# Executive Summary

Advance was developed to facilitate the Academic Review Process. This document describes Academic Review and includes a description of the Advance pages used in that process. The document is divided into two sections: The Document Overview explains the Academic Review Process and some basic information about Advance; How to Use Advance includes a screen shot and description of each of the Advance pages available to the Chair.

With more than thirty different web pages within several functional groupings described in this document, it may be useful to focus on the few things that seem to confuse most people:

1. The Generalist is the conductor of the Academic Review process – both the Candidate and the Chair look to you for direction.
2. If you are confused about what to do, or are not sure, ask your Manager, or contact your AP Specialist in the HR Specialty Center (aka, VPAA office).
3. If you run into technical issues, email AdvanceProject@ucsf.edu and describe what you (or the candidate or chair) were doing and what happened. Screen shots can help.
4. Be sure to develop a communication process with each Chair so that he/she knows when to (or not to) certify a Chair Letter; after the Chair Letter is certified, you cannot modify the packet in any way.

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The AP Generalist and the Academic Review process

Amongst the duties of an Academic Personnel (AP) Generalist is the responsibility to initiate and manage the business process that supports the Academic Review process. This document was created to help the AP Generalist understand the academic review process and specifically how to use the Advance system in that capacity.

What is an APA?

There are four roles in Advance that use the designation APA (Academic Personnel Analyst). These roles are responsible for managing the Academic Review process at different levels of review.

- **Department APA** is the role given to the Shared Services AP Generalist. This Tutorial is designed for this role. All of the features described here are available to this role. This role creates packets, assist the candidate (faculty or NFA) with understanding the requirements for the proposed academic action (Appointment, Merit, Promotion, etc.), and coordinates the departmental review. The Generalist uses Advance to route the packet to the next level of review – typically, the Dean’s Office. Actual routing is typically automatic after notifying the candidate that they can review the packet in light of the department recommendation.

- **Dean APA** is a role that is coupled with the VPAA APA role and given to the AP Specialist

- **VPAA APA** is a role that is coupled with the Dean APA role and assigned to the AP Specialist to enable this analyst to manage packets outside of the department. The Specialist evaluates packets routed by the AP Generalist (Department APA) and destined for Dean review. Some packets may require review by the Academic Senate’s Committee on Academic Personnel (CAP) and/or review by the Vice Provost (VPAA). The Specialist routes the packet appropriately, ensuring that each packet is complete and ready for review.
• **CAP APA** is a role that manages packet review at CAP. This document does NOT cover the *Advance* system pages or functionality related to the CAP APA’s duties or the CAP review process.

**How do I get APA access to *Advance***?
The APA roles are restricted to people who actively manage the academic review process within *Advance*. Access is granted when your supervisor (Shared Services Academic Manager or the Director of Academic Affairs) emails a request to AdvanceProject@ucsf.edu.

**Academic Review: General concepts**
Academic Review is a **UC policy**-driven process designed to ensure that academic appointees are contributing as expected for their series and rank.

1. Packet is created by HR Shared Services and populated by the Candidate and the AP Generalist
   a. *Advance* determines the “eligibility” for review based on UC Policy, but *Advance* allows a packet to be created outside of the policy guidelines for accelerations, decelerations, as well as actions that have no UC Policy-defined timing (e.g., Career Review, Change in Series, etc.)
2. **Department Review**: culminates with a certified Chair Letter (department recommendation)
3. **Dean Review**: culminates with a certified Dean Letter (school recommendation)
   a. Most packets are “Dean Delegated” meaning that the packet is not routed beyond the Dean, who makes the final decision
   b. Packets that are NOT Dean Delegated are either routed to CAP (when required) or to VPAA (Vice Provost for Academic Affairs)
4. **CAP Review**: culminates with a certified CAP Letter (CAP recommendation)
   a. Packets that require CAP review include Faculty and Professional Research Promotions and Faculty Merits from Step 5 to 6 and Step 9 to Above Scale, as well as some exceptional Merit actions
5. **VPAA Review**: culminates in the final decision, for those actions not “Dean Delegate”
6. The end of the academic review process includes notification from *Advance* of the final decision and subsequent adjustment to the candidate’s title (changed Step, Rank, Series, etc.)
   a. Salary is negotiated on an annual basis between the candidate and the Chair; a successful Merit or Promotion action does not necessarily result in a salary increase, although both will result in a change to the “X” portion of the salary (the portion define by the UC Salary Scales)
      i. For those with only an “X” component, the salary will increase due to the action
      ii. For those with other salary components, those components may be decreased to accommodate the increase in “X”, so the salary may not remain the same, even when the “X” increases as a result of the successful Merit or Promotion


**Advance: General concepts**
*Advance* is a web application that works by delivering information to a browser. Some browsers work better than others. See the General Guidelines below for more specific recommendations for using *Advance*.

