Advance Tutorial for Department Chairs

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 fifty different web pages within three different functional groups described in this document, it may be useful to focus on the few things that seem to confuse most people:

1. When reviewing Packets on your For Review page, be sure to periodically click on Leave Request to see whether there are any Academic Leave Requests that need to be reviewed.
2. Never Certify a Chair Letter unless asked to do so by your AP Generalist; after the Chair Letter is certified, the packet is locked – if the Generalist needs to make a change, they will have to de-certify the Chair Letter and later ask you to certify it again.
3. The Admin pages are a great way to view all of the academic records you have access to; but do your official review of the packets assigned to you from within your For Review page.
4. If you are confused about what to do, or are not sure, ask your AP Generalist (name at the bottom of each page within the Advance application).
5. If you run into technical issues, email AdvanceProject@ucsf.edu and describe what you were doing and what happened. Screen shots can help

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Document Overview

The Department Chair and the Academic Review process

Amongst the duties of a Department Chair (outlined in APM-245, Appendix A; and in the UCSF Stewardship Review document) is the responsibility for faculty development and evaluation. This document was created to help the Department Chair understand the academic review process and specifically how to use the Advance system in that capacity.

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

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 defined 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 Chair, you have access to several sets of pages:

- **Home**: Your own faculty pages, including Overview, My CV, My Packet, Proxy, and For Review; these are the same pages your faculty will see when they use Advance
- **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**: These are a “View only” version of the pages used by the AP Generalists to manage the academic review process and include Overview (active packets) and Candidate Management (academic records you have access to)
- **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 Chair has an academic record in *Advance* AND has access to academic records within their department and to those “academics” in other departments who have a Joint Appointment with the Chair’s department
- Your AP Generalist (usually the person noted at the bottom of each *Advance* page) will let you know when you have packets to 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.
  - A new academic appointee must either have an active non-academic payroll record, or an active ACADAP appointment in IID
  - 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](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)
Home

Faculty pages
When you first login, you will land on your Home page, your view of the same pages all faculty see when they log into Advance. You can return to this set of pages anytime, by clicking on the Home link in the upper right of any Advance page. Please refer to the Faculty Tutorial for information about this set of Faculty pages.

- Tabs to help you navigate Advance
- Your academic appointment(s)
- Your next eligible action

Hint: Click on the Help buttons if you need more information.

Help: Call or email this person if you have any questions.

The hyperlinks in the upper right of the Advance pages will take you to different parts of Advance.

- Home will bring you to these Faculty pages
- Search will take you to a page where you can find and view any academic record you have access to, and can generate an Eligibility List
- Proxy Access will show you which faculty have given you access to their CV
- Admin will take you to the AP Generalists’ pages that display Active academic review packets
- Reports will enable you to run reports based on your access permissions
- Dashboard will open a new browser tab that displays graphics and summaries of academic review packets
- Prefs allows you to identify which parts of your CV you want to share with other UCSF systems

All academic appointees at UCSF have an academic record in Advance. Because the Department Chair will normally have an academic title (i.e., Professor), you probably have an academic record in Advance. When you log into Advance you will see that academic record -- the “Faculty pages”. For detailed information about navigating through your academic record, refer to the Faculty Tutorial document. This Department Chair Tutorial will describe those pages used in the capacity of Department Chair, specifically, the pages within the For Review tab, and those found under the Admin link, and other links at the top of each page.
Click For Review to display Packets and Leave Requests you have been asked to review.

The For Review page has two views:
1. Packet: this is the default view
2. Leave Request: must be selected to view pending requests

The Packet view includes a top section and a bottom section. The top

Packet review
This is the default when you click For Review. It displays packets that have been assigned to you for review.

Features:
- Hide Columns
- Packet count
- Show (filter)
  - Based on text you enter, a subset of packets displays

Functions:
- To review a packet, click the Candidate Name
- To move packets to “Review completed” check the box and click Save
- To Vote, select a drop down value and click Save
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

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 have no tools

Attachments
View attachments added by your Generalist.

Functions:
- To view an attachment, click it
### Teaching Evaluations

View Teaching Evaluations added by your Generalist.

