(updated 12/5/24)

FACULTY SEARCH TRAINING GUIDE FOR ADMINISTRATOR

School of Medicine & Dentistry

Welcome to UR Faculty, our new comprehensive Faculty Information System! This training guide covers the Faculty Search module of UR Faculty, focusing on the role of an administrator.

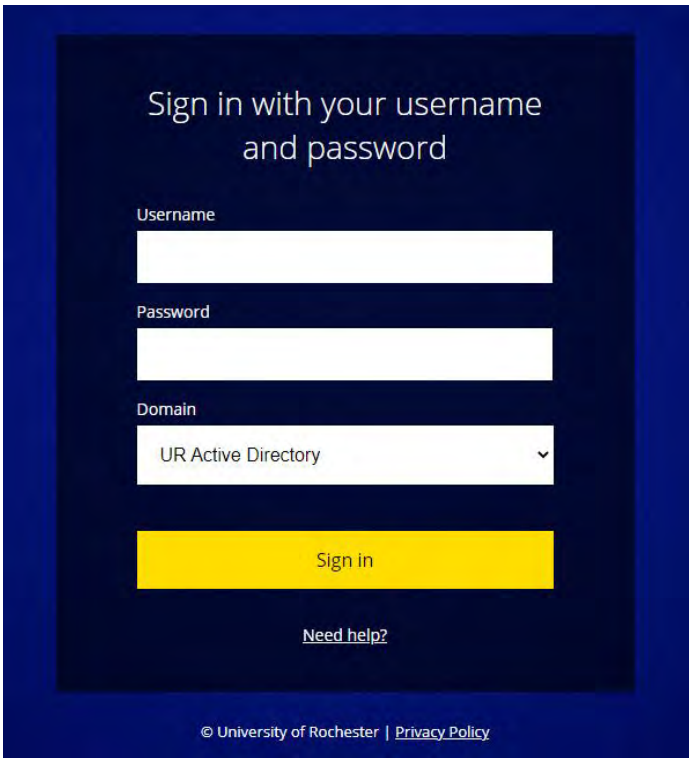
Note: You must be included the UR Faculty: Faculty Search database in order to access Faculty Search. If you are not or would like to request access on behalf of a new user, please send an email to URFacultyHelp@rochester.edu and include:

- User's full name
- Email address
- URID, if possible
- School/department
- Role (Administrator/Committee Manager/Evaluator)

For information on role definitions and permission levels, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/user-roles-in-interfolio-faculty-search

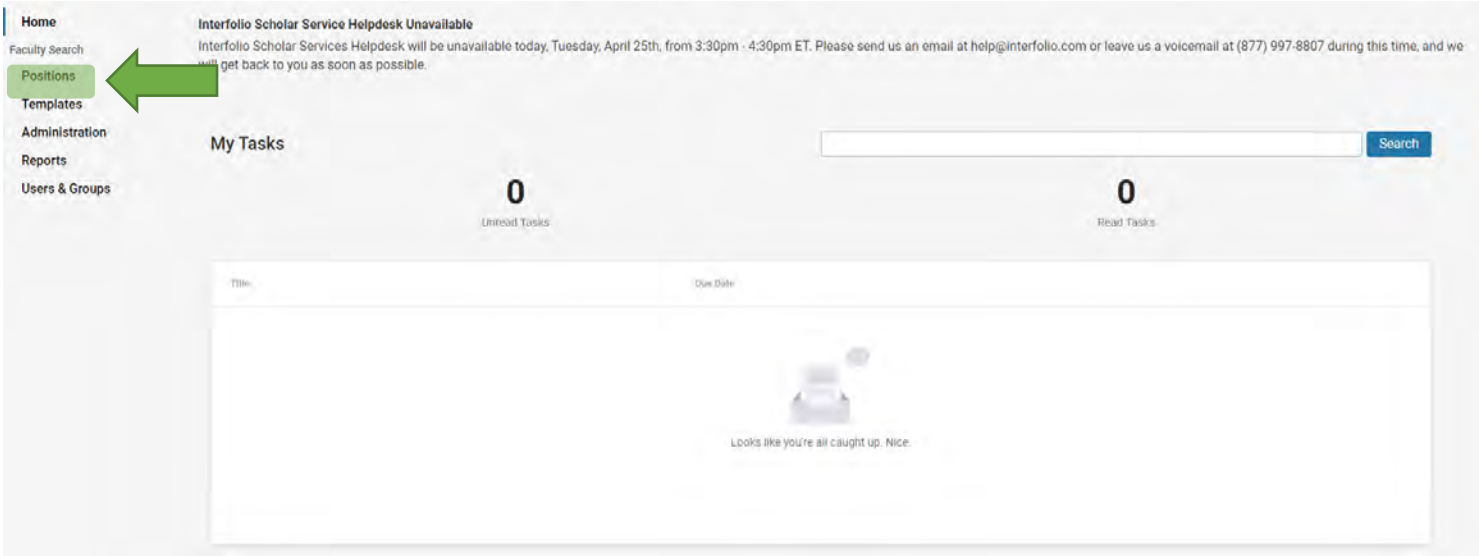
SIGN IN

- **Access Interfolio at: https://iam-api.interfolio.com/users/sso_redirect?tenant_id=16224**
- **Fill out your username and password (SSO login credentials for University of Rochester) and select the appropriate domain**
- **Click on "Sign in"**

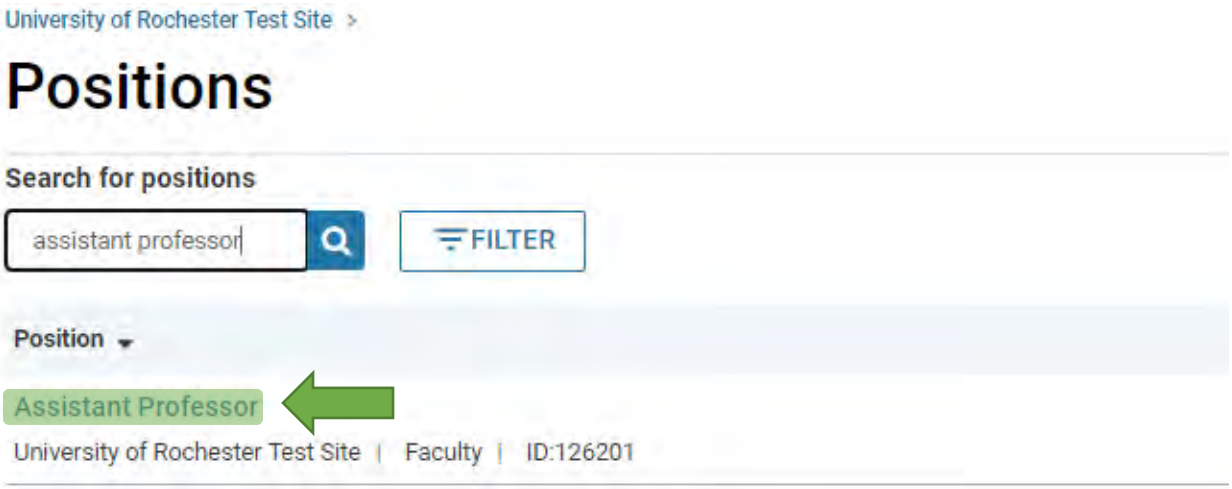


SET UP A SEARCH

- **WORKDAY STEP: Create a new position in Workday following myURHR instructions. Ensure that the position is set to send over to UR Faculty. Once approvals have taken place in Workday, the position will flow over to UR Faculty. Note: the position integration from myURHR to UR Faculty runs once an hour.**
- **This is your UR Faculty home screen. On the left side menu under Faculty Search, click on "Positions"**

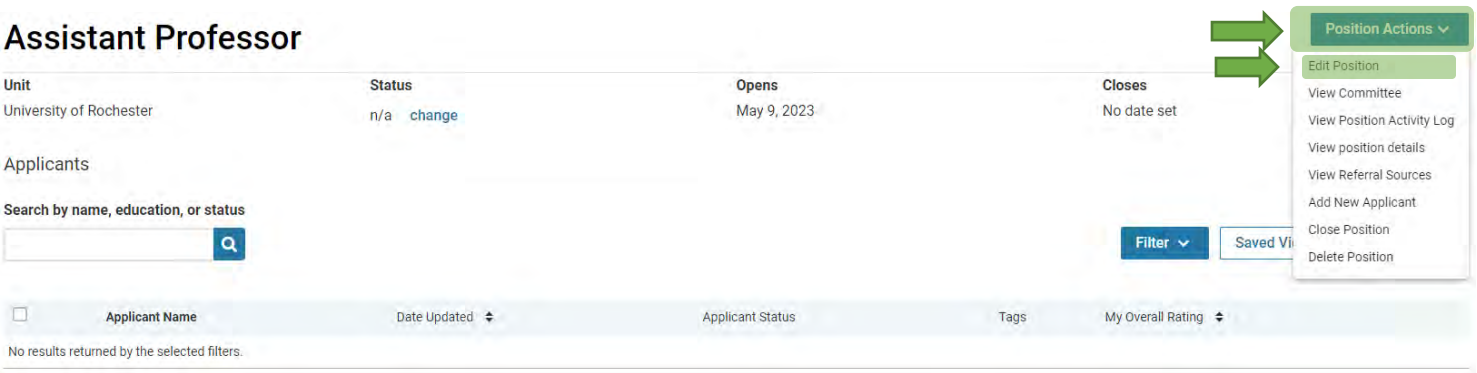


- **Locate the position you're working on by searching for the name of the position. Click on the position name.**

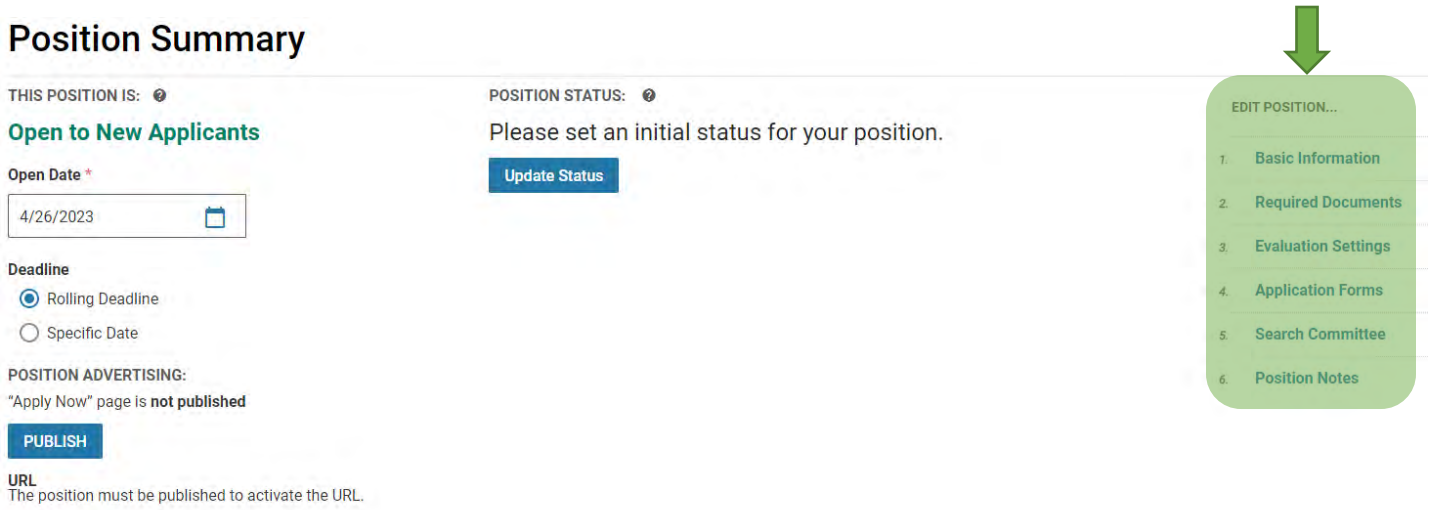


EDIT YOUR POSITION

- **The position will now need to be edited in preparation for publishing. Click on "Position Actions" on the top right and click on "Edit Position".**



- **You should now be on the "Position Summary" page, which shows you all the information about the position as it currently stands. Use the menu on the right side to navigate through each of the sections and make edits.**

