



User Guide

# My CV - Assessment Manager

Version 1.0

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# 1. My CV Introduction

**Important note:** This User Guide provides details for navigating, completing and submitting your External Activity Report (EAR) in My CV. There are additional User Guides for other functionality, such as navigating and modifying your profile, publications, teaching activities and service. These can be found on the Training and Support page of the [My CV Project Website](#).

## Overview

My CV is a software system that is used to help Boston University collect, analyze and showcase the scholarly and professional activities of the University's academic community. The information collected in My CV includes appointments, education and degrees, publications, teaching activities, grants, and professional activities.

My CV is an **internal only** system, and the data in the system is only available to members of the Boston University community.

My CV aims to ease the administrative burden on faculty in the collection and entry of their scholarly and professional contributions, allowing them to store all of their scholarly information in one place. This reduced burden will be achieved by pre-populating the system with data from other source systems wherever possible. Additionally, the system will provide support for faculty in adhering to [BU's Open Access Policy](#) by automatically flagging those publications that fall within the policy and making it easy to deposit into OpenBU and, when necessary, request a waiver of the opt-out open access policy.

More information about My CV, including contact information for your My CV Liaisons and Frequently Asked Questions, can be found on the [My CV Project Website](#).

## Benefits

Faculty receive the following benefits from using My CV:

- A single place for faculty to store their profile information, publications, grants, and teaching and professional activities.
- Information from BU authoritative sources is pre-populated, minimizing time consuming re-entry of information.
- Publications are pre-populated from a number of external sources which are harvested for new materials regularly.
- Publications that fall within BU's Open Access Policy are flagged and the items can be deposited into OpenBU through the My CV user interface making adherence to the policy easier.
- Information collected and entered into My CV can be leveraged for automated creation of CVs and Biosketches.
- Visualization features can be used to highlight existing and identify new opportunities for inter-disciplinary academic partnerships.
- The Assessment Module (Faculty Annual Report (FAR) replacement) will automatically be populated with data already kept in My CV; making this annual process a confirmatory step of checking existing information rather than a massive data entry effort.

## 2. User Guide Focus

The purpose of this User Guide is to explain how the **Assessment Manager** can use the Assessment Management page, or dashboard, to oversee a FAR or EAR.

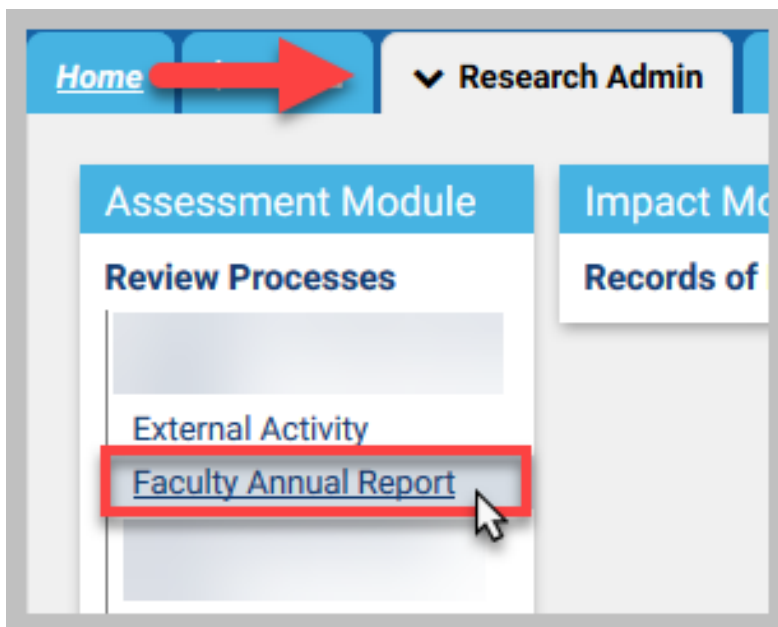
## 3. Accessing My CV

Access My CV at <https://mycv.bu.edu/>

## 4. Navigation

### 4.1 Accessing your dashboard(s)

You can access your FAR or EAR dashboard through the **Research Admin Tab**. Navigate to **Research Admin > Review Processes** and select the report you wish to manage. The name of the report will be specific to either your college or department.



## 4.2 Selecting FARs and EARs

The default dashboard view allows you to manage multiple faculty FARs/EARs at once.

