## Dossier

Dossier is an online data storage service that allows faculty to place files in FAR or RPT and to organize them for future reviews. Each Dossier is private to the individual and cannot be accessed by anyone else. The information stored in Dossier belongs to that faculty member and can be used and maintained as the faculty member moves through their career.

Because Dossier is a data storage service, it is similar to the data storage functionality available on a personal computer through a hard drive or portable drive. The advantage of using Dossier on a regular basis is that it is a repository of documents needed for compiling applications for various professional personnel purposes listed in the Introduction of this training manual (e.g., ANNUAL evaluations and reviews required by university policies, promotions, and leaves such as sabbaticals). Developing a routine pattern of updating/uploading critical documentation to Dossier makes it easier to compile necessary documents when the time comes for submitting these applications.

The process for using Dossier is very straightforward and should be reasonably consistent for faculty across all colleges. After logging into Interfolio, click the down arrow next to your name at the top righthand corner of your screen. Under switch accounts click the link for Interfolio Dossier.

Notice the vertical menu options on the left-hand side of the Dossier homepage. Each of the options includes descriptions for various functions under the option.

Home

Deliveries

Letters

Materials

Collections

Shared with Me
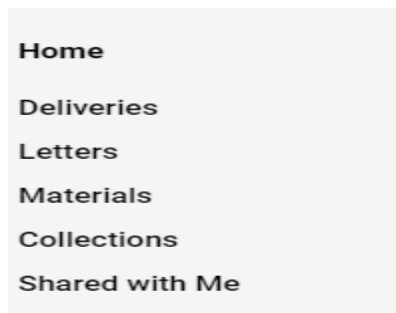
Under **Deliveries** there are descriptions and links to the following functions: Manage Confidential Letters, Collect and Curate Materials, and Find Opportunities.

By clicking the Manage Confidential Letters link, you will be taken to the **Letters** menu. [Alternatively, you can just click the Letters link in the navigation menu to the left to get to the same webpage.] This function allows the user to manage requests for letters of recommendation from faculty in other institutions as well as faculty at FAU. An example of an appropriate use of this function would be requests for references pertaining to sabbatical applications. [Note that this function is not to be used by faculty going up promotion. Faculty do not initiate letters requesting references for promotion. Department chairs must make these requests. See university and college promotion policies for the protocol to select and contact reviewers.]

By clicking on the Collect and Curate Materials link, you will be taken to the **Materials** menu option. [Alternatively, you can just click the Materials link in the navigation menu to the left to get to the same webpage.] This function allows the user to upload documents on a range of topics. This space in Dossier is a place to first import documents, and then to categorize them. When you upload a document, you will be prompted to select a document type, such as Scholarship, which is one way to categorize your entry. Dossier affords additional capability for further categorization by tagging and sorting entries.

> For example, if you have uploaded a refereed journal article you have published, or a letter of acceptance for a manuscript that will be published, you will be able to Tag the document. Under the journal article you have uploaded, you can click on the + icon to Add a new tag, which you might name Refereed Journal Article. Under the acceptance letter for a new manuscript, you might Add another new tag named Acceptance Letter. As you add new tags, they will be listed as tags you can reuse for future uploaded documents. To delete a tag, click the x to right of the existing tag.

> If you want to sort the documents in the Materials section, click the box to the left of the document entry. You will immediately see a horizontal list of menus on the upper righthand side of the screen. To sort the document, click the down arrow to the right of the Add To link. You can Create a New Collection, which you might name Research Articles. After you create the New Collection, you will be able to sort the Refereed Journal Articles and the Acceptance Letters into the Research Articles collection. As you add new collections, they will be listed as collections you can reuse for future uploaded documents.

> You will notice that the horizontal list of menus includes a Tag link, which is just an alternative way to add a tag to an entry. And there is an Archive link, which allows you to hide an entry from the webpage. By clicking the box next to an entry and then clicking Archive, you will place the entry into the Archive. However, you will only be able to view the move after you click the View Archived Materials link at the top of the Material webpage. To move the entry out of the Archive, click the box next to the entry, then use the Unarchive button at the upper right side of the webpage.

My Materials

**Guidelines** **Request Recommendation**

All Materials (2)

search | Filter | View Archived Materials | **Add Files**

Tag ⌄ Archive Add To ⌄

	Title ⇅	Type ⇅	Status ⌄
☑	Power and Trust -- Electronic Data Exchange [Organization Science] Refereed Journal ✕ ➕	🗎 Scholarship	Received Mar 14, 2024 at 11:30 AM
☐	An Extended Provacy Calculus Model for E-Commerce Transactions [Information Systems Research] Refereed Journal ✕ ➕	🗎 Scholarship	Received Mar 14, 2024 at 11:28 AM

Under **Collections** in the vertical menu options on the lefthand side of the Dossier homepage, you will be able to view the collections of documents you have created.

My Materials

Guidelines **Request Recommendation**

Collections

Add Collection

Name ▲	Created ⇅	Actions
Research Articles	Mar 14, 2024	Select ⌄

By clicking the title of any one of the collections you will be able to view your entries. Notice that on the upper righthand side of the webpage, you will be able to Add Materials. You can add new entries under Collections, just as you can add new entries under Materials. Be sure to notice that when you click the box to the left of an entry under **Collections** the horizontal list of menus on the upper righthand side of the screen is different from the horizontal list of menus under **Materials**. Under Materials the options are Tag, Archive, and Add To, whereas under Collections the options are Tag, Remove, and Archive.

And if you click the box of an entry under Collections, you will be able to share the document by using the Share button at the top righthand side of the webpage.

Materials › Collections ›

Research Articles

Search

| Q Enter keywords | Filter |

Share   ➕ Add Materials

Tag ⌄   Remove   Archive

☐	Title ⬍	Type ⬍	Status ⌄
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Others can reciprocate and share their documents with you. Find the articles sent to you by clicking the **Shared With Me** button in the vertical menu on the lefthand side of the screen.

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