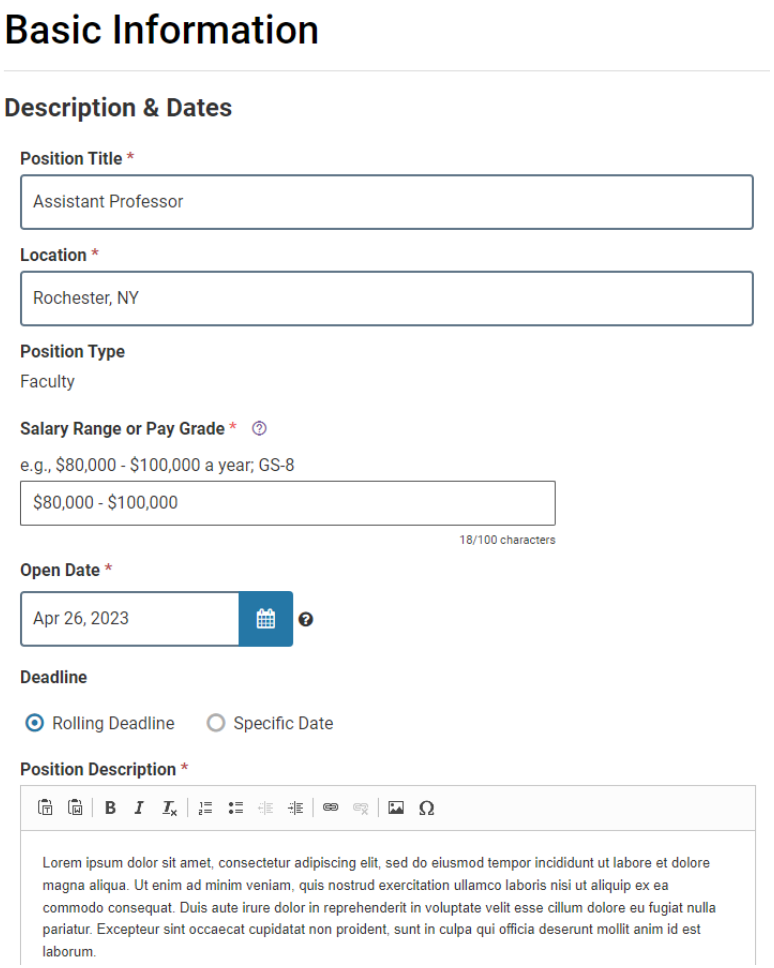


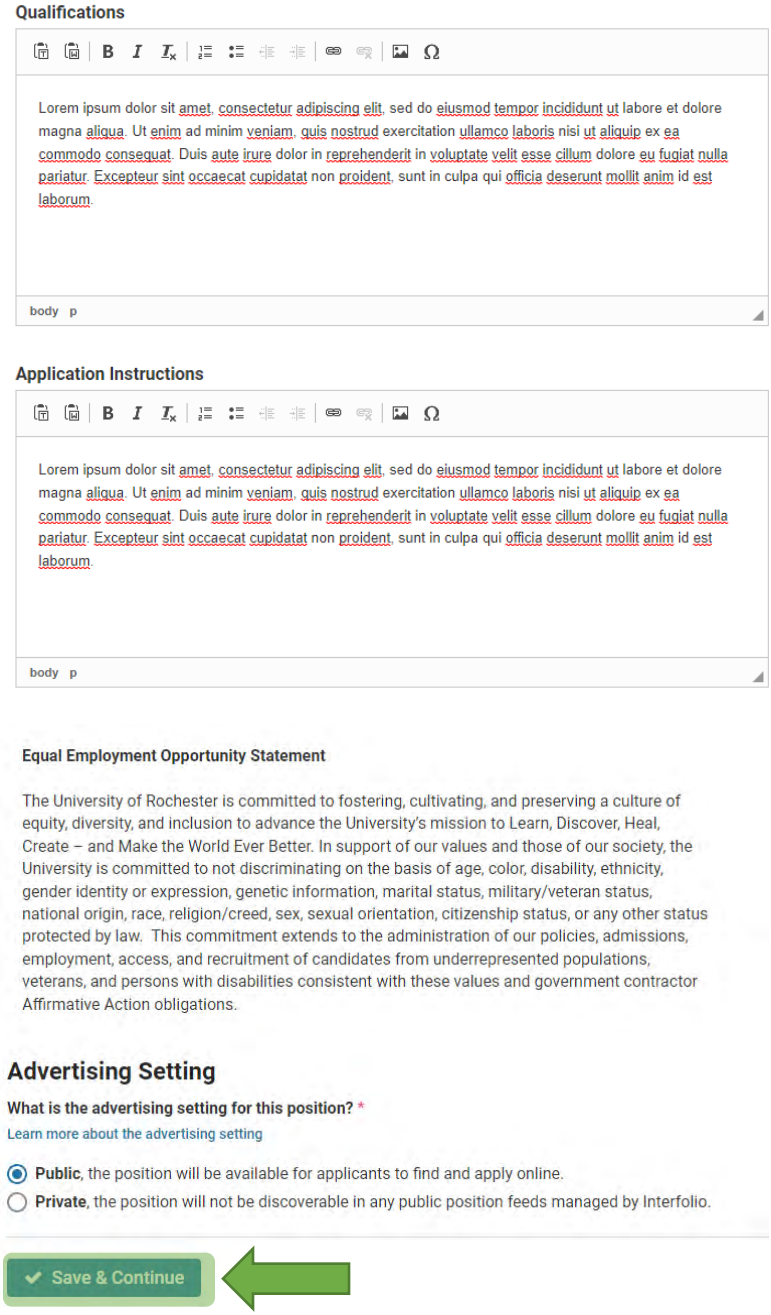
BASIC INFORMATION

- **The Basic Information page should be pre-filled with information flowing over from Workday. Please note that any changes to positions made in UR Faculty is subject to additional approval.**

Position Title: integrated from Workday
Location: integrated from Workday
Salary Range or Pay Grade: integrated from Workday
Open Date: integrated from Workday; update if necessary. If the position has citizenship limitations, please include this statement at the end of the description: "The University acknowledges that there may be limited situations where a federal law, regulation, executive order, or government contract requires the University to consider candidates with certain citizenship statuses."
Position Description: copy and paste from Workday
Qualification: copy and paste from Workday

Application Instructions: copy and paste from Workday. Include the following: "If you already have an Interfolio account, please sign in to apply to this position. If not, please create an Interfolio account. For questions/concerns pertaining to the position, email [committee manager's email address]." *Do not direct applicants to apply external to UR Faculty. Advertising Setting (public/private): integrated from Workday; update if necessary*

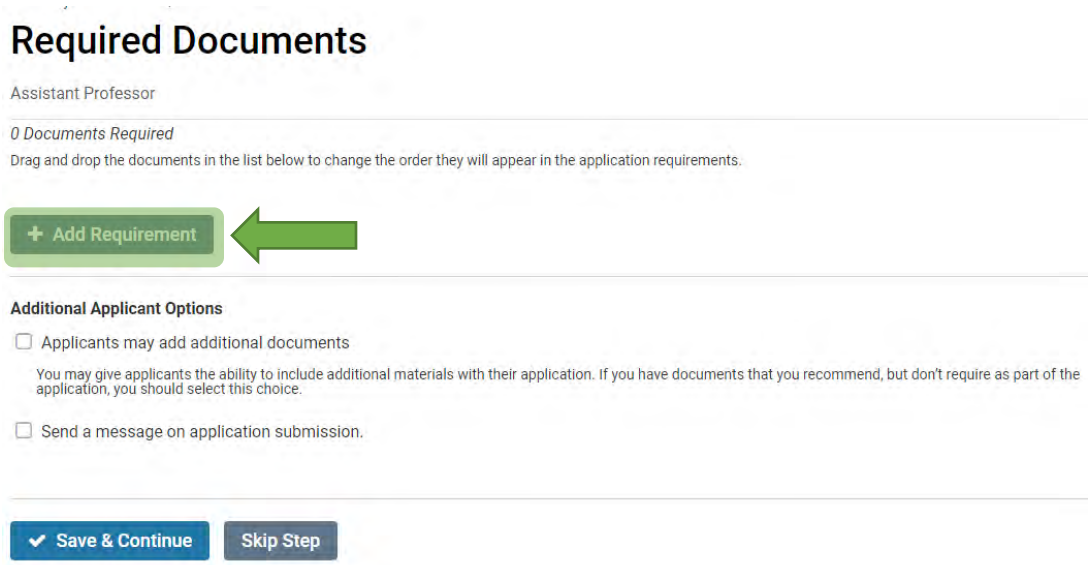




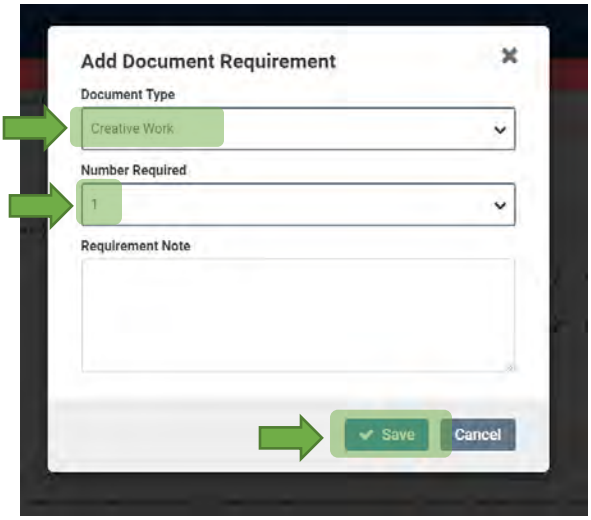
- **Click on "Save & Continue".**

ADD REQUIRED DOCUMENTS

- **Click on "+ Add Requirement"**



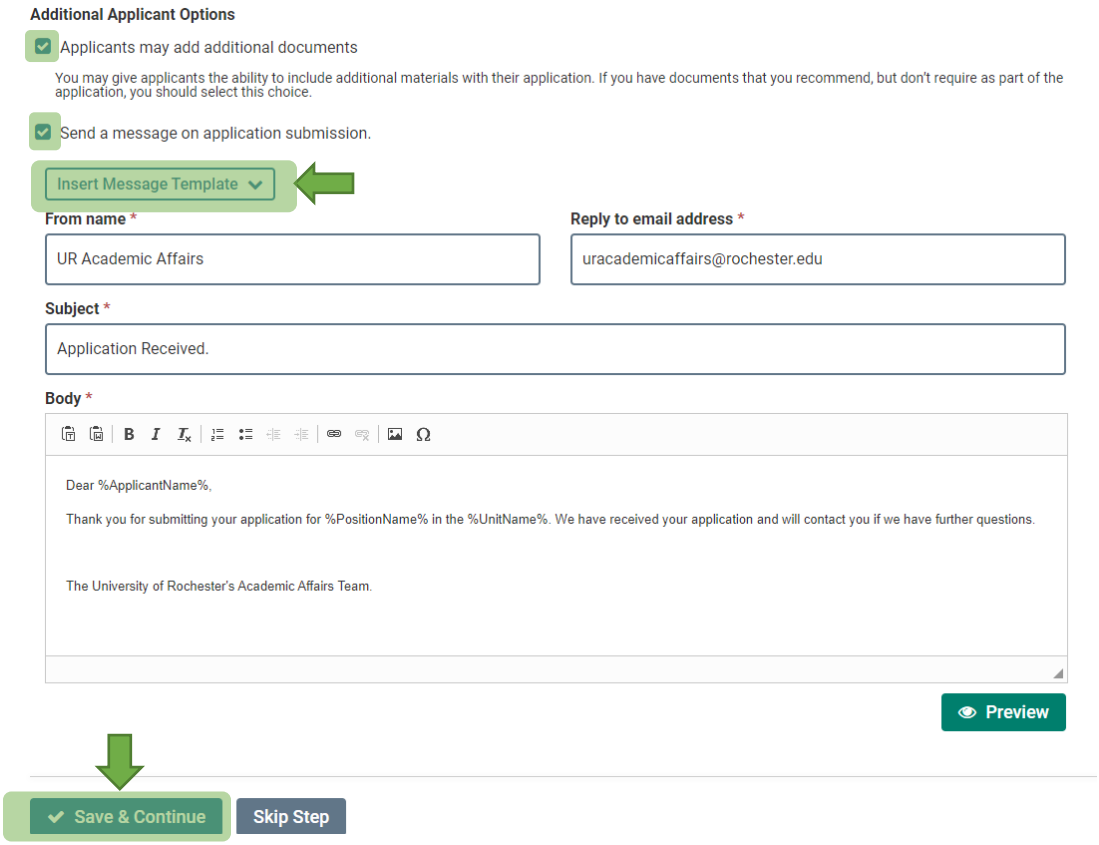
- **In the pop-up window, select a document type, number of documents required, and a requirement note (optional).**
- **Click "Save". Repeat for each required document.**



- **Note on indicating that a document is optional and not required: After adding the document following previous steps, edit the required document and change the number next to it to "0". This will mean that the document is optional and that applicants may submit their application without meeting this document requirement.**
- **Note on "Non-confidential Letter of Recommendation or Evaluation" vs. "Confidential Letter of Recommendation or Evaluation": If you select "Non-confidential Letter of Recommendation or Evaluation", applicants may upload letters themselves and attach them to their applications. If you select "Confidential Letter of Recommendation or Evaluation", applicants will be prompted to enter the email addresses of letter writers of their choice. The letter writers will then be prompted by Interfolio to upload the letters. Finally, the letters will get attached to the applications without being visible to the applicants, hence remaining confidential.**

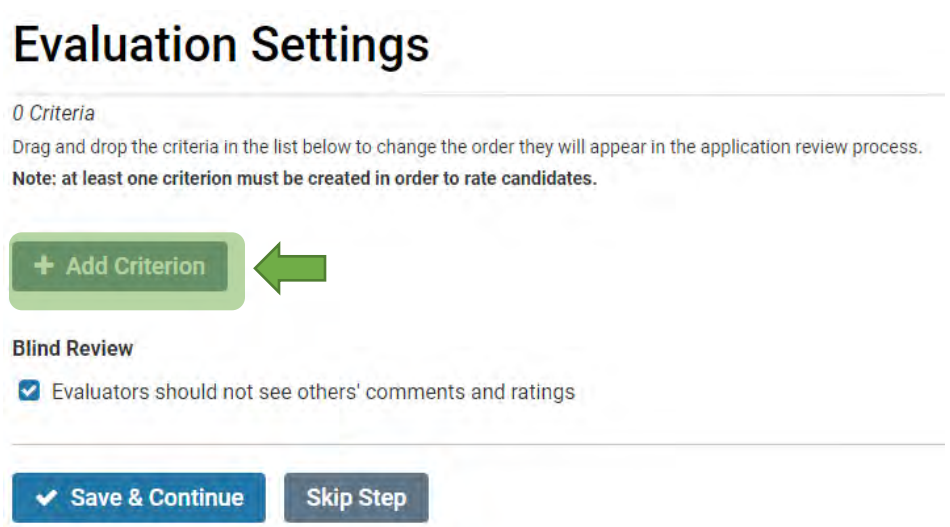
Additional Application Options:

- **Select the first checkbox to allow applicants to upload additional documents**
- **Select the second checkbox to send an "application received" message to applicants**
- **Click on "Insert Message Template" and select "Application Received." (pre-made template)**
- **Click "Save & Continue"**

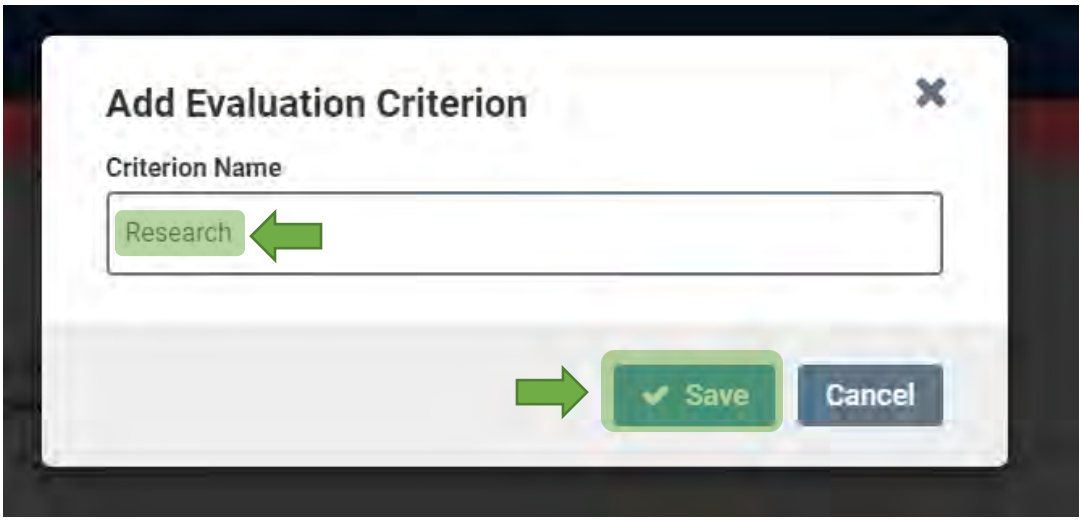


IDENTIFY EVALUATION SETTINGS

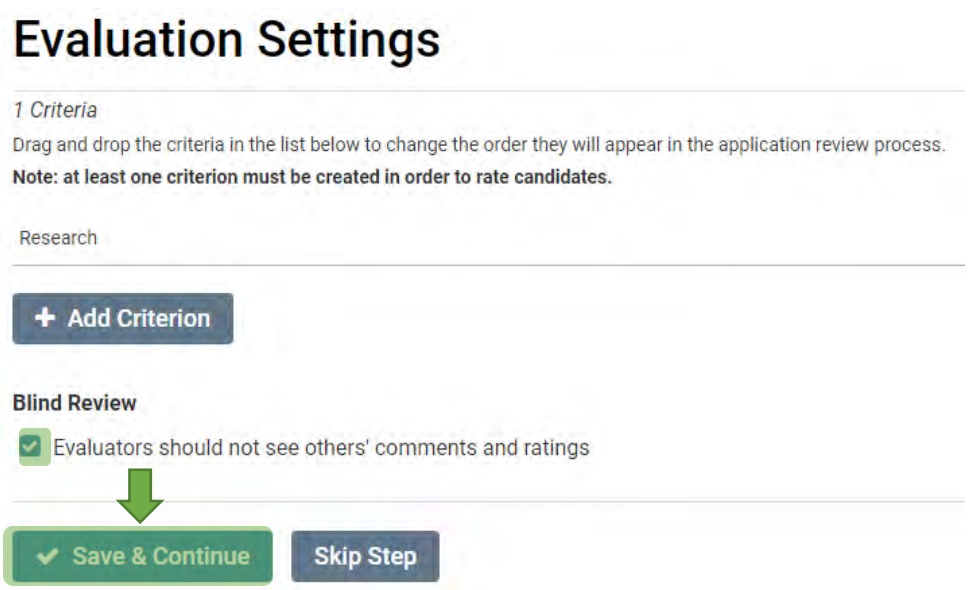
- **Click "+ Add Criterion"**



- **In the pop-up window, add criterion name.**
- **Click "save". Repeat for each criterion.**