As and APA, you have access to several sets of pages:
- **Search**: View all academic records you have access to and click on the resulting name for a limited view of their faculty pages; generate an Eligibility List
- **Proxy Access**: These pages (and this link) will only be available if one or more of your faculty grant you Proxy access to their CV/Packet
• Admin: This set of pages is where you land when you log in. These pages are used to manage the academic review process and include
  o Overview Displays active packets with drill down to Candidate Mgmt pages
  o Candidate Mgmt includes a search feature as well as additional pages for managing individual packets: Profile, Packet, Content, History, and Leave pages
  o Department Mgmt has two function: first, it enables you to define the Chair whose signature line (entered here) appears on emails to referees; and second, enables you to define “Committees” (groups of packet reviewers) to facilitate adding names for packet review
• Reports: These are designed to provide you with key information related to academic appointees and their academic review packets
• Dashboard: Several graphical views of the packet process

Advance includes records for faculty and non-faculty academic appointees. Each person with a record in Advance holds an academic appointment.
  • The AP Generalist use the pages within Advance to generate an Eligibility List, create academic review packets, contact the candidate whose packet has been created, invite faculty to a packet for review (packet displays on faculty member’s For Review page), and route the packet to the next level of review

How to use Advance

Guidelines for successful use of Advance
• Use Firefox or Chrome. You should be able to use Safari with no issues, but Internet Explorer is not recommended.
• Do not access Advance through VPN. Your normal practice may be to log into UCSF systems using VPN, but using VPN with Advance can cause data issues, especially in the CV. Instead, open a new browser window, go to myaccess.ucsf.edu, and then select Advance.
• New academic appointees will not have access to Advance until an Appointment packet has been created. All academic appointees with an active record in the UCSF payroll system have automatic access to Advance, but new appointees require a packet in Advance in order to gain access.
  o A new academic appointee must either have an active non-academic payroll record, or an active ACADAP appointment in IID
  o A new staff member (non-academic) must either have an active payroll record, or an active AFFEMP appointment in IID
    ▪ This situation arises when a faculty member attempts to give Proxy access to a contract (temp) worker – until that temp has an AFFEMP in IID, their name will not be available for assigning Proxy access
Log In
Go to MyAccess at myaccess.ucsf.edu

1. Enter Username
2. Enter Password
3. Click Login
4. Select Advance from the list of apps

Hints:
- **Username** is derived from your UCSF ID. E.g., if your UCSF ID is "020583423" then your Username is "SF058342".
- **Password** can be recovered by clicking the "Forgot your password?" link and answering the challenge questions.

Help: Call 415-514-4100, option 2 (7am-6pm weekdays)
Overview

The Admin link in the upper right of the page will bring you to your Overview page.

Packets
Advance displays all Active Packets you have access to.

Features:
- Refresh Overview
  - Click to display recent changes
- Hide Columns
- Show (filter)
  - Based on text you enter, a subset of packets will display
- Copy to Clipboard
- Excel Download

Functions:
- Packet count
- Click header to Sort
- Drill-down to Candidate Mgmt details

Help: or AdvanceProject@ucsf.edu

Leave Requests
Advance displays all Leave Requests you have access to.

Functions:
- Lv Request count
- Click header to Sort
- Drill-down to view details

Status values:
- Pending Chair Apvl = submitted
- Pending Dean Apvl = approved by Chair
- Pending VPAA Apvl = approved by Dean
- Approved, Pending Final Report = approved by VPAA
- Completed = final report reviewed

Help: or AdvanceProject@ucsf.edu
When you "drill down" from the Overview page by clicking the candidate name, you are brought to the Profile page.

