User Roles in Interfolio Review, Promotion & Tenure

In Interfolio Review, Promotion & Tenure, there are four different user roles: Institutional Administrators, Administrators, Committee Managers, and Users/Committee Members. These three roles have different levels of access to materials and actions within the system.

Anyone added to Interfolio RPT is automatically called a "user." Users have the most basic and restricted access in the system. Once a user is added to a committee, they are often referred to in that context as **Committee Members**. A user must be added to a committee in order to view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to.

Committee Managers possess all of the capabilities of Committee Members, plus a few more. Most noticeably, Committee Managers have the power to move a case either backward or forward after a committee has finished reviewing. In addition, Committee Managers have communication powers within the system; they can e-mail both the candidate and committee members from within the product and can record committee votes in the program. In order to make a user a Committee Manager, an Administrator must manually select them to serve this role.

Administrators are the users with the most power within Interfolio RPT. In addition to being able to access documents, e-mail candidates, and committees, and move a case forward or backward, Administrators are the only users who can create templates, forms, and cases for the units to which they have access. Administrators can also create users and standing committees. Administrators can exist at any organizational level in RPT and have the ability to perform administrative functions for all units within their administrative hierarchy. For example, an Administrator at a university level will have access to settings, cases, and committees for all units at or beneath the university level, such as colleges, departments and so on. Administrators will lose such access only when "recused" from a case at a particular workflow step.

Institutional Administrators are administrators at the highest level of an institution. They have all the powers of administrators, but can also set whether or not comments and downloads are enabled for an institution, add custom branding to the appearance of Interfolio, establish case statuses that can be used across an institution, and set up and manage committee voting at an institution.

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	**Administrator**	**Committee Manager**	**Committee Member**
Administration				
Add/edit and manage organizational units	TRUE	TRUE	FALSE	FALSE
Add/edit and manage users	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:

	Institutional Administrator	Administrator	Committee Manager	Committee Member
Assign users to one or more units	TRUE	TRUE	FALSE	FALSE
Name users Administrators or Committee Managers	TRUE	TRUE	FALSE	FALSE
Assign users to a committee	TRUE	TRUE	FALSE	FALSE
Create and manage candidate forms (forms to filled out BY a candidate)	TRUE	TRUE	FALSE	FALSE
Create and manage case data forms (forms ABOUT a candidate or case)	TRUE	TRUE	FALSE	FALSE
Enable/disable comments for an institution	TRUE	FALSE	FALSE	FALSE
Enable/disable downloads for an institution	TRUE	FALSE	FALSE	FALSE
Add/ edit custom branding (logo and colors)	TRUE	FALSE	FALSE	FALSE
Create/edit institution-wide custom statuses	TRUE	FALSE	FALSE	FALSE
Set up committee voting (enable feature and add institution-wide voting options)	TRUE	FALSE	FALSE	FALSE
Committees				
Create/manage standing committees	TRUE	TRUE	FALSE	FALSE
Permanently Add/remove users to/from standing committees	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:

	Institutional Administrator	Administrator	Committee Manager	Committee Member
Create/delete case-specific (ad-hoc) committee	TRUE	TRUE	FALSE	FALSE
Add/remove case-specific (ad-hoc) committee to or from a case	TRUE	TRUE	FALSE	FALSE
Add single reviewer (committee of 1) to a case review step	TRUE	TRUE	FALSE	FALSE
Edit name, instructions due date of a case-specific committee	TRUE	TRUE	FALSE	FALSE
Add users to, or remove users from a case-specific committee	TRUE	TRUE	TRUE	FALSE
Assign temporary members to a standing committee	TRUE	TRUE	TRUE	FALSE
Temporarily remove (recuse) members from a standing committee	TRUE	TRUE	TRUE	FALSE
Set up committee document requirements	TRUE	TRUE	TRUE	FALSE
Upload documents to satisfy committee document requirements	TRUE	TRUE	TRUE	FALSE
Record the results of a committee vote	TRUE	TRUE	TRUE	FALSE
Templates & Cases				
Create/edit/delete a template	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:

