Quick Steps for Dossier Setup

Login and Contribute

1. To access the e-dossier system, go to https://dossier.usu.edu and login with your A# and password.

2. Click the **Contribute** button in the left-hand navigation column.

3. When asked what type of resource you are contributing, choose **Dossier**.

Add Details About the Candidate and Review

4. Make sure you are on the Dossier Administration screen.

5. Under the **Candidate** heading, click the **Select a User**.

6. Search for the candidate by name or A#.

   **If the candidate's name does not appear, call CID at 435.797.9506.**

7. Click the radio button next to the candidate’s name when it appears in the search results. Click **Select this user**.

8. Next, select the candidate’s department. Under the **Department** heading, click the **Select Terms** button.

9. Browse to the list of departments and click the **Select** button next to the candidate’s department.
10. Click **OK**.

11. Next, select the type of review (Tenure with Rank Advancement or just Rank Advancement), and then select the review year.

### Add Committee Members and Reviewers

12. Look for the *Dossier Reviewers* heading. In the box below it, click the **Select a User** button to search for and select a user in the system.

13. Select a role for the user from the *Viewer Role* menu.

14. Click the **Add** button below the box of options to add another user. This reveals a new box with options for adding another user with a specified role.

Steps 12-14 above are performed as shown in this figure.

15. Continue this process until you have added all reviewers that you are aware of to the dossier.

### Additional notes on adding reviewers

- You will not add reviewer recommendation votes until later in the review process, when each individual’s Yes or No recommendation has been submitted to you.

- It is easiest to add reviewers in the order you wish them to appear. However, if you need to reorder or remove viewers, each viewer box has options at the top right for reordering or removing users.

Submit for Moderation

When you are ready for the candidate to be able to edit the dossier and upload materials, click **Save** and then **Submit for Moderation** to put the dossier in the Dossier Preparation stage.