How to: Share and Receive Feedback on Dossier Materials

A This premium feature is only available to users with <u>Dossier Deliver</u> accounts or users who have <u>Dossier accounts through their institution</u>.

This Interfolio Dossier feature allows users to collect feedback on academic materials and plans for self-presentation of your academic work, research, creative production, teaching, and service to the academic community.

FAQ about Feedback and Sharing

- Comments are restricted to be viewed only between the document owner and also the owner of said comment. You cannot have commenters collaborate.
- If you want to receive feedback on a new version of a document, you must upload it and share that new document with the reviewer.
- Users do not need an Interfolio account to review a document. If the reviewer/ commenter does not have an Interfolio account, they must login via the link provided in their email.
- Updating a document (such as a Non-Confidential Letter of Recommendation or a CV) will remove all previous feedback on the old version of the document.

Who Can Use the Sharing and Feedback Feature?

1. Dossier users who pay for Dossier Deliver

This section is for users who have paid for their Dossier Deliver account to request, manage, and send their materials and confidential letters.

If your account is through your institution, see the section below.

With an active Dossier Deliver account, you can share your Dossier materials (with the exception of the letter of recommendation) and your collections of materials with anyone regardless of whether that person has an Interfolio account.

2. Dossier users whose account is provided by their institution

This section applies to users who have had their account provided directly by an Interfolio client institution.

If you are a Dossier Deliver user who paid for their personal account, see the section above.

With your Dossier account provided by your institution you can share individual items and collections of materials stored in your Dossier with other Dossier users at your institution. The person you share with will be able to view those materials online through their browser, within an Interfolio environment, and write comments on them. In order to access the shared document/collection, current Interfolio users will have to sign into their own Dossier account.

You can hold an account of both user types: by having a Dossier account provided by your institution AND a Dossier Deliver account.

Sharing your Materials for Feedback

Sharing an individual item from your Dossier materials:

Navigate to Materials section and click to open the item in the materials viewer:

Home	My Materials 🛛
Deliveries	All Materials (29)
Letters	Q search Filter View
Materials	C search View
Collections	
Shared with Me	□ Title \$
	Untitled None
	Katherine Feo Course Syllabus
	Candidate Narrative Shared

From the document viewer page, click the "Share" button

\equiv Statement of Teaching Philosophy update	×
Details History	Share Download V Other Options V
ID: 375313E175 2 pages	
Title *	
Statement of Teaching Philosophy update	Statement of Teaching Philosophy As a teacher I believe it is my responsibility to engage students, to capture and keep their
Type *	attention and inspire them to participate with confidence in intellectual discourse. My goal as a teacher is to help students effectively formalize, organize and communicate their ideas. I corect from a working class background. I was the first in my farmity to go to college, and I know how transformative and ergopowering education can be. Through
Teaching Statement 🗸	learning I gained a better sense of my potential and place in the world, and I want nothing less for my students. In this way, my teaching reflects an interest in problems of orthographic representation and investment in experimental ethographic practices aimed
	at chaining the authority to speak for one's self. I want to help my statests find their voice and represent themselves effectively in writing. I want them to learn to think critically, to constitut the ideas they encounter and to intercount their own beliefs and

Add the emails of the person or persons from your list of contacts with whom you want to share the item from your Dossier, enter a message if

necessary, and click "Share"

Note that you will need to have the person in your contact list. You can easily add them from here by clicking "Add Them."

For more information on adding contacts see <u>How to: Create Your List of Contacts and Send</u> <u>Letter Requests to Multiple Writers.</u>

Document owners have the option to include a message that will appear in the email notifying the reviewer/collaborator and giving them access to the shared materials.

() When sharing with multiple people, reviewers will NOT be able to see the comments made by others with whom the document owner have shared the item.

Statement of Teaching Philosophy update.doc	×
ihare with Someone Else	
lease enter the name or email address of the people you'd like to share with. If they are not in your o	ontact list,
lease add them to your list of contacts now.	
ihare with	
Aessage	
Enter message (optional)	
People you share this with will receive an email with a link that allows them to access this item and n	take
comments. They will NOT be able to see comments made by others whom you have shared this with	
Share Cancel	
one	

In the image above, the account is using a Dossier Deliver profile. If you have a Dossier account provided by your institution (and not Dossier Deliver), you can only search for users **within** your institution.

