eDossier Help Topics

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A. **Accessing eDossier:**

All active Faculty who are going up for P&T have access to eDossier by default:

1. Log into One.IU using your IU Username and Passphrase.

2. Search/Type "**eDossier System**", select the value from the results.

3. An **"eDossier System"** Task will appear.

4. Click on the "**Start**" button to access the application.

Getting started: Click on the **"Dossiers" tab** and then on the **"View Dossier" button**. This will open up the dossier menu – the P&T Checklist – on the left pane. Clicking on the arrows > expands each section further.

Logging out: To logout of eDossier, click on the "Logout" button located on the top right hand corner. For complete CAS logout, click the "CAS logout" button.

B. **Delegates and Guests:**

P&T guidelines state that "responsibility for assembling the dossier belongs to the department chair or dean (in non-departmentalized schools), who works closely with the candidate to ensure that all pertinent materials listed on the checklist are included in the proper categories". However, candidates may appoint a **delegate** (e.g., a support staff) to assist in preparing the eDossier. The delegate may, for example, help upload files and populate various checklist categories. Ultimate responsibility for the contents and submission of the eDossier remain with the candidate and the chair/dean who "sign-off" on the checklist. The delegate may not submit the eDossier.

To assign a delegate:

1. Click '**Assign a Candidate Delegate**' link, located at the top of the left-hand menu pane.
2. Enter the "IU Username" of the delegate and click the "Search" button.
3. The name of the person should show up on the "Name" field.
4. If desired, you can enter a "Start and End Date" during which time the delegate has access to your eDossier. With or without start/end dates, click the "save" button to establish your delegate until you remove/delete them.
5. To delete delegate access, click the delete button under the "Action" column to remove their access to your eDossier. *Note:* Delegate permissions automatically expire once the dossier has been formally submitted (see Section D).

Naming a Guest:

Candidates may also allow **guest** access. After logging in, on the upper left side of the window, click on "Assign a Guest". A guest has view only access. This role may be useful if, for example, you are asking a colleague or mentor to review your dossier.
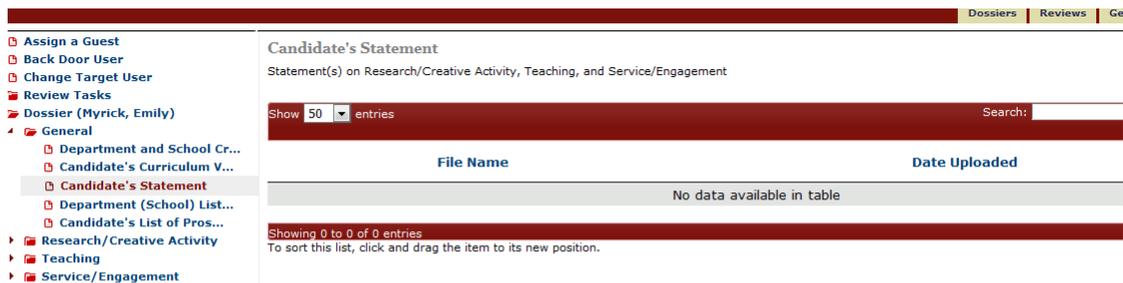
How does a Delegate or Guest access a candidate's eDossier?

A delegate or guest also accesses the eDossier System via One.IU (see "Accessing eDossier" above). After logging in and clicking on the "Dossiers" tab, the "Candidate" name appear. Clicking on the name will then open up the candidate's eDossier in the left-hand menu pane.
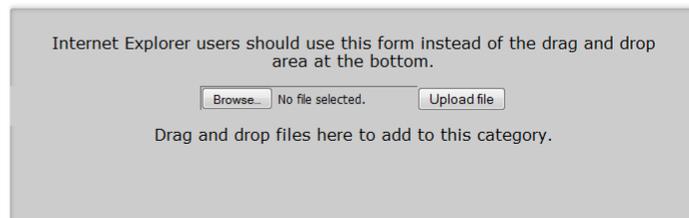
C. **General Use Instructions:**

Navigating: In the left-hand menu pane, click the arrows > to expand sections. Clicking the arrow on an already expanded section will collapse it.

