eDossier FAQ

Department Administrator

As a **Department Administrator,** what can I do?

* View all dossiers and candidate’s materials (view only) for your department/school until they reach “Closed” status.
* Upload only “Restricted Area” materials to a candidate’s dossier, including External Review Letters, Solicited Letters, and List of Referees Contacted.
* Setup committee memberships at each review level. Use the [Manage Group Memberships Functionality Guide](https://iu.box.com/s/7drdl3zpx1s03qzc8f9x).

How can I be assigned as a **Department Administrator**?

* Department Administrators are assigned/changed by the eDossier system administrators. Requests for changes can be sent to edossier@indiana.edu.

How can I view dossiers with a **closed** status in eDossier?

* In order to view dossiers with a closed status, you must be assigned by the candidate as a **guest.**

Candidate Delegate & Guest

As a **Candidate Delegate**, what can I do?

* View and upload candidate materials on behalf of the candidate. However, you do not have access to upload “Restricted Area” materials or the ability to submit/route a dossier.

What are **Candidate Materials** vs. **Restricted Area** materials?

* **Candidate Materials** are those that can be added by a candidate or their delegate and include the items under the *General, Research/Creative Activity, Teaching, and Service Engagement* folders in eDossier.
* **Restricted Area Materials** cannot be seen by the candidate at any time during the dossier process, and are used by either Review Committee Members or Department Administrators. These include *the Vote Record(s), Internal Review Letters, External Review Letters, List of Referees Contacted, and Solicited Letters.*

How can I be assigned as a **Candidate Delegate?**

* There are two ways that you can be assigned as a candidate delegate:

	1. The faculty member, themselves, can assign you as a candidate delegate in the eDossier system by following the below steps.

Login to the [eDossier system](https://apps.iu.edu/edo-prd/EdoIndex.do).

Click on the *Dossiers* tab.

Click on the *View Dossier* button in main screen area.

Click on the *Assign a Candidate Delegate* in the left-hand navigation menu.

Enter in the user name for the delegate you wish to add and a start and end date, if necessary and click Save.

You have now enabled this user to be your eDossier delegate.

* 1. The department or campus administrator can assign you as a candidate delegate for a specific faculty member (see pages 9-11 of the [eDossier Administrator Support Guide](https://iu.box.com/s/7drdl3zpx1s03qzc8f9x) for steps).

As a user with **Guest** access, what can I do?

* Review dossier materials for the faculty candidate. A guest can also view a dossier after it has been closed. Guest users have read-only access and cannot modify candidate materials.

How can I be assigned as a **Guest**?

* There are two ways that you can be assigned as a guest:

	1. The faculty member, themselves, can assign you as their guest in the eDossier system by following the below steps.

Login to the [eDossier system](https://apps.iu.edu/edo-prd/EdoIndex.do).

Click on the Dossiers tab.

Click on the Assign a Candidate Delegate in the left-hand navigation menu.

Enter in the user name for the delegate you wish to add and a start and end date, if necessary and click Save.

You have now enabled this user to be your eDossier guest.

* 1. The department or campus administrator can assign you as a guest for a specific faculty member (see pages 9-11 of the [eDossier Administrator Support Guide](https://iu.box.com/s/7drdl3zpx1s03qzc8f9x) for steps).

How do I view the candidate’s dossier as a **guest** or a **candidate delegate**?

* Once you have been assigned as either of the above, you can review a candidate’s dossier by logging in to the [eDossier system](https://apps.iu.edu/edo-prd/EdoIndex.do), clicking on the Dossiers tab, and select the dossier from the list.

Candidate

Why do I not see a **Submit** button on my dossier summary/main screen?

* You have not met the requirements for submission. You must upload the documents below under the General folder and select an **Area of Excellence** on the main dossier summary screen.
	1. *Department and School Criteria*
	2. *Curriculum Vitae*
	3. *Candidate’s Statements*
	4. *Mission Statement (only for Librarians)*

I have met the requirements for dossier submission, why do I still not see a **Submit** button?

* If you have met the requirements for submission as outlined above and the Dossier status indicates that you are “ready for submission” on the main screen, then the **Submit** button should be visible. However, if it is not this is because the system administrators have not activated the button for your campus. The submit dossier button is not turned on until all department, school, and campus Group Members are setup for the different route levels. Usually this happens during the first week of August.

Can I add documents to my dossier after it has been began the formal routing process?