**Functions:**
- 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

---

#### Excel Download

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Institution</th>
<th>Reference Type</th>
<th>Email</th>
<th>View Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate</td>
<td>Arthur, John, M.</td>
<td>Medical Resident</td>
<td>UC, San Francisco</td>
<td>05/20/2014</td>
<td>05/20/2014</td>
</tr>
<tr>
<td>Buchanan, Jason</td>
<td>Professor &amp; Director of CVRI</td>
<td>UCSF</td>
<td>Intramural</td>
<td>05/20/2014</td>
<td>05/20/2014</td>
</tr>
<tr>
<td>Buren, Mark M.</td>
<td>Chief Resident</td>
<td>UC, San Francisco</td>
<td>Teaching/Mentoring</td>
<td>05/20/2014</td>
<td>05/20/2014</td>
</tr>
<tr>
<td>Bush, George W.</td>
<td>Professor of Medicine</td>
<td>UC, San Francisco</td>
<td>Intramural</td>
<td>05/20/2014</td>
<td>05/20/2014</td>
</tr>
<tr>
<td>Carter, James</td>
<td>Professor</td>
<td>Univ of Boston, CHIAPS</td>
<td>Extramural</td>
<td>06/11/2014</td>
<td>06/11/2014</td>
</tr>
<tr>
<td>Cleveland, Grover</td>
<td>Medical Student</td>
<td>Stanford University</td>
<td>Teaching/Mentoring</td>
<td>05/20/2014</td>
<td>07/02/2014</td>
</tr>
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<td>Chun, William J.</td>
<td>Medical Intern</td>
<td>UC, San Diego</td>
<td>Teaching/Mentoring</td>
<td>05/20/2014</td>
<td>05/20/2014</td>
</tr>
<tr>
<td>Coolidge, Calvin</td>
<td>Associate Professor of Medicine</td>
<td>University of California, San Diego</td>
<td>Extramural</td>
<td>05/20/2014</td>
<td>Attached</td>
</tr>
<tr>
<td>Eisenhower, Dwight D.</td>
<td>Professor of Medicine and Anesthesia</td>
<td>UC, San Francisco</td>
<td>Intramural</td>
<td>05/20/2014</td>
<td>06/22/2014</td>
</tr>
</tbody>
</table>
Chair Letter

Best Practice: 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)
**Features:**
- Faculty Vote

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

**Chair Letter (bottom)**

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**University and Public Service**

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

Comments on University and Public Service (required)

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**Contributions to Diversity**

Comments on Contributions to Diversity (if applicable)

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**Additional Comments**

Additional Comments (optional)

---

**Faculty Vote and Overall Department Assessment**

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

Overall Department Assessment

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**Comments in support of accelerated or decelerated actions (required)**

Please provide a detailed reason for this requested action

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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.
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.

(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

Decision page
The Decision page is only visible to School of Medicine Chairs, and only for Volunteer Clinical packets – these actions have been re-delegated down to the SOM Chairs.
The Leave Request

Features:
- Leave details:
  - Type
  - Dates
  - Credits used
- Explanation (empty boxes will have information specific to this Leave Request)

Functions:
- Links to Policy related to academic leave
- Attachments
  - Click to view
- Approval options
- Remarks section
- Certification button

Overview My CV My Packet Proxy For Review

John Adams Academic Leave

Leave Type: Professional Development In Residence

Start date: 07/18/2016, End date: 05/31/2017

Leave Credits required for this Academic Leave: 22

Are you a Principal Investigator on any grants that will be active during the proposed leave? Yes No

Leave Program Statement: Describe your planned leave activities, including:
- A brief history of the project, from inception through progress to date and projection as to completion date. Include a description your preparation and any significant contributions already made in the field of activity with which the project is concerned.
- Significance of the project as a contribution to knowledge, to art, to a particular profession, or as an expected contribution to your increased effectiveness as a teacher and scholar.
- Name(s) of the location(s) or institution(s) where the project will be carried out, and the names of colleagues, if any, with whom it will be conducted.
- Assurances of cooperation, or authorization to conduct the project, received from individuals, institutions, or agencies.
- Description of all financial support expected during the sabbatical leave for professional activities, except as provided in APM-025 and APM-070. Description of any fellowship, grant, and/or government-sponsored exchange lectureship. Description of any proposed arrangement under which you would receive additional salary for research in accordance with APM-740-1B-c, any associated intellectual property-related issues, and actions proposed to assure that all obligations under the University intellectual property policies are preserved.