• Note that when an item is shared, it will appear marked as "shared" in the list of materials in your Dossier

Му	Materials 🛛	
All	Materials (29)	
٩	search	Vie
	Title 🗢	
	None +	
	Katherine Feo Course Syllabus	
	Candidate Narrative Shared	

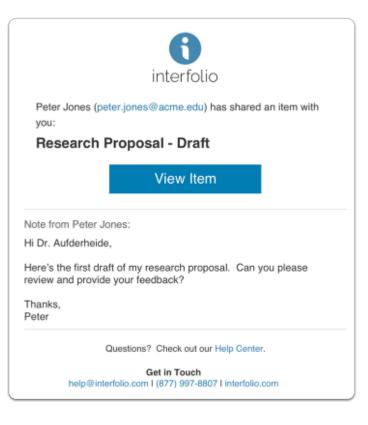
Accessing documents and providing feedback via Interfolio Dossier

Reviewers and collaborators will receive an email with a link allowing them to access the shared item

Q If reviewers cannot find the email, they should check their spam filter.

This from the email links directly opens to the shared item.

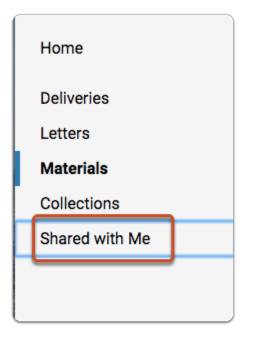
If the reviewer/collaborator are not logged in to their Interfolio Dossier account, the only way they can access the item or collection is through the link included in the notification email.



Each person that has been requested to review and provide feedback, can view the material in their browser



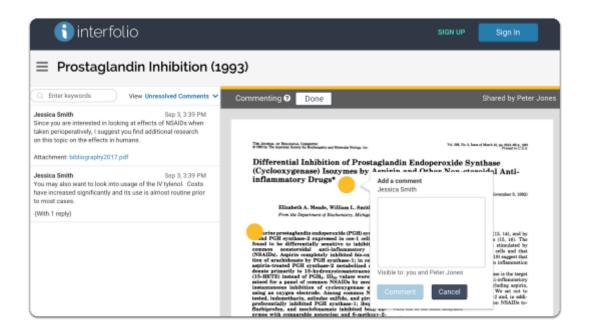
Recipient view: If the reviewer/collaborator shared the item **has an active Dossier account**, the shared item will also appear on the "Shared with Me" tab from the navigation bar.



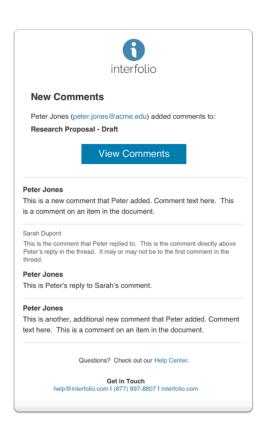
The table will display all documents shared with you.

Shared with Me		
Search Q. Enter keywords Filter		
Name	Туре	Shared by
Annual Review - Clinical Faculty (2016) Based on Cape College guidelines	Collection	Ada Smith
Annual Review - Clinical Faculty (2017) Based on Cape College guidelines	Collection	Mary Dupont
Research Proposals - 2016-2017	Document	Martin Jones

The reviewer/collaborator can leave comments with feedback on the shared material for the document owner to view.



