Advance Faculty Information System

HOW TO REFINE THE DATA IN THE ADVANCE CV

Background

You have imported a CV into Advance and there is data in all the sections (some sections do NOT import). But you realize that some issues remain. You can use the Advance user interface to fix all of the issues, but if there are a lot of them, it may be easier to follow the instructions in this document to refine the data in Advance. After you generate a UCSF CV from Advance you can make modifications to the data within that CV. It is often easier to work with the data in a document than in a web browser (Advance). Then follow the steps below to import the modified CV to fix your data problems in My CV.

Assumptions

- You are still in the process of getting the initial CV data into MyCV
  - You have not added grant descriptions or PI information

Step-by-step process

1. Export a UCSF CV from Advance
   a. Go to My CV and click on the Export UCSF CV button
   b. Save the document where you can find it
2. Work with the data in the CV you've just exported; data modifications may include:
   a. Separating out data within sections that might otherwise be in single text fields
      i. Principal Positions Held
      ii. Other Positions Held Concurrently
      iii. Honors and Awards
      iv. Service to Professional Organizations
      v. University and Public Service sections
      vi. Invited Presentations
      vii. Teaching and Mentoring sections
   b. Fixing fonts within the rich text sections of the CV
      i. The fonts in these sections are defined within Advance (either through the import or using the text tools within each field) and should be changed to Arial 11pt to match the output font of the non-rich text fields
         1. Select all (entire exported CV doc) and change everything to Arial 11pt
3. Sections that do NOT import –these sections will need to be copy/pasted into the Advance CV
   a. Summary sections (i.e., Clinical Activities Summary, Teaching Summary, etc.)
   b. Contributions to Diversity
   c. Significant Publications
   d. Educator Portfolio sections (i.e., Educator Overview, Direct Teaching, etc.)
   e. Academic Leadership
4. Save the modified CV document in a place where you can find it for import
5. Import the CV
   a. Go to My CV and click on the Import CV link found below and to the left of the My CV tab
   b. Select either the Upload Partial CV or the Upload Full CV button
      i. If you select Upload Partial CV, select which sections you want to import
   c. Click the Choose File button to find the CV you just modified and select it
   d. Click the Import Full (or Partial) CV button
   e. When the message shows CV Successfully Imported, click My CV to view the CV data
6. Re-do the Significant Publications section (you can copy/paste from the exported CV document)

Key Issues

- When you use the Import CV feature, it will permanently delete (over-write) the data in My CV
- When you Import a CV, it will NOT import the Significant Publications section