**Features:**
- Status
- Academic Dept
- Affiliation
- Academic Appts
- Academic Leave
- Academic Leave History

**Functions:**
- Create a Packet
  - This can be done from any page within Candidate Mgmt
- Academic Leave Credit Statement
  - Modify Leave Credits
- Modify Date assigned Rank
- Modify Date assigned Step
  - Modify "years at" by changing the "Date Assigned"
Packet page

Use this page to define the packet and to initiate the packet process with the candidate. From the Overview page when you “drill down” on Action, you are brought here.

Features:
- Packet definition
  - Defines packet requirements sent to the candidate
- Effective Date
- Appointment History
- Typical packet elements

Functions:
- Reference Due
  - Date when reference submission closes
- Initial Notification
  - Date when reference submission closes
- Packet owner
  - APA responsible for the packet

Initial Notification

Click the Initial Notification button to see this part of the packet page.

Features:
- This process starts a clock. Candidate has 42 days to copy CV to the packet and provide required materials to you
- Standardized email text based on the packet definition

Functions:
- Attach documents
- View the Email text
- Email the candidate
  - Validation required
Reference List
Use this page to enter names and email addresses for people who will be asked to provide a reference for the candidate. When a candidate enters referee names on their own Referee List page, they will appear here.

Features:
- Collapsible form for entering referee information
- List of CAP member names who should NOT be asked to provide a reference
- List of referee names already entered
- If the candidate enters referee names on her Referee List page, they will appear here

Functions:
- Click Add Referees to open/close form
  - Identify referee names provided by the Candidate and those provided by the Chair
  - Click the name to open the form for that referee name
  - Click the red X to delete a name

NOTE: After referee has been contacted, the name cannot be modified or deleted
Manage References

Use this page to send a standard email request to referees, and to monitor submitted references.

**Features:**
- Displays names, contact/reminder dates and when a reference was submitted
- Click to view email
- Click to view submitted reference

**Functions:**
- Mark for emailing
  - Initial email
  - Reminder email
  - Copy email to you
- Attach documents
- Email the candidate
- Change Due Date to give referees more time to submit
- Click flag to indicate that the referee sent a letter that is attached to packet

Reviewer List

Use this page to grant access to the packet to people assigned academic review responsibilities. The packet will appear on their For Review page until the Review Due Date is passed. Chairs will see it on their For Review page until the packet is routed to the Dean’s Office.

**Features:**
- Displays names, Due Date, and whether the reviewer has indicated that they have reviewed the packet

**Functions:**
- Add buttons
  - Reviewer – Find feature enables adding any academic as a reviewer
  - Review Committee – Will display ALL committees you have access to
    - ALL committees you have access to will display
    - Adding a committee adds all members of that committee to this page (packet access granted to all)
    - Permanently modify committee membership using the functionality under the Department Mgmt tab
  - Add Chair (Dean APA role has Add Dean button; VPAA APA role has Add VPAA button)
- Change Review Due date (Click Save Changes)
- Delete – removes the packet from the reviewer’s For Review page
Manage Vote
Use this page to call the vote, make select voters "Not Eligible", and to monitor the process – you will never know how someone voted, only whether they voted.

Features:
- List of voters
  - Chairs/Deans/CAP members are marked not ineligible
- Who voted

Functions:
- Send for Vote
  - Must click this to SAVE date changes
- Change Due Date
  - Can change for all
  - Can change for individual voters

NOTE: Advance does not require a vote, but allows voting on actions that typically do require a vote. It up to the AP Generalist to know which actions require a vote.

Manage Packet
This page has several functions that enable a Generalist to manage specific packets.

Features:
- Routing History shows where/when the packet has been
- Comments History displays saved comments

Functions:
- Notify candidate when department review process is complete
  - Candidate has 7 days to review Chair Letter and attach a rebuttal
  - Packet automatically routes to Dean’s Office
- Route Packet
  - Ignores 7-day clock and pushes packet to Specialty Center
- Status
  - Enables Withdrawal
- Comments
  - Record reason for non-standard events
  - CAUTION: legally discoverable
**Content tab**
The Content tab is designed to mirror the packet as viewed by a reviewer. It includes all the elements of the packet, plus a page to show packet activities. **Best Practice: advise Chairs to review packets from within their For Review page – do not review packets from Content tab.**

**Summary Page**
This page has several elements to help a Generalist understand how to proceed with the packet review.

**Features:**
- Years at Rank and Step
- Affiliation
- Academic Review History
- Certified recommendations for the current packet

**CV (Packet CV)**
The Packet CV is copied into the packet by the candidate. The act of copying the CV to the packet certifies that the candidate is aware of the UC policies related to academic appointment and advancement.