### Manage Faculty Annual Report

[< Return to manage review processes](#)

Group:  [Select user](#) Results last updated 11:51:07 AM

[instead](#)

**Select all**

3 results

User	User Done?	Locked?	Status	Stage	Rs	Actions
<b>HESKETH, Drew D</b> (HESKD16) <input type="checkbox"/> Started 21 days ago Last updated 6 days ago Marked as ready 21 days ago	<span>Marked done</span>			- In draft -	-	<b>Move to...</b>
<input type="checkbox"/> Started 5 days ago Last updated 5 days ago	<span>In progress</span>			- In draft -	-	<b>Move to...</b>
<input type="checkbox"/> Started 2 days ago Last updated 2 days ago	<span>In progress</span>			- In draft -	-	<b>Move to...</b>

0 filters have been set.

#### Filters

Exercise stage:

Exercise status:

Alternatively, you can select an individual faculty's FAR/EAR to manage via the **Select user instead** link.

## Manage Faculty Annual Report

[< Return to manage review processes](#)

Group:  [Select user instead](#) Results last updated 11:51:07 AM

**Select all**

3 results

User	User Done?	Locked?	Status	Stage	Rs	Actions
HESKETH, Drew D (HESKD16)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		In draft	-	<a href="#">Move to...</a>
Started 21 days ago Last updated 6 days ago Marked as ready 21 days ago						

## Manage Faculty Annual Report

[< Return to manage review processes](#)

Select name(s):

[Select group instead](#)

0 filters have been set.

### Filters

Exercise stage:

Exercise status:

## 5. Managing faculty reports

There are actions and options available on the dashboard to assist with management of faculty reports.

User	User Done?	Locked?	Status	Rs	Stage	Actions
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### 5.1 User

User	User Done?	Locked?	Status	Rs	Stage	Actions
<input type="checkbox"/> HESKETH, Drew D (HESKD16) Started 21 days ago Last updated 6 days ago Marked as ready 21 days ago	Needs attention			-	In draft	Move to...

The **User** column displays the faculty name. If the faculty has begun working on his or her report, the amount of time since starting the report and the amount of time since last update will appear under his or her name.

### 5.2 User Done?

User	User Done?	Locked?	Status	Rs	Stage	Actions
<input type="checkbox"/> HESKETH, Drew D (HESKD16) Started 21 days ago Last updated 6 days ago Marked as ready 21 days ago	Needs attention			-	In draft	Move to...

The **User Done?** column indicates the status of the report in its current stage. There are three statuses that will display:

	<i>Needs attention</i> indicates the faculty has not yet begun his or her report.
	<i>In progress</i> indicates the faculty has begun working on the report but has not yet completed by clicking <b>Mark as done</b> .
	<i>Marked done</i> indicates the faculty has signaled that they have completed the report. The report is now ready for the next review stage.

### 5.3 Locked?

User	User Done?	Locked?	Status	Stage	Rs	Actions
<b>HESKETH, Drew D</b> (HESKD16) <input type="checkbox"/> Started 21 days ago Last updated 6 days ago Marked as ready 21 days ago	Needs attention			- In draft -		Move to...

**Locked?** is used to lock or unlock the faculty’s report from further edits. The options are Locked, Unlocked, or a blank, which means the report has not been started. Once the faculty completes the report, by clicking **Mark as done**, the report will remain Locked unless manually changed.

### 5.4 Status

User	User Done?	Locked?	Status	Stage	Rs	Actions
<b>HESKETH, Drew D</b> (HESKD16) <input type="checkbox"/> Started 21 days ago Last updated 6 days ago Marked as ready 21 days ago	Needs attention			- In draft -		Move to...

If a stage is unfinished, a red triangle with an exclamation point (!) will appear under the **Status** column. The likely cause for a report being incomplete is that key information, such as tenure status, has not been provided. An empty circle indicates the report has not yet been started. The letter "i" in a box means more information can be provided, but is not necessary. Based on the FAR and EAR structure, all completed reports will display the letter "i".

### 5.5 Stage

User	User Done?	Locked?	Status	Stage	Rs	Actions
<b>HESKETH, Drew D</b> (HESKD16) <input type="checkbox"/> Started 21 days ago Last updated 6 days ago Marked as ready 21 days ago	Needs attention			- In draft -		Move to...