Description of sabbatical plans

Leave requested by John Adams on May 30, 2016 3:31:39 PM

Approver list

Certify
Advance Chair Tutorial
Version 061516

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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

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, there is an active packet
- Enter additional criteria to refine the search
Proxy Access

When your faulty members grant you Proxy Access, their name will appear on this page. 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

The Admin pages

The AP Generalists in the Shared Services unit use a set of pages very different from the Faculty pages. As Department Chair, you have a view (read-only) of many of the Admin pages. These are provided to enable the Chair to understand the packet process within the department.

Overview

Click on the Admin link to see the Admin 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

NOTE:
- The pages in this section are read only images of the pages used by the AP Generalist to create and manage academic review packets; you cannot save changes
**Leave Requests**

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

**Functions:**
- LR 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

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**Candidate Mgmt**

The pages within the Candidate Mgmt section give you the ability to see the packet the way the Generalist sees it.

**Candidate Mgmt page overview:**
- Profile – appointment data, next action, and leave data
- Packet – packet management tools
- Content – active packet elements
- CV – from last approved action
- Leave – current or approved leave requests

Access these pages by:
- Clicking on a packet on the Overview page
- Clicking on the Candidate Mgmt tab and then using the search feature; enter part of the Last Name and First Name and
  - Click Academic Search to find a match within the academic appointees
  - Click Non-Academic Search to find a match with all active employees

**IMPORTANT:**
- Do not certify a Chair Letter from within the Candidate Mgmt section; when the Chair Letter is certified, the packet is locked; instead, work with the Generalist to understand WHEN to certify the Chair Letter and ONLY certify from the For Review page (Faculty Tutorial)
Profile page

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:
- Academic Leave Credit Statement
- Modify Date assigned Rank
- Modify Date assigned Step
  - Modify “years at” by changing the “Date Assigned”

NOTE:
- The pages in this section are read only images of the pages used by the AP Generalist to create and manage academic review packets; you cannot save changes you try to make.
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

Reference List
A list of referees entered by the Generalist or by the Candidate.
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

Functions:
- Click to view email
- Click to view submitted reference

Reviewer List
Use this page to see who has been assigned to review this packet. 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.

Manage Vote
Use this page to see who was called to vote and whether they voted (you will not be able to see their vote, only that they did or did not vote)

If the Vote has not been called, you will see a panel indicating this.
Manage Packet

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

The Chair may add comments, but otherwise only view this page.

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: view packets from your For Review page, NOT from this Content tab.**

Because the Content tab contains the pieces of the packet, the pages within the Content tab have the same features as those described in the For Review section, above. Please refer to that section for information about the following pages:

- Summary
- CV
- Attachments
- Teaching Evaluations
- References
- Chair Letter
**Activity page**
This page only exists within this Generalist view of the packet (not visible in the For Review section). It lists all actions on this packet – a line for each Save or Routing activity.

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

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**CV tab**
Displays the CV from the candidate’s last Approved packet

Review the information for [CV (Packet CV)](https://example.com) to understand how this page works.
**Leave tab** (top)
Best Practice: View/edit the Leave Request from within the For Review page (NOT from within this Leave tab).

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

**Functions:**
- View prior Leave forms under the Academic Leave History section
- View the list of Approvers
- View attached documents
- Review approvals

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**Academic Leave**

**Type** | **Start** | **End** | **Credits Used** | **Status**
--- | --- | --- | --- | ---
Professional Development, In Residence (on site) - Partial Pay | 08/01/2016 | 05/31/2017 | | Pending Initial Review

**Leave Request**

**Leave Type:** Professional Development, In Residence (on site) - Partial Pay  
**Start date:** 08/01/2016  
**End date:** 05/31/2017

**Accrued leave credits:** 14

**Leave Credits required for this Academic Leave:**

**Leave Program Statement:** Describe your planned leave activities, including:

- A brief history of the project, from inception through progress to date and projection as to completion date. Include a description your preparation and any significant contributions already made in the field of activity with which the project is concerned.