**Features:**
- View the CV using the tools provided

**Functions:**
- Filter – eliminates from view all items that fall outside of the selected range

NOTE: a CV copied to the packet prior to 2/28/2016 will look a little different and have no tools.
Packet CV tools
Tools are included to facilitate CV review. A “Sticky Header” and the Shortcut follow you through the CV.

The Sticky Header:
- Packet definition
- Filter
- Highlight
- Sort – reverses the order of items within CV sections
- Prior CV – displays in a new tab the CV from the last approved action
- Close by clicking the chevron button

The Shortcut:
- Highlights the section being viewed
- Click to jump to that section of the CV
- Enter text into the “Filter Sections” to display in the Shortcut headers matching the text
- Close by clicking the shortcut button

NOTE: a CV copied to the packet prior to 2/28/2016 will look a little different and will not include the filter or the sticky header

Attachments
Click the Attachments tab to add attachments or to view attachments.

Functions:
- To add a PDF document:
  1. Click Browse to find the file
  2. Select appropriate Attachment Type from drop down
  3. Click Upload
- To view an attachment, click it
**Teaching Evaluations**

Teaching Evaluations are attached here

**Functions:**
- To add a PDF document:
  1. Click Browse to find the file
  2. Type a description of the document to help the user understand what they are seeing
  3. Click Upload
- To view an attached evaluation, click it

**References**

This is what a reviewer sees when viewing the submitted references

**Features:**
- When “Attached” is visible, look for the submitted reference on the Attachments page

**Functions:**
- Export list to Excel
- Click the View Ref date to see the submitted reference
**Chair Letter**

Best Practice: advise Chairs to view/edit the Chair Letter from within the For Review page (not from within this Content page).

The Chair Letter is divided into 6 sections:
1. Teaching and Mentoring
2. Research and/or Creative Activities
3. Professional Competence
4. University and Public Service
5. Contributions to Diversity
6. Faculty Vote and Overall Department Assessment

The Chair Letter for non-faculty academics does NOT include the Teaching section.

**Features:**
- Comments Guide to help understand how to complete the comments sections
- Common Issues to help understand how to complete the letter

**Functions:**
- Radio button ratings
- Text boxes for comments
- Drop down list for Department Recommendation (bottom of Chair Letter)

### Teaching and Mentoring

<table>
<thead>
<tr>
<th></th>
<th>Not Applicable</th>
<th>Needs Improvement</th>
<th>Favorable</th>
<th>Outstanding</th>
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</thead>
<tbody>
<tr>
<td>Student/Trainee/mentee evaluations</td>
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<td>○</td>
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<tr>
<td>Peer Evaluations</td>
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<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Overall</td>
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</table>

Comments on Teaching (required)

### Research and/or Creative Activities

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<th>Outstanding</th>
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</thead>
<tbody>
<tr>
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<td>○</td>
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<tr>
<td>Independence</td>
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<td>○</td>
</tr>
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<td>Significance of research</td>
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<tr>
<td>Collaborative research (not a requirement)</td>
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<tr>
<td>Peer-reviewed research support</td>
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</tr>
<tr>
<td>Overall</td>
<td>○</td>
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</table>

Comments on Research and/or Creative Activities (required as applicable to salary)

### Professional Competence

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<tr>
<th></th>
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<th>Needs Improvement</th>
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</thead>
<tbody>
<tr>
<td>Overall</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

Comments on Professional Competence (required)
Chair Letter (bottom)

Features:
- Faculty Vote

Functions:
- Drop down list for Department Recommendation
- Save as Draft
- Certification

University and Public Service

<table>
<thead>
<tr>
<th></th>
<th>Not Applicable</th>
<th>Needs Improvement</th>
<th>Favorable</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department/School/Campus/Hospital</td>
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<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Professional (Local and National)</td>
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<td>○</td>
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<tr>
<td>UC/System-wide</td>
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<tr>
<td>Community</td>
<td>○</td>
<td>○</td>
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<td>○</td>
</tr>
<tr>
<td>Overall</td>
<td>○</td>
<td>○</td>
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<td>○</td>
</tr>
</tbody>
</table>

Comments on University and Public Service (required)

Contributions to Diversity

Comments on Contributions to Diversity (if applicable)

Additional Comments

Additional Comments (optional)

Faculty Vote and Overall Department Assessment

<table>
<thead>
<tr>
<th></th>
<th>Faculty Vote</th>
<th>In Favor</th>
<th>Against</th>
<th>Abstain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senate</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Non-Senate</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Comments in support of accelerated or decelerated actions (required)

Please provide a detailed reason for this requested action

By clicking this “certify” button, I confirm that the appropriate faculty of the Department were consulted about the proposed action, and that this form represents the Departmental recommendation. I authorize that the packet is ready to be forwarded to the appropriate reviewing agencies.

