the position.

This article explains the steps involved in creating a position in ByCommittee Faculty Search.
Note: By creating a position you will also generate a landing page that applicants will use to learn about and apply for your position.

To get started, select "View Positions" on your Faculty Search Account Dashboard

Welcome, Beverly!
Click "New Position" on the Positions page

Select the unit for the position you are creating

Choose to create the new position from scratch or use settings from an existing position

- Select the appropriate department and click "Create New Position."
- -or- Select "Create from Existing Position" to re-use settings, requirements, and basic information from an existing position.
Now you're ready to create your position!

1. Add position description and dates
1.1. Provide general information about the position

- Position Title: e.g., Assistant Professor
- Location
- Position Type: Faculty, Staff, or Fellowship
- Position Opens: Date when new applications will first be accepted for the position.
- Position Closes: Date when new applications will no longer be accepted.
1.2. Describe the position including specific qualifications

Describe the position in as much detail as possible, and list specific qualifications.

The McDonnell Department of Music invites applicants to apply for a tenure-track position in CCS in Music to begin Fall of 2018.

Excellence in teaching is expected, both in the classroom and in mentoring students outside the classroom.
1.3. Provide instructions for applying (required documents, formats, etc.)

Applications are only accepted online. Applicants must include electronic copies of a letter of application, a current CV...

1.4. Enter an Equal Employment Opportunity Statement, and click "Save & Continue"

Note: Your institution may already have the EEO statement set up for you.
2. Add required documents

Here you can add the documents your applicants must submit with their application. You can set the document type such as C.V., or Peer Evaluations, and set the number of documents necessary to fulfill the requirement. For instance, you might require one C.V., and three peer evaluations.

Your applicant can upload these documents and submit them electronically when applying for a ByCommittee position. The applicant will need to upload the exact number of each document type that you set in order to fulfill the requirement. When a requirement is filled the check mark will turn green.

ℹ️ The "Number Required" sets the number of individual documents the applicant will need to upload to satisfy the requirement. If, for instance you want three references, but want them in one document, you will need to set the number required to one, instead of three.

ℹ️ We accept the following file types:

- DOC
- DOCX
- DOT
- ODT
- WPD
- RTF
- TXT
- HTML
- PDF
- Links to webpages
- Links to videos hosted by YouTube and Vimeo
2.1. Click "Add Requirement"

2.2. Select the document type from the dropdown list

You will be presented with a list of typical documents such as cover letters, C.V., transcripts, and letters of recommendation.
2.3. Set the number required of that document type

⚠️ The "Number Required" sets the number of individual documents the applicant will need to upload to satisfy the requirement. If, for instance you want three references, but want them in one document, you will need to set the number required to one, instead of three.
2.4. Add an optional note with any special instructions or other information about the requirement and click "Save" when you are finished.
2.5. You have the option to allow applicants to add additional documents

ByCommittee – Positions
Assistant Professor of 20th Century Music
Required Documents

5 Documents Required
Drag and drop the documents in the list below to change the order they will appear in the application requirements.

1. Cover Letter
   Please address letter to Janet Price...

2. C.V.

3. Confidential Letter of Recommendation or Evaluation

[Add Requirement]

Additional Applicant Options
- Applicants may add additional documents
  You may give applicants the ability to include additional materials with their application if you have documents that you recommend, but don't require as part of the application; you should select this choice.
- Send a message on application submission.

[Save & Continue] [Skip Step]

3. Create an automated message to send applicants when they submit an application

[Add Requirement]

Additional Applicant Options
- Applicants may add additional documents
  You may give applicants the ability to include additional materials with their application if you have documents that you recommend, but don't require as part of the application; you should select this choice.
- Send a message on application submission.

Subject
Thank You For Applying

Body
The Music Department at Demo University has received your application.
4. Create custom evaluation criteria and edit evaluation settings

If your institution allows, you can establish custom evaluation criteria for rating applicants on a 5-star scale. This allows Evaluators to rate and compare applicants on criteria such as scholarship, teaching, research, publishing, or whatever criteria you add. We will calculate the average score of an applicant by both category and overall rating. You can set whether or not Evaluators can view comments and ratings given by other users.

4.1. Click "Add Criterion"

![Image of Add Criterion button](image)

4.2. Type in the evaluation criterion and click "Save"

![Image of Add Evaluation Criterion dialog box](image)
4.3. Specify "Blind Review" if you don't want evaluators to see the comments and ratings of their fellow committee members.

5. Attach application forms

- Application forms are used to gather additional information from applications.
- All Admins and Committee Managers can create forms.
- Forms can be specific to any institution, college, department or position.

*Note: Application forms are attached during the process of creating or editing a position, but forms are created from the Administration page.*
5.1. Click "Add Form"

5.2. Select form from the dropdown list and click "Save"

A list of forms that have already been created (from the Administration page) will appear in the dropdown list.
5.3. You can click "Preview" to see how applicants will see the form you have added.

5.4. If necessary, make EEO forms a requirement, and click "Save & Continue" when you are done.

You can Make EEO forms a requirement by checking box labeled "Applicants must complete an Equal Employment Opportunity Form."
6. Create a search committee

You have the option to add members to a search committee as part of the position creation process. Note that in order to be assigned to a search, potential committee members must be added to the program as ByCommittee users.

Note: You can also add committee members after a position is created from the Review Position screen. For more information, see How do I add members to a search committee?
6.1. Click "Add Member" to call up a list of available ByCommittee users who can serve on your committee.

6.2. Search for the user by first or last name, and click "Add" to add them to the committee.

As you are typing, matches of existing ByCommittee users will appear. If you don’t see the user you are looking for, you may need to add them as ByCommittee user.
6.3. Click "Add Manager" to call up a list of available Committee Managers for your committee.

6.4. Click "Add" to add the user as manager for the committee.

This list displays users who have been assigned the role of Committee Manager for the unit in which you are creating the position. If you don't see the user you are looking for you may need...
to **add them to the program as a ByCommittee user**, or **assign the user the role of Committee Manager** for the unit in which you are creating the position.

6.5. Keep adding members and/or managers until you have your committee assembled, and click "Save & Continue"

![Add Manager](image)

To remove a member, simply click the X next to the user’s information.
7. Enter internal notes

You will be taken to the "Internal Notes" page of the position. Internal notes are optional, are only accessible to users at your institution and will never be seen by applicants. They are available to all committee members for the position.

Here you can add a position ID number, enter a salary range, select a term length for the position you have created, identify the funding source, writer out a hiring plan, add general notes, and upload files that will become available for committee members evaluating the position.
You may need to submit your position for approval by an administrator before it can be published.

If approval is required, click "Submit for Approval." An email will be sent to the administrator responsible for approving the position and he or she will be notified that your position requires approval when they log into the program.

You may continue making edits and preparing the position while awaiting approval. You will receive a notification once your position is approved or if changes need to be made to the position.

See here for more information on submitting a position for approval.
You will be notified if changes need to be made before the position can be approved

Warren Pease has requested that you make changes to your position (Lecturer in Trumpet Performance) before it is approved.

UPDATE POSITION

Please add the following text to the position qualifications section:

"Other preferred qualifications will include proficiency on a musical instrument or voice, and ability to teach courses on topics in non-Western music and/or early music as needed."

You will receive a notification once your position is approved and you can continue with the steps below

Your position (Professor of Chemistry) has been approved!

Sign in to ByCommittee to view your position.

VIEW POSITION

Questions? Check out our Help Center.

Get in Touch

help@interfolio.com | (877) 997-8807 | interfolio.com
8. Review and open your position

Your position will automatically be published when the Open date passes -or- you can click "change" to publish the "Apply Now" page manually.

Click "Update Status" to set an initial status for the position

You will need to set an initial status for the position (such as "Accepting Applications").
Select the initial status from the dropdown list, or click "Add New Status" to create a new one.

Set permissions related to the status

Set whether or not applicants can view or update their materials, and whether or not evaluators can review applications when the status is active.
Publish Your Position

When the open date passes your "Apply Now" page will automatically be published, but you can click "change" to publish it manually.

The URL of your position will display on the review page. You can use this URL wherever you want to announce your position.
Position Announcement:

After you create a position and the position has passed it's open date, or you have manually published the URL, ByCommittee generates a landing page announcing the position. The landing page includes details and application instructions. It also provides applicants with a free Interfolio Dossier & Portfolio account, which they use to apply for your position.

Demo University: School of Music: Department of Critical and Comparative Studies in Music
Assistant Professor of 20th Century Music

Location: Washington, DC
Closes: Jul 29, 2017

The McDonaldson Department of Music invites applicants to apply for a tenure-track position in CCS in Music to begin Fall of 2018...

QUALIFICATIONS
Excellence in teaching is expected, both in the classroom and in mentoring students outside the classroom.

APPLICATION INSTRUCTIONS
Applications are only accepted online. Applicants must include electronic copies of a letter of application, a current CV,

For help signing up, accessing your account, or submitting your application please check out our help and support section or get in touch via email at help@interfolio.com or phone at (877) 997-8807.
Adding and Editing Required Materials for a Position

When creating or editing a position Administrators and Committee Managers can indicate the materials that must be submitted with all applications to the position. Applicants can upload these documents and submit them electronically when applying for the ByCommittee position through the "Apply Now" page for the position.

This article explains how to create and edit document requirements and gives some context for administrative users about how document requirements are presented to the applicant and the process of satisfying those requirements.

In addition, we recommend that Administrators and Committee Managers familiarize themselves with the process of applying for a ByCommittee position. For more information on the applicant experience see our Job Applicant's Guide to ByCommittee Faculty Search.

Required documents are set during the process of creating a position

See here information on setting document requirements when creating a position.
Document requirements can also be edited after a position is created

Click the edit pencil on the applications page of a position.

Clicking the "Required Documents" link on the Edit Position screen takes you back to the screen above where you can edit document requirements. For more information, see the help article that covers how to edit an existing position.

We accept the following file types:
We accept the following file types:

- DOC
- DOCX
- DOT
- ODT
- WPD
- RTF
- TXT
- HTML
- PDF
- Links to webpages
- Links to videos hosted by YouTube and Vimeo

To add or edit required documents click "Add Requirement"

**ByCommittee – Positions**

Assistant Professor of 20th Century Music
Required Documents

O Documents Required
Drag and drop the documents in the list below to change the order they will appear in the application requirements.

- [ ] Add Requirement

Additional Applicant Options

- Applicants may add additional documents
  
  You may give applicants the ability to include additional materials with their application. If you have documents that you recommend, but don't require as part of the application, you should select this choice.

- [ ] Send a message on application submission.

- [ ] Save & Continue
- [ ] Skip Step

Select the document type from the dropdown list

You will be presented with a list of typical documents such as cover letters, C.V., transcripts, and letters of recommendation.
Set the number required of that document type

⚠️ The "Number Required" sets the number of individual documents the applicant will need to upload to satisfy the requirement. If, for instance you want three references, but want them in one document, you will need to set the number required to one, instead of three.
Add an optional note with any special instructions or other information about the requirement and click "Save" when you are finished.
You have the option to allow applicants to add additional documents.

You can also create an automated message to send applicants when they submit an application.
What the applicant sees:

Applicant's will apply through a link on your position announcement.

When they begin to apply, the applicant will see the document requirements listed.
The applicant can upload a file from their computer or select an existing document if they already have a Dossier account.

When the correct number of each document type is uploaded a check mark appears indicating the requirement is complete.

**Note:** The "Number Required" applies to the number of individual documents the applicant will need to upload to satisfy the requirement.
If you have created one, the applicant will get a confirmation email when they submit their application
Establish Custom Ratings Criteria and/or Set Up a Blind Review

If permissions allow, Committee Managers can set custom evaluation criteria for rating applicants on a five-star scale. It is also possible to set up a "blind review" in which Evaluators will not see the comments and ratings left by others.

Custom ratings criteria and/or a blind review can be set during the process of creating a position, or when editing a position.

The directions below explain how to add criteria and set a blind review when editing a position.