	Institutional Administrator	Administrator	Committee Manager	Committee Member
Create/edit/ a case	TRUE	TRUE	FALSE	FALSE
Create/edit candidate packet requirements for a case	TRUE	TRUE	FALSE	FALSE
Allow candidates to add packet sections	TRUE	TRUE	FALSE	FALSE
Set up a case workflow (series of case review steps)	TRUE	TRUE	FALSE	FALSE
Move a case forward or backward	TRUE	TRUE	TRUE	FALSE
Close/reopen a case	TRUE	TRUE	FALSE	FALSE
Delete a case	TRUE	FALSE	FALSE	FALSE
Recuse (temporarily remove) a standing committee member from a case review step	TRUE	TRUE	TRUE	FALSE
Recuse an administrator from one or more case review steps	TRUE	TRUE	FALSE	FALSE
Recuse an administrator from one or more case review steps in a template	TRUE	TRUE	FALSE	FALSE
Apply and remove an existing status to a case	TRUE	TRUE	TRUE	FALSE
Create and apply a custom status for particular case	TRUE	TRUE	TRUE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:

	Institutional Administrator	Administrator	Committee Manager	Committee Member
Communication				
Notify a candidate of their review	TRUE	TRUE	FALSE	FALSE
Email a candidate	TRUE	TRUE	TRUE	FALSE
Email committee members	TRUE	TRUE	TRUE	FALSE
Enable/disable comments for a case review steps	TRUE	TRUE	TRUE	FALSE
Leave comments on a case	TRUE	TRUE	TRUE	TRUE
View notifications	TRUE	TRUE	TRUE	TRUE
Share materials with candidate and allow response	TRUE	TRUE	TRUE	FALSE
Share materials with committee members from committees outside of workflow	TRUE	TRUE	TRUE	FALSE
Materials & Forms				
Create/edit a candidate form	TRUE	TRUE	FALSE	FALSE
Add a candidate form requirement to a case (attach a candidate form to a case)	TRUE	TRUE	FALSE	FALSE
Create/edit a case data form	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:	Institutional Administrator	Administrator	Committee Manager	Committee Member
Add a case data form requirement to a case (attach a case data form to a case)	TRUE	TRUE	FALSE	FALSE
Upload new materials to a case	TRUE	TRUE	TRUE	FALSE
Add sections to a packet that are not visible to candidate (committee documents)	TRUE	TRUE	TRUE	FALSE
Reorder packet documents	TRUE	TRUE	TRUE	FALSE
Change the document group in which materials appears	TRUE	TRUE	TRUE	FALSE
Edit title and type of documents added to a case by a committee	TRUE	TRUE	TRUE	FALSE
Delete materials added to a case by a committee (note that Committee Managers can ONLY delete materials added by themselves, not documents added by another user)	TRUE	TRUE	TRUE	FALSE
Set download privileges	TRUE	TRUE	TRUE	FALSE
Set access to materials (including external evaluations)	TRUE	TRUE	TRUE	FALSE
Allow/disallow candidate editing of packet materials	TRUE	TRUE	TRUE	FALSE
Allow candidates to add packet sections	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	**Administrator**	**Committee Manager**	**Committee Member**
Request/ edit/resend external evaluation requests	TRUE	TRUE	TRUE	FALSE
Access external evaluations (depending on settings for case)	TRUE	TRUE	TRUE	TRUE
Download print documents (depending on settings for institution or document)	TRUE	TRUE	TRUE	TRUE
Read case documents and forms (access of candidate, committee, and other docs are dependent doc permission settings)	TRUE	TRUE	TRUE	TRUE
Annotate (make notes) on documents in the document viewer, and export your annotations.	TRUE	TRUE	TRUE	TRUE
Reports & Logs				
Generate and download reports including case info, forms, and voting results reports	TRUE	TRUE	FALSE	FALSE
View Case Activity logs: case movement, changes in status, and messages sent	TRUE	TRUE	FALSE	FALSE