**Stage** indicates which stage the report is in. A blank means the report has not yet been started.



## 5.6 Rs

The screenshot shows a table with columns: User, User Done?, Locked?, Status, Stage, Rs, and Actions. The 'Rs' column is highlighted with a red box. The row for 'HESKETH, Drew D' shows a 'Needs attention' status, a lock icon, a warning icon, and 'In draft' stage. The 'Actions' column contains a 'Move to...' dropdown, a trash icon, and a download icon.

**Rs** is the number of reviewers who have been assigned for a stage. Clicking the number will show the reviewers' names, the status of the review, and the date of the most recent update.

The pop-up window is titled 'Reviewers for [redacted]' and contains a table with the following data:

Reviewer	Status	Last updated
HESKETH, Drew D	Marked done	5 days ago
KING, Jennifer L	In progress	55 days ago

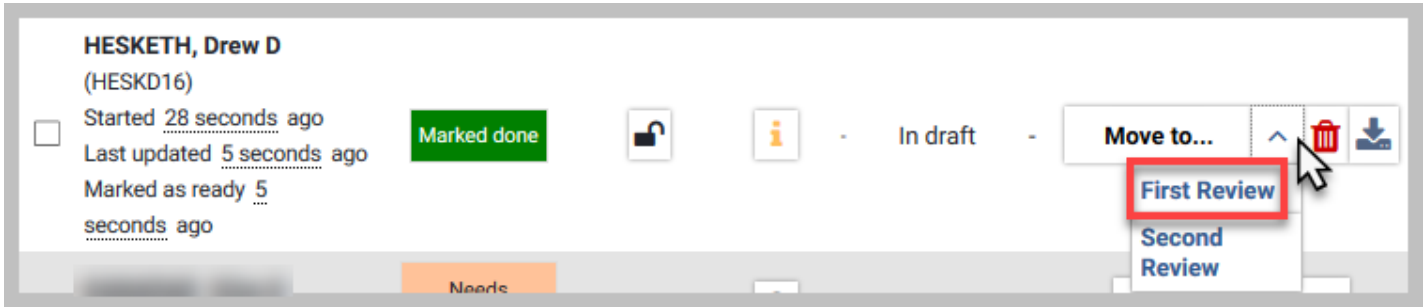
## 5.7 Actions

The screenshot shows a table with columns: User, User Done?, Locked?, Status, Stage, Rs, and Actions. The 'Actions' column is highlighted with a red box. The row for 'HESKETH, Drew D' shows a 'Needs attention' status, a lock icon, a warning icon, and 'In draft' stage. The 'Actions' column contains a 'Move to...' dropdown, a trash icon, and a download icon.


**Actions** gives the Assessment Manager the ability to progress the report in a variety of ways. The "Move to" dropdown will move the report to the next review stage. Clicking the "Trashcan" icon will delete the report. The "Export" icon will present the option to either print a complete report or a one-page summary.


## 6. Transitioning Reports

Once a report is in status **Marked done** it is ready to be transitioned onto the next review stage. To move the exercise, click on the “Move to” dropdown and select the appropriate next stage of review.

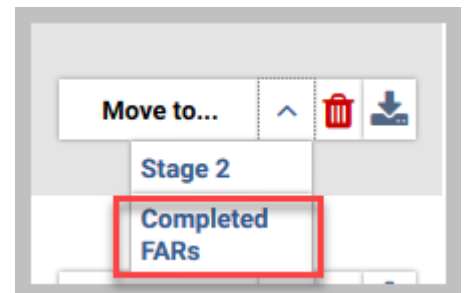


After the report has been transitioned, the **User Done?** and **Stage** will be updated.

 Depending on the review path of certain individuals, Stages may be skipped as appropriate. For example, if a particular FAR does not undergo department review and instead is reviewed directly by the dean, all intermediate stages before the dean review may be skipped.

 For assistance in moving many reports at once, use the Filters located to the upper right of the dashboard. You may filter the dashboard by stage and status.

Once a report has undergone its final, college-level review, but before it has been submitted to the Provost, it can be moved into the Stage entitled, “Completed FARs.”