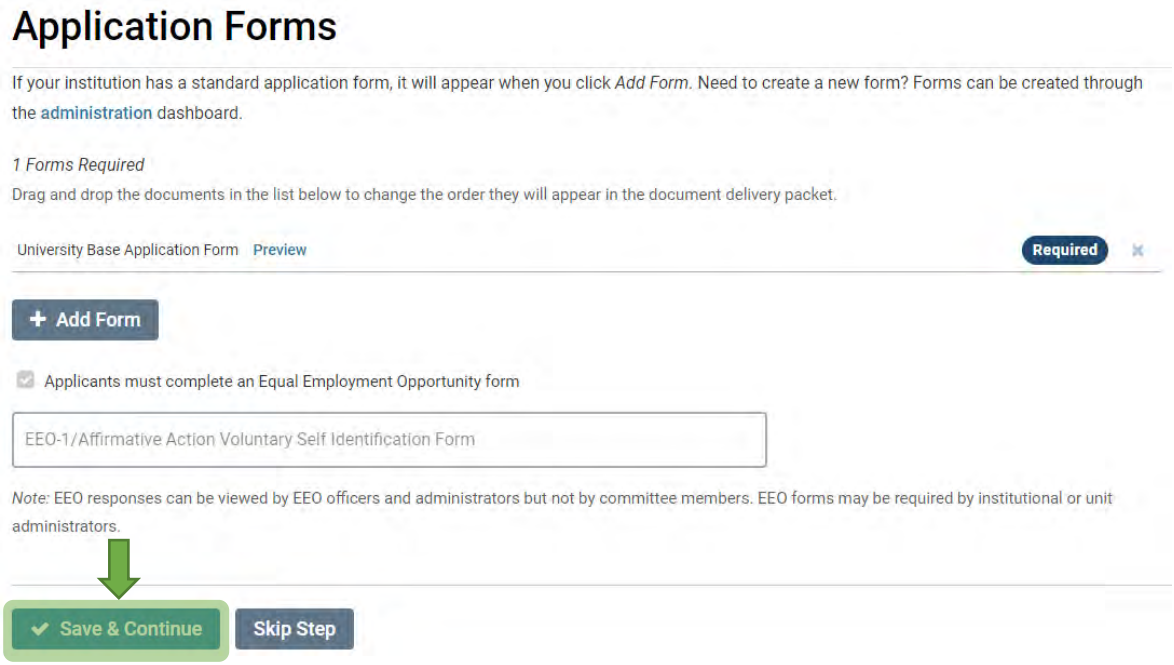


- **Select the checkbox to indicate if evaluators should see each other's comments and ratings**
- **Click "Save & Continue"**



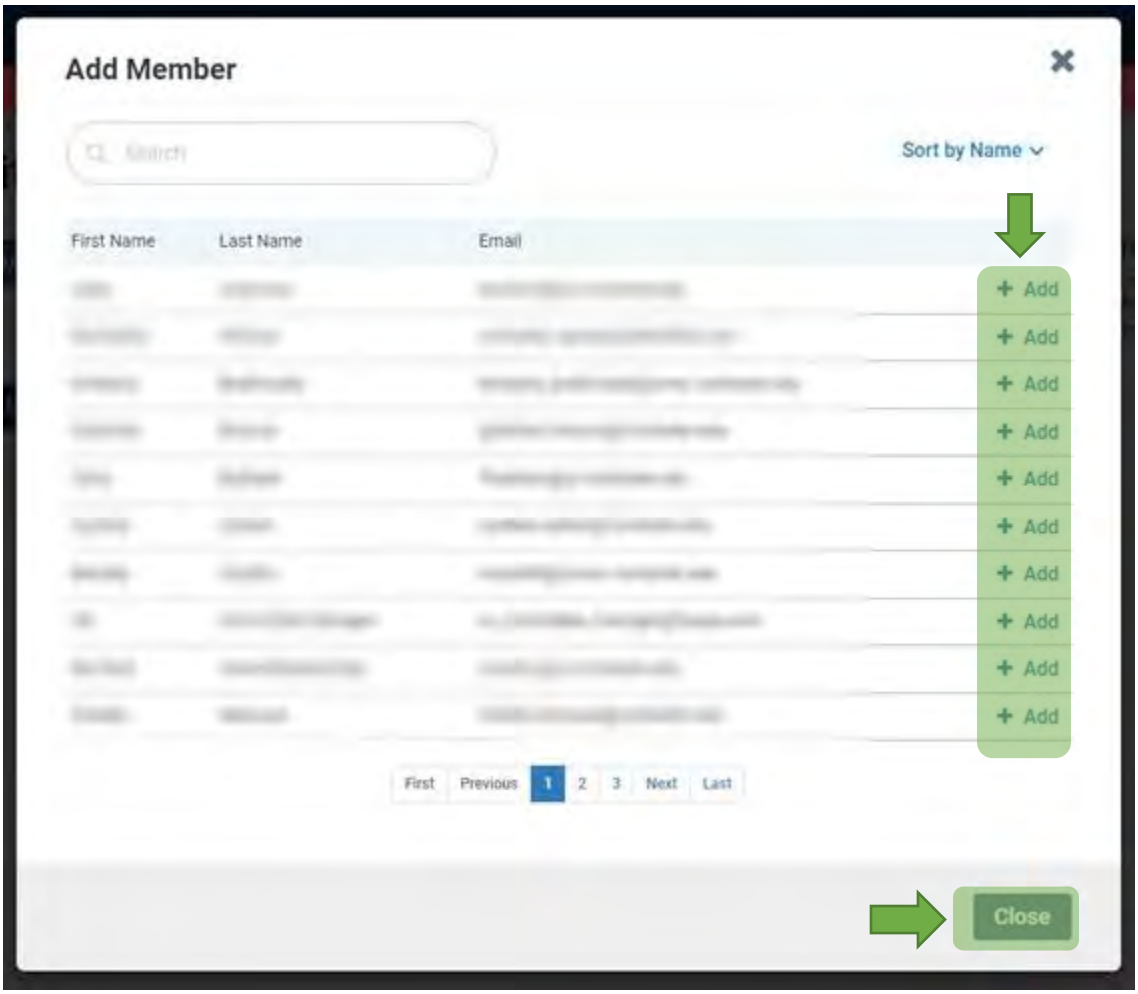
ATTACH CUSTOM APPLICATION FORMS

- **The University Base Application Form (required) is added by default**
- **The EEO form (required) is added by default**
- **If your department has a custom form, attach it here. Otherwise, click on "Save & Continue"**



CREATE A SEARCH COMMITTEE (this can be edited while a search is underway)

- **Click "+ Add Member" and select user(s) to be added to search committee.** Note that Committee Managers cannot be Evaluators. Note that in order to be assigned as Committee Manager or Evaluator, the user needs to first be in the FIS database. To add a new user, please send an email to URFacultyHelp@rochester.edu and include:
  - User's full name
  - Email address
  - URID, if possible
  - School/department
  - Role (Administrator/Committee Manager/Evaluator)
- **Click "Close" when done.**



- **Repeat for "+ Add Manager".** Note that the user creating a new position is listed as Committee Manager by default. This can be changed by clicking on the "x" adjacent to their name and adding a new manager. Note that in order to be assigned as Committee Manager or Evaluator, the user needs to first be in the FIS database. To add a new user, please send an email to URFacultyHelp@rochester.edu and include:
  - User's full name
  - Email address
  - URID, if possible
  - School/department
  - Role (Administrator/Committee Manager/Evaluator)
- **Click on "Save & Continue"**

ENTER POSITION NOTES

- **Some information on this page will be data flowing over from Workday, and some will be information for you to complete.**

  Position ID or Requisition Number: integrated from Workday
  Appointment Type: do not use
  Rank: job code integrated from Workday
  Title: intended functional job title (may be different from the job posting title)
  Discipline: for academic units that might have specialties
  Position Term Length: note that this is in months
  Anticipated Start Date: enter information
  Funding Source: enter information
  Hiring Plan: note if this is a part of a cluster hire, etc.
  General Notes: ***Provide answers to the following two questions for the finance team to review:***

1. **Is this position > 25% research?**
2. **Is there a startup package associated with this position?**

Also, if there is a recruitment form associated with this position, please enter that information here.

- **Click "Save & Continue"**

Position Notes

Public Facing Notes

Your Institutional Administrators have enabled visibility of the salary field. Any information entered on this screen is public and available to all applicants for all positions created within University of Rochester.

Salary Range or Pay Grade *

e.g., $80,000 - $100,000 a year; GS-8

$80,000 - $100,000

18/100 characters

Internal Notes

Any information entered on this screen remains private to users at your institution and will never be seen by applicants.

Position ID or Requisition Number

12345

Appointment Type

– Select Appointment Type –

Rank

e.g., Associate Professor, Lecturer

0005

Title

e.g., Visiting, Clinical, Research

Assistant Professor

Discipline

Spanish

Position Term Length

1-120 months

24 Month(s)

Anticipated Start Date

May 26, 2023

Funding Source

e.g, Vice-President's Office; Grant Foundation

Hiring Plan

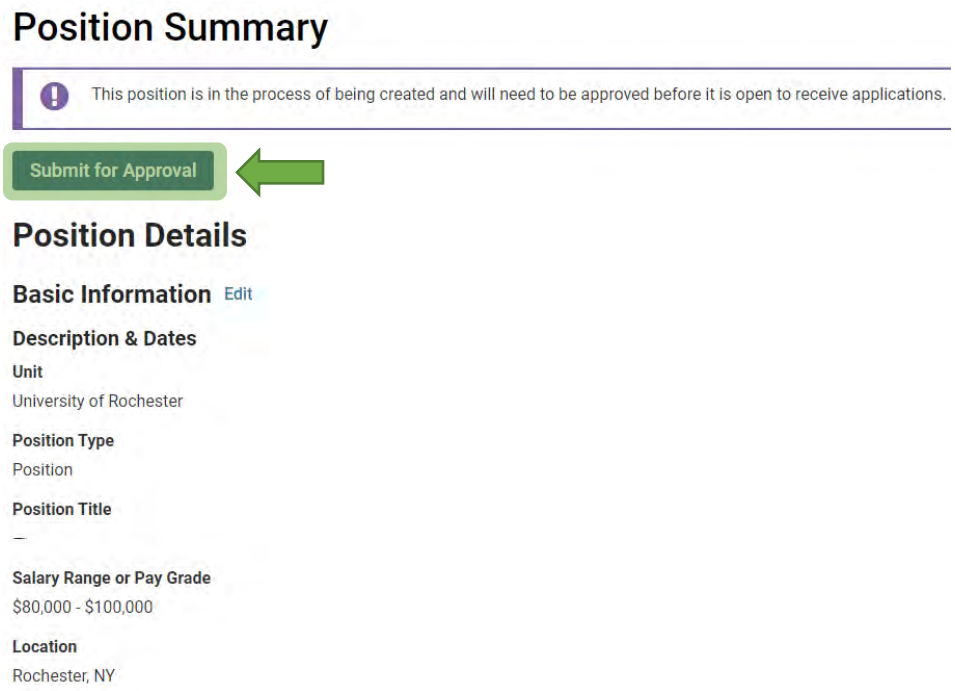
Cluster hire

body p

General Notes

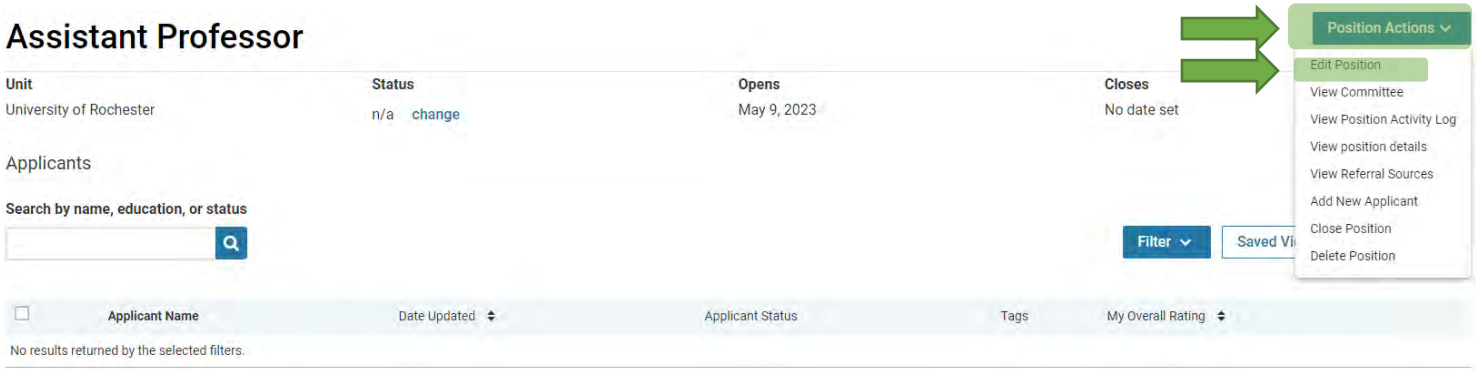
SUBMIT FOR APPROVAL

- **Approval templates have been created to allow the Office of Academic Affairs and the finance team to give approval before a posting can be published.**
- **Click on "Submit for Approval". This will send an email to the finance team prompting them to approve/send back the posting (you can also include a personal message). Once approved by the finance team, the Office of Academic Affairs will also be prompted to approve.**

