How to Add Committee Members to a ”Case” In Interfolio RPT

Office of the Dean of Faculties
Texas A&M University
How to log into Interfolio

1. Go to Interfolio: [http://account.interfolio.com](http://account.interfolio.com)

2. Click “Partner Institution” and search for Texas A&M University

3. Once you have selected Texas A&M University, click “Sign In”

4. You will be re-directed to sign in with your CAS credentials
Committee Member Management in Interfolio RPT

- **Administrators** (department/college level Support Staff, Department Head, Dean) are the only individuals who can add members to a committee!

- Once logged into Interfolio, the left side of the dashboard will have a list of Modules (Faculty 180; Faculty Search; Review, Promotion and Tenure) the **Administrator** has access to.

- Under Review, Promotion and Tenure click on “**Users & Groups**”.
Users & Groups in Interfolio RPT

• On the User & Groups page, click the “Users” tab.
• Search for the name of the individual you are wanting to add to a committee.

• If the individual is NOT in the list of Texas A&M University “Users” in this example “XYZ” you will see the message below
  • If they do not populate, you will need to click “Add User”
Users & Groups in Interfolio RPT

• Click on “Add User”
Users & Groups in Interfolio RPT

- Enter the “User” information as in the screenshot below
- Click “Save”
- The new “User” will be created, and an email notification sent
Users & Groups in Interfolio RPT

- A popup message will indicate that the "User" has been added
- Click "Save"
Users & Groups in Interfolio RPT

- Once a new user has been added or if the individual’s name you typed into the search bar populates, click the pencil on the far right-hand side.
Here, you will be able to edit the individual user’s access privileges.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blanca</td>
<td>Lupiani</td>
</tr>
</tbody>
</table>

Email: blupiani@tamu.edu

- If checked, this user will need to sign on using their institutional credentials.
- Send the user a welcome message.

[Save] [Delete]
Users & Groups in Interfolio RPT

• Under “Units”, the individual’s role in the unit will be displayed. This can be changed to “Administrator” or “None”.
  • If you are adding a P&T Committee member, the role in unit should be reflected as “None”.

![User Details and Units section in Interfolio RPT](Image)
Users & Groups in Interfolio RPT

- Under “Committees”, there will be a drop down list of possible committees for you to assign this individual to within your unit.
  - Once selected, click “Add Committee”
  - This method is used to add a single user to a standing committee
Committees in Interfolio RPT

• To add multiple members to a committee in bulk, click the pencil on the right-hand side for the respective committee.

• From the User & Group Management page, a user can only be assigned to standing committees, however, once added, they will appear as available for ad-hoc committees created within their respective unit.
Committees in Interfolio RPT

- Search for the individual’s name to be added to the committee.
- Click the “Add” button
Committees in Interfolio RPT

- Once “Add” has been selected, you will see the individual added under the Committee Members section.
- Repeat this step to add additional committee members, as appropriate.
- Those listed under “Committee Members” will populate on the assigned committee for any candidate case with that committee in the routing, respectively.

To select a “Committee Manager”, click the green star next to the individual’s name.