Select "View Positions" on your Faculty Search Account Dashboard
Find and click the position title to open the list of applicants for the position

![Positions](image)

Click the edit pencil to open the Edit Position page

![Associate Professor of Orthodontic Dentistry](image)
Click "Evaluation Settings" to the right of the page

On the Evaluation Settings page:

1. Click "Add Criterion" to add a custom criterion to the list
2. Click X to delete a criterion
3. Select "Blind Review" if you don't want Evaluators to see comments and ratings entered by their fellow committee members
Set the Open Date of Your Search, Publish Your Position, and Start Accepting Applications

Once you've created and reviewed your ByCommittee Faculty Search position, the position URL that advertises your search will be published automatically when your position reaches its "Open" date. The article below explains the rules around publishing a position, how to publish your "Apply Now" page, and how to retrieve the link for that page so you can start advertising your position.

Your unique landing page

While entering all the information and requirements for your position, you are also creating a unique landing page that announces your search, and which applicants will use to apply for your opportunity. The landing page includes details and application instructions, and provides applicants with a free Interfolio Dossier & Portfolio account, which they will need to apply.
You generally set the open date while creating your position, but you can also edit the date if necessary.

Find and click the title of the position you want to open and publish.
Click the edit pencil to open the Edit Position page

Click "Change" to make changes to the open and close dates
Click "Change" to either publish or unpublish the web page announcing your position

The URL for your position will be published when the open date arrives

1. The position pictured below is "Open." Note that you can change the open and close dates from the Review Position screen
2. Note that the "Apply Now" page has been published. Click the link to view the page, or click "change" to unpublish it
3. To begin accepting and reviewing applications you will also need to set an initial position status such as "Accepting Applications" that allows applicants to submit and update applications, and allows Evaluators to review materials
Click "View" to see your position announcement

THIS POSITION IS:  
Open to new applicants

It opened on Jun 30, 2016. change clear
It will close on Apr 14, 2017. change clear

“Apply Now” page is published. view change

http://apply-test.interfolio.com/24389

POSITION STATUS:  
Accepting Applications

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

Click "View" to see your position announcement

THIS POSITION IS:  
Open to new applicants

It opened on Jun 30, 2016. change clear
It will close on Apr 14, 2017. change clear

“Apply Now” page is published. view change

http://apply-test.interfolio.com/24389

POSITION STATUS:  
Accepting Applications

With this status active:
- Applicants can view this status.
- Applicants can update their application materials.
- Evaluators can review applications to this position.
  change
You can preview your announcement and copy the URL

[Image of announcement]

[Text of announcement]

Help for Interfolio Faculty Search
Manually Publish the "Apply Now" Page for Your Position

You can manually publish the "Apply Now" page for your position from the Review Position screen.

Select "View Positions" on your Faculty Search Account Dashboard
Click the name of the position you want to publish

Click edit pencil icon to the right of the page
Click the "change" link to publish your "Apply Now" page.
Submit a New Position for Approval

If your organization requires approval for posting new positions, you will be prompted to submit new positions for approval as the final step in creating a position. The Administrator who is designated to approve new positions will be notified that you have submitted a position for approval, and can either approve the position or send it back for changes. If changes are required, you will be notified of the necessary changes and can resubmit the position once the required changes have been made. This article explains more about the process of approving positions. To get a view from the other side of the approval process, see the help article on how to require approval to post new positions.

You will first need to create a new position

See here for detailed instructions on how to create a position.

If approval is required, you will be asked to submit the new position you create for approval
The designated approver will be sent an email notifying them that you have submitted a position to be approved.

Blothar Brown has created a new position in ByCommittee that requires your approval.

**Position:** Associate Professor of Music and Composition  
**Unit:** Jazz Studies

Questions? Check out our Help Center.

Get in Touch  
help@interfolio.com | (877) 997-8807 | interfolio.com

You may continue to make changes and updates to the position while awaiting approval.

While awaiting approval the new position will appear in the list of positions with the status "Approval Required".

**Note:** Until it is submitted for approval, a position will appear in the positions list with the status "Position Being Created."
You will be notified by email once the position has been approved or if changes need to be made before approval.

<table>
<thead>
<tr>
<th>NAME</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate Professor of Orthodontic Dentistry</td>
<td>ACCEPTING APPLICATIONS</td>
</tr>
<tr>
<td>College of Dentistry</td>
<td></td>
</tr>
<tr>
<td>Associate Professor of Periodontics</td>
<td>ACCEPTING APPLICATIONS</td>
</tr>
<tr>
<td>College of Dentistry</td>
<td></td>
</tr>
<tr>
<td>Associate Professor of Music and Composition</td>
<td>APPROVAL REQUIRED</td>
</tr>
<tr>
<td>Jazz Studies</td>
<td></td>
</tr>
<tr>
<td>Jazz Performance Instructor</td>
<td>APPROVAL REQUIRED</td>
</tr>
<tr>
<td>Jazz Studies</td>
<td></td>
</tr>
<tr>
<td>Visiting Assistant Professor/Instructor in American Literature</td>
<td></td>
</tr>
<tr>
<td>Department of English Language and Literature</td>
<td></td>
</tr>
</tbody>
</table>

Your position (Professor of Chemistry) has been approved!

Sign in to ByCommittee to view your position.

VIEW POSITION

Questions? Check out our Help Center.

Get in Touch

help@interfolio.com  |  (877) 997-8907  |  interfolio.com
If changes need to be made you will receive an email prompting you to update the position

Warren Pease has requested that you make changes to your position (Lecturer in Trumpet Performance) before it is approved.

UPDATE POSITION

Please add the following text to the position qualifications section:

"Other preferred qualifications will include proficiency on a musical instrument or voice, and ability to teach courses on topics in non-Western music and/or early music as needed."
Find the URL For Your Position

In the process of creating a position in ByCommittee Faculty Search, you are also creating an "Apply Now" landing page that will announce your opening online. You can copy the unique URL of this landing page and use it wherever you want to post your position.

Make sure your the "Apply Now" page for your position has been published

Once the open date of your position arrives, the "Apply Now" page will be published automatically. You may also publish the "Apply Now" page manually when editing a position.
The URL of your "Apply Now" page will appear on the Review Position page

Copy and paste this URL anywhere you want to announce your position

http://apply-test.interfolio.com/24389
Run a Multi-Stage Search: Request Additional Materials From Selected Applicants

A common search strategy is to conduct a “two-stage” or multi-stage search in which the applicant field is narrowed down, and additional materials are requested from a select group of applicants.

For instance, let's say you have a search with 100 applicants. After a first review, your committee narrows the list down to just 20 applicants. From those 20 applicants, the committee needs to request three additional confidential letters of recommendation. This means you will need to update the document requirements for the position; however, you don't want to notify your rejected applicants of any changes in the position (such as updated requirements) until after a hire has been made.

So, how do you add additional requirements to a position that will only notify your shortlist of applicants?

Simple: you implement a two-stage search by following the steps below. You can customize your workflow to be more than two stages with additional statuses and tags.

1. Use application statuses to divide your applicants into different categories

A. Create an application status specifically for your shortlist of applicants

See here for more information on creating an application status.
Check the box to allow applicants to update their applications when they are assigned this status.

B. Apply the new application status to selected applicants from the Applicant List

Select the shortlisted applicants from the list on the Applicant List of the position.
Look for the "Status" button to the right of the page and apply the new status to selected applicants.

Confirm the new status and the implications. Then click save.
C. Archive applicants that are not moving forward

Filter the list to display applicants with an application status indicating they have not been selected to move to the second stage of the search.

Select all applicants in the filtered list.
Click the "More Options" icon to the top right of the list, and select "Archive" from the dropdown menu.

**Note:** Archiving an applicant does not delete their application. This will simply move them to another folder and “freeze” the applicant's view and what s/he is permitted to do within the system. Archived applicants will not be notified of any updates to the position's document requirements. Although if the applicant opens the application they will be able to see newly added requirements.
2. Edit the position to add the additional required documents you need from applicants on your shortlist

When shortlisted applicants sign into their account, they will see additional requirements for the position and be able to add additional materials or request additional letters of recommendation for this search.

When archived applicants sign into their account, they will not be able to update their application unless they specifically open and enter their submitted application.

Follow the instructions below, and see here for more information on adding and editing the document requirements for a position.

A. Click the "Edit" pencil to edit the position
B. Select "Required Documents" from the list of steps to the right of the page

C. Click "Add Requirement"
D. Select the document type, number required, and add any necessary notes about the new requirement

![Add Document Requirement](image)

3. Notify shortlisted applicants that they must add additional documents to their application

You will need to notify your shortlisted applicants that they must add additional documents to their application.
A. Filter the list to display only shortlisted applicants

B. Select all applicants in the filtered list
Some tips on improving your two-stage or multi-stage search

1. You can add and remove committee members at any time during your search. So it's possible for you to add committee members for either the first or second stage of the search.
2. With application statuses, you can determine whether or not applicants can see their application status. For best results, be consistent and conscientious about allowing different categories of students access to view application statuses.
3. When editing the position, you can add or upload notes to be read internally by committee members on hiring best practices.
Managing a Position
Interfolio Faculty Search: Best Practices for Managing a Search

If you’re managing a search this year, here are a few best practices to keep in mind:

1. **Logging In:** You can help your faculty access their account by resending the invitation to ByCommittee. That email will prompt your faculty member to create a new password and help them access their account. If your committee members experience any trouble, they can select "Forgot your password?" from the Interfolio home page.

2. **Requiring Confidential Letters of Recommendation:** Don’t forget! In order for an applicant to apply to your position, they need to complete all requirements before they can submit. That means, fulfilling each required document slot and completing all required form questions before they can submit their application.

3. **Collecting Additional Documents from a Subset of Applicants:** A common strategy for narrowing down a large applicant pool is a two-stage search. After you narrow down your applicant pool, you can request additional documents from the smaller list of applicants. Don’t forget to add additional document requirements (if necessary), and make sure to edit either the Position Status or the Application Status to permit those applicants to update their application materials.

4. **(For Committee Managers) Change Your Role:** Don’t see the position you’re looking for? It’s possible that you may need to change your role so that you can toggle your scope within the institution, school, college or department. Learn more about our user roles here.

5. **Landing Page Analytics:** Wonder how your applicants are finding your positions? We now have a tool that shows a simple pie chart illustrating how your potential applicants accessed your positions through our service.
applicants are accessing your position's “Apply Now” page. This handy chart can help you learn whether your recruitment dollars are paying off—why pay to post someplace that no one goes? If you aren't getting the applicant pool you expected for whatever reason (not diverse enough, not competitive enough), you can see which job boards are getting applicants and switch tack, if necessary.

Additionally, we have guide books for every user type where all relevant articles for your role are sourced for you. The fifth resource listed is a webinar our Client Success team hosted back in August 2016. It's a comprehensive training covering how to create and manage a search in ByCommittee.

1. A Committee Manager's guide to ByCommittee Faculty Search
2. An Evaluator's guide to ByCommittee Faculty Search
3. An Applicant's guide to applying to a ByCommittee position
4. Help evaluating applications
5. “Finding the Faculty” webinar

Still Stuck?

We're here to help! Anyone can contact our Scholar Services team at help@interfolio.com or (877) 997-8807 Monday- Friday, 9:00-6:00 PM ET.
Create a Position Status

Committee Managers and Administrators can create position statuses, such as "Accepting Applications," or "Under Review," to mark the current state of a position review. Position statuses are created on the "Administration" page of a unit or position in ByCommittee Faculty Search. A position status created for a given administrative unit will become available as a potential status for positions created at or below that administrative unit. Position statuses can also be created from the "Review Position" screen when editing a position.

From your Account Dashboard, click "Manage" and select "Administration"

Check to make sure you are editing settings for the correct unit or position

The settings you make on this page apply to the unit or position displayed at the top left of the page. Click "Change" to update settings for a different unit.
Open the "Statuses" tab, and click "Add" to the right of the list of position statuses.

Enter the status name and indicate the permissions associated with the status.