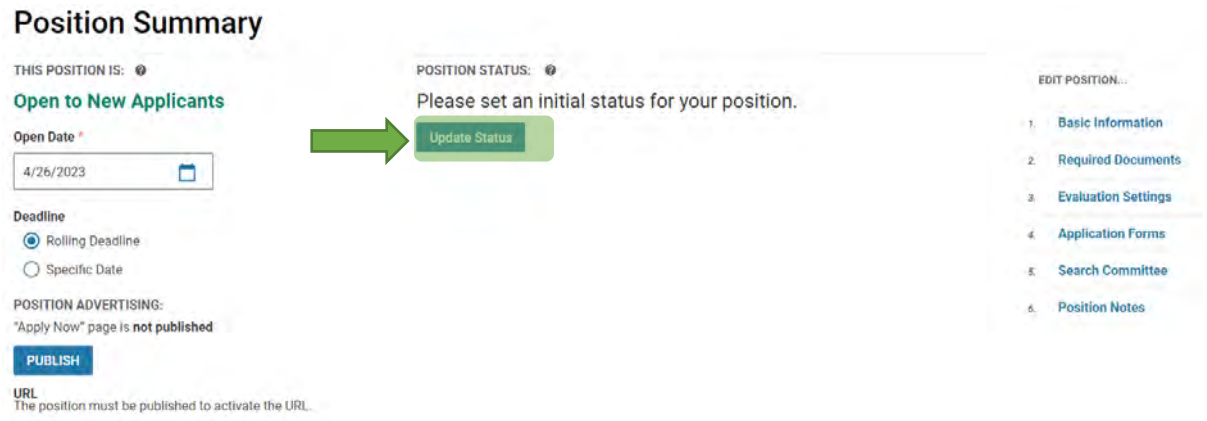


SET INITIAL POSITION STATUS

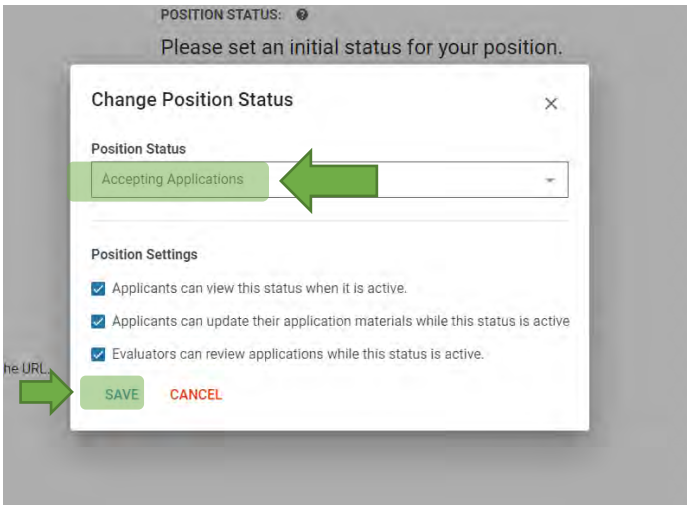
- **Once a position has been approved by both the finance team and the Office of Academic Affairs, you will receive an email confirmation.**
- **The email will lead you to the below screen. Click on "Position Actions" dropdown at the top right and select "Edit Position"**



- **Click on "Update Status"**

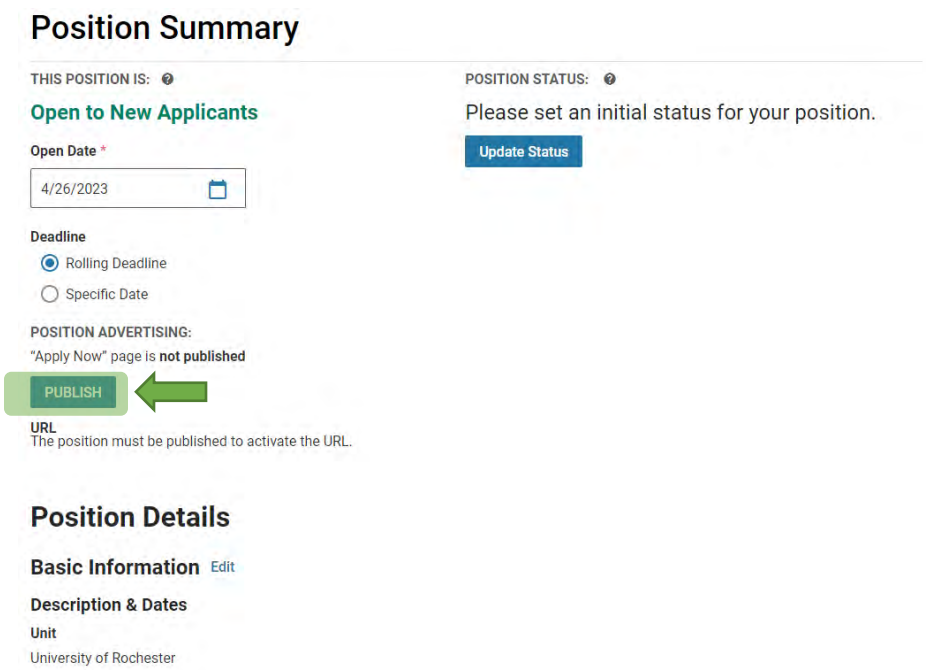


- **Set the position status from the drop down menu**
- **Set the position settings by selecting the checkboxes**
- **Click "Save"**



PUBLISH POSITION

- **Publish position by clicking on "Publish". Please note that the posting is not live until you click on "Publish".**



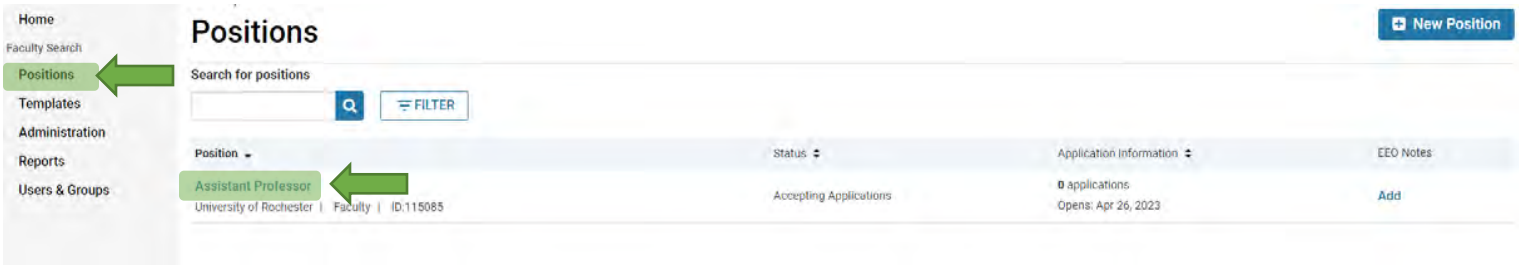
- **Once a position has been published, copy the URL displayed under "URL". Include this URL in your job posting advertisement to direct applicants to apply via Interfolio.**

For more information on creating positions, see Interfolio's help site: https://product-help.interfolio.com/en_US/creating-and-managing-positions/create-a-position

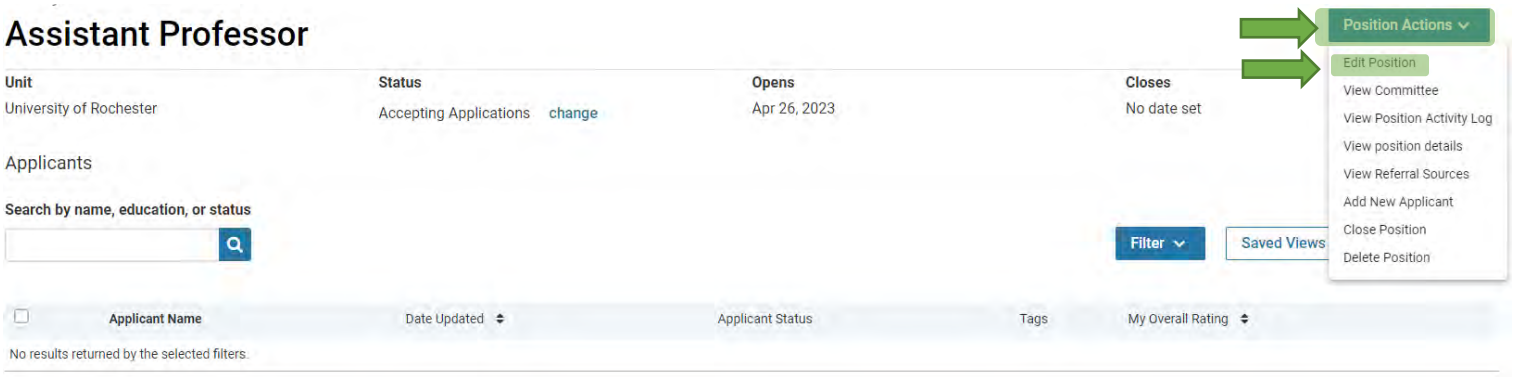
EDIT AN EXISTING POSITION

EDIT POSITION

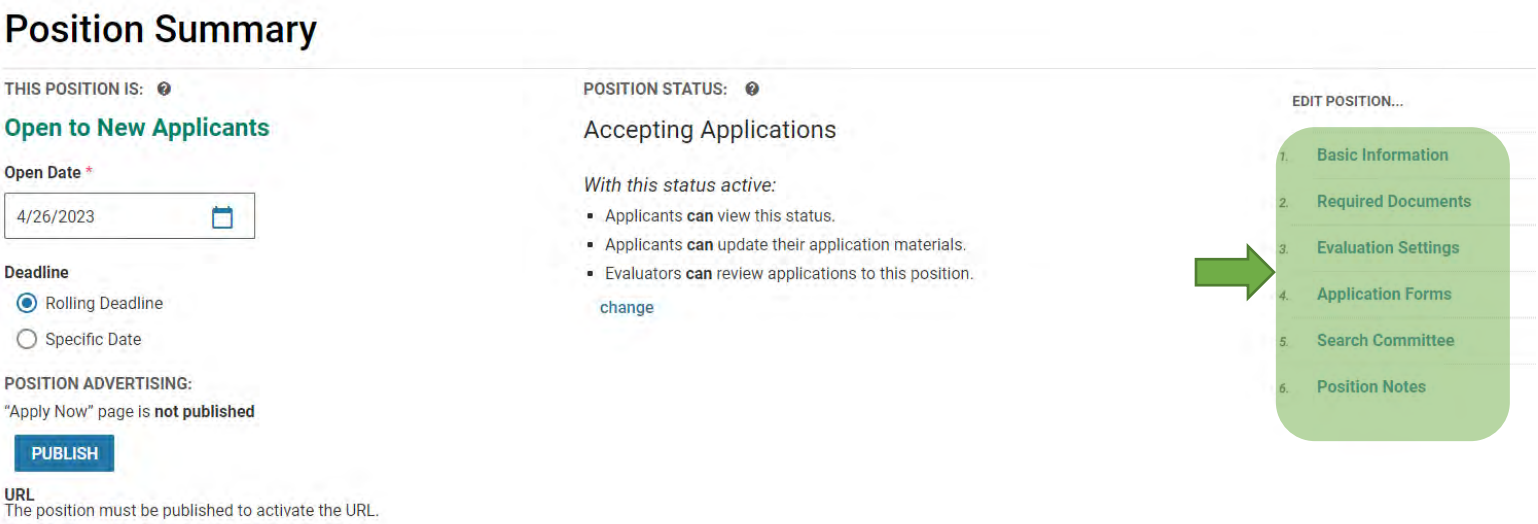
- **Note: After the position has been approved, the Office of Academic Affairs will receive email notifications for position edits.**
- **From the UR Faculty home screen, click on "Positions" on the left menu**
- **Click on the position from the list of positions displayed**



- **Click on "Position Actions" at the top right corner and select "Edit Position"**



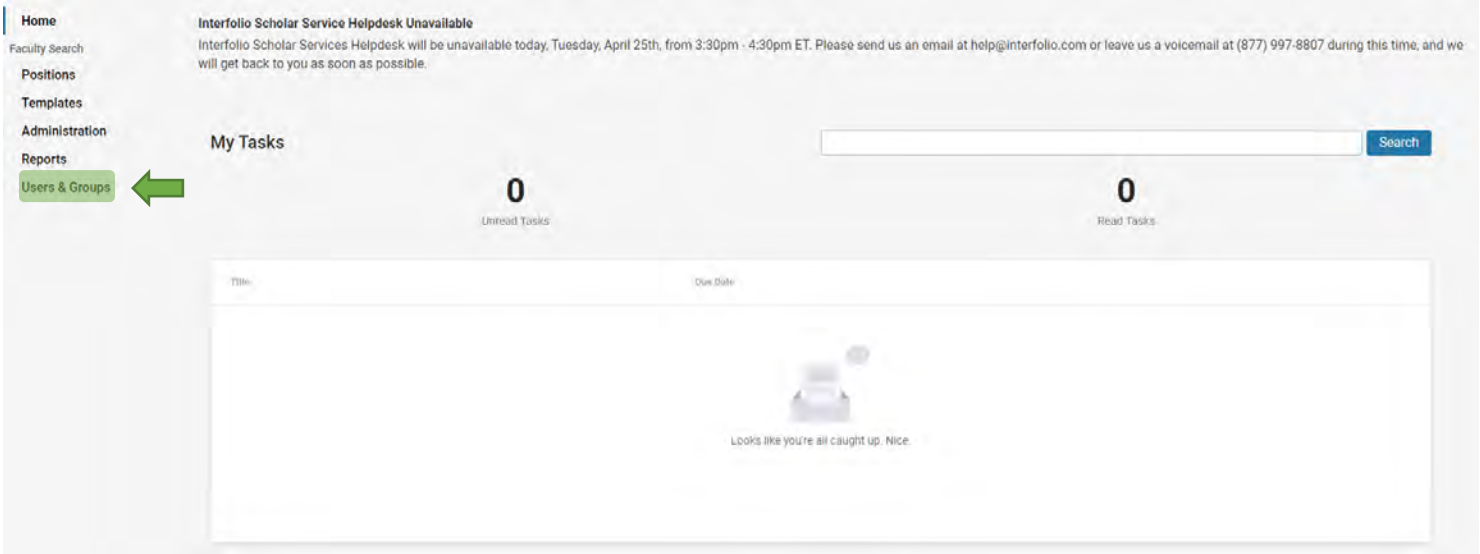
- **Under the "Edit Position" menu on the right side, select the section you want to edit.**



