

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. 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 My CV
 - You have not added grant descriptions or PI information
 - You have not identified NIH Biosketch items

Step-by-step process

1. Generate a UCSF CV from Advance
 - a. Go to My CV and click on the Export UCSF CV hyperlink below the My CV tab
 - b. Save the document where you can find it
2. Work with the data in the CV you've just generated; 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. The various Teaching sections
 - b. Fixing fonts within the rich text section 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. Prepare the CV for import:
 - a. The three Grants sections need to be manually converted to enable import:
 - i. Put the cursor anywhere in the table and the Design and Layout menus appear
 - ii. From the Design menu, select Draw Table
 1. Your cursor becomes a pencil and you can draw table lines between the text lines within the table: the goal is to break each grant into three rows – pay attention to where the text is winding up
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

Key Issues

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