Set permissions by indicating whether Evaluators can review applications, applicants can update materials, and applicants can view the status when it is applied to a position. Click "Save" to apply the changes.
Click the pencil to edit existing position statuses
Make your edits and click "Save"

Statuses can also be created when editing a position from the "Review Position" screen

Click the edit pencil on the "Applications" page of the position for which you want to add a status

Click "Change"
Note: The "Review Position" screen also appears as the final step in creating a position, so you can also create a new status immediately after creating a position.

Select "Add New Status" from the dropdown menu
Enter the new status, indicate the permissions connected to the status and click "Save"

The new status will be applied
Assign or Change a Position Status

Administrators and Committee Managers can change the status of a position in ByCommittee Faculty Search from the Applications page or the Review Position screen.

To change position status from the Applications page:

1. From your Account Dashboard, select "View Positions"
2. Click the position title to view the list of applicants

3. Click the current status to the right of the page to open a dropdown menu of available statuses

4. Select a new status from the dropdown menu

Note: Notice the "Close Position" status at the bottom of the list. See here for more information on [closing a ByCommittee search](#).
5. Confirm and notify applicants

The "Change Status" window reminds you of the permissions associated with the active status and gives you the option to compose and send an email to applicants about the change.

To change position status from Review Position page:
1. Click the edit pencil beside the application title to open Review Position screen

2. Click "change" to open the "Position Status" window
3. Apply an existing status or create a new one

**Position Status**

- Interviewing Finalists

- Applicants can view this status when it is active.
- Applicants can update their application materials while this status is active.
- Evaluators can review applications while this status is active.

[Save] [Cancel]
Enable or Disable Reviewer Comments and Tags

Administrators in ByCommittee Faculty Search can enable or disable comments and tags from the "Communications" tab of the "Administration" page. When enabled, reviewers can comment on applications, and/or assign tags to applications.

1. From your Account Dashboard, click "Manage" and select "Administration"
2. Check to make sure you are editing settings for the correct unit or position

3. Scroll down to the "Communications" tab
4. Check or uncheck boxes to enable or disable comments and tags
Edit Search Committee Membership (Add/Remove Users)

In order to be added to a search committee, a person must first be added to the program as a ByCommittee Faculty Search user.

Committee Managers and Administrators often add users to a search committee during the process of creating a position, but it is simple to edit the membership of an existing search committee from the "Applications" page of a position.

First, make sure the committee member has been added as a ByCommittee Faculty Search user.

⚠️ If your potential committee member is not already a ByCommittee user, you will need to add them to the program.

Find and click the position title to open the list of applicants for the position:
Click "Additional Options" (three dots) to the right of the screen

Select "View Committee"
Click "Edit"

Click "Add Member" to call up a list of available ByCommittee users who can serve on your committee

Search for the user by first or last name, and click "Add" to add them to the committee
As you are typing, matches of existing ByCommittee users will appear.

Click "Add Manager" to call up a list of available Committee Managers for your committee.
Click "Add" to add the user as Committee Manager

This list displays users who have been assigned the role of Committee Manager for the unit in which you are working. If you don't see the user you are looking for you, may need to assign the user the role of Committee Manager for the unit in which you are editing the position.
Keep adding members and/or managers until you have your committee assembled, and click "Update"

To remove a member, simply click the X next to the user's information.
Request a Letter of Recommendation on Behalf of an Applicant

Committee Managers and Administrators can request confidential letters of recommendation directly from recommenders on behalf of an applicant. This allows, for instance, a committee to request recommendations from a list of potential recommenders suggested by the applicant without involving the applicant in the request process.

Navigate to the applicant's profile page
Click "View Positions"
Click the name of the position

Select the applicant
Click the "Additional Options" icon to the right of the documents section of the application.

Select "Request Recommendation".

Fill out the request form, set a due date for the recommendation, and write an email message to recommenders.
Letter writers will receive the message you create along with instructions for submitting the recommendation.

You can request recommendations from multiple letter writers at once.
When requesting recommendations from multiple writers, you can use text variables to automatically fill in the first and last name of each letter writer.

You can also attach files from the materials submitted by the applicant.

Click "Add"
Select a document to include with the request

The request will appear listed in the applicant's document queue. While it is still pending, you can resend, edit and resend, or cancel the request.

Once received, the recommendation will appear in the "Documents" section of the Applicant Profile page.
Automatically fill in the first and last names of recommenders when sending letter requests to multiple letter writers

When requesting letters of recommendation from multiple letter writers, you can set ByCommittee to automatically personalize the message sent to each recommender. It is quite easy to set this up, and only requires that you cut and paste a couple lines of text into the salutation of your message.

Open the recommendation request form from the profile page of the applicant
Add the names of your recommenders

Recommendation Request for Bing Boland
Use this message to request confidential recommendations on behalf of the applicant from one or more recommenders. Your request can include a personal message and materials to aid in their review. Note that you can create one message to request recommendations from multiple recommenders.

<table>
<thead>
<tr>
<th>Recommender First Name</th>
<th>Recommender Last Name</th>
<th>Recommender Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ronaldo</td>
<td>Whiten</td>
<td><a href="mailto:wr@demo.edu">wr@demo.edu</a></td>
</tr>
<tr>
<td>Samal</td>
<td>Amo</td>
<td><a href="mailto:as@demo.edu">as@demo.edu</a></td>
</tr>
<tr>
<td>Thomas</td>
<td>Edle</td>
<td><a href="mailto:et@demo.edu">et@demo.edu</a></td>
</tr>
</tbody>
</table>

Add Another Recommender

Enter the salutation of your message

Deadline

Message

Dear

Copy the variables from the "Help with Messaging" box to the right of the page
We have provided variables for first and last name. You can use one or the other, or both if necessary.

Paste the variable(s) into the message

- Don't forget to add a comma at the end.

- You may want to include the title if you know all of your letter writers will share a title such as "Dr." or "Prof."
Fill in your message and click "Preview" to see how it will appear to recipients.

The preview displays an example of how the message will appear in the inbox of all recommenders:

Dear Dr. %LW_First% %LW_Last%,

The search committee at Demo University requests a confidential recommendation on behalf of [Recipient] applying for the position of Assistant Professor of Orthodontics at our institution. We would appreciate your input as your letter will provide a letter evaluating the applicant's teaching abilities and scholarship.
Demo University is conducting a review of Bing Boland and has requested a confidential evaluation.

I ACCEPT

I DECLINE

If you have questions about this request, please contact sot@demo.edu.

Dear Dr. Ronaldo Whiten,

The search committee at Demo University requests a confidential recommendation on behalf of Bing Boland, who is applying for the position of Assistant Professor of Orthodontics at our institution. We would be most grateful if you could provide a letter evaluating the applicant’s teaching abilities and scholarship.
Edit an Existing Position

Committee Managers and Administrators can edit position settings and information from the Review Position screen in ByCommittee Faculty Search.

Select "View Positions from your ByCommittee Faculty Search Account Dashboard"
Select the position to edit

Click the pencil icon to the right of the page

Select a step to edit from the sidebar

Click the name of any of the six steps listed in the "Edit Position..." sidebar to edit information and settings for the position.
Other edits possible from the Review Position page

From the Review Position page you can edit all of the information and settings established when creating the position:

1. Set the open and close dates of the position
2. Click "view" to see published landing page for the position. Click "change" to unpublish landing page.
3. Click "change" to set status of a position and select associated permissions (e.g., allow Evaluators to review applications, allow applicants to update applications and/or view status).

Note: While some areas are easy to change at any time, such as the members of the committee, we recommend exercising caution when editing other areas, particularly the required documents and application forms. Changes to required documents and forms initiated after the position opens may result in issues with the complete/incomplete status of individual applications.
ByCommittee – Positions
Associate Professor of Orthodontic Dentistry
Review Position

THIS POSITION IS:  
Open to new applicants

POSITION STATUS:  
Accepting Applications

With this status active:

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

It opened on Jan 31, 2016. change clear
It will close on Jun 24, 2016. change clear

“Apply Now” page is published. view change
Close a Position and Indicate the Outcome of a Search

A ByCommittee Faculty Search position is either "Open," meaning the position is accepting new applications, or "Closed," meaning no new applications are being accepted.

Committee Managers and Administrators can close a position when applications are no longer being considered, either because a hire has been made or for some other reason.

When closing a position, Committee Managers or Administrators are asked to indicate which applicants were selected to fill the position, and if no applicants were selected, can leave an optional note to document why no selection was made. The user is also asked to set a final closed status for the position and has the option to send a message to all applicants based on the status they have chosen.

In addition, Administrators can run reports that clearly document who was hired for every search in the system. For more information see this article on how to run a report on hired applicants.

This article explains how to close a position and document the outcome of the search.

Note: The open and close dates for a position represent the date range within which new applicants can apply. If a position is reopened, new open and close dates will need to be set from the Review Position screen as explained below.

Select the position you want to close from the list of positions

![Positions](image-url)
The current status of the position is displayed to the right of the screen

Click to open the dropdown menu and select "Close Position"
Indicate whether or not an applicant was selected to fill the position

If no applicant was selected, you can leave an optional note to document why no selection was made.
If an applicants was selected, type the name in the search bar and click "Add" when it appears

Click "Continue" when all of the applicants selected to fill the position have been added to the list
Select a position status or add a custom position status to complete the search

The position status is a label that indicates where a search is in the process and allows you to set rules for what Evaluators and applicants can do when that particular status is active. See here for more information on Position Statuses.

Select an existing position status from the dropdown list
-or- Add a new custom status and click "Finish"

If you have to add a custom status you will need to set permissions linked to the new status

Whether you use a custom status or create a new one, you can set whether or not applicants can view the status, update their application materials, and whether or nor evaluators can review applications while the status is active.
You can elect to send a message to applicants notifying them of the change in status

Click "Preview" to see how the message will appear in the inbox of applicants. Click "Finish" when you are ready.

The position is now closed

Note: The landing page of the closed position will be unpublished and no longer accessible to applicants.
The position will no longer appear in the list of active cases but will appear in the list of closed (archived) positions viewable by filtering the list of positions.

To reopen the position, select it from the list of closed positions.
The current status of the position is displayed to the right of the list of applicants.

Click to open the dropdown menu and select "Open Position"
Select and apply a new status to reflect that the position has been reopened

Confirm the change to an open status
You will need to edit the position if you want to start accepting applications again.

You may need to manually change the close the date of the position if you want to start accepting applications again.
You may also want to republish the "Apply Now" page for the position.
Reopen a Closed Position

A ByCommittee Faculty Search position is either "Open," meaning the position is accepting new applications, or "Closed," meaning no new applications are being accepted.

Committee Managers and Administrators can close a position when applications are no longer being considered, either because a hire has been made or for some other reason.

If you need to reopen a closed position, follow the instructions below.

Filter your list of positions to show only closed (archived) positions
To reopen the position, select it from the list of closed positions

The current status of the position is displayed to the right of the list of applicants
Click to open the dropdown menu and select "Open Position"

Select and apply a new status to reflect that the position has been reopened
Confirm the change to an open status

**Change Status**

Please confirm you wish to change the status of this position to **Interviewing Finalists**.

**WITH THIS STATUS ACTIVE:**
- Applicants cannot view this status.
- Applicants cannot update their application materials.
- Evaluators can review applications to this position.

☐ Send a message to all applicants with this change

[Confirm] [Cancel]

You will need to edit the position if you want to start accepting applications again
You may need to manually change the close the date of the position if you want to start accepting applications again.

You may also want to republish the "Apply Now" page for the position.
Creating an Open Rank Search

Because of a recent update, we're now requiring applications to be complete before they are submitted. Before, applicants could submit their applications before they were complete, but the rules around editability were confusing to them. Now, applicants can submit only if all document requirements are complete (or with letters of recommendation pending).

Because of the update, you will not be able to create requirements for 2 different sets of applicants.

*Example: Applicants at the rank of Assistant Professor should include three reference letters and Associate faculty candidates should include a list of three references.*

Instead, to accommodate this type of search, you'll want to create “optional” requirements for your applicants. To create “optional” fields for your applicants, you’ll first need to jump into the position and select the edit option. Ultimately, you’ll need to edit the number of documents required to zero.