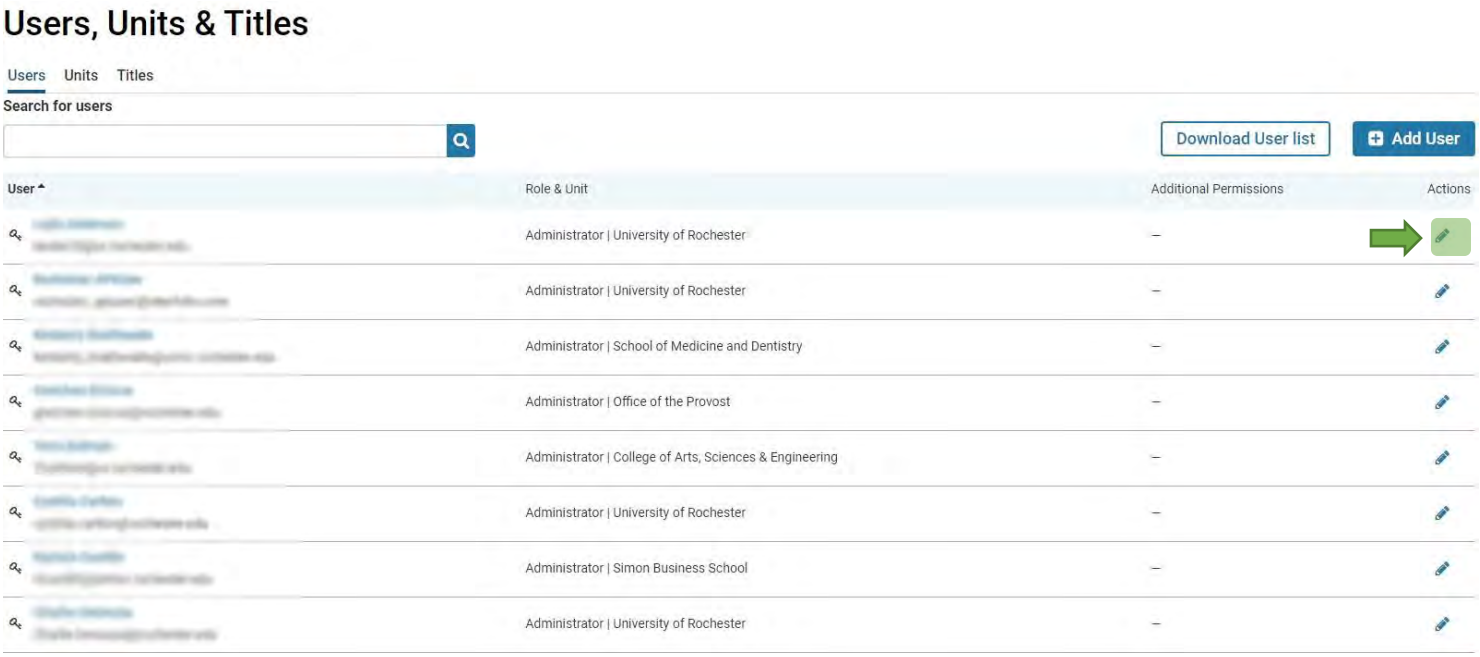
For more information on editing an existing position, see Interfolio's help site: https://product-help.interfolio.com/en_US/creating-and-managing-positions/edit-an-existing-position

SETTING A USER'S PERMISSION LEVEL

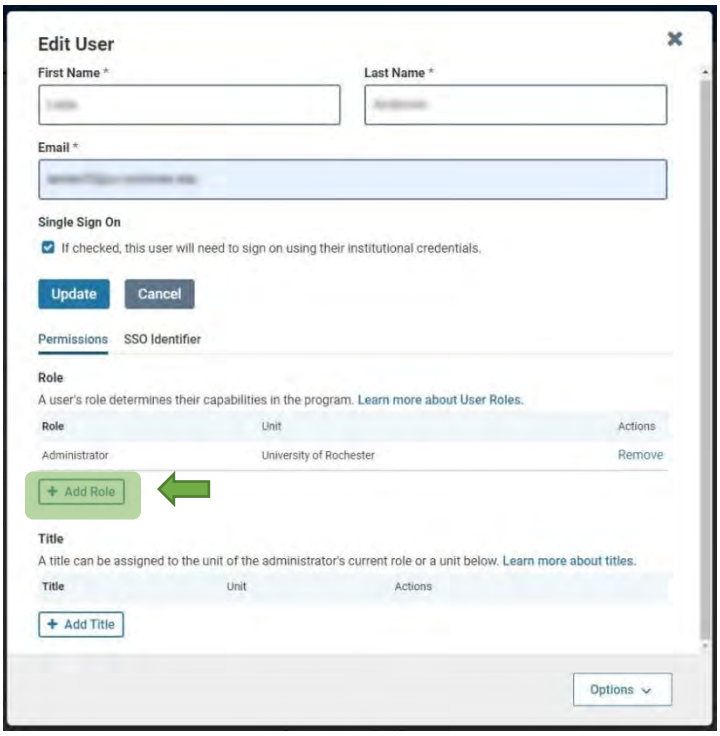
- **Administrators and Committee Managers can set the permission level of users in their unit and below. By default, users have the permission level of an Evaluator. If you are trying to add a user as a Committee Manager but do not see their name as a selectable option when creating/editing a search committee, you will need to assign that user a Committee Manager role.**
- **From the UR Faculty home page left side menu, click on "Users & Groups"**



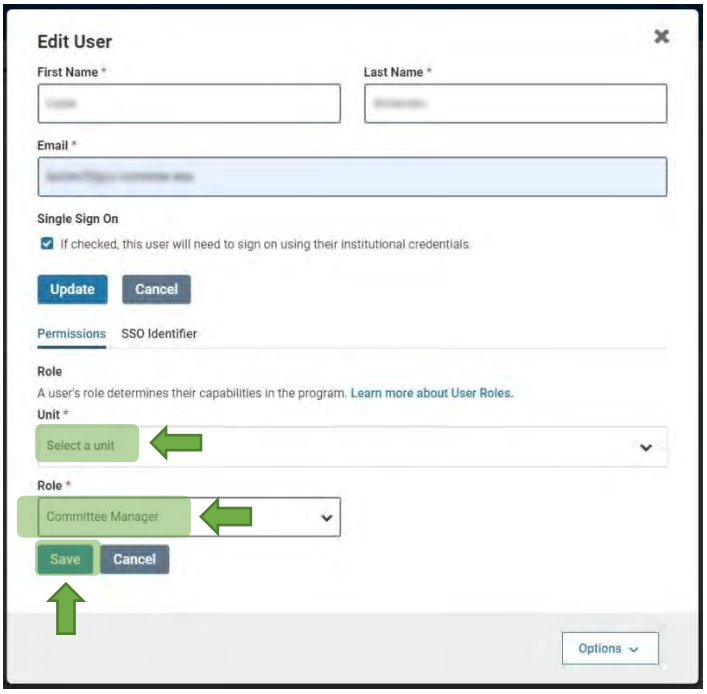
- **Click on the pencil icon on the right side of the desired user's name.**



- **Under “Permissions”, click on “+ Add Role”**



- **Select your unit from the drop down list and select the appropriate permission level under Role**
- **Click “Save”**



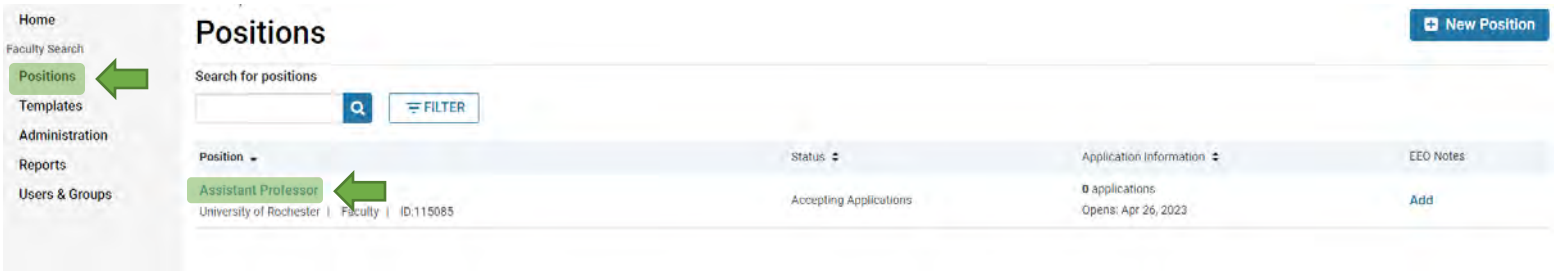
- **Note: if you are trying to add someone to your search committee who is not in the UR Faculty database at all, please do not add a new user yourself. Please contact URFacultyHelp@rochester.edu so that the UR Faculty team can set up the new user with the correct security settings. Once they are in the database as a user, you can add them to your search committee.**

For more information on changing a user's role, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/change-a-users-role-or-delete-a-user-in-faculty-search

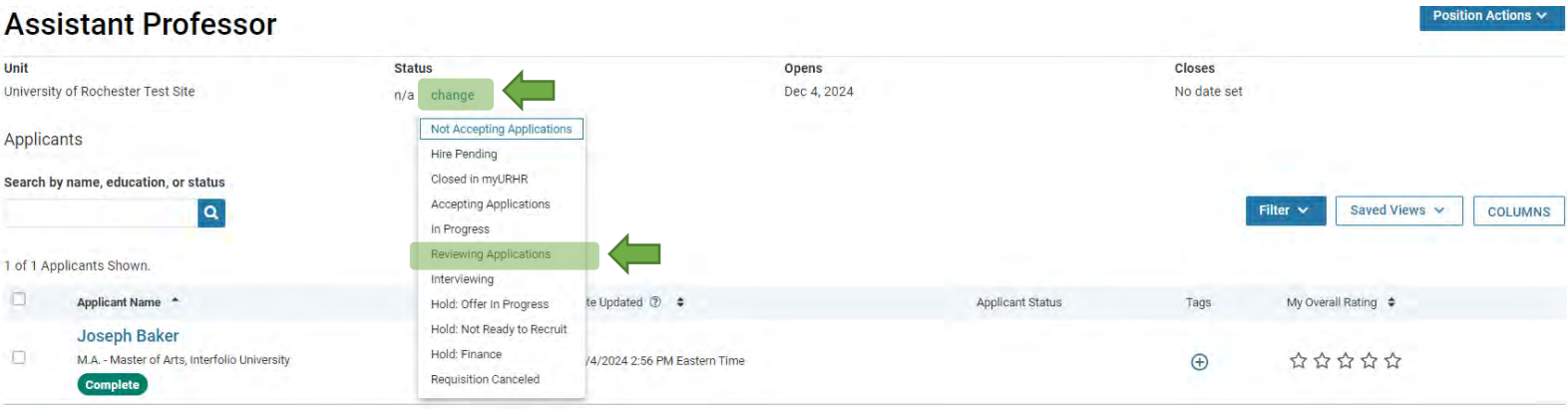
MANAGE A SEARCH

CHANGE POSITION STATUS

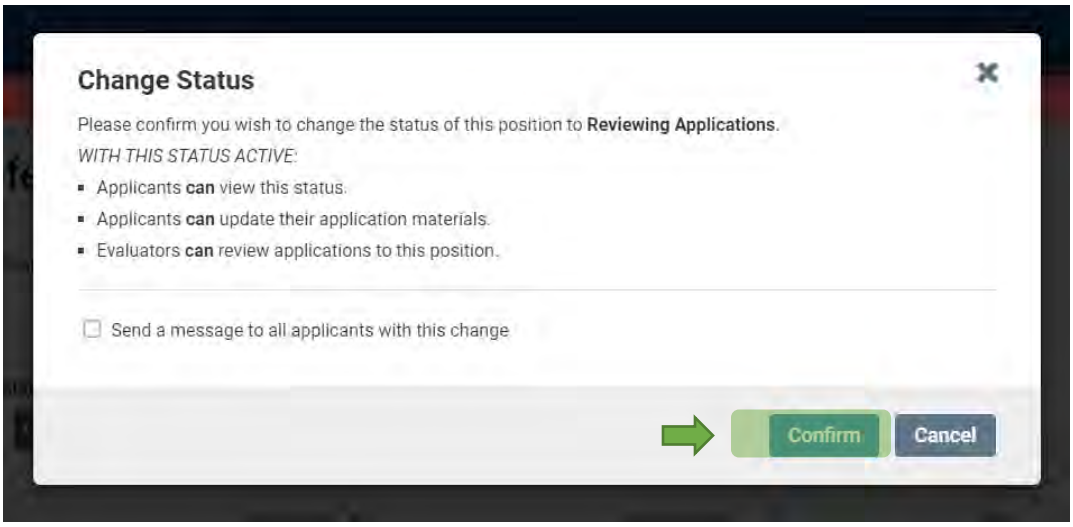
- **From the UR Faculty home screen, click on "Positions" on the left menu**
- **Click on the position from the list of positions displayed**



- **You are now on the position profile page. Under Status and next to the current position status, click "change". When you choose a new position status, a pop-up will display what that status means for current applicants and evaluators. The position status does not affect whether new candidates can apply to the position or not (use open date/unpublish position/close position to control that).**
-

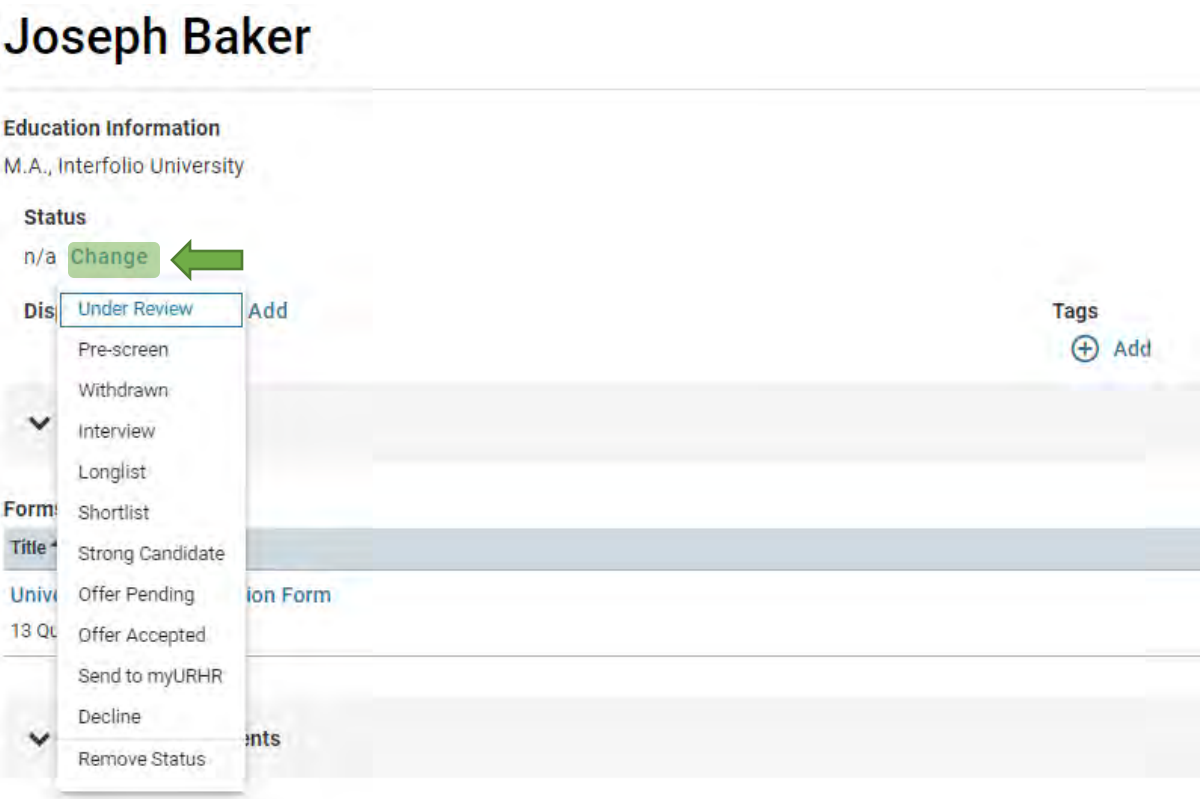


- **Select the desired position status and click "Confirm" on the pop-up window.**