Save As Draft  Certify
**Additional Chair Letter features**
- After the Chair Letter is certified, it can be “decertified” in order to make revisions.
- Click the date under Decertification History to help understand what has happened.

**J(Joint Chair) Certification**
When asked to review a packet for a faculty member who has a joint appointment in your department:
- Review the packet as usual
- Read the certified Chair Letter
- Add any comments you feel are necessary
- Apply your recommendation
- Certify the Chair Letter

**Activity page**
This page shows when things have been done to the packet – a line for each Save or Route to activity.

**Features:**
- Chronological list of activities
  - Date and time
- Description
- Who did the activity
- Number of days since the packet was created
**Decision page**

Only visible to APAs who have at least one SOM department accessible to them, and only for Volunteer Clinical packets. And only those packets within SOM can be certified by the Chair. APAs are generally discouraged from drafting a Decision.

**Features:**
- Recommendations for this proposed action

**Functions:**
- Decision
- Open Issues
- Email addresses
- Boilerplate text based on the Decision
- Text box for personalizing the message
**History page**

From this page, the Generalist can create a redacted copy of any packet for which the radio button is active. The process takes several minutes and the page needs to be refreshed before the PDF version of the packet is available. Click the History tab to refresh this page.

**Features:**
- List of packets
  - Only packets with clickable radio buttons can be requested

**Functions:**
- Select a packet
- Select a Reason
- Click Request PDF
- Wait 3-5 minutes
- Refresh the page
- Click on the packet

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**Leave tab**

The Academic Leave Request process is managed by the Generalist on the two pages within the Leave tab. Please refer to the Guide for APAs found on the Using Advance website for details about how this process is managed.

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**Leave page (top)**

**Features:**
- Academic Leave History
- Current Request

**Functions:**
- View prior Leave forms
- Assign approvers on the Approver List page (see below)
Leave page (bottom – Pending Initial Review)

Features:
- Links to relevant section of the Academic Personnel Manual

Functions:
- Attach documents
- Routing action

Leave page (bottom – Pending Final Report)

Features:
- View attached documents
- Review approvers and their remarks

Functions:
- Withdraw Leave when requested by candidate

Approver List page
Use this page to assign reviewers – routing is automatic based on the reviewer hierarchy.

Functions:
- The Add Approver button returns a list of campus approvers – pick only those appropriate to the candidate
**Department Mgmt**

**Dept Information**

This page is used to record the way you want the Department Chair name to appear in the emails sent by Advance that request reference letters.

**Features:**
- Chair Email Signature

**Functions:**
- Drop down list of Departments
- Reference Due Date
  - This date is added to each packet for this Department as the References Due Date

---

**Committee page**

This page displays committees that have been created. REMEMBER: a Committee is simply a group of reviewers. It is created to make it easier to add reviewers to a packet – it may or may not be a true committee.

**Features:**
- List of Committees

**Functions:**
- Add a Committee
- Click a name to Review/Modify a Committee name
- Click Manage Membership to Add/Delete members
Manage Membership
Click this link to open a page for adding/deleting members

Features:
- Committee Name
- List of Members

Functions:
- Add members by using this search box and selecting from the returned list
- Delete members by clicking the red x
- Return to the prior page by clicking the Return to Committee List link
Search/Eligibility List

Click the Search link to access pages used by the Administrator role to see academic info for the department.

**Functions:**
- Search by Criteria (name, etc.) or by Employee ID
- Specify Series and Rank, School and Department
- Search by packet Effective Date range to generate an Eligibility List

• The Academic Review cycle runs from 7/2/YYYY to 7/1/YYYY+1
• Effective Dates use this range as well (e.g., 7/2/2016 – 7/1/2017)

Search Results – Eligibility List

The results of your search display in a table format.