The document owner will receive an email notification when new comments are left by the person with whom they shared the item



The document owner can review, respond to, and resolve comments left

by the reviewer

E Cover Letter 2015		x
Details History Comments		Manage Sharing Download 🗸 Other Options
Collaborate with Beverly Brown 🗸		Add Comments
C Enter keywords Beverly Brown Consider adding a line about your consulting work .	View All Comments 🗸 Jan 17, 2018 at 2:33 PM	
		2711 East Torson Roid. Annet, VA. 36798 Sanot Committee University of the Faxes School of Hamanities and Social Sciences Per Road Computer Sciences Per Road Computer Sciences Per Road Sciences Points (2145) Richmond, Virginia 12345
		Dear Consultae Mambers: Law writing ar apply for the position of Architecture Notinuotor advantiation the onlings' writing in 2011, i produced with an Associants of Arcs from Tomerave College, when I writing table in the Associant's Support Charge of the Downarve Campus, Noer recently, in Appart of this years (and produced to applicating ar PD in Architectures of the Tolevenius of Time with a concentration in Ethographics and Beverify Brown Jann 17, 2016 and 2233 PM
		Consider adding a line about your consulting work. y of neared is focused on veryor of taxwing and paptic virtuals. My disarration, "A performance etholography concerned of a syntage forest works in such a syntage focus withing component designed
Jownload comments	Show comment markers	s 🔀 Q Q 🔍 <1/2 >

Users can search for keywords in comments from the left pane of the viewer

In the example below, the user has searched for "consulting." The list of results displays in bold text in the list of comments, and in the comments as they appear on the document.

E Cover Letter 2015					×
Details History Comments			Manag	e Sharing Download 🗸	Other Options 🗸
Collaborate with Beverly Brown 🗸		Add Comments			
Consulting Beverly Brown Consider adding a line about your consulting work .	View All Comments ↓ Jan 17, 2018 at 2:33 PM	Ja Co	Prodortik Moss 2701 East Person Rivel. Anova, VA. 58785 Seach Committee University of the Planar School of Hammalfee and Social Sciences Per Bad Canapa P.D. Box 12045 Richarmed, Vinglia 12345 Dear Consultaes Meether: Lars writing to apply for the position of Archite cology 4 workste. In 2020, I graduated with Downtown Canapa. More recently, in August Achieves on the University of Three adds a vertify Broom n.17, 2018 or 22:53 PM	n Associates of Arts from Tornorrow far Academic Support Center of the t of this year I completed my PhD in	
Download comments	Show comment markers	xqq	< 1.	significant writing component designed	

Click "Download comments" at the bottom left of the viewer to download a pdf of the comments on an item, the document owner can also set whether or not to display comment markers on the displayed document



Working with Multiple Reviewers/Collaborators using Sharing and Feedback in your Dossier

If the document owner has shared with multiple collaborators, they can only view and respond to the comments of one reviewer at a time, and all threads are restricted to both reviewers.

E Cover Letter 2015			
Details History Comments	/		
Collaborate with Beverly Brown 🗸		Add Comments	
consulting O	View All Comments 🐱		
Beverly Brown Consider adding a line about your consulting work .	Jan 17, 2018 at 2:33 PM	Frederick	Mi
		2701 East Atown, V.	A. :
		Search Co University School of Per Road P.O. Boo Richmond	Hu Car 123

Document owners can switch between collaborators from the dropdown list labeled "Collaborate with..."



(1) If you choose a collaborator for whom you have revoked access to a particular document, document owners will be notified that the collaborator no longer has access to the item

≡ cox-	3 Pape	r (2002)		
Details	History	Comments		
Collaborate with	Jessica Sn	nith 🗸	× E	Add Comment
	-	access to this iter or respond to any	n	
Q Enter keywords	s vi	iew Unresolved Com	iments 🗸	COX-3, acetam
Jessica Smith		Sep 3, 3:3	39 PM	drugs:
,	-	t effects of NSAIDs v find additional resear		N. V. Chandrase and Daniel L. Si
on this topic on the	effects in humar	ns.		Department of Cher
				Communicated by A
Attachment: bibliogr	aphy2017.pdf			Two cyclooxygen lyze the rate-lim?

Sharing collections of items from your Dossier materials:

Collections of materials can be shared from the Collections tab of your Materials page. You can also share a collection of materials from the home page of the collection.