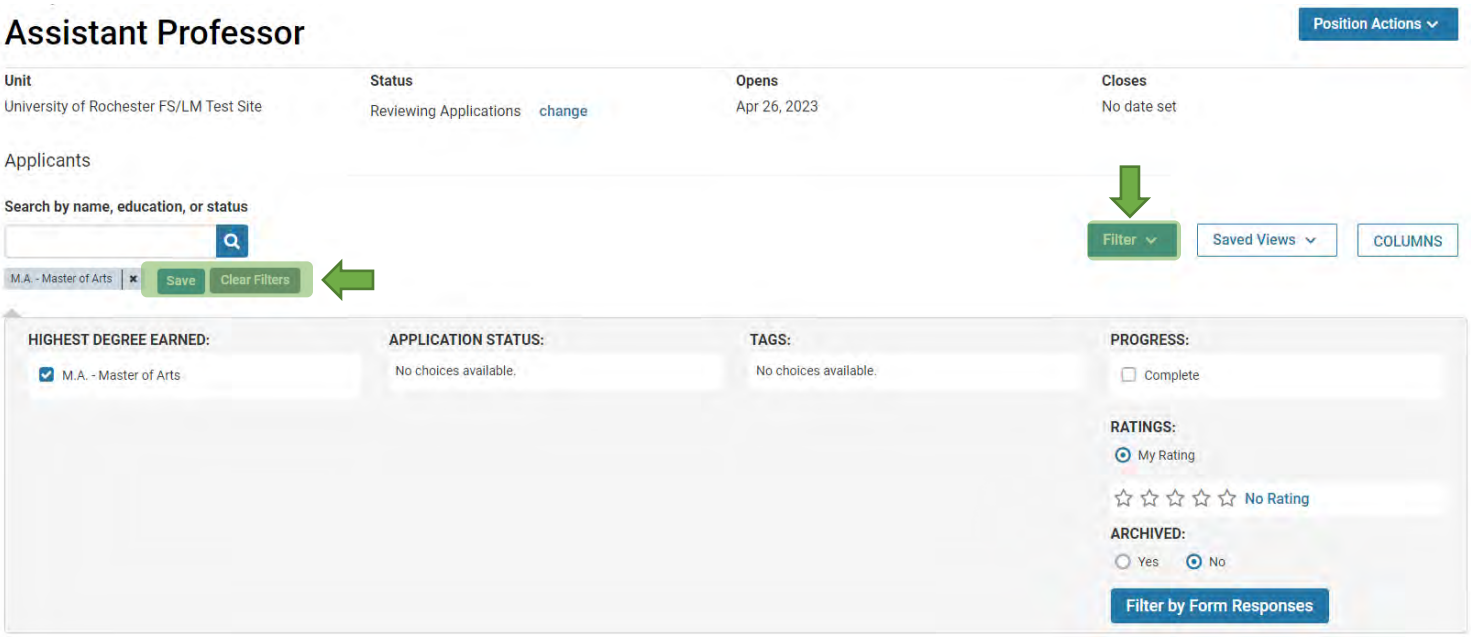
USE APPLICATION STATUS

- **Use application statuses to track the progress of applications. Application statuses can also be filtered by in Faculty Search reports, which might be useful for you.**
- **On the position profile page, you will see the pool of applicants who have applied for the position. Click on an applicant's name to enter their application profile page. Under Status, click "change". When you choose a new application status, a pop-up will display what that status means for the applicant.**
- **Select the desired application status and click "save" on the pop-up window.**



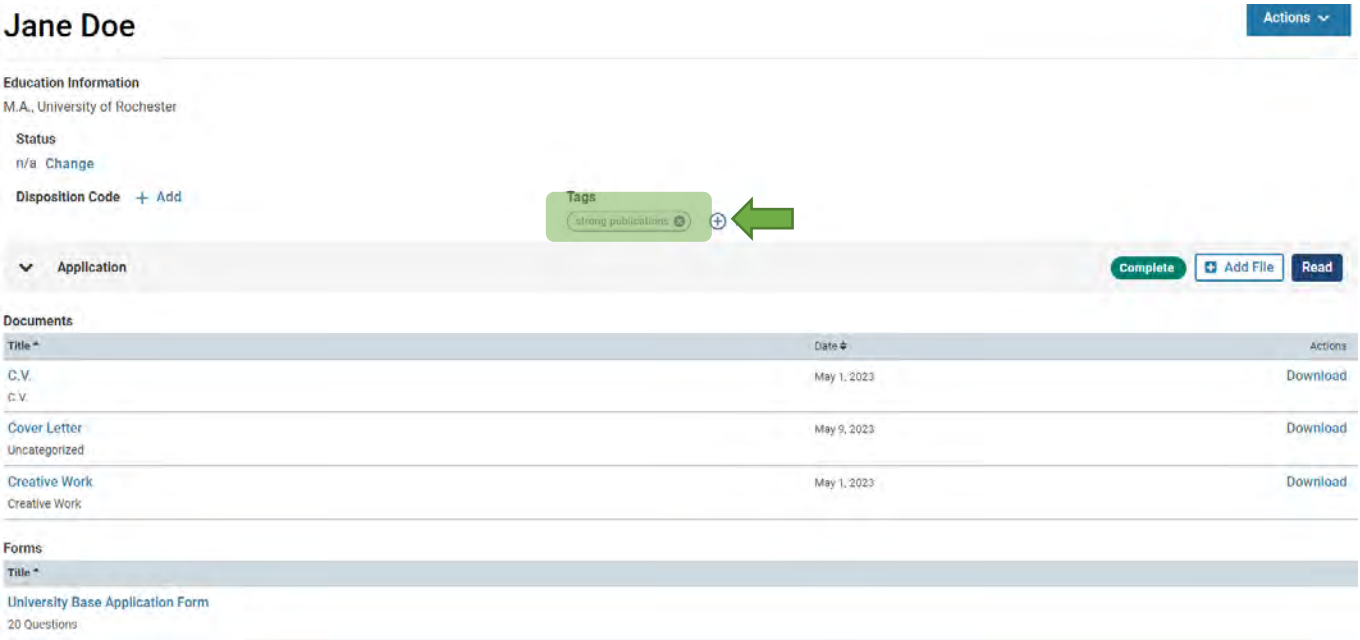
FILTER APPLICANT POOL

- **The list of applications can be filtered by data points including highest degree earned, application status, tags, completion status, ratings, or form responses**
- **Click "Filter" and apply desired filters**
- **The filtered view can be saved by clicking "Save" or cleared by clicking "Clear Filters"**



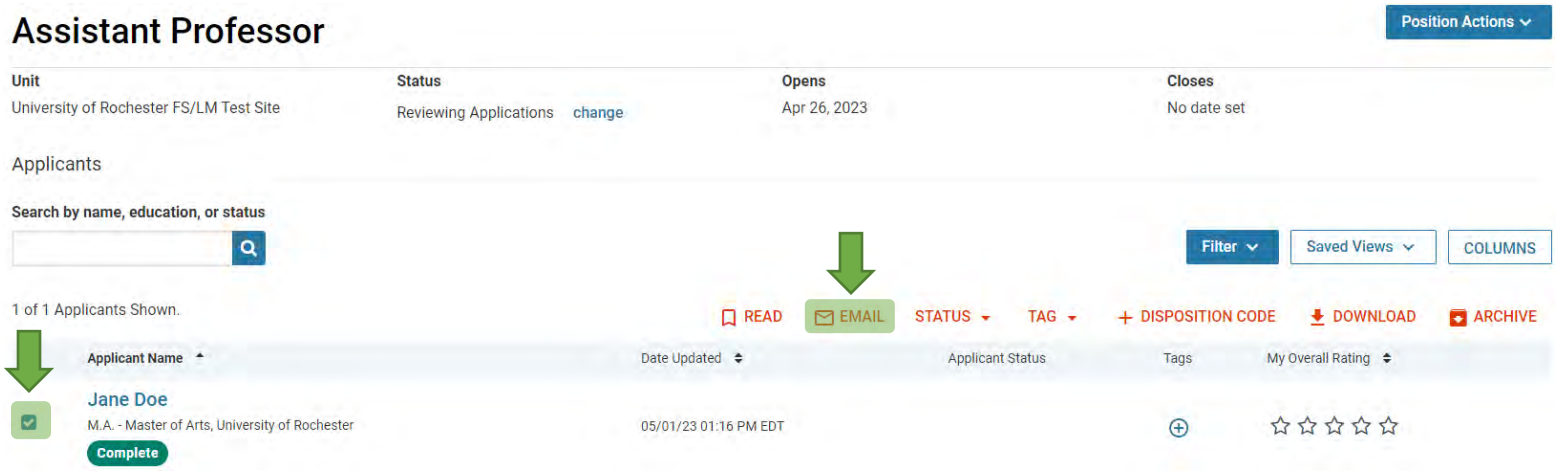
USE TAGS TO MARK & SORT APPLICATIONS

- **Tags are used to help sort, categorize, and quickly identify applications. Tags are visible to other committee members.**
- **On the applicant's profile under "Tags" click "+ Add" to add a tag.**
- **Alternatively, tags can also be added in bulk from the position page.**

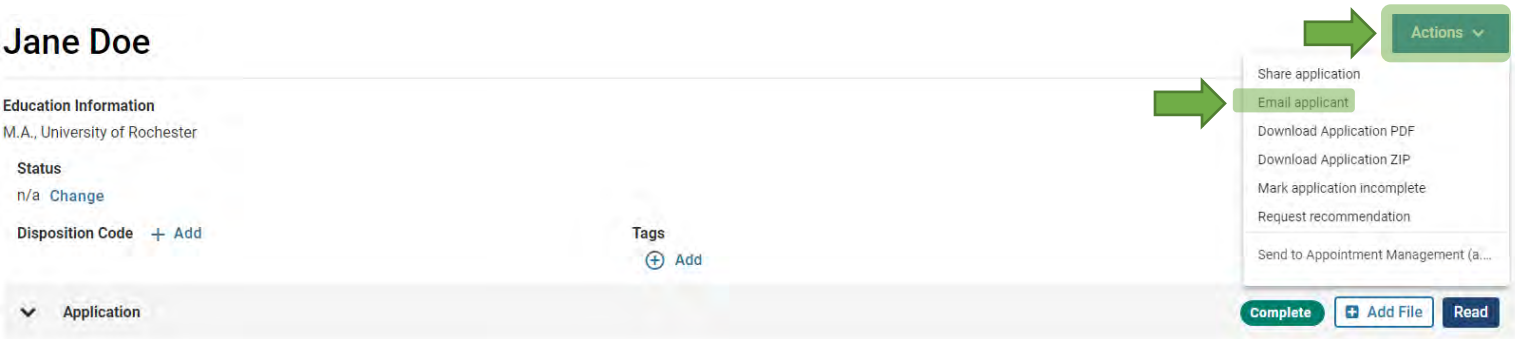


EMAIL APPLICANT(S)

- **From the position profile, select the checkbox next to the desired applicant(s).**
- **Names of applicants who applied for the position will appear on this position page. Select the checkbox next to the desired applicant(s).**
- **A red horizontal menu bar will appear. Click on "Email"**

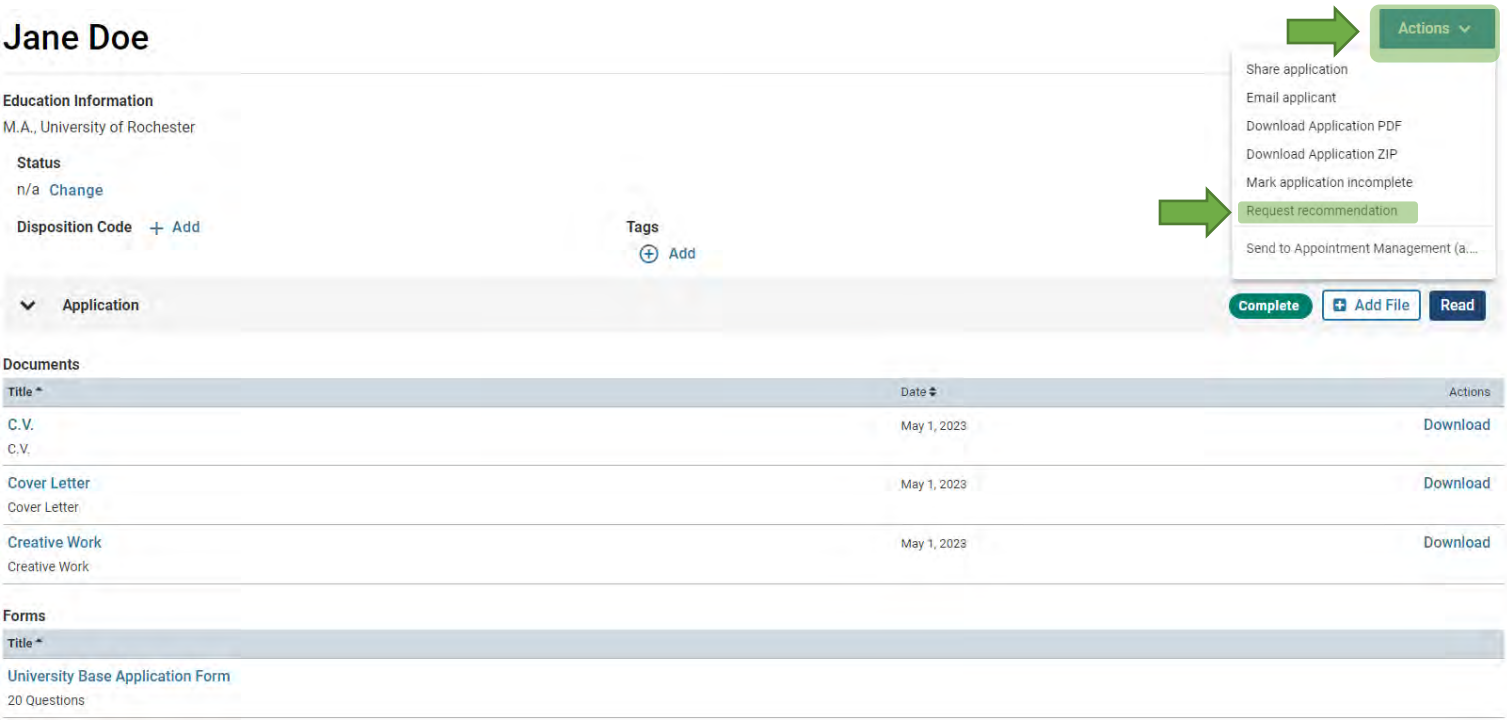


- **Fill out the information on the pop-up window and click "Send".**
- **Alternatively, to email a singular applicant, you can also click on the applicant's name to see the applicant's profile. Then click "Actions" from the top right menu, and click "Email applicant".**