1. On your position's review page, select "Required Documents"
2. Select the pencil next to the requirement that needs to be optional

3. Type in the number 0 so that technically, 0 documents will be required for the applicant
4. Select "Save" then "Update"
View Referral Sources to See Where People are Finding Your Position

Administrative users can get an idea of where people are finding a position by viewing a graph of the top websites sending visitors to the landing page of a position.

Note that the number of visitors will be larger than the number of applicants to your position because more people will view the posting than will apply for a position.
To find the chart, click "View Positions" on your Faculty Search dashboard

Select the position to track
Click the chart icon at the top right of the page

The top referring websites are represented in a color coded circle graph
Click a section of the graph to see the percentage of visitors sent to your position by the source.
Evaluating Applicants
If You Have Multiple Roles In ByCommittee, Change Your View to See Positions for a Particular Role

ByCommittee's Faculty Search allows Administrators to assign users three distinct roles: Administrator, Committee Manager, and Evaluator. One user may have more than one role in a department, or roles in more than one department. While conducting your search, you can change your scope to move between the different user roles you have been assigned.

More information on user roles and permissions can be found [here](#).

From your Dashboard, scroll over ByCommittee Faculty Search and select "View Positions"

![Welcome, Beverly!](image)

Your current view is displayed in the upper left of the "Positions" page
In the example below, the user is viewing the list of positions to which they have access that have been created under the administrative level "Demo University."

Note: The system will always default to your highest permission.
Click "Change" to view positions from a different unit

Select the unit to view and click "Save"
Positions to which you have access in that unit will display in the list.

Selecting "All Evaluator Positions" will display all positions to which you have been assigned as an evaluator.
View the List of Positions

Positions accessible to you in ByCommittee Faculty Search appear on the Positions page.

Select "View Positions" on your Faculty Search Account Dashboard

Positions are listed in a table that displays the position name, status, type, and open and close dates

The positions to which you have access will display in a table that lists:

1. The name of the position is generally the title of the position you are trying to fill such as "Associate Professor..."
2. The position status describes the current state of the search, such as; Accepting Applications, Under Review, etc.
3. The type of of the position indicates if this is a search for faculty, staff, or fellowship recipients
4. The open and close dates indicate when a position is open or closed to new applications
5. The number of applications is listed here
6. A red EEO flag indicates that a problem has been identified by an EEO officer
If you don't see the position you are looking for, check to make sure you are viewing positions for the correct role.

If you have more than one role in the program, for instance, if you are an Administrator AND an Evaluator, or if you have access to multiple units, you may need to change the scope of what you are viewing by selecting the correct role from the dropdown box at the top left of the Positions page.
To access the applications for a position, click the position title.

The "Filter" button allows you to limit the list according to status or view archived (closed) positions.
You can also sort the list by title, type of position, or open date

If you have multiple roles within the program, or roles within multiple organizational units, you can set the list to display positions according to your role

1. The current scope, or the administrative unit you are viewing, appears beneath the "Positions" heading
2. Click "Change Role" to open a dropdown list that displays your role in the units to which you have access
3. Click the link for "All Evaluator Positions" to limit the list of positions to display only the positions to which you are assigned as an Evaluator
Don't see the position you are looking for?

- Ensure that you've been assigned to the search committee: You may not yet be assigned as a committee member to the position
- Check the status of the search: The current status of the search may not allow for Evaluator access
Access the Applications For a Position

In Faculty Search, all the applications to a given position appear listed on one page. We call this the Applicant List. This article explains how to find the Applicant List and how to access applications.

💡 The list of applications for a position is often quite long. We provide you with a number of useful features and organizational tools to help you sort and manage your work on the Applications List. See here for more information on working with the Applicant List.

To view the list of applicants for a position:

1. Select "View Positions" on your Faculty Search Account Dashboard
2. Click the position title to open the list of applications for that position

![Positions](image)

3. You will see the list of applicants for your position listed in a table as shown below

![Table](image)

- The position title and open and close dates appears at the top left of the page, the position status to the top right.
To access applications:

Select one or more applicants in the list

1. Check the "Applicant Name" box at the top of the table to select all applicants in the list, or check the box next to the applicant(s) you want to review.
2. Click an applicant's name to view the profile of an individual applicant.
3. Selecting a name or names from the list opens a new set of buttons on the page.

Note: The buttons that appear after selecting an application are determined by your role in the program. If you are an evaluating committee member, you will likely see "Read" and "Tag" buttons. Committee Managers or Administrators may see additional buttons for assigning a status to an application, emailing applicants, etc.
To read application materials:
Click "Read" to view selected applications in your browser using ByCommittee's "Materials Viewer"

- See here for more information on using the viewer to read and annotate application materials.
To download materials for one or more selected applications:
1. Select one or more applicants in the list
2. Click the "Additional Options" icon and select "Download"
3. You will receive an email and a notification when your download is ready.

4. Click to download your materials

* The example below is for downloading materials from the notifications menu, but you can also download these materials through the email you receive, or from your Notifications center.
The application materials will be downloaded as zipped collection of PDF files.

See here for more information on other options for downloading application materials, including downloading all materials for an individual application, and downloading individual application documents one at a time.
Working With the List of Applicants For a Position

The list of applicants for a position is often quite long, but we provide you with tools that will help you organize your work by allowing you to customize how the list or applicants is sorted and what information is displayed. You can also save and recall your searches and customized views of the list so you can save your work and return to it later.

This article explains the tools we provide to help you sort, organize and manage the applications for your position.

Access the list of applicants for a position:
1. Select "View Positions" on your Faculty Search Account Dashboard
2. Click the position title to open the list of applications for that position

You will see the list of applicants for your position listed in a table. The position title and open and close dates appears at the top left of the page, the position status to the top right, as shown below.
3. Select one or more applicants in the list

- Check the "Applicant Name" box at the top of the table to select all applicants in the list, or check the box next to the applicant(s) you want to review.
4. Selecting a name or names from the list opens a new set of buttons on the page as shown below.

The buttons that display here are determined by your role in the program, and your display may show different buttons than the ones below.

You can read, annotate, and download the selected applications.

See here for more information on using our Materials Viewer to read and annotate application materials.

See here for more information on downloading application materials.
Searching the list of applicants and saving searches:
1. Enter a keyword in the box to search the list
2. The results display and the search term appears above the list
3. Click "Save" to save and name the view of the list filtered according to your search results

4. Enter a name for your view and click the check to save it
5. Click "Saved Views" to the right of the page to recall the saved view of the list

Filter the list of applicants and save and recall your view:
1. Click the "Filter" button at the top of the list to open a set of options for filtering the list

ℹ️ You can filter the list of applications by data points including highest degree earned, application status, labels, ratings, or completion status.

💡 If applicants have filled out forms, you can also filter by responses to application forms!
2. 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 labeled "Clear Filters."
3. Click "Save" to name and save the filtered view of the applicant list

4. Enter a name and click the check mark
5. Click "Saved Views" (to the right of the page) to recall the view of the list using the filters you have set.

Tagging applications:

Tags are bits of text you can use to help identify, sort, and mark applications. If your institution allows it, you can add and create tags to attach to an application.

With one or more applicants selected in the list, click the "Tag" button and either select or create a tag.

You can also click the "Add" icon to add a label to an application.
Customizing the columns of information that display on your view of the applicant list:

You can configure which columns the applicant list will display.

Click the "Columns" button to the right of the page 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.
Setting the pagination of the applicant list:

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.
Saving searches and views of the list:

- 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 view a name.
View an Applicant's Profile

Each applicant to a position in ByCommittee Faculty Search has a profile page where Evaluators can access the applicant's application materials. If settings allow, Evaluators can also assign ratings and leave comments on an application from the Applicant Profile.

Note: This article is primarily about the Applicant Profile page as it appears to Evaluators in Faculty Search.

Committee Managers and Administrators can perform several administrative functions from the Applicant Profile. Some of these are mentioned below, but most are covered in other articles.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title

Accessing application materials:

- Applicant's uploaded materials appear under the "Documents" heading. From here you can access materials to read and make notes from your browser, or download materials.
Click "Read" to load all application materials into the viewer where you can read and annotate documents.

Click "Download" to save a copy of all documents in a single PDF.
You can also download files from the upper right corner of the Materials Viewer.

Viewing responses to application forms:

If forms are included as part of the application, you can view how the applicant responded to form questions.

Scroll down to "Application Forms" and click the title of the form you want to view.

The applicant's responses to the form will display in a popup window.

Adding tags, and sharing an application:

Note: Tags must be enabled by your institution. If they do not display, your institution may not have enabled the feature.
Click the "plus" sign to add or edit tags on the application.

To share the application, click the "forward" icon at the top right of the page, and fill out the message form that opens.

⚠️ Applicant details and materials will be attached to the message when you share an application.
Emailing the applicant:

Committee Managers and Administrators can email the applicant by selecting the envelope icon at the top right of the Applicant Profile page.
Rating applicants:

If enabled, you can rate applicants on pre-established criteria using a simple five-star scale.

Scroll down to "Ratings" and scroll over the stars to rate the applicant

If the search has been set up as blind review, you will only see your own ratings. If allowed, you may see a summary of the ratings of other Evaluators on your committee.

Commenting on an application:

Depending on how your institution has set up the program, you may only be able to read your own comments.

Scroll down to "Comments" and click "Add Comment"

Note that you can edit and delete comments using the icons to the right of the page.
About Notes:

You may see notes providing additional information about this application such as hiring notes, application notes, or offer notes.

Notes can be created by Committee Managers and Administrators, but are visible to all members of a committee.

To leave a note, click "Add note" and select the type of note you want to add.
Read and Evaluate Applications Using the Materials Viewer

ByCommittee Faculty Search users can read and annotate application materials using our built-in viewer.

Materials from multiple applicants can be loaded into the viewer, allowing users to scroll through and evaluate applications without leaving the browser window.

Users can also make annotations on application materials, download the annotations they make, and if enabled, can leave comments, add labels, and rate applicants from the viewer.

💡 The instructions below are for accessing the viewer from the Applications page of a position. Accessing the viewer from here allows evaluators to load multiple applications into the viewer at once. Note that evaluators can also access the viewer from the profile page of an individual applicant and read one application at a time.
Navigate to the Applications page for the position you are evaluating:
Select "View Positions" on your Faculty Search Account Dashboard

Click the position title
Select applications to review

Click "Read" to load selected applications into the Materials Viewer

The buttons that display here are determined by your level of permissions in the program.
All selected applications will be loaded into the viewer for you to review one at a time.
If enabled, users can leave comments, tags, and ratings, and download applications from the top right of the viewer.

Viewing Materials:
All materials of the currently displayed application will appear bookmarked in the left hand column of the viewer.

Click the name of a document to display it in the viewer.
Videos will also display in the viewer

Links to Webpages appear in the viewer but open the webpage in a new browser tab
Navigating in the Document Viewer:
Use the arrows at the top of the viewer to move between applications when multiple applicants are selected.

Use the controls at the bottom of the viewer for navigation of the currently displayed application:

Toggle on or off the header bar of the viewer for distraction free viewing of materials.
Annotations are private, personal notes about an application, and are only viewable by the committee member who added the note. See here for more information on making annotations on application documents.
Annotations are added and managed from the lower right corner of the viewer.

Click the "note" icon to leave an annotation on the currently displayed document.
Click the "view" icon to toggle on or off the display of annotations.

You can quickly view all of the annotations added to a document from the "Annotations" tab in the document viewer.

Click the annotation in the list to find it in the application.
Note that you can export and download annotations by clicking the export icon.

Annotations are exported to a PDF file that you can save, download and print.