Sharing a Collection of Materials from your Dossier

From the Collections page, located on the navigation bar

Home	
Deliveries	
Letters	
Materials	
Collections	
Shared with Me	

In the desired row, click on the 'Select' button, then click 'Share' from the options

My Materials	🧰 Guidelines 🛛 🗠 Request Recommendation
Collections	
	Add Collecti
	Displa
Name * Another Collection	Created Created Created
Image Portfolio	Mar 12, 2018 Selection
Scott Harris - Collection 2	Feb 27, 2018 Rename
Scott Harris - My Collection	Jan 26, 2018 Delete

To share from the home page of a collection, open the Collections page and click the name of a collection to open it

Collections Name Name Another Collection Image Portfolio Scott Harris - Collection 2 Scott Harris - My Collection	My Materials	
Another Collection Image Portfolio Scott Harris - Collection 2	Collections	
Another Collection Image Portfolio Scott Harris - Collection 2		
Image Portfolio Scott Harris - Collection 2	Name *	
Scott Harris - Collection 2	Another Collection	
	Image Portfolio	
Scott Harris - My Collection	Scott Harris - Collection 2	
	Scott Harris - My Collection	

Then, click the "Share" button

Materials > Collections > Research Background 2017		View Guidelines
C Enter keywords	Share	Add Materials
Title	Туре	Status
CV Latest - 2017	CV	Received Mar. 1, 2017
Letter of Recommendation for Peter Jones (Dr. Smith) Review LORs × +	Letter of Recommendation	Received Mar. 27, 2017
Meta-analysis of Recent Research on Warfarin Dosing and Monitoring in Pediatric Patients Review Pubs X +	Publication	Received Mar. 23, 2017

Add the name and email of the person or persons with whom you want to share the collection

Sharing collections of materials works the same as sharing individual items from your Dossier. Enter the name and emails of the people you want to share with. You have the option to include a message to the person that will appear in the email notifying them and giving them access to the shared materials.

Share with		
Please enter the n	ame or email of the p	person you'd like to share this with.
First Name	Last Name	Email Add
Message		
Enter message (optional)	
make comments.		an email with a link that allows them to access this item ble to see comments made by others whom you have
make comments. shared this with.	They will NOT be abi	ble to see comments made by others whom you have

You can share with multiple people

Note: When sharing collections with multiple people, reviewers will NOT be able to see the comments made by others with whom you have shared the items within the collection.

Share with		
Please enter the n	ame or email of the per:	son you'd like to share this with.
First Name	Last Name	Email
		Add
Mary Dupont, md	lupont@institution.edu	x James Smith, js392@inst.edu x
Message		
Message Enter message (o	optional)	
People you share t make comments.	this with will receive an e	email with a link that allows them to access this item a o see comments made by others whom you have sha
Enter message (o	this with will receive an e	

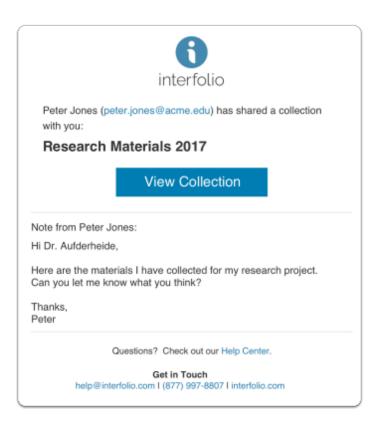
Reviewer/Collaborator Experience

People with whom you share will receive an email with a link allowing them to access the shared collection

Each person listed will receive an email with a link that allows them to view the collection.

The link in the above email opens the collection.

If the person with whom you have shared the collection does not have an account, or are not logged in to their Interfolio Dossier account, the only way they can access the collection is through the link included in the notification email.



Recipient view: Recipients of shared collections will be taken to the collection page where they can select materials from the collection to review

If the person with whom you share the collection **does not have an Interfolio account**, the link in the email will take them to a page that looks like the one below, where they can choose items to review from the list of materials in the collection.