Uploading Files[1]: To add files to a category (e.g., Candidate Statements), click on the category in the left-hand menu pane. The right-hand page will open and the upload option will become visible. To upload files, "drag and drop" them *or* manually 'browse and click upload file' from your local file location. **NOTE:** If you are using Internet Explorer as your browser, you have to select it manually and then click the "Upload File" button.

Sorting/Reordering Files: If you have multiple files in a particular category, you may wish to reorder them (i.e., create a particular sequence). To do so, select a file and simply drag it up or down in the list.

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[1] *TIP #1:* **Good files names** are essential for you to manage your eDossier, but also essential to accessibility by reviewers. File names should make sense and be reflective of the content (e.g., MyResearchStatement.pdf). While eDossier is designed to handle multiple **file formats** (e.g., PDF), certain formats require particular applications to open the file. If you have a file format that might require special software, make sure to provide instructions to your chair/dean upon submission.

Deleting Files: To delete a file, select the file and check it in the "Mark" column. Click on the "Actions" button and select **Delete** from the drop-down menu. To confirm, click on the message to delete or cancel the request.

File Name	Date Uploaded	Ac
Fast Authorization1 17 12_massey.docx	2013-07-01 12:08PM	Action
Organizational&Collaboration_Questions.docx	2013-07-01 12:07PM	Action
THCI_ResponseR2_June2013.docx	2013-07-01 12:07PM	Action Delete Replace Copy Link

Show 50 entries   Search:

Showing 1 to 3 of 3 entries
To sort this list, click and drag the item to it's new position.

Replacing Files: To replace a file, select *Replace* from the drop-down menu next to the document. A dialog box will appear, allowing you to upload a new version in the place of the old document by clicking the *Browse* button, selecting the appropriate file, and clicking *Upload File*.

Replace File

This will replace the file, **Supplemental Readings and Response Assignments.docx**.

Browse... No file selected.

Upload File

Cancel
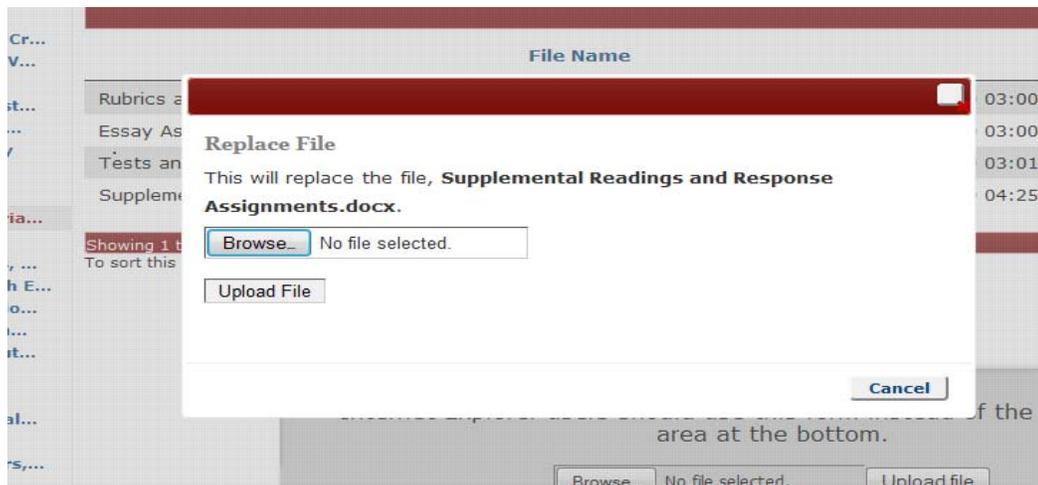
Embedding URLs – Linking 2 Documents: Within a file, you may sometimes want to point reviewers to another document/file in your dossier. For example, within your teaching statement, you might want to point reviewers to a particular syllabus you previously uploaded. Via the **copy URL feature**, you can embed the link to the syllabus directly in your statement so reviewers can easily access it.