<table>
<thead>
<tr>
<th>Bing Boland</th>
<th>1 of 4 Applicants</th>
<th>Application</th>
<th>Annotations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Search</td>
<td></td>
</tr>
<tr>
<td>Cover Letter</td>
<td>Nov 7, 2016 at 2:35 PM</td>
<td>Note that these shorter publications are standard in the field.</td>
<td></td>
</tr>
<tr>
<td>Cover Letter</td>
<td>Nov 7, 2016 at 2:45 PM</td>
<td>Good amount of experience.</td>
<td></td>
</tr>
<tr>
<td>CV</td>
<td>Nov 7, 2016 at 2:33 PM</td>
<td>Ask Jane for her thoughts on this.</td>
<td></td>
</tr>
</tbody>
</table>
Download Application Materials

Evaluators can download application materials one document at a time, download an entire packet of application materials, or select and download the application materials of a group of applicants.

Click "View Positions"

![Image of Interfolio Faculty Search interface](image)
Select the position you are evaluating from the list of positions

To download application materials for one or more selected applicants:
1. Select one or more applicants from the list
2. Click the "Additional Options" icon to the right of the page, and select "Download" from the dropdown menu.

3. You will receive an email and a notification when your download is ready.

4. Click to download your materials.

The example below is for downloading materials from the notifications menu, but you
can also download these materials through the email you receive, or from your Notifications center.

The application materials will be downloaded as zipped collection of PDF files.

Download Position Applications (ZIP)

Your file download should begin shortly. If it does not, you may download the file directly.
To download individual documents from an application:
Click the download icon for the individual document that appears to the right of the page.

- The selected document will be downloaded as a PDF file.
Print Applications

To print application materials in ByCommittee Faculty Search, you must download the materials and print the downloaded files.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title

Select applications to print
Click the "Additional Options" icon and select "Download" to save PDF copies of all selected applications zipped into a single file.

Print the downloaded file

Each PDF contains all application forms and materials (transcripts, CV, teaching philosophy, etc.), ready to print.
Rate Applicants

If your institution or department allows it, Evaluators can rate applicants on a simple 5-star scale. Ratings can be assigned and viewed from the Applicant Profile page or from within the Materials Viewer.

Depending on the settings established by your institution, you may or may not be able to see the ratings of other Evaluators.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title

Click the applicant's name to open the Applicant Profile page

If enabled, you will see an average of the ratings you have given the applicant to the right of the page.

Scroll down to "Ratings" and mouse over the stars to rate the applicant.
If the search has been set up as blind review, you will only see your own ratings. If allowed, you may see a summary of the ratings of other Evaluators on your committee.

You can also assign ratings while reviewing applications in the Materials Viewer:
On the Applications page, select the name or names of the applicants to review and click "Read"

💡 Click " Applicant Name" at the top of the table to load all applications into the viewer.
The applications you’ve selected will open in the viewer

Click "Ratings" at the top right of the document viewer
Enter your ratings for each criteria and click "X" to close when you are finished rating the applicant.
Comment on an Application

Depending on your institution's or department's settings in ByCommittee Faculty Search, Evaluators can comment on applications from the Applicant Profile page, and can also add comments from the Materials Viewer while reviewing applications in a browser window.

Comments are not the same as annotations. Depending on the settings in the program, comments may be visible to other reviewers, where as annotations are personal notes only visible to you.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title

Click the applicant's name to open the Applicant Profile page

Scroll down to "Comments" and click "Add Comment"

Depending on the settings, you may only be able to read your own comments.
Comment on applications from the Materials Viewer:

You can also comment on applications from the viewer by following the steps below. This allows you to load multiple applications into your browser and scroll through leaving comments without leaving your browser window.

On the Applications page, select the name or names of the applicants to review and click "Read"

The applications you've selected will open in the viewer. Click next to "Applicant Name" at the top of the table to load all applications into the viewer.
Click the "Comments" button at the top right the viewer

Enter your comment and click "Save"
Use Tags to Mark and Sort Applications

Tags are bits of text that can be added to an applicant's record to help sort, categorize, and quickly identify applications in ByCommittee Faculty Search.

If enabled, committee members can use tags:

- To identify candidates with significant achievements such as teaching awards or fellowships.
- To mark progress of an application through the hiring process ("Interviewed," "Shortlist," "Not Competitive").
- To quickly add comments useful for sorting applications ("Good Teaching Evaluations," "Strong Publications").
- To mark applications they have reviewed or are responsible for reviewing.
- To filter the list of applicants and focus on the most competitive.

Committee Managers can also use tags to assign specific Evaluators to a candidate. Tags can be added from the Applications page, the Applicant Profile of an individual candidate, and can also be attached to an application when running an application report.
Navigate to the Applications page for a position
Select "View Positions" on your Faculty Search Account Dashboard

Click the position title

Check the box next to name of applicant(s) you want to tag

💡 Click "Applicant" at the top of the table to select all applicants.
Checking the box next to a name opens a row of buttons to the right of the page.

The buttons that appear here are determined by your permissions in the program.
Click the "Tag" button

Select the tag you want to apply, or select "Add new tag" to create a new one
In the default list view, applied tags appear in the same row as the applicant's name.

Note that you can set whether or not tags will display by customizing and saving your view of the list.
You can also create and add a tag to an application by clicking the "Add" icon in the same row as an applicant's name.

You can use tags to filter the list of applications: Click "Filter" at the top of the list of applications and select one or more tags from the list.

Note that the active filters appear across the top of the list of applications.
Only applications with the selected tag(s) will display in the list

To remove the tag as a filter, uncheck it in the list of filters at the top of the page, or click the "X" beside the tag in the list of filters above the applicant list.
You can also add and create tags from the Applicant Profile page

Users with access to reporting functions can add tags to an Applications Report

💡 For more information see the article on how to Create an Applications Report.
Committee members can add annotations to individual documents when viewing application materials in the viewer and can export the annotations they make in a PDF file.

Annotations are private, personal notes about an application, similar to attaching sticky notes, or marking up a document with comments. Such annotations come in handy if you are a committee member reviewing a large number of applications and need to remember your thoughts about each applicant.

Unlike comments, which can be viewed by other committee members, these annotations are visible only to the evaluator who created them.

Annotations have their own tab in the viewer, making it easy to quickly view your notes. Simply export your annotations to save your notes on an application.

Only in extreme cases (such as a lawsuit that demands discovery of all private documents) are annotations "discoverable."
Navigate to the Applications page for the position you are evaluating:
Select "View Positions" on your Faculty Search Account Dashboard

Click the position title
Select applications to review

On the Applications page, check the box next to "Applicant" at the top of the table to select all applications -or- check the box next to the name of each individual applicant you want to review.

Click "Read" to load selected applications into the document viewer

Selecting names in the list opens a new set of buttons on the page. The buttons that open here are determined by the actions your user role can perform in the program. Committee Managers and Administrators will see a few more buttons than Evaluators.
All selected applications will be loaded into the viewer for you to review one at a time.
You can quickly view all of the annotations added to a document from the "Annotations" tab in the document viewer.

💡 Click the annotation in the list to find it on the application.

Note that you can export and download annotations by clicking the export icon.

ℹ️ Annotations are exported to a PDF file that you can save, download and print.
Annotations are added and managed from the lower right corner of the viewer

Annotations are private, personal notes about an application, and are only viewable by the committee member who added the note.
Click the "view" icon to toggle on or off the display of annotations.
Click the "note" icon to leave an annotation on the currently displayed document

Select the type of annotation you want to create

- Make no selection to add a simple "stickie" note to the document
- "Point" adds a note with an arrow pointing to a particular point in the document
- "Area" adds a note about a selected area
- "Text" adds a note about highlighted
Stickie notes:

Click into the document and add your note where you want it to appear.

"Point" (arrow) notes:

Select "Point," and add a note with an arrow in the document. You can drag and drop to change the location of the arrow or note.
"Area" notes:

Click "Area," and draw to select an area in the document to annotate.

"Text" notes:

Click "Text" and select text in the document to highlight. Note that you can choose between orange or yellow highlighting.
To edit a note you've added, simply click into the text field.
To delete a note, click into the text field and then click the trash icon.
Share Applications by Email

ByCommittee Faculty Search users can share applications with their colleagues by email from the Applicant Profile page.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title

Click the applicant's name to open the Applicant Profile page

To share the application, click the "forward" icon at the top right of the page

⚠️ Applicant details and materials will be attached to the message when you share an application.
Fill out the message form and send
Notifications Center in ByCommittee Faculty Search

Users receive notifications and reminders of some pending and recent actions in the program. If you have multiple Interfolio accounts (say, ByCommittee Faculty Search and your own personal Dossier) you will see notifications for all accounts in one place, although your information will remain private between accounts. You can see notifications in the upper right corner, or, if you click "View all notifications," you'll be able to see all of your upcoming tasks on a single screen.

Click the notifications icon in the upper right corner of the Accounts dashboard to view notifications.
Notifications appear in a dropdown list organized by product.

Click "View All Notifications" at the bottom of the panel to view the Notifications Center.
Notifications for all products appear in one central location

In Faculty Search you will see notifications of positions that need approval (if you are the designated approver), when positions have been approved, as well as notifications of new committee assignments and pending position close dates.
Download Application Materials

Evaluators can download application materials one document at a time, download an entire packet of application materials, or select and download the application materials of a group of applicants.

Click "View Positions"

![Screenshot of Interfolio Faculty Search](image-url)
Select the position you are evaluating from the list of positions

To download multiple applications at once:
1. Select multiple applicants from the list
2. Click the "Additional Options" icon to the right of the page, and select "Download" from the dropdown menu.

3. You will receive an email and a notification when your download is ready.

4. Click to download your materials.

The example below is for downloading materials from the notifications menu, but you
can also download these materials through the email you receive, or from your Notifications center.

The application materials will be downloaded as zipped collection of PDF files.
To download all application materials for an individual applicant:
1. Click on the applicant's name in the list to open his or her applicant profile

2. Click the "Additional Options" icon to the right of the page, and select "Download"

Application materials will be downloaded as a PDF file.
To download individual documents from an application:
Click the download icon for the individual document that appears to the right of the page.

The selected document will be downloaded as a PDF file.
If you have been asked to provide an evaluation for a candidate who is up for review at an institution that uses ByCommittee Faculty Search, you can fulfill this request in a few, simple steps outlined below.

Indicate if you accept or decline the letter request

All requests for evaluations are managed by an administrator at the institution conducting the search. This individual will invite you to submit an evaluation via email.

The email will include:

- A due date for submission of the evaluation
- The email address of the individual who sent the request, in case you have questions
- A personal note (if any) from the person or committee making the request
If you accept the request:

Click "I accept"

![Image of a request form with "I accept" and "I decline" options]

If you choose to accept the request you will be taken to a page with relevant documents (if any), provided by the institution, to help guide your review.

Click "Download" to access files included with the request.

*Note: selecting “Accept” will notify the requester that you have accepted, but will not show whether you have read or uploaded materials.*
When you are ready to submit your evaluation, click "Select File for Upload"

You can return to the page at any time while you are working on your evaluation by either re-opening the initial email request and clicking “Accept,” or, if you have an Interfolio account, sign into your account to find the request on your dashboard.
Drag & Drop or browse to locate the file containing your evaluation

Click "Submit Evaluation"

Activate your free Interfolio account

You will see a confirmation screen thanking you for your evaluation and inviting you to create a free Interfolio account.

💡 You do not need an account to submit an evaluation. This is an optional step. However,
you may find it useful to store, track requests, and send confidential recommendations using your free account.

**Confidential Evaluation Request for Rita Book**

from Demo University

Thank you for completing an evaluation on behalf of Rita Book!

Your document will be sent to the appropriate committees for review.

interested in saving your work and making your letter writing process even easier in the future? Activating a free account with Interfolio allows you to store and send confidential letters of recommendation for candidates to a range of academic opportunities, from grants to tenure reviews to faculty positions. Plus, your account will contain any previous history of letter requests that were sent to this email address.

![Activate Now Button]

If you decline the request:

Click "I Decline"

---

Farragut Square State University

Farragut Square State University is conducting a review of Katie Feo and has requested a Confidential Recommendation.

I ACCEPT

I DECLINE

Farragut Square State University asks that you submit your recommendation by May 26, 2017. If you have questions about this request, please contact davidlopes@interfolio.com.