Search Q Enter keywords		Shared by Peter Jones
Title	Туре	Status
CV Latest - 2017	CV	Received Mar. 1, 2017
Letter of Recommendation for Peter Jones (Dr. Smith)	Letter of Recommendation	Received Mar. 27, 2017
Meta-analysis of Recent Research on Warfarin Dosing and Monitoring in Pediatric Patients	Publication	Received Mar. 23, 2017

If the reviewer/collaborator **does have an account**, the shared collection will open in their Dossier:

Materials > Shared with Me > Research Background 2017		
Search C Enter keywords		Shared by Peter Jones
Title	Туре	Status
CV Latest - 2017	CV	Received Mar. 1, 2017
Letter of Recommendation for Peter Jones (Dr. Smith)	Letter of Recommendation	Received Mar. 27, 2017
Meta-analysis of Recent Research on Warfarin Dosing and Monitoring in Pediatric Patients	Publication	Received Mar. 23, 2017

If reviewer/collaborator has an Interfolio account, the shared collection will also appear on the "Shared with Me" tab of the Materials section of their Dossier:

🗴 🐧 dossi	er	Scott Harri	is 🗸
Home	My Materials	🟛 Guidelines 🛛 🗷 Request Recommendation	n
Deliveries Letters	Shared with Me		
Materials Collections	Search		
Shared with Me	Q Enter keywords		
	Name *	Type Shared by ¢	

For more information on the collaborator experience, <u>click here</u>.

Managing Already Shared Materials:

Document owners can manage their shared materials, including revoking access to individual items and collections and sharing their materials with others by adding to the list of collaborators.

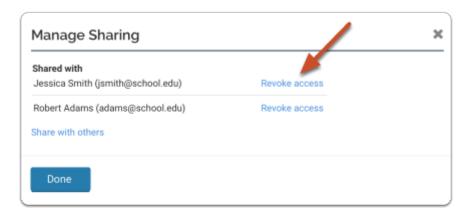
How to Remove Reviewers and Collaborators Viewing Privileges of a Document

To manage sharing of an item, open the item, and click "Manage Sharing" at the top right of the viewer

This button will only appear on items that are shared. Otherwise, the "Share" button, will appear here.

002)	
omments	Manage Sharing
~	Add Comments
t.	
	COX-3, a cyclooxygenase-1 variant inhibiter acetaminophen and other analgesic/antipy

Click "Revoke access" to take away access from a reviewer/collaborator with whom you have previously shared the item



Click "Undo" to reverse this action and restore a person's access to the item

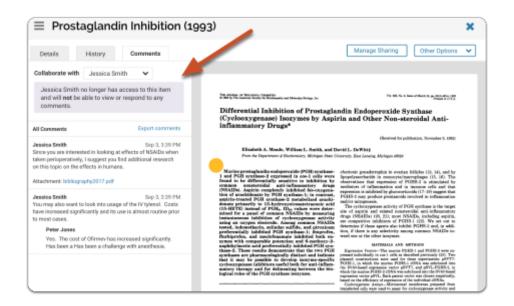
essica Smith (jsmith@school.edu)	Revoke access
obert Adams (adams@school.edu)	Access revoked – Undo
are with others	

When managing the sharing of an item that is part of a collection, the document owner must revoke the access to the collection of the reviewer/ collaborator whom has access to the item through a shared collection,

This will be noted when you open the "Manage Sharing" window, and will include a link to the shared collection.

Jessica Smith (jsmith@school.edu) Revoke access Robert Adams (adams@school.edu) Revoke access Xavier Hébert (hebert@school.edu) * Has access through: Robert Adams (adams@school.edu) * Revoke access through: Robert Adams (adams@school.edu) * Robert Adams		
Kavier Hébert (hebert@school.edu) * Has access through:	sica Smith (jsmith@school.edu)	Revoke access
	pert Adams (adams@school.edu)	Revoke access
Hesearch Materials - 2017	rier Hébert (hebert@school.edu) *	Has access through: Research Materials - 2017
This person has access to this item through a collection that has been shared with them. To revoke this person's access, please revoke their access to the collection.		
Share with others	re with others	

When access to a document is revoked for a collaborator, the document owner can still see their comments if you select them as a collaborator in the document, but the document owner will see this notice that they no longer have access to the item



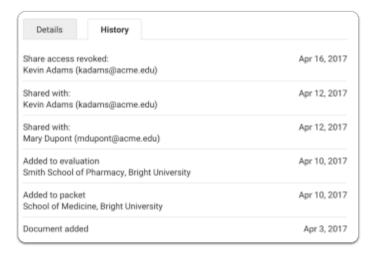
Collaborator/Reviewer view: When the collaborator tries to open the item, they will see a message explaining that they have lost access

No access

You do not have access to this item. If you believe this is an error, please contact the person who shared it with you.