REQUEST LETTER OF RECOMMENDATION ON BEHALF OF AN APPLICANT

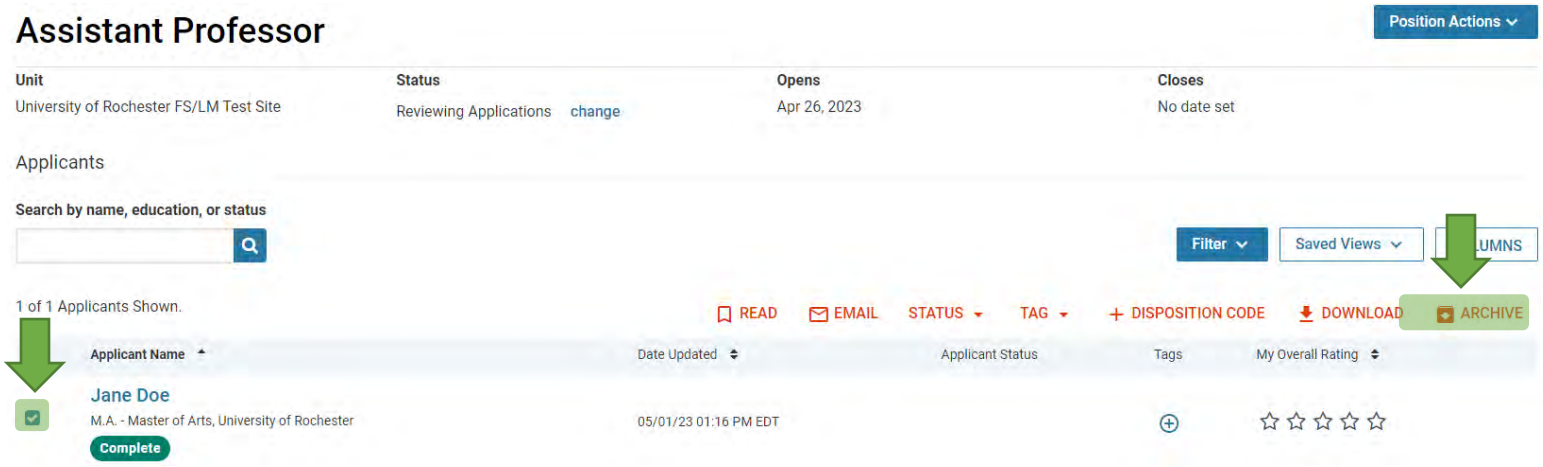
- **From the applicant's profile, click "Actions" from the top right menu, and click "Request recommendation"**



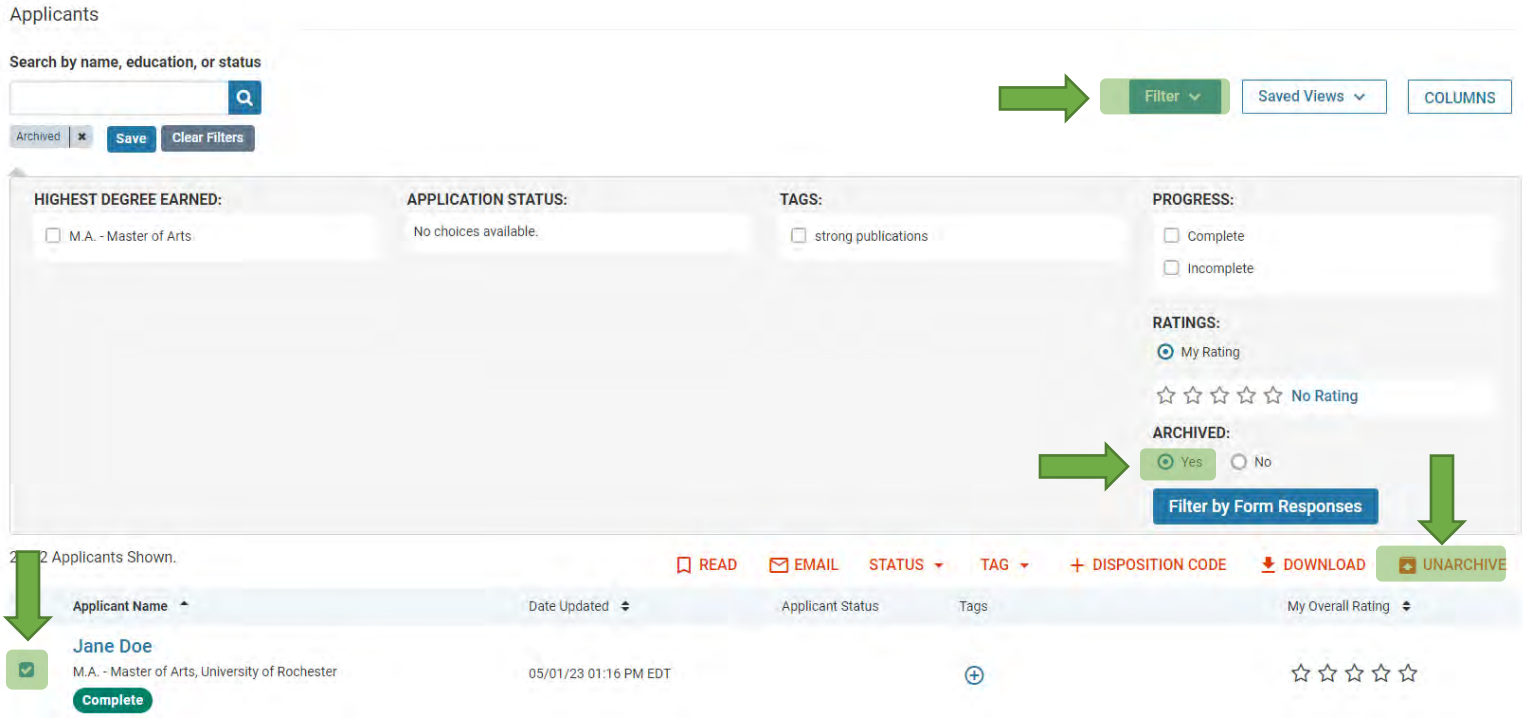
- **Fill out the recommendation request page and click "Send"**

ARCHIVE OR UNARCHIVE AN APPLICATION

- **During the search process, you may want to archive specific applications so that it is no longer displayed in the applicant pool (unless you change the filters). For example, if an applicant is not moving on to the next stage of the recruitment process, you may choose to archive their application so it is no longer visible to Evaluators.**
- **From the position profile, select the checkbox next to the desired applicant(s).**
- **Select the checkbox next to the desired applicant(s)' name.**
- **A red horizontal menu bar will appear. Click on "Archive"**

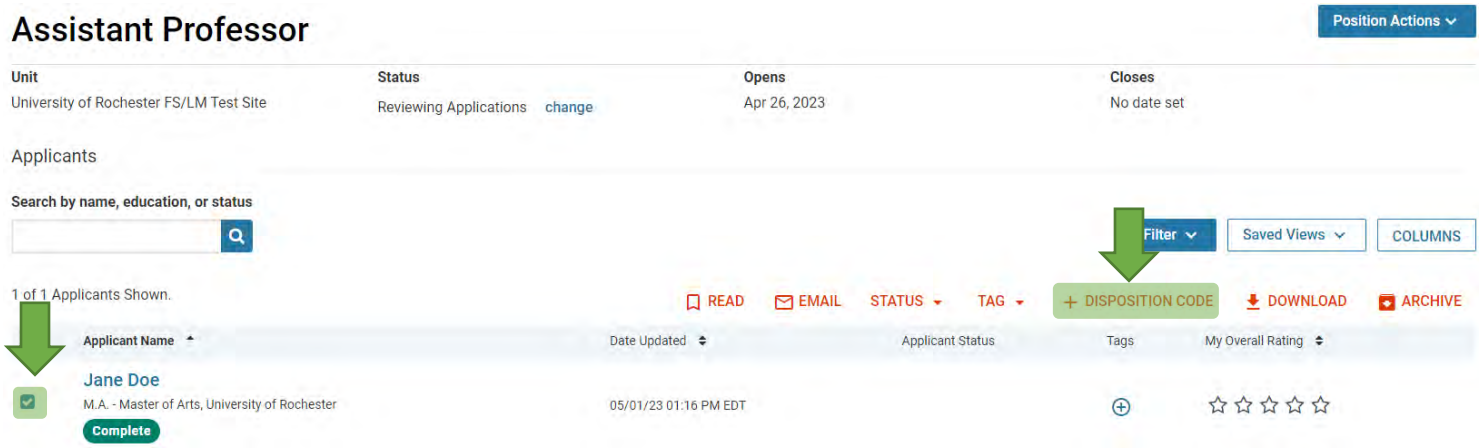


- **To unarchive, click the Filter button above the list of applicants. Select "Yes" under "Archived" to filter the list to display only archived positions.**
- **Select the checkbox next to the desired applicant.**
- **On the red menu bar that appears, select "unarchive"**

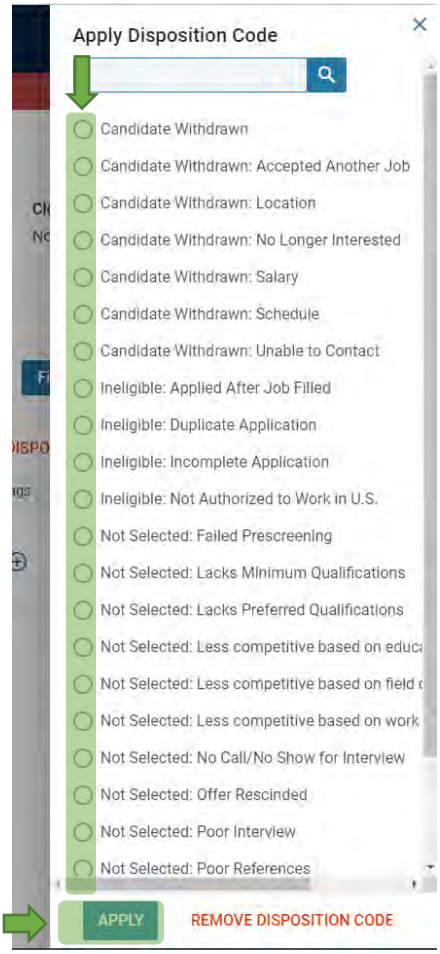


APPLY DISPOSITION CODES

- **Once an applicant has been selected for hire and you are getting ready to close out the position, you will first apply disposition codes to all the applicants who have not been selected, including the applications you may have archived (change the filters to display archived applications).**
- **On the position profile page, select the checkbox next to the desired applicant(s)' name.**
- **A red horizontal menu bar will appear. Click on "Disposition Code"**



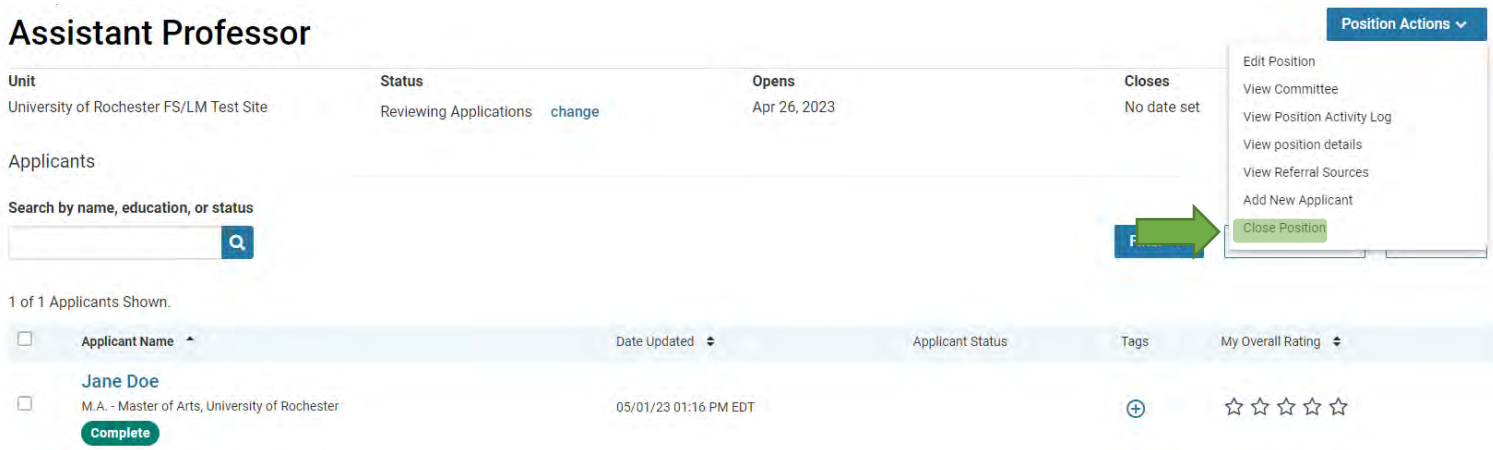
- **Select the desired disposition code and click "Apply"**



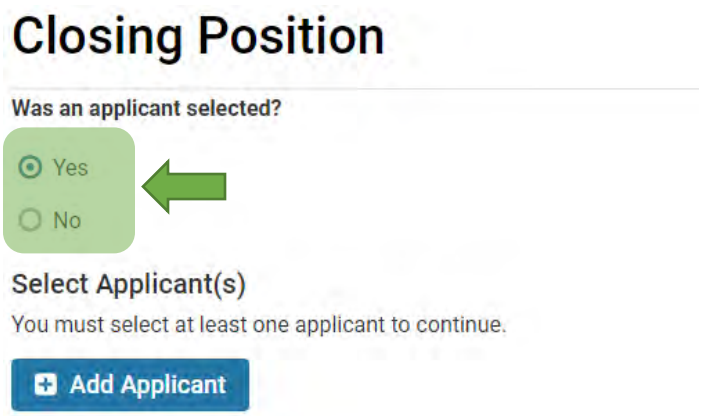
- **Alternatively, to apply a disposition code to a singular applicant, you can also click on the applicant's name to see the applicant's profile. Then next to Disposition Code, click "+ Add"**

CLOSE POSITION

- **Please follow the University of Rochester Posting Requirements guidelines for your school regarding the number of days a position must stay open.**
- **Please note that positions with applications attached to them can only be closed, not deleted.**
- **From the position page, click on "Position Actions" from the top right drop down menu and click "Close Position."**