Hi Dr. Marcus,

We are currently considering Katie Feo for a tenure-track faculty position at FSSU. We are hoping you would consider writing a letter of recommendation on her behalf. Please use the link in this email to accept the request, review her information, and submit your letter. We appreciate your support! Feel free to reach out to my assistant Max Swagler if you need any support in fulfilling this request.

Best,

David
If you choose to decline the request for an evaluation you will be taken to a page confirming your choice. Note that if you change your mind, you can come back to this page through the original email (or your Interfolio account if you have one) and agree to submit an evaluation.

Click "Message the Committee" if you want to write a message to the committee who sent the request.
You do not need an account to submit an evaluation. This is an optional step. However, you may find it useful to store, track requests, and send confidential recommendations using your free account.
Confidential Evaluation Request for **Rita Book**
from Demo University

Thank you, we received your decision on May 1, 2017.
If you have any questions, please contact: blothar.brown@interfolio.com

Interested in saving your work and making your letter writing process even easier in the future? Activating a free account with Interfolio allows you to store and send confidential letters of recommendation for candidates to a range of academic opportunities, from grants to tenure reviews to faculty positions. Plus, your account will contain any previous history of letter requests that were sent to this email address.

[Activate Now]
Managing Applications
Add Materials on Behalf of an Applicant

This article explains how Committee Managers and Administrators can add materials to an application on behalf of an applicant in ByCommittee Faculty Search.

Select "View Positions" on your Faculty Search account dashboard
Click the position title

Click the applicant's name to open the Applicant Profile page
Add document files (pdf, .doc, etc):

Scroll down to the "Documents" section and click "Add File"

You can drag & drop or browse to upload document files
Give the document title, and identify the type (cover letter, C.V., etc)

If the file satisfies a requirement, indicate which requirement it satisfies
Click "Add" to upload the document

Add video files:

You can also upload links to Vimeo or Youtube videos and use those to satisfy document requirements of the application.
Select the "Video" tab, give the video a title, add the url of a Youtube or Vimeo video, and add a description.

If the video satisfies a requirement, indicate which requirement it satisfies.
The video will be added to the application materials

Evaluators can view the video in the materials reader

Add Webpages:

You can also add links to webpages and use those to satisfy document requirements of the application.
Select the "Webpage" tab, give the webpage a title, add the URL and a description of the page.

If the webpage satisfies a requirement, indicate which requirement it satisfies.
A link to the page will be added to the application materials, and will display to evaluators when they open the materials reader.

The link will display in the materials reader.

Note: Clicking the link will open the webpage in a new browser tab.
Mark the application complete when all required materials are received

Click the "Additional Options" icon to the right of the page, and select "Mark Application Complete."
Create an Application on Behalf of an Applicant

This article explains how Committee Managers and Administrators can create an application on behalf of an applicant in ByCommittee Faculty Search.

Select "View Positions" on your Faculty Search Account Dashboard
Find the position you are working on and click the title to open the list of applicants for the position.

Click the "Add" button on the Applications page of the position.
Fill out the "Add New Application" form and click "Add"

The applicant's name now appears in the list of applications
Applicants will receive a standard email after being added

![Email example](image)

Administrators and Committee Managers **CANNOT** fill out forms (EEO or Custom) on behalf of applicants.

Applicants must be notified to complete any form responses, and to do so the application must allow for updates. For more information on how to accomplish this, reference our resources on [Messaging Applicants](#) and [Creating a Position Status](#).
To add materials to the application:
Click the applicant's name to open the Applicant Profile page

Scroll down to the "Documents" section and click "Add File"
Add document files (pdf, .doc, etc):
Scroll down to the "Documents" section and click "Add File"

You can drag & drop or browse to upload document files
Give the document title, and identify the type (cover letter, C.V., etc)

If the file satisfies a requirement, indicate which requirement it satisfies
Click "Add" to upload the document

Add video files:

- You can also upload links to Vimeo or Youtube videos and use those to satisfy document requirements of the application.
Select the "Video" tab, give the video a title, add the url of a Youtube or Vimeo video, and add a description.

If the video satisfies a requirement, indicate which requirement it satisfies.

The video will be added to the application materials.
Evaluators can view the video in the materials reader

Add Webpages:

You can also add links to webpages and use those to satisfy document requirements of the application.
Select the "Webpage" tab, give the webpage a title, add the url and a description of the page

If the webpage satisfies a requirement, indicate which requirement it satisfies
A link to the page will be added to the application materials, and will display to evaluators when they open the materials reader.

The link will display in the materials reader.

Note: Clicking the link will open the webpage in a new browser tab.
Mark the application complete when all required materials are received

Click the "Additional Options" icon to the right of the page, and select "Mark Application Complete."
Request a Letter of Recommendation on Behalf of an Applicant

Committee Managers and Administrators can request confidential letters of recommendation directly from recommenders on behalf of an applicant. This allows, for instance, a committee to request recommendations from a list of potential recommenders suggested by the applicant without involving the applicant in the request process.

Navigate to the applicant's profile page
Click "View Positions"

[Image: Screen showing the option to view positions]
Click the name of the position

Select the applicant
Click the "Additional Options" icon to the right of the documents section of the application.

Select "Request Recommendation".

Fill out the request form, set a due date for the recommendation, and write an email message to recommenders.
Letter writers will receive the message you create along with instructions for submitting the recommendation.

You can request recommendations from multiple letter writers at once.
When requesting recommendations from multiple writers, you can use text variables to automatically fill in the first and last name of each letter writer.

You can also attach files from the materials submitted by the applicant.

Click "Add"
Select a document to include with the request

The request will appear listed in the applicant's document queue. While it is still pending, you can resend, edit and resend, or cancel the request.

Once received, the recommendation will appear in the "Documents" section of the Applicant Profile page.
Automatically fill in the first and last names of recommenders when sending letter requests to multiple letter writers

When requesting letters of recommendation from multiple letter writers, you can set ByCommittee to automatically personalize the message sent to each recommender. It is quite easy to set this up, and only requires that you cut and paste a couple lines of text into the salutation of your message.

Open the recommendation request form from the profile page of the applicant
Add the names of your recommenders

Enter the salutation of your message

Copy the variables from the "Help with Messaging" box to the right of the page
We have provided variables for first and last name. You can use one or the other, or both if necessary.

Paste the variable(s) into the message

Don't forget to add a comma at the end.

You may want to include the title if you know all of your letter writers will share a title such as "Dr." or "Prof."
Fill in your message and click "Preview" to see how it will appear to recipients.

The preview displays an example of how the message will appear in the inbox of all recommenders:
Demo University is conducting a review of Bing Boland and has requested a confidential evaluation.

I ACCEPT

I DECLINE

If you have questions about this request, please contact scf@demo.edu.

Dear Dr. Ronaldo Whiten,

The search committee at Demo University requests a confidential recommendation on behalf of Bing Boland, who is applying for the position of Assistant Professor of Orthodontics at our institution. We would be most grateful if you could provide a letter evaluating the applicant’s teaching abilities and scholarship.
Mark Applications as Complete

Committee Managers can mark applications as complete once all documents are uploaded and other requirements satisfied in ByCommittee Faculty Search.

⚠️ You can mark an application as complete, but it will be listed as "Complete Pending Letters" until any outstanding letters of recommendation are received.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title

Click the applicant's name to open the Applicant Profile page
Scroll down to the "Documents" section and click the "Additional Options" icon to the right of the page.

Select "Mark Application Complete"
The application will then be marked "Complete" on the profile page of the applicant.

⚠️ You can mark an application as complete, but it will be listed as "Complete Pending Letters" until any outstanding letters of recommendation are received.
Create an Application Status

Committee Managers and Administrators can create application statuses to mark where the application is in the process of review. These can be statuses such as "Long List," or "Short List," or "Removed From Consideration." Application statuses are created from the "Administration" page of a position.

From your Account Dashboard, click "Manage" and select "Administration"

Check to make sure you are editing settings for the correct unit or position

The settings you make on this page apply to the unit or position displayed at the top left of the page. Click "Change" to update settings for a different unit.
Open the "Statuses" tab, and scroll down to "Application Statuses"
Click "Add"

Enter the status name and set whether or not applicants can update application materials, and view the status when it is applied.

To edit existing statuses, click the blue "edit" pencil.
Edit the status and click to "Save"
Assign or Change an Application Status

Committee Managers or Administrators can assign or change an application status in ByCommittee Faculty Search from the Applications page or the Applicant Profile page.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title

Select one or more applications
Click the "Status" button that appars to the right of the page

Select the appropriate status to apply to the selected applications

💡 You can also remove a status this way
Confirm and notify applicants

In the "Change Status" window you can compose and send an email to the selected applicants about the change.
You can also assign or change an application status from the Applicant Profile page:

Click the applicant's name to open the Applicant Profile

Click the current status and select a new status from the dropdown menu
Archive or Unarchive an Application

Committee Managers are able to archive and unarchive applications in ByCommittee Faculty Search. Applications can be archived and unarchived from the Applications page.

Select "View Positions" on your Faculty Search Account Dashboard
Click the position title to access applications for the position

Select the application(s) to archive
Click the "Additional Options" icon (to the right of the page) and select "Archive" to archive the selected applications.

To unarchive an application, click the "Filter" button and select "Archived" to the right of the page.

This will filter the list to display only archived positions.
Select one or more names in the list to unarchive

Click the "Additional Options" icon (to the right of the page) and select "Unarchive" to unarchive the selected applications

Remember to clear the "Archived" filter to view active applications
Communicating with Applicants
Email Applicants

Committee Managers and Administrators can email applicants individually or in groups, as well as create automated email notifications in ByCommittee Faculty Search.

Note: When messaging more than one applicant, recipients will never see the names or email addresses of other applicants being contacted.

Navigate to applications for the position you are managing:
1. Select "View Positions" on your Faculty Search Account Dashboard
2. Click the position title to access applications for the position.

To email multiple applicants at the same time:

- To email a group of applicants, it is best to do so from the Applications page.

1. Check the box next to the name(s) of applicants you want to email.

- Note: Selecting "Applicants" at the top of the table will select all applicants in the list.
2. Click "Email" to open a window where you can type your message to all selected applicants.
3. Enter your message, click "Preview" to see how it will appear to the recipients, and send when you are ready.

To send an email to just one applicant from the "Applicant Profile" page:
1. Click the applicant's name to open their "Applicant Profile"
2. Click the email icon at the top right of the page to open a window where you can type and send your message.

About applicant notification message templates:

See here for more information on creating message templates.
Send Letters of Rejection

It's never pleasant to send letters of regret, but ByCommittee Faculty Search can make it easier.

Committee Managers can send email to individual applicants, or automate the process by setting up an automated notification and linking it to a change in application status.

1. Create appropriate application status

You will first want to create a specific application status such as "Rejected After Phone Interview." Note that you can create any number of statuses for specific situations such as "Did Not Make First Cut" etc.

Follow instructions here to create an application status.

2. Set up an automated notification to go out when the status is applied

Once you've created an appropriate application status, link it to an automated notification. See this article for more information on setting up automated email notifications.
Set Up Applicant Notification Message Templates

Committee Managers and Administrators can create message templates for applicant notifications in ByCommittee Faculty Search. These templates can be used to quickly create messages which will alert applicants when their application status changes, the status of a position changes, or under other conditions.

Note: To set up message templates for applicant notification messages, you must first have an existing application status or position status to trigger your message.

This article explains:

1. How to create an application status or position status
2. How to create new message templates for applicant notifications
3. How to link applicant notification messages to a change in application status or position status

In order to make a message template, you must have an application status or position status to trigger the message

You need an application status or position status to trigger your automated message. You can use an existing status, or you can create a new one.

See here for information on creating a position status, and here for information on creating an application status.
1. Click "Manage" on your Faculty Search dashboard, and select "Administration" from the dropdown menu

From other screens, click "Administration" in the upper right corner
2. Open the "Message Templates" tab of the "Administration" page

3. Click "Add" to create a new message template
4. Enter the message and click to "Save"

5. Click "Add Condition" to add a condition that will trigger the message
6. Choose to link your message to a either an application or position status

![Add Condition](image)

7. Select the status and click to "Save"

![Add Condition](image)
8. You can also add a change in position status as a condition.