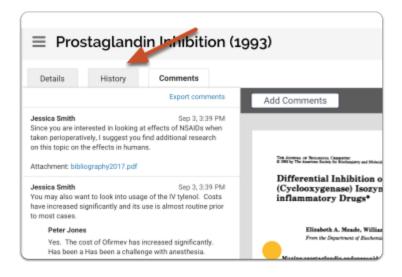
Viewing a Document's Share History as the Document Owner

Sample of the History Tab Information



Only the document owner can view the history of a shared item to see with whom and when it has been shared and when access has been revoked. With the materials viewer open, open the "History" tab

The "History" includes a record of when and with whom the item has been shared, when and for whom access was revoked, when an item was added to a packet, or sent to an opportunity, and when the item was added to Dossier



Searching for specific documents that you have shared is easy using the filtering tools available in your Dossier

Туре	Tags	Date Added		Shared with	_
AADSAS Letter of Evaluation	 Review LORs 	From		 Anyone 	
Form	Review Pubs	MMM D, YYYY		 Robert Adams 	
C.V.				 Jessica Smith 	
 Confidential Letter of 		То			
Recommendation		MMM D, YYYY			

Note that document owners can also share and unshare items by adding or removing items from collections of shared materials

When adding materials to a shared collection...



Likewise, when removing an item from a shared collection, document owner's are warned that some people with whom the item is shared may no longer be able to view or comment on these items

Some people may lose access	×
By moving these items from a shared collection, some people may no longer be able to view or comment on these items.	
Continue	

Return to Top of the Article

Sample of the confirmation message that is displayed

Add to a shared collection?	×
Any items you add to this collection will be shared.	
Cancel	

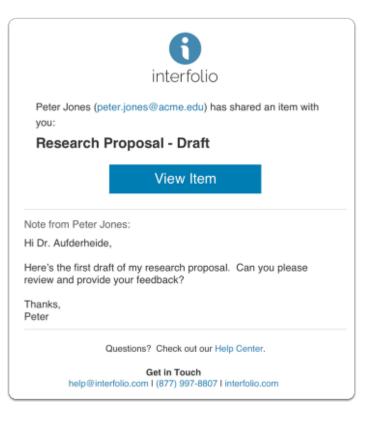
Providing and Responding to Feedback on Shared Documents in Dossier

() Comments made can only be viewed by the reviewer and the commenter.

When a user has been invited to review and provide feedback on a scholar's materials, they will receive an email as displayed below.

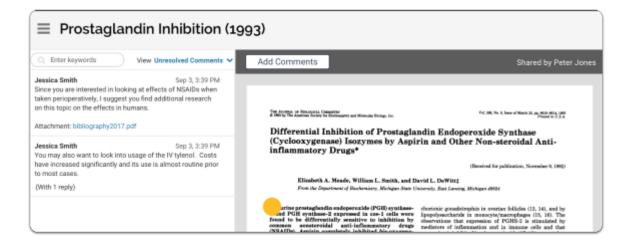
Click the View Item Button

Solution Users that do not have an Interfolio account should either bookmark the link or save the received email to be able to navigate back to the document easily.



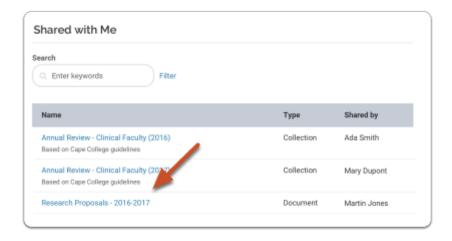
An Interfolio document viewer page will display and allow users to review and comment on the provided materials.

Users will be able to view the document on the right and any comments made will populate on the right and also the location of said comment will display on the document on the right.