1. Select the previously uploaded document you want to link to using the *Copy Link* option in the drop down menu next to the uploaded document.
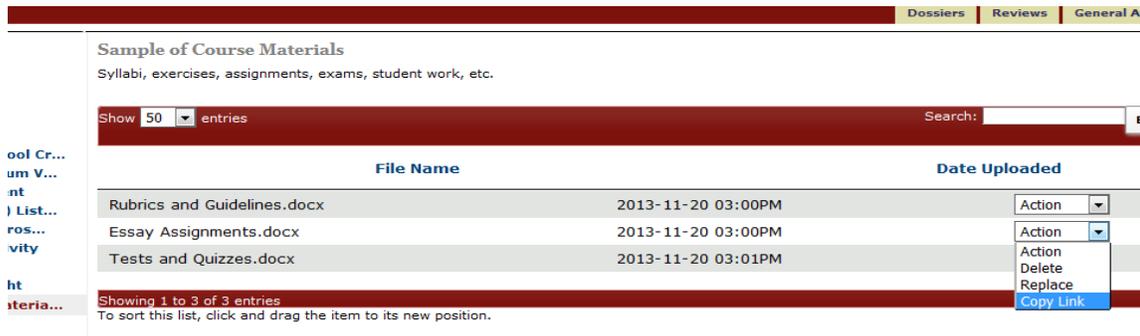
2. A dialog box will now appear with the appropriate URL. Copy the URL to your clipboard.

3. Paste the copied URL into the relevant document before uploading it to your dossier. Here a two examples of ways to include the URL in your file:

    ✓✓ "This is my research statement. I want to note a very important paper that examines the relationship between *a* and *b*. The paper may be found at the following link: https://test.uisapp2.iu.edu/edo-prd/EdoDownloadFile.do?itemID=546
    ✓✓ "This is my research statement. I want to note a very important paper that examines the relationship between *a* and *b*. [Note: here, the word 'paper' has the hyperlink attached to it].

4. Save the document to your computer or server and upload as normal. When a reviewer opens the document from within e-dossier, clicking on the URL link will direct the system (and reader) to the linked file.

D. **Submitting your eDossier:** When you have completed your e-Dossier, the next step is to "submit" it to your department (or unit) chair. S/he is responsible for "signing off" on your P&T Checklist. That is, after review, your chair will either "return" the e-dossier to you for further development or "sign off" and route it to the first level of review. At this point, your accepted eDossier will advance automatically (using IU's workflow system) to review bodies.

   Note: Each sub-folder in the "General" section of your dossier must have at least one file uploaded before the "Submit" button option becomes visible to you.

   If you submit your eDossier in error, please contact edossier@indiana.edu for assistance.

E. **Adding Materials after Submission:** Once your eDossier is routed and under review, it is essentially frozen. However, additional materials (e.g., new publications, awards etc.) may be added by using the "Supplemental Items" folder at the bottom of the left menu. This folder is activated and becomes visible to you once your department chair has signed off on the checklist and the review process has begun. New items will be date-stamped.

F. **Access to Evaluative Letters and Votes:** External letters, internal evaluative letters, and vote records are *not* viewable by the candidate at any time during the review process. Access to any evaluative materials is managed outside the e-dossier system and according to policy and local practices.

G. **Who do I contact for help?**

   If you encounter an error while working within the application, please email edossier@indiana.edu and someone will assist. General questions and feedback may also be sent to edossier@indiana.edu.

H. **eDossier Resources and FAQ**

   View our eDossier FAQ guide for answers to a list of Frequently Asked Questions.

   Video Tutorial – Adding Files using Drag & Drop, Submitting Dossier - http://go.iu.edu/21qc
   Video Tutorial – Embedding URLs & Linking Documents - http://go.iu.edu/21ru