9. When the given status is applied, either to position, or to an applicant, or both, you will have the option to edit and send the message.
Reporting, EEO, and System Logs
Create a Custom Application Form

During the process of applying for a ByCommittee position, ByCommittee Faculty Search will collect the names, emails, and contact information of applicants along with typical documents such as cover letters, CVs, and letters of recommendation.

Administrators can collect additional information by creating custom application forms. Once created, Administrators can add the forms to new or existing positions within their ByCommittee account.

1. Access the "Administration" page

Click "Manage" on your Faculty Search dashboard, and select "Administration" from the dropdown menu
-or- From other screens, click "Administration" in the upper right corner

2. Check to make sure you are editing settings for the correct administrative unit or position

The form you create will be available to positions created at or below the unit displayed.

Click "Change" if you need to select another unit or position
3. Open the "Application Forms" tab

If forms are already available to this unit or position, they will be displayed in the list.

4. Click "Add" to begin creating a new form

You can also open and edit forms by clicking the blue edit pencil.
5. Give your form a title and brief description and click "Save"

The "Edit Form" window will open
If you are creating an EEO form, check the box to indicate whether or not the form is an EEO questionnaire.

❗ EEO data can only be accessed by EEO officers, and Administrators with EEO access.

Indicate if the EEO form should be required by all new positions.
6. Click "Add Question"

7. Enter your question title and help information

8. Select a question type

You can choose between five question types. See below for a description of the available question types.
9. Indicate if this question is required and click "Save"

10. If the question type is multiple choice, checkboxes or a grid, you will need to enter possible answers

>Note: If the form you are creating is an EEO form, ByCommittee automatically includes "I prefer not to disclose" as an opt out answer for multiple choice or checkbox questions.
11. Click "Show Applicant Preview" to see how the form will appear to applicants

About Question Types:

- You can create five types of questions.

**Text Questions**

Text questions prompt applicants to respond with one line of text. These are best suited for short answer, free-form responses.
Paragraph Questions

Provide applicants with an entire text box for their answer. Best suited for longer, paragraph-form responses.

Multiple Choice Questions

Presents multiple answers and applicants can choose one. This type of question can also work for True/False, Yes/No, and other binary questions. You can also provide applicants with a box for "Other," where they enter their own answer.

Checkboxes

These provide applicants with multiple answer choices, of which they can choose one or more. You can provide applicants with a box for "Other," where they can enter their own answer.
Grid Questions

Applicants can select one option per row. This type of question can be used to express preferences, e.g., which courses the applicant would like to teach.

Organizing Forms:

Once your questions are added you can drag and drop to change the order in which they appear and also add formatting to customize how the form displays.
For more complex forms, we recommend including these elements for order and clarity:

1. Section Divider: A simple horizontal line that can visually break up the form.
2. Section Heading: A large-text label that can be placed atop a discrete section of your form.
3. Section Description: Contextual text that can be tucked underneath a heading and above the actual questions.

To add elements to the form, click the down arrow to the right of "Add Question" at the bottom left of the page.

Select an element to add
Create an EEO Form

Administrators in ByCommittee Faculty Search can create a custom form and designate it as an EEO form. Admins can set the program to require the EEO form for all new positions, and designate a form as the default for all new positions created.

ByCommittee Faculty Search also provides Institutional Administrators with a standard, VEVRAA/503-compliant EEO form, available from the Administration page. The form can be used as is, or cloned and edited.

Institutional Administrators can see here for more information on how to create and edit a VEVRAA/503-compliant EEO form.

1. Access the "Administration" page

Click "Manage" on your Faculty Search dashboard, and select "Administration" from the dropdown menu
-or- From other screens, click "Administration" in the upper right corner

2. Check to make sure you are editing settings for the correct administrative unit or position

The form you create will be available to positions created at or below the unit displayed.

Click "Change" if you need to select another unit or position
3. Open the "Application Forms" tab

If forms are already available to this unit or position, they will be displayed in the list.

4. Click "Add" to begin creating a new form
5. Give your form a title and brief description and click "Save"

The "Edit Form" window will open

6. Check the box to indicate the form is an EEO questionnaire
EEO data can only be accessed by EEO officers, and Administrators with EEO access.

7. Indicate if the EEO form should be required by all new positions

8. Click "Add Question" and begin constructing your form

💡 See here for more information on how to Create a Custom Application Form.
Create and Edit a VEVRAA/503-compliant EEO Form

ByCommittee Faculty Search provides Institutional Administrators with a standard, VEVRAA/503-compliant EEO form, available from the Administration page. The form can be used as is, or cloned and edited.

To access the standard EEO form:

1. Click "Manage" on your Faculty Search dashboard, and select "Administration" from the dropdown menu

2. Check to make sure you are editing settings for the correct administrative unit or position

The form you create will be available to positions created at or below the unit displayed.
Click "Change" if you need to select another unit or position

3. Open the "Application Forms" tab
4. Click the blue edit pencil to view the form

In compliance with VEVRAA/503, our default standard EEO form cannot be edited, but a duplicate can be created and customized

Create a duplicate by renaming the default form and clicking "Save"
Edit the duplicate form you create

Indicate if the form should be required for all new positions
The forms you designate as EEO and default forms will appear with those labels in the list of application forms.
View System Logs

The reports contained in the System Logs section of ByCommittee Faculty Search provide Administrators with complete visibility of changes associated with the positions they are managing.

To access System Logs:

1. On your Faculty Search account dashboard, click "Manage," and select "Reports" from the dropdown menu
-or- Click "Reports" in the top right corner of most program screens

2. Open the "Logs" tab on the Reports page

Application Form Changes

ByCommittee will track any changes made to any form attached to a position in the system, providing visibility of when the form was created, and when any questions or available answers were changed.
Follow the steps below to view a log of changes to application forms.

1. The "Logs" tab opens on the Application Form Changes log, or choose "Application Form Changes" from the System Logs menu.

2. Select or search for a unit.
3. Select the form(s) to include in the report from the dropdown menu.

4. Select "View Report" to view the data onscreen, or "Download (CSV)" to download the information and open it in a spreadsheet program.
Application Status Changes

This log keeps track of the application statuses assigned to applicants. This report can be run either for an entire position or for a single applicant.

Follow the instructions below to view a log of application status changes.

1. Open the "Logs" tab of the Reports page, and choose "Application Status Changes" from the System Logs menu.

![System Logs menu with Application Status Changes highlighted.](image)
2. Select or search for the position for which you want to run the report

3. Select "View Report" to display the report on screen, or "Download (CSV)" to save it as a spreadsheet file

Messages Sent

The Messages Sent log allows you to view all outbound communication sent while running a ByCommittee position.

Follow the steps below to view a log of messages.
1. From the "Logs" tab of Reports, click the "System Logs" button to the right of the page, and choose "Messages Sent" from the dropdown menu.

2. Select one or more positions
3. Click "View Report" to view the emails, or "Download CSV" to save a spreadsheet of the results

Position Details Changes

This log will track changes made in the position details while creating or editing the position.

Follow the steps below to generate a log of changes to position details.
1. Open the "Logs" tab of the Reports page, and choose "Position Detail Changes" from the System Logs menu

2. Select one or more positions
3. Click "View Report" to view the emails, or "Download CSV" to save a spreadsheet of the results.

Position Status Changes

This log keeps track of the application statuses assigned to positions.
1. Open the "Logs" tab of the Reports page, and choose "Position Status Changes" from the System Logs menu.

![Image of System Logs menu with Position Status Changes selected]

2. Select one or more positions to include in the report.

![Image of Reports page with Logs - Position Status Changes section selected]
3. Select a date range for the report

![Select Date Range Input](image)

4. Click "View Report" to view the emails, or "Download CSV" to save a spreadsheet of the results

![View Report and Download CSV Buttons](image)
Create an Applications Report

Applications Reports allow Administrators to pick and choose from an extensive list of applicant data fields to create a customized report, which can be viewed onscreen, saved and recalled, and downloaded as a CSV file.

About Applications Reports

Applications Reports are created by applying a customizable set of filters to sort applications along many possible data points.

As you apply filters...
...the applications meeting the criteria are displayed.

You can even customize what columns of information will display.
To get started, navigate to the Reports section of your ByCommittee Faculty Search account. On your Faculty Search Account Dashboard, click "Manage," and select "Reports" from the dropdown menu.
-or- Click "Reports" in the top right corner of most program screens

Reports opens by default on the "Applications Report" tab

Select a set of filters

By default you can filter by unit, status, degree, tags, name, etc.
You can sort by application ratings, completeness, choose to view only selected or rejected applicants, and view archived or withdrawn applications.

You can also filter by date of final submission, and date of first submission, and filter by responses to form questions.
To filter by form responses:
Click "Filter by Form Responses" and select the form, question, and response.

Add custom columns of information
Click the "Columns" button and select or deselect columns to add

There is an extensive list of possible columns including information about applicants (telephone, email, city, state, ratings, etc.) information about positions (dates, committee members, salary range and so on). You can even add a column to see responses to one or more form questions.
View and/or download the results

The list will display your custom columns and applied filters. Click "Download CSV" to save a spreadsheet file of the results.

Save your report

Click "Save" and give your report a name

Save and name your report so you can recall this set of filters and columns later.
Click "Saved Reports" to recall a report at any time
View Report of Emails and Notifications

Administrators can view sent emails and notification messages in ByCommittee Faculty Search from the "Logs" tab of the Reports page.

Note: You cannot view account welcome emails sent to other ByCommittee users or to applicants for whom a new Dossier account was created when applying for a position through ByCommittee Faculty Search.

To access System Logs:

1. On your Faculty Search account dashboard, click "Manage," and select "Reports" from the dropdown menu
-or- Click "Reports" in the top right corner of most program screens

2. Open the "Logs" tab on the Reports page

Messages Sent

The Messages Sent log allows you to view all outbound communication sent while running a ByCommittee position.
1. From the "Logs" tab of Reports, click the "System Logs" button to the right of the page, and choose "Messages Sent" from the dropdown menu.

2. Select one or more positions
3. Click "View Report" to view the emails, or "Download CSV" to save a spreadsheet of the results
Run an EEO or Custom Form Report

Administrators, Committee Managers and EEO Officers in ByCommittee Faculty Search can generate a Forms Report that provides a visual representation of data collected from EEO questionnaires and custom application forms. The report data can be displayed onscreen or downloaded as a .csv file for use in spreadsheet programs.

Access to EEO form reports is restricted accordingly to those with partial or full access to EEO information at your institution. Any Committee Manager, Administrator, or EEO Officer can view a summary of data collected with EEO forms for the units or positions to which they have access. EEO Officers and Administrators who are granted full EEO access can view a report of detailed applicant responses to EEO forms. Committee Managers cannot view or pull a report on individual responses to EEO forms.

Navigate to the reports section of your ByCommittee account
On your Faculty Search Account Dashboard, click "Manage," and select "Reports" from the dropdown menu
-or- Click "Reports" in the top right corner of most program screens

Select the "Form Report" tab
1. Select a unit

2. Select the position(s) to include in the report
3. Select the form(s) on which you want a report

4. Click "View Report" to view the data online, or "Download (CSV)" to download the data in a spreadsheet file
5. Link to report

When the report displays, click "Report Link" to open or bookmark a permanent link to the report, or you can copy and paste a link to share the report.

If you select an EEO form, and you are an EEO Officer or Administrator with EEO access, you can choose to view a "Response Summary" or "Detailed Applicant Responses" to the form.

Note: This option will not appear for Committee Managers or Administrators who do not have access to EEO information.
The "Response Summary"

The "Response Summary" report is available to any Committee Manager, Administrator or EEO Officer with access to a position or the unit in which that position resides.