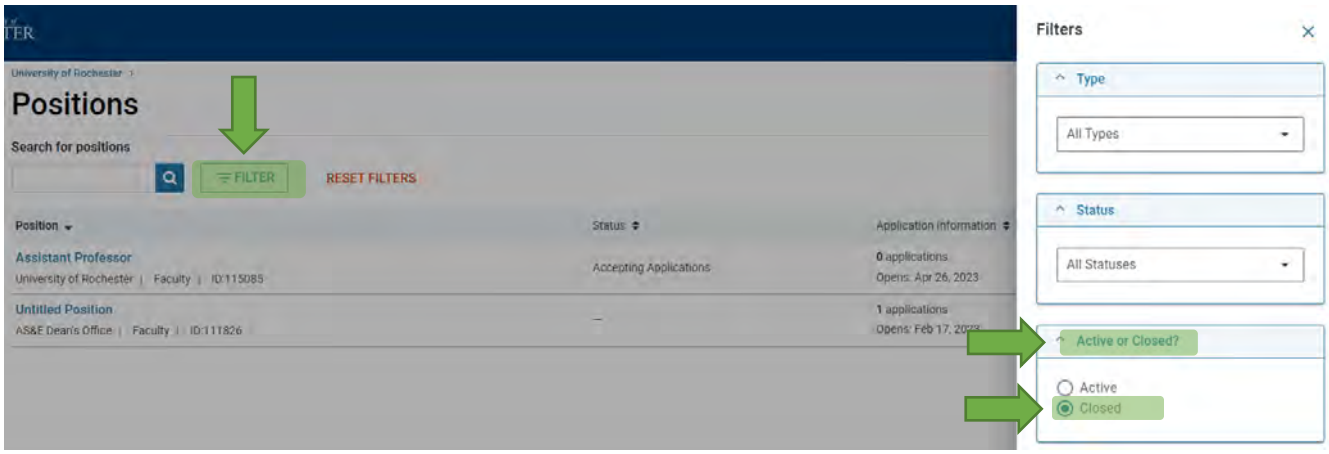
- **Indicate if an applicant has been selected.**
- **If "yes" click on "+ Add Applicant", select the desired applicant, and click "Close Position"**
- **If "no" add a note to document why no selection was made, and click "Close Position"**



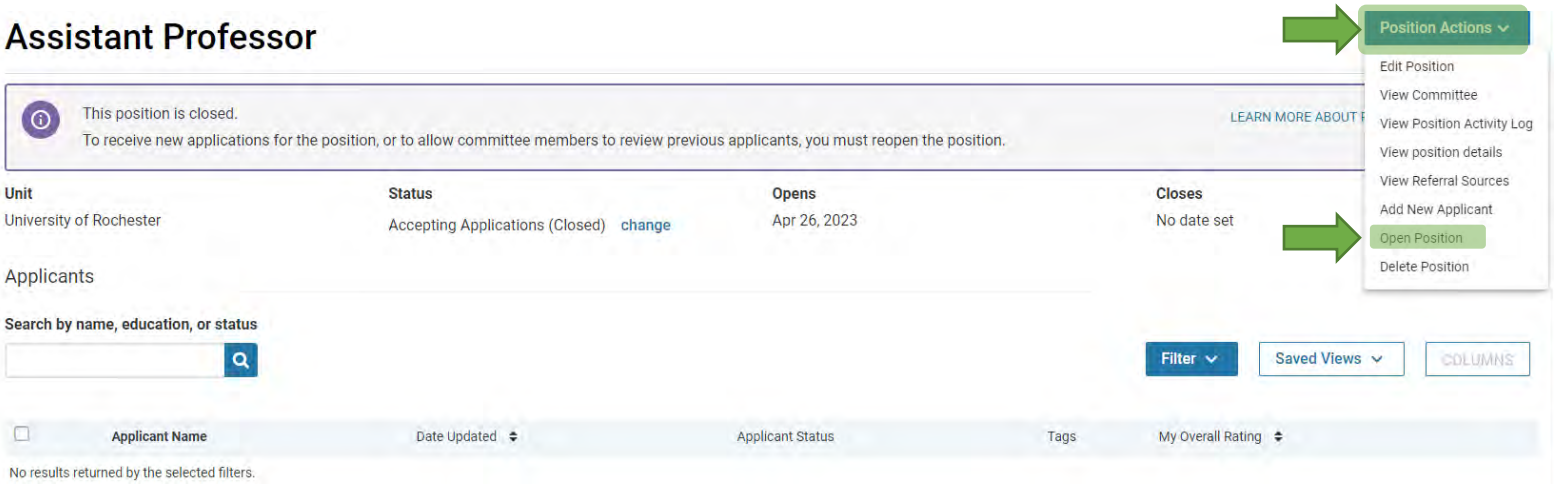
- **The process of having your selected applicant approved for hire starts by closing the position. This will trigger a notification to the Office of Academic Affairs to approve or reject the hire.**
- **If the corresponding position in myURHR is closed, the position status of the UR Faculty position will automatically change to "Closed in myURHR". This is only a position status change for visibility purposes, and does not actually close the position. Closing a position in UR Faculty will need to be done manually by clicking on Position Actions.**

REOPEN A CLOSED POSITION

- **If for some reason you need to reopen a closed position, click on "Filter" and in the pop up window, select "Closed" in the "Active or Closed?" section.**



-
- **Click on the desired position to reopen.**
- **Click on "Position Actions" in the top right corner and click "Open Position"**

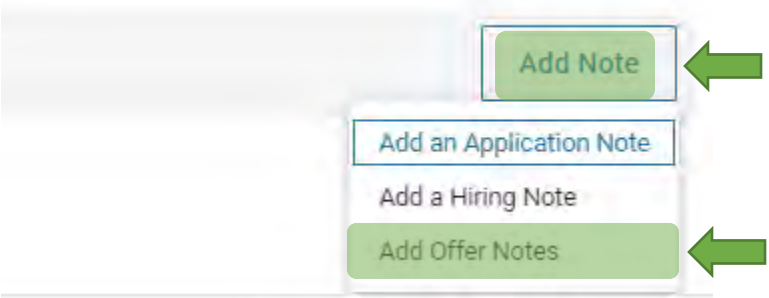


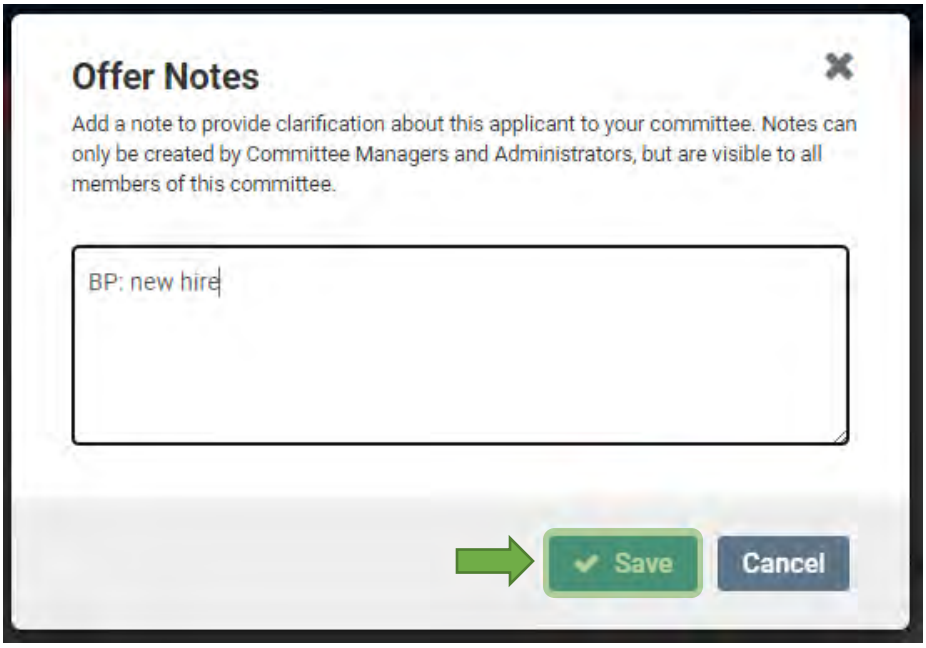
For more information on managing a search, see Interfolio's help site: https://product-help.interfolio.com/en_US/creating-and-managing-applications

Click here for an in-depth training course on Faculty Search for Administrators: https://rise.articulate.com/share/W-GxsP51z-YF0IFRD2r1GbTFlMYyaTma#/

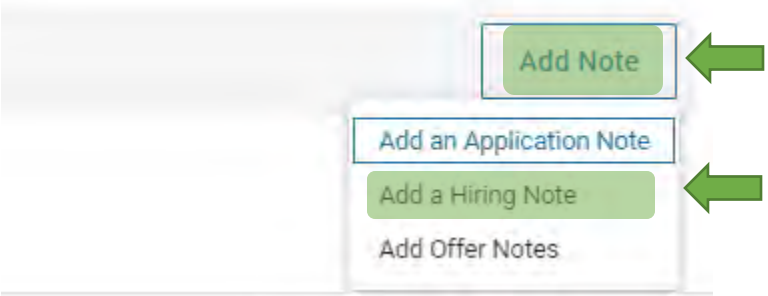
SENDING A HIRE TO MYURHR

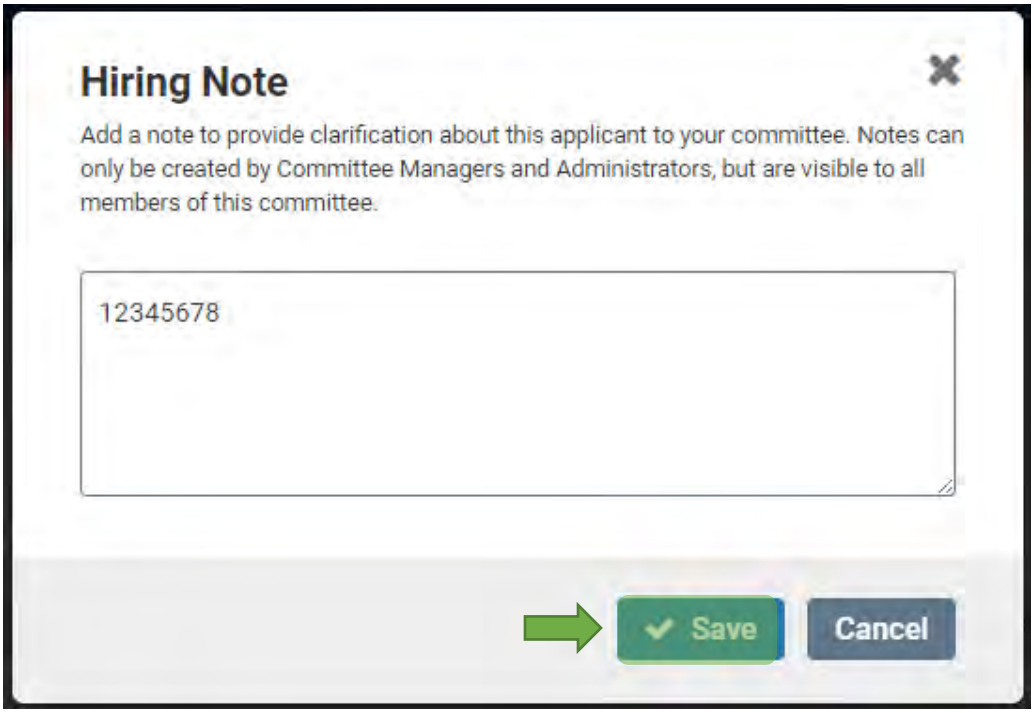
- **An integration has been set up to send a hire directly from UR Faculty to myURHR. There, they will be placed into the position that was initially created to kick off the recruitment process. If the hire will be using a different job code from what was entered into the myURHR position, you will need to first update the myURHR position to reflect this.**
- **Enter the applicant's profile. You can do this even if the position has been closed. (To find a closed position, change the filters on the Positions page to display closed positions).**
- **You will need to indicate which business process should be used in myURHR. Scroll down to the bottom of the applicant's profile and click on "Add Note", then select "Add Offer Note". Enter one of the following business processes (BPs) exactly as it appears here:**
  BP: new hire
  BP: rehire
  BP: change job



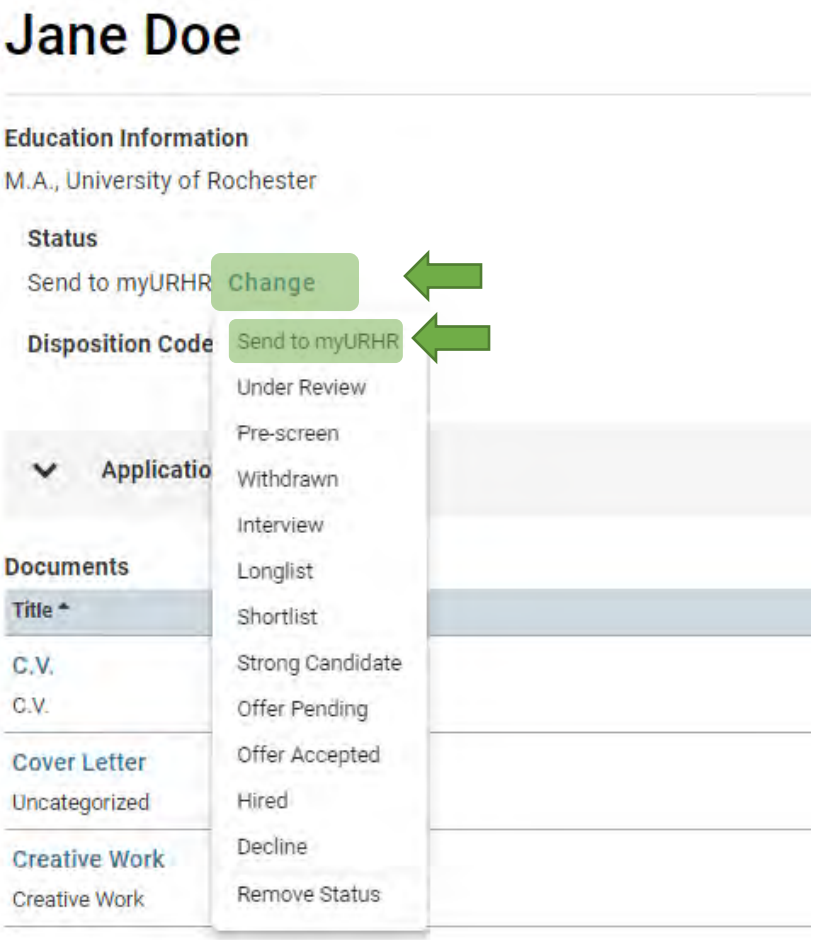


- **If the hire is already affiliated with University of Rochester and has a URID, it will need to be indicated. Click on "Add Note" again and select "Hiring Note". There, enter only the 8 digit URID.**





- **Finally, update the application status to send the hire to myURHR. On the applicant's profile under Status, click on "Change". Note that the application status is different from the position status; the application status is found on the individual applicant's profile. Select the status "Send to myURHR". This triggers the integration to send the hire to myURHR.**



- **WORKDAY STEP: Continue with onboarding your hire in Workday following myURHR instructions. Note: the hire integration from UR Faculty to myURHR runs once an hour.**

Click here for an in-depth training course on Faculty Search for Administrators: https://rise.articulate.com/share/W-GxsP51z-YF0IFRD2r1GbTFlMYyaTma#/