Step 1: Log in to Interfolio using the following link: [https://account.interfolio.com/sso](https://account.interfolio.com/sso)
Select Tulane University from the drop down menu.
Click “Sign In”
Step 2: You will be redirected to a Tulane-branded page. Enter your username (part of the email without the “@tulane.edu”) and regular Tulane email password. Click “Sign In”. You will be redirected back to Interfolio’s landing page after sign in.

If you experience difficulties signing in, contact Alysia Loshbaugh (akravitz@tulane.edu or 862-8209).
Step 3a: You should see a page that looks similar to the picture below. Depending on your access, permissions, and history, you may see slightly different options.

For example, the “Promotion & Tenure” module in the lower right may not be an option if you do not participate in the P&T process. Likewise, if you are not undergoing any type of academic review this year, you will not see the “Promotion & Tenure” packet information under “My Packets”.

Click on “View Positions.”
**Step 3b:** You will be taken to the "Positions" page. From here, Click "+ New Position" in the top right hand corner.
Step 4: Depending on your permissions, you may have to select the department in which you wish to post the position.

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

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

If there is a prior, archived position that you wish to use as a template, you can select it from the drop down menu under “Create from Existing Position” and then modify it accordingly.
Step 5a: You should see the first of six pages to creating the position in Interfolio. This step has several fields so will take up several pages of this “How-To” guide.

Any fields that are required will be designated appropriately (“*”).

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

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

Location: use city and state, can also include campus
Position Type: ‘Faculty’ for faculty positions and ‘Fellowship’ for Postdoc positions
Position Opens: Date when you wish to allow candidates to begin applying. Please make this date the same as the open date in HCM/iRec.
Position Closes: Optional, date when you no longer wish to receive new applications. Please make this date the same as the close date in HCM/iRec.
Step 5b: Scroll down to “Position Description”. This is the main text of your ad and is a required field.

Qualifications: Optional. For example, “Successful candidates should have a PhD or equivalent degree in a relevant field as well as a record of excellence in teaching and scholarship.”
Step 5c:
Application Instructions: Optional. For example, “Candidates must apply in Interfolio and provide the following materials for submission: CV, Sample Syllabi of Courses Taught, Teaching Evaluations from Courses Taught, and Three Confidential Letters of Recommendation.”

Equal Employment Opportunity Statement: Do not modify or delete! This language is standardized for all Tulane positions and should not be changed. Simply skip over this section.

Click “Save & Continue”
**Step 6a:**
The next page should say “Required Documents”. This is where you add the documents you wish for each candidate to submit in order for them to complete their application materials.
Click “+ Add Requirement” and select the appropriate document type from the drop down menu.
**Step 6b:** Select appropriate document types, designate the number desired, and add any notes to the candidate. Then click “Save”. Repeat until all documents are added to the requirements.

Note that you can allow applicants to add additional documents, should you want to give them that freedom, by clicking this box.

You can also allow the system to send an email message when an application is received. Click this box then populate the subject and body of the email. Keep the language generic, as it will go to all applicants.

You can modify requirements by clicking the pencil or delete requirements by clicking the x.

Click “Save and Continue”
Step 7:
Any criteria by which your search committee may evaluate a candidate can be added here. Click “+ Add Criterion” and type the name of the criterion you wish to add. You must have at least one criterion in order to rate candidates in Interfolio using their star rating system. It is strongly recommended to keep “Blind Review” checked (default setting) so that evaluators on the search committee cannot see the ratings of other members of the search committee.
Step 8a: Forms
If you have a specific form or questionnaire you want candidates to complete as part of their application, you would add the form here.

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

Two forms are required for all positions. The first is automatically added to all positions and requires no action. That first form is the EEO form. You cannot turn off or modify Tulane’s EEO form.
The second required form is the “Candidate Additional Information Form”. This form must be manually added to all positions.

Click “Add Form”. There will be a pop-up that asks you to select a form.

Select “Candidate Additional Information Form” and then click “Save.” The form will be added to your position.