The "Response Summary" provides a summary, detailed category view, and overview of the applicant pool responding to EEO forms. Results can be displayed onscreen or downloaded via .csv file. Both will display your questions & responses, along with a break down of the number of responses and response percentage for each answer value.
"Detailed Applicant Responses"

The Detailed Applicant Response report is available only to EEO Officers or Administrators who have specifically been granted complete EEO access. Committee Managers are not able to pull this type of report under any circumstance. Results can be displayed onscreen or downloaded via .csv file. Both will display the applicant's name and responses to each of the questions included in your EEO form.
Customizing the Standard VEVRAA/503-compliant EEO Form

Note: The changes to our Standard EEO form described below will not affect users who have an existing standard form or edited standard form already in place.

In compliance with VEVRAA/503, our default Standard EEO form cannot be edited

If you want to make a customized version, simply create a duplicate by renaming the default form and clicking "Save."

You may then edit the duplicate form.
The following is a VEVRAA/503-compliant EEO form.
If you wish to create a customized version of this form, you may duplicate it below and edit the newly created duplicate.

☐ This EEO form should be required by all new positions.

To create an editable duplicate of this form, please enter a name for the new form and select 'Save'.

New Form Name

Save
Managing EEO Statements

ByCommittee Faculty Search provides administrative users with a standard, government mandated EEO statement to use for your searches.

Administrators can use this statement as is, edit it, or add their own.

Administrators in the program can also set a default EEO statement that will become available to all units creating positions at the institution.

Follow the directions below to view or edit the standard EEO statement.

1. Access the "Administration" page

Click "Manage" on your Faculty Search dashboard, and select "Administration" from the dropdown menu
-or- From other screens, click "Administration" in the upper right corner

2. Check to make sure you are editing settings for the correct administrative unit or position

Click "Change" if you need to select another unit or position

3. Open the "EEO Statement" tab

The image below shows what an Administrator in the program would see when setting up a default EEO statement for an institution.
If you are managing a unit or position within an institution, you may see a default statement for the institution or unit you are editing.

See step 5.1 below for more information.

4. Click "Update Statement" to the right of the page

5. Choose between adding the standard government mandated EEO statement, or creating your own

The statement you set here will become the default EEO statement for all units creating positions at your institution.
If you use the government mandated statement, you can still edit and save the statement.

Equal Employment Opportunity Statement

Farragut Square University shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.
5.1. If you are managing a position or a unit within an institution that has set up a default EEO statement, you can choose between using the government statement, your own statement, or the default statement of the institution.
Committee Managers and Administrators can use the positions report feature in the "Reports" section of ByCommittee Faculty Search to generate report data on searches in ByCommittee.

About Positions Reports

Positions Reports are created by applying a customizable set of filters to sort positions.

As you apply filters...
...the positions meeting the criteria are displayed.

You can even customize what columns of information will display.
Navigate to the Reports section of your ByCommittee Faculty Search account
On your Faculty Search Account Dashboard, click "Manage," and select "Reports" from the dropdown menu
-or- Click "Reports" in the top right corner of most program screens

Select the "Positions Report" tab
Select filters
Select unit(s) on which to report

Select Position Statuses
Select a date range for open and close dates

Select a position type (faculty or fellowship)
Choose to filter by open positions

Save reports
Click to save the filters and columns you have set
Give your report a name so you can recall it later

You can recall your saved reports by clicking "Saved Reports"

Customize the displayed columns

You can set the columns that will display in your report by deselecting the defaults and/or adding new columns to display.
Download your report
How to Weight Ratings from an Applicant Report

Weighting evaluations and attaching them to a faculty search should only be performed AFTER all applications have been received and AFTER all ratings have been performed.

If any additional ratings occur after performing the weighting of ratings, then this process will need to be repeated for the Search Committee to receive updated information.

For some search committees there ratings that are more important than others. For instance, 'Teaching Experience' may be twice as important than say 'Scholarly Publications', and you want this knowledge to be accessible by every member in the search committee from one place.

This article will guide a committee member with the proper permissions through the following content:

• How to create an Applications Report displaying each applicant's average ratings
• How to download the information as a CSV file
• How to apply weights in an external spreadsheet software or similar calculations program (I.E. Microsoft Excel or Google Sheets)
• How to upload the modified file to the position for other committee members to review

Creating an Applications Report on the Average Ratings for Each Applicant

1. From the Dashboard, navigate to the Reports page to run an Applications Report.

After selecting Reports, by default, the Applications Report screen will display.
2. Select the relevant positions from the 'Position Names' section

3. After selecting the relevant Position Name, navigate to the 'Columns' button and be sure to check 'Average Rating By Criteria'.
4. Select 'Done' when finished.
You can also add any other relevant fields that are desired to display in the final document for the search committee.

After selecting 'Done', the report information will populate beneath the form. Now you are ready to download the data.

**How to Download Report Information**

- Select the 'Download CSV' button to download the table of information from the report in a CSV File.

💡 Be careful to note where you downloaded the file onto your machine. You will need to be able to find it to open it in your preferred calculations software.
How to Apply Weights to Ratings

There are many programs available to do this type of modification (Microsoft Excel, Google Sheets, etc).

This article uses Microsoft Excel 2013 for Mac.

1. After launching your favorite spreadsheet software, open the CSV file.
1. After your file is open, you will need to create a new column for every criteria you are going to modify.

It will likely look similar to the below image. The beige columns have been added, titled with 'Weighted' and formatted for easier identification.

Before you start creating calculations, it is important to identify what criteria are going to be weighted and by how much.

For instance, there are currently three different criteria in this example:

- Community (is our base value, it will not be modified or weighted)
- Scholarship (will be worth 1.25 times as much as 'Community')
- Interview (will be worth 0.75 times as much as 'Community')

(Note: You are not limited to the criteria in this demonstration)

2. Next create the weighted column for 'Community', in the cell enter the following formula:

   =E2

This formula causes the originating cell to pull data from cell E2, which is the unweighted Community rating.

3. Copy the calculation downwards using the auto-fill tool to update the entire column. Click-and-Drag the formula down to the final cell in the table.
Auto-Fill tool is the square-node that is in the bottom-right of the selected (or active) cell.

After releasing the mouse, your formula will be copied through the selected cells.

4. Next we will modify 'Scholarship' to be worth 1.25x as much as 'Community'

   Note the formula below: C2 is the cell where the data is originating, 1.25 is the modification to the weight of the value.

   \[ =C2 \times 1.25 \]
5. Use the Auto-Fill tool to copy the formula downwards, similar to Step 3 in this progression.

![Excel spreadsheet screenshot](image.png)

After you finish weighing and modifying all of your Ratings, make sure you eliminate any extra information that you do not want to be considered.

6. Save your now Weighted CSV file as a PDF.

⚠️ In the picture below, note that it is important to perform 'Scaling' when exporting your document. If you have a lot of criteria (columns), you will want to make this more than ONE page wide, and also may want to copy your headers onto every page.

Here is a guide that can assist you with that.
The file must be uploaded to committee documents as a PDF format.

How to Upload and Attach the Weighted Document of Ratings to the Relevant Faculty Search

The file must be uploaded to committee documents as a PDF format. See the 'How to Weight Ratings' section above.

1. After selecting the relevant position, click the "Edit" Pencil button to edit any internal notes and add the Weighted Ratings PDF.
2. On the right side of the screen, select "6. Internal Notes"

3. Click the 'Add File' button at the bottom of the page to upload your PDF for the Search Committee to access.

After you have uploaded your file to the position's internal notes, any search committee member can access it via the "View Details' page.
Interfolio Faculty Search FAQs
I accidentally archived an applicant. What can I do now?

Committee Managers can archive and unarchive applicants from a position's the Applications page. If you accidentally archive an application, follow the directions below to unarchive the applicant and the send the applicant an email letting them know what happened.

Navigate to applications for the position you are managing:

1. Select "View Positions" on your Faculty Search Account Dashboard
2. Click the position title to access applications for the position

Click the "Filter" button at the top of the list of applications
Look to the right of the page, and select "Archived" from the list of available filters.

The "Archived" button will turn white, and the list of applicants will display only archived applications.
To unarchive the applicant, select their name in list.

Click the "More Options" button and select "Unarchive".

Next, select "Email" if you want to email the applicant about the change.
Enter your subject, compose your message and click to send

Note that you can preview the message to see how it will appear in the inbox of the applicant.
Can I use Interfolio Faculty Search for fellowships and post-docs?

Yes. ByCommittee is a platform for committee-based decision making, whether the task is hiring faculty and staff, or awarding fellowships and postdocs. You'll find, however, that the language and interface in the product is geared primarily toward job searches. If you'd like to use ByCommittee Faculty Search for your fellowship and post-doc searches, check with your Client Success Manager on some best practices to make sure it runs smoothly.
I don't see the position I'm looking for. What now?

Make sure you have been assigned to the search committee

Your Committee Manager may not have added you to the search yet.

Check the status of the search

The status of the search may not allow for Evaluator access at this point in time.

Check to make sure you are viewing positions for the correct role by using the "Change Role" button

If you have more than one role in the program, for instance, if you are an Administrator AND an Evaluator, or if you have access to multiple units, you may need to change the scope of what you are viewing by selecting the correct role from the dropdown box at the top left of the Positions page.

1. Select "View Positions" on your Faculty Search Account Dashboard
2. Click the position title to access applications for the position

3. View your current role under the Positions heading

NOTE: The system will always default to your highest permission
4. Select "Change Role" to change your scope within an institution, school, college, or department.

5. Select "All Evaluator Positions" to view all positions to which you have been assigned as an evaluator.
Why can I no longer review applicants for a specific position?

Evaluators in ByCommittee Faculty Search can only review positions with an active status that allows Evaluator review.

If you cannot access applications for a position, the search may have a current status that does not allow for Evaluator access.

Check the status and dates of the position

- The position status is listed on the Positions page.
- If you need help see this article on how to view the list of positions you are evaluating.
- Contact your Committee Manager or Administrator if you are unable to access applications for a position with an active status.

Check to make sure you are viewing positions for the correct unit, or viewing the positions you are assigned to evaluate.

⚠️ If you have more than one role in the program, for instance, if you are an Administrator AND an Evaluator, or if you have access to multiple units, you may need to change what you are viewing from the dropdown box at the top left of the Positions page.
Click "Change"

Select the unit to view and click "Save"

Scroll down the list to view "All Evaluator Positions"
The list of units may be long, so make sure to scroll all the way to the bottom see "All Evaluator Positions."
Why can't Evaluators see the applicants?

If Evaluators can't see the applications for a position, check to make sure they have been added to the search committee, that the position status allows Evaluators to review applications, and that the position or application has not been archived.

Committee Managers or Administrators must add Evaluators as new users to the system, but these users must also be assigned to the search committee for a position. For more information, see this article on [adding members to a search committee](#).

Also, the position status must allow for Evaluators to review applications. See this article on [position statuses](#).

If the Evaluator has more than one role in the system, they may be viewing the program as the wrong user type. See this article on [how to change user scope](#).

Finally, positions and applications that have been archived will not show up by default on the Positions or Applications pages, so check to make sure your Evaluators are viewing active positions.

See this article (written for Evaluators) for more information on viewing positions "[Don't see the position you are looking for?](#)"
Other Details
Faculty Search - Text Character Limits

Below are all of the text character limits within ByCommittee Faculty Search. This is going to be most relevant for those who are in the process of setting up their Faculty Searches for their institution.

Creating a Position

Description and Dates

Title: 100 characters

Location: 100 characters

Position Description, Qualifications, Instructions, EEO Statement: 6000 characters

Required Documents

Document Description: 300 characters

Evaluation Settings

Criterion Name: 255 characters

Internal Notes

Position ID: 100 characters

Salary Range or Pay Grade: 100 characters

Funding Source: 255 characters

Hiring Plan, General Notes: 6000 characters
Administration

Status

Position Status:  
255 characters

Application Status:  
255 characters

Forms

Name:  
255 characters

Description:  
6000 characters

Question:  
6000 characters

Help Information:  
512 characters

Multiple Choice options:  
255 characters

Grid options:  
255 characters

Notifications

Subject:  
255 characters

Message:  
6000 characters

Notifications email address:  
79 characters

New User

First Name, Last Name:  
No limit to first and last name characters

Message:  
No limit