- Significance of the project as a contribution to knowledge, to art, a particular profession, or as an expected contribution to your increased effectiveness as a teacher and scholar.

- Name(s) of the location(s) or institution(s) where the project will be carried out, and the names of colleagues, if any, with whom it will be conducted.

- Assurances of cooperation, or authorization to conduct the project, received from individuals, institutions, or agencies.

- Description of all financial support expected during the sabbatical leave for professional activities, except as provided in APM-625 and APM-670. Description of any fellowship, grant and/or government-sponsored exchange lecturership. Description of any proposed arrangement under which you would receive additional salary for research in accordance with APM-740-15, any associated intellectual property-related issues, and actions proposed to assure that all obligations under the University intellectual property policies are preserved.

- Description of the University service you will provide if you propose to substitute significant University service for some or all of the teaching/instructional requirements of a sabbatical leave in residence. (See APM-740-8.d.)

- If you are requesting a Sabbatical In Residence leave, please describe your teaching responsibilities during the leave. If possible, for each course you will teach, list the course, course name, hours per quarter, and whether you have full responsibility for the course.

**Attachments**

- Following files have been uploaded:
  - letter of agreement  
  - Leave Email  
  - Division Chair letter  
  - Sabbatical Calculation Worksheet

**Approver list**

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Department</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calvin Coolidge</td>
<td>Department Chair</td>
<td>Medicine</td>
<td>Approved</td>
<td>05/12/2015</td>
</tr>
<tr>
<td>James Carter</td>
<td>Dean</td>
<td>School of Medicine</td>
<td>Approved</td>
<td>07/14/2015</td>
</tr>
<tr>
<td>Dwight Eisenhower</td>
<td>Vice Provost/Provost</td>
<td>Campus Academic Affairs</td>
<td>Requested more information</td>
<td>07/29/2015</td>
</tr>
<tr>
<td>Calvin Coolidge</td>
<td>Department Chair</td>
<td>Medicine</td>
<td>Approved</td>
<td>08/04/2015</td>
</tr>
</tbody>
</table>
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

### Reports

**Administrator Reports**

- **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
  - List of widgets
  - Check to display
  - Drag/Drop to reorganize
- Chart style
  - Click to change
- 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
### 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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### My “For Review” page

Identifies items on your For Review page

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### Packets with No Activity

**Features:**
- Counts the 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
Packet Completion

**Features:**
- % of packets approved by the Effective Date

**Functions:**
- Click on Table to see percentages
- Set filter to evaluate specific actions
- Turn off years that may have less meaningful data

This widget might help you understand whether the approval timing is improving year over year.

Active Packet Overview

**Features:**
- A count of packets at various stops in the Review process
- 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.
Packet Trending

Features:
- A monthly count of packet creation and completion

Functions:
- Set width to Full
- Set filter to evaluate specific actions
- Mouse over chart to see data
- Click to turn on/off data sets

This widget might help you understand the packet cycle in your department

Packet Trending by Cycle

Features:
- Compares two cycles’ packet creation/completion

Functions:
- Set filter to evaluate specific actions
- Click to turn on/off data sets

This widget might help you understand the packet cycle in your department
The Preferences page lists all sections of My CV.

The concept behind this page is to provide a way for you to allow other UCSF systems to access information from your CV.

**Features:**
- A visual representation of the sections with My CV

**Functions:**
- Check all sections where you agree to allow another application to use/display your CV data
- Check the box in the blue grouping to select all sections within that group
- Click Save

**NOTE:** The Steering Committee that governs Advance will act as the approving body when other UCSF systems request access to your data. Advance will honor your selections and prevent the sharing of information from the sections that you do NOT select.

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