* It is important to note that once your eDossier has been routed past the Checklist Signoff Level, it is essentially frozen. In the case that you need to add other materials after this point, you may do so by accessing the Supplemental Items folder by following the steps below:
	1. Login to the [eDossier system](https://apps.iu.edu/edo-prd/EdoIndex.do).
	2. Click on the *Dossiers* tab.
	3. Click on the *View Dossier* button in main screen area.
	4. Click on the *Supplemental – Post Submission* folder the left-hand navigation menu.
	5. Choose the file you wish to add using by clicking on the Choose File button and then Upload the file by clicking on the Upload File button.
	6. After the upload is completed and displayed in the list of Supplemental Items, click on the **Dossiers** folder to view the main dossier screen.
	7. Click on the **Submit** button next to “Submit your Supplemental Items” to ensure that the prior review levels are notified that of your additional materials.

*More information for Candidates can be found at* [*eDossier Candidate Help Topics.*](https://iu.app.box.com/files/0/f/1857100607/1/f_16306796315)

Reviewers and Committee Members

As a **Chair Reviewer,** whydon’t I see the **Route** button?

* The routing requirements have not been fulfilled. In order to route a dossier onto the next review layer/level:
	1. an evaluative letter (internal review letter) must be uploaded (for that specific review layer);
	2. and the vote record must be saved.

As a **Chair Reviewer,** what can I do?

* You are able to review all of the materials in the candidate’s dossier, enter vote records on behalf of the committee, upload evaluative letters, and review past vote records and evaluative letters up to your review level.

As a **Committee Member Reviewer**,what can I do?

* You are able to review all of the materials in the candidate’s dossier. You are responsible for discussing your review with other committee members and coordination of saving of vote records and evaluative letters. However, only those assigned chair can submit the vote and evaluative letters.

Can more than one **chair** be assigned for a specific level on the *Manage Group Member* screens?

* Yes, you may assign more than one chair. In effect, this “second” chairperson acts as a delegate for the first chair and will have the same exact access.

Why aren’t **Committee/Chair Members** able to access candidate dossiers immediately after committee memberships have been setup by the department/school admin?

* The committee members can only access the candidate dossier(s) once the candidate has submitted their dossier and the checklist sign off user signs off on the dossier and it hits a particular review level that you are part off. So for example, if you are member of the “Primary Unit/Dept. Committee” and once the candidate submits their dossier and the checklist sign off user sign’s off on the dossier, it then will go to the “Primary Unit/Dept. Committee” level which is when the members of that committee will receive a notification and access to the candidate dossier will be opened up. The same is true for School and Campus Level committee memberships.

*For more information for Committee (and Chair) Member Reviewers, please consult* [*eDossier Help Instructions: Reviewers and Principals*](https://iu.app.box.com/files/0/f/1857100607/1/f_18823217932)*.*

Matrix - Summary of Roles and Access

Below is a matrix that outlines the different roles within eDossier, how they are setup, the different types of access granted to each role and whether there are restrictions.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Department/School Admin** | **Candidate Delegate** | **Guest** | **Review Committee/Chair Members** |
| How is the role setup? | Setup by eDossier system administrator(s) | Assigned by candidate | Assigned by candidate | Setup by department/school admin |
| Which statuses are available? | OpenSubmitted | OpenSubmitted | OpenSubmittedClosed | Submitted |
| Type of Access? | View, setup group members, upload Restricted Area Materials  | View, Upload Documents | View Only | Review after Submitted, Submit Vote Records, Add Evaluative Letters and Routes |
| Any Restrictions? | Cannot view a dossier with closed status; cannot view vote records/letters for levels above their assigned level | Cannot Submit dossier or view Restricted Area Materials | Cannot upload documents, view Vote Records, External letters, Evaluative Letters | Cannot view vote records/letters for levels above their assigned level |

Flow Chart – Dossier Process and Requisite Documents/Action

Below is a flow chart representing the standard path that a dossier will take in the eDossier System. Note that the last category will repeat until all review levels have submitted a vote record and evaluative letter.

ROUTE

Vote Records & Letters have been added

Next Review Level(s)

At this point, the department/primary unit committee and chair members will be able to review dossier, save/submit vote records, and add evaluative letters.

Candidate also has ability to add Supplemental Items

VERIFY & ROUTE

Enters formal routing process

At this point, the department/primary unit committee and chair members will be able to review dossier, save/submit vote records, and add evaluative letters

Candidate also has ability to add Supplemental Items

Dept Committee Level

SUBMIT

Provides one last review and check before dossier enters formal routing process and evaluation. If dossier needs additional modification, it can be returned to the candidate. Usually the Unit Head/Chair serves in this role.

Checklist/Sign-Off Submission Level

Upload of:
1) Department and School Criteria;
2) Curriculum Vitae;
3) Candidate’s Statements;
4) Mission Statement (Librarians only);
5) Select Area of Excellence; and
6) Candidate Materials

Candidate
(or delegate)