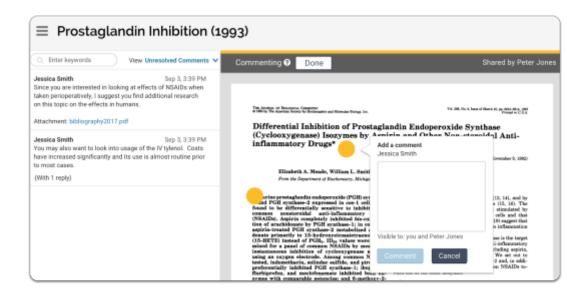


With an active dossier account, reviewers/collaborators can navigate back to this document easily from their Dossier Materials page.

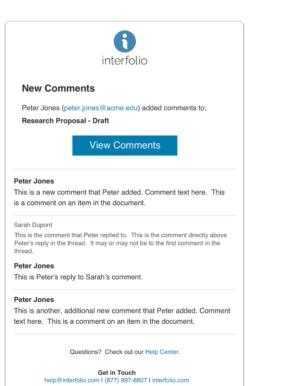
If the reviewer/collaborator shared the item **has an active Dossier account,** the shared item will also appear on the "Shared with Me" tab of the Materials section of their Dossier:



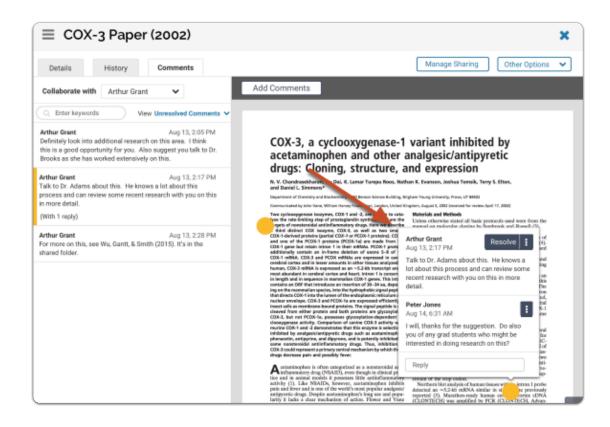
Click the Add Comment Button to leave a comment in a specific location on the document.



The participating user will receive an email notification when new comments are left the reviewer/collaborator

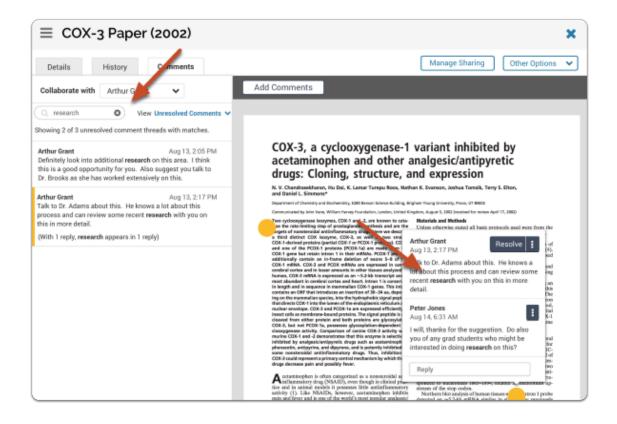


The documenter owner can review, respond to, and resolve comments left by the reviewer



Users can search for keywords in comments from the left pane of the viewer

In the example below, the user has searched for "research." The list of results displays in bold text in the list of comments, and in the comments as they appear on the document.



Click "Download comments" at the bottom left of the viewer to download a pdf of the comments on an item, users can also set whether or not to display comment markers on the displayed document



Why can't I comment on the document that was shared with me?

If you find that you are able to view, but no longer able to make comments (aka Read-Only), on a document that was once shared through Interfolio's Dossier, this is because of one (or more) of the following situations:

For users with a Dossier account provided by their institution:

- The document owner's Dossier account is no longer provided by an Interfolio Client Institution.
- The account of either user's Dossier account is no longer provided by an Interfolio Client Institution.

For Dossier Deliver users who purchased their own personal account:

• The document owner's account is no longer a **Dossier Deliver** account due to it's expiration.