**Features:**
- Number matching your search
- Series/Rank/Step
- Academic and Home Depts
- Yrs at Rank/Step
- Next eligible action and date

**Functions:**
- Export to Excel
- Click header to Sort
- Click name to see their faculty pages
- Click Action to see the AP Generalist pages
  - When no Action appears, an active packet is in process
- Enter additional criteria to refine the search
Proxy Access

This page will only appear as an option after a faculty member has granted you Proxy Access to her CV. Use this page to jump to their faculty pages and view/edit their CV and Packet; or use the Search page to find the name and jump to their faculty pages and view/edit their CV and Packet.

Functions:
- Click the name to access a limited view of their faculty pages

Reports

This page lists all printable reports you can run.

Features:
- Reports will generate in PDF, CSV (open using Excel), or both (click csv to run the CSV version)

Functions:
- Reports run based on your access, returning records and information you have access to
- Academic Leave and Packet Review reports ask for date range
  - Report will run without a date range, but may include a lot of data

5 Year Review Report
- Shows all faculty who have not had a recent academic review
  - Will deliver PDF or CSV (opens with Excel) file

Academic Leave Report
- Shows all faculty who have requested an academic leave
  - Asks for date range
  - May be run with the date range fields empty, be may deliver a lot of data

Academic Roster Report
- Shows all academics you have access to

Appraisal Report
- Shows all Senate faculty, Assistant rank and their Appraisal and 8-Year dates
  - Will deliver PDF or CSV (opens with Excel) file

Packet Review Report
- Shows all packets you have access to
  - Asks for date range
  - May be run with the date range fields empty, be may deliver a lot of data

Security Access Report
- Shows the Admin role for everyone you have access to
  - Will deliver PDF or CSV (opens with Excel) file
Dashboard

The Dashboard was developed to give users a graphical overview of some elements of the Advance packet process. The Dashboard is made up of several “Widgets” that graphically portray something about the packet process. Some things to know about the Dashboard:

- When you click the Dashboard Link, the Dashboard opens in a new browser tab
- Click on the Widget Selector to see the widgets available to your role
- You can drag and drop widgets to re-organize them
- Some widgets look better at full screen width
  - There is “Width” tool on the Widget header to change the width of the widget

Widget tools:

- Widget Selector
  - Click to display a list of widgets
  - Check the box to indicate the Widgets to display
  - Drag/Drop to reorganize

- Change width

- Collapse widget

- Filter
  - Select to include specific data sets
  - Mouse over icon to see which filters are set

- Export options
  - Mouse over chart to see data
  - Click to turn on/off data sets

Widget Filters

- Widgets may or may not have filters
- Mouse over the funnel icon to see which filters are set
- Click the Funnel icon to select filters
  - Click the sections to select filters for that field
  - Click Apply button to set filter
My Active Packets

Features:
• A count of packets with you as Packet Owner, in Process Step categories

Functions:
• Click on Category for a list of the packets
• Download list to Excel
• Click on the name and that packet will display in the main tab (not in the dashboard tab)

This may help you understand what is happening with certain packets

My Packets with No Activity

Features:
• Counts YOUR active packets that have not been touched in 30/60/90/120 days

Functions:
• Click on Header for a list of the packets
• Download list to Excel
• Click on the name and that packet will display in the main tab (not in the dashboard tab)

This could help you understand why packet review has stalled
Active packets by location

**Features:**
- Counts the active packets that YOU have access to and shows you where they are
- Roll over the filter icon (funnel) to see which filters have been applied

**Functions:**
- Click filter icon (funnel) to select filters for the widget

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Active Packet Overview

**Features:**
- A count of packets you have access to, in Process Step categories
- Drill down to the individual packets

**Functions:**
- Set filter to evaluate specific actions
- Click on specific stop to see packets
- Click on the name and that packet will display in the main tab (not in the dashboard tab)

This widget might help you understand why a packets is at a specific stop
Packets with No Activity

**Features:**
- Counts the active packets you have access to that have not been touched in 30/60/90/120 days

**Functions:**
- Click on Header for a list of the packets
- Download list to Excel
- Click on the name and that packet will display in the main tab (not in the dashboard tab)

This widget might help you understand why a packets is at a specific stop

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**More Questions?** Email the Advance Project team: AdvanceProject@ucsf.edu