Click “Save & Continue.”
Step 9: Search Committee

At this point, you can add members to your search committee. Click “+ Add Member” and then start typing either the first or last name. Interfolio’s smart search will find letter combinations that match in either the first or last name fields. If you wish to add someone as a Committee Manager (i.e. Search Chair), click “+ Add Manager”.

If you cannot find a person, that means they probably do not have an Interfolio account or do not have permission to be a committee manager. Please contact Alysia Loshbaugh (akravitz@tulane.edu or 862-8209) for assistance.
**Step 10: Internal Notes**
All fields on this page are optional as per Interfolio’s requirements. HOWEVER, Tulane requires that the first field, “Position ID or Requisition Number”, be populated with the appropriate and matching IRC number from the iRec vacancy that must also be created at the same time the position is being created in Interfolio. This allows us to match candidates in Interfolio to positions in iRec.

The iRec number should be entered in the following format: IRC12345 with no spaces or extra characters.

It’s okay if you don’t have the IRC number yet. Click “Save & Continue” to go to a summary page, and you can come back and fill in that field at a later time.
Step 11: Summary/Overview—shows you an overview and the status of the position you just created. If you need to edit any information, select “Edit” under the appropriate section.
**Step 12:** Get unique link for applicants and insert in iRec vacancy “How to Apply” instructions.

Click “Return to Application List” in order to view the unique link that is generated by Interfolio and which should be used in the “How to Apply” instructions in iRec, as well as in all position advertisements.

Next, select "Additional Options”

Lastly, select “View Details” from the drop box
**Step 13**: Get unique link for applicants and insert in iRec vacancy “How to Apply” instructions.

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

Once you have the link, click the “X” or “Close” buttons to go back to the position details.
Step 14: Changing the Position Status
This position is currently listed as “Closed” because the open date is in the future. The status of the position is “Being Created.” If you feel that your position is ready to go live, and you have submitted your corresponding iRec vacancy in HCM, you must request that the position be approved.

Click to ‘Submit for Approval’. This notifies the Provost’s Office that a faculty/postdoc position is ready for review. After approval by the Provost’s Office, the creator of the position will receive a notification email.
Step 15: Changing the Position Status and Publishing

After the Provost’s Office approves the position in Interfolio, the Position Status will change to “Approved.”

(1) Change the Position Status to “Accepting Applications.”

(2) Next, you must change the “Apply Now” page to “published”. If you skip this step, your URL to which you want to direct people to apply, will not work. It will be a dead link, so this step is important.

Click to change Position Status to “Accepting Applications”.

Click to publish “Apply Now” page.
Step 16: Accepting Applications Status

When you change your Position Status to “Accepting Applications”, the default is that the middle checkbox is activated—applicants can update their materials while this status is active.

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

These boxes can all be checked/unchecked any time you change a position status.
**Step 17:** Returning to a Position After Logging Out of Interfolio

If at any time, you have to log out of Interfolio and then return to a position, either to continue working on it or edit it, etc., it is a simple process to get back to where you were. This will be important if you leave Interfolio to go work in HCM to create your iRec vacancy, and then have to go back into Interfolio to insert your IRC number.

Simply log in as per instructions in steps 1-3. Once logged in, click “View Positions.”
Step 18: Returning to a Position After Logging Out of Interfolio

You should then see a page that shows you all the open positions in your default department, or shows you all the positions for which you are a member of a search committee. This depends on your level of permissions.

Click on the name of the position, and you’ll be taken to the list of applicants page.

If you don’t see the position you are looking for, try clicking “Change Role” above and select another unit in which the position may be posted. This may be the case for an interdisciplinary hire with faculty from multiple units.
Step 19: Returning to a Position After Logging Out of Interfolio

You are now back at the Applicants page. If you are a member of a search committee, you can review applications here. If you need to modify it, such as adding a ‘position close date’, click the “Edit” button.
Step 20: Returning to a Position After Logging Out of Interfolio
You can now click “Edit” in any of the sections or from the list of pages on the right to return to the position and make changes.