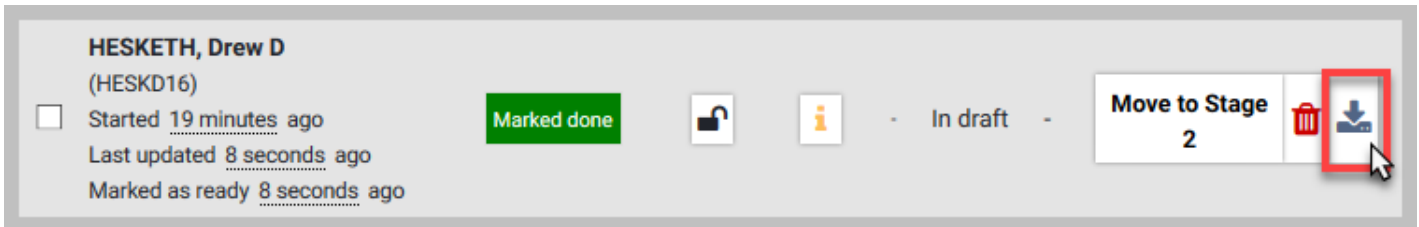


## 7. Exporting Reports

There are options to export your faculty's FARs and EARs in either a comprehensive or summary report format. These export options are available at both the faculty level as well as the FAR level.

### 7.1 Faculty level reports

To produce a faculty level report, click on the **Export** button on the far right of that faculty's row within the dashboard.



HESKETH, Drew D  
(HESKD16)  
 Started 19 minutes ago  
Last updated 8 seconds ago  
Marked as ready 8 seconds ago

Marked done

Lock icon

Info icon

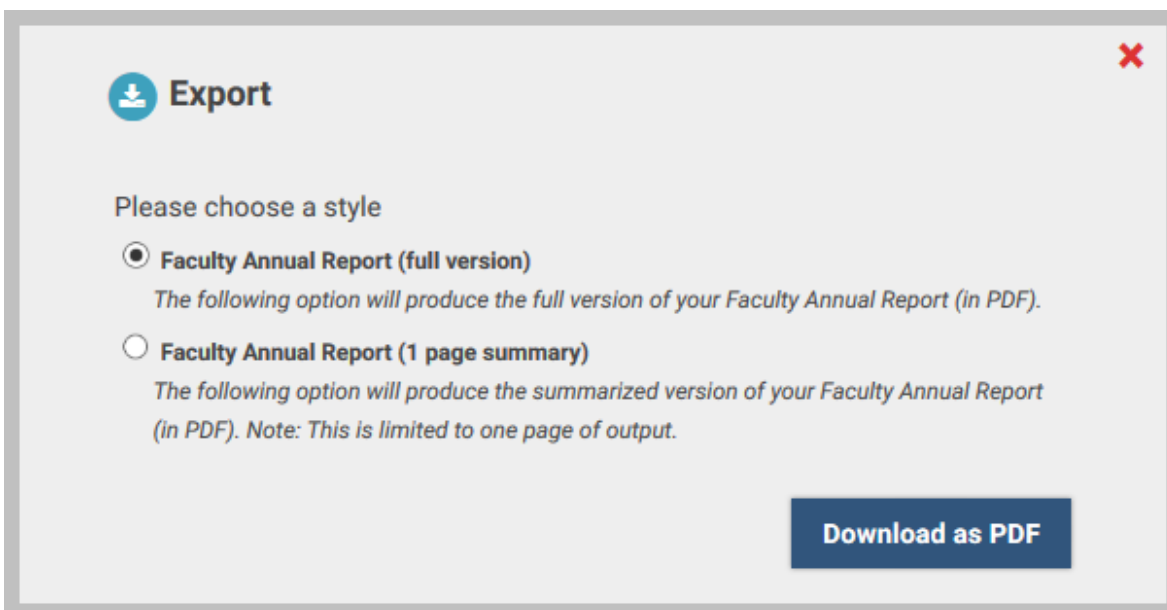
In draft

Move to Stage 2

Trash icon

Download icon (highlighted)

A pop-up window will display and provide two export options. Select the report you wish to produce and then click "Download as PDF"



**Export**

Please choose a style

**Faculty Annual Report (full version)**  
*The following option will produce the full version of your Faculty Annual Report (in PDF).*

**Faculty Annual Report (1 page summary)**  
*The following option will produce the summarized version of your Faculty Annual Report (in PDF). Note: This is limited to one page of output.*

**Download as PDF**

**Faculty Annual Report (full version):** This export will produce a full version of a faculty's FAR.

**Faculty Annual Report (1 page summary):** This export will produce a 1 page summarized version of a faculty's FAR, as it will appear to the Provost. A mapping document that provides guidance as to what is printing on the report is located on the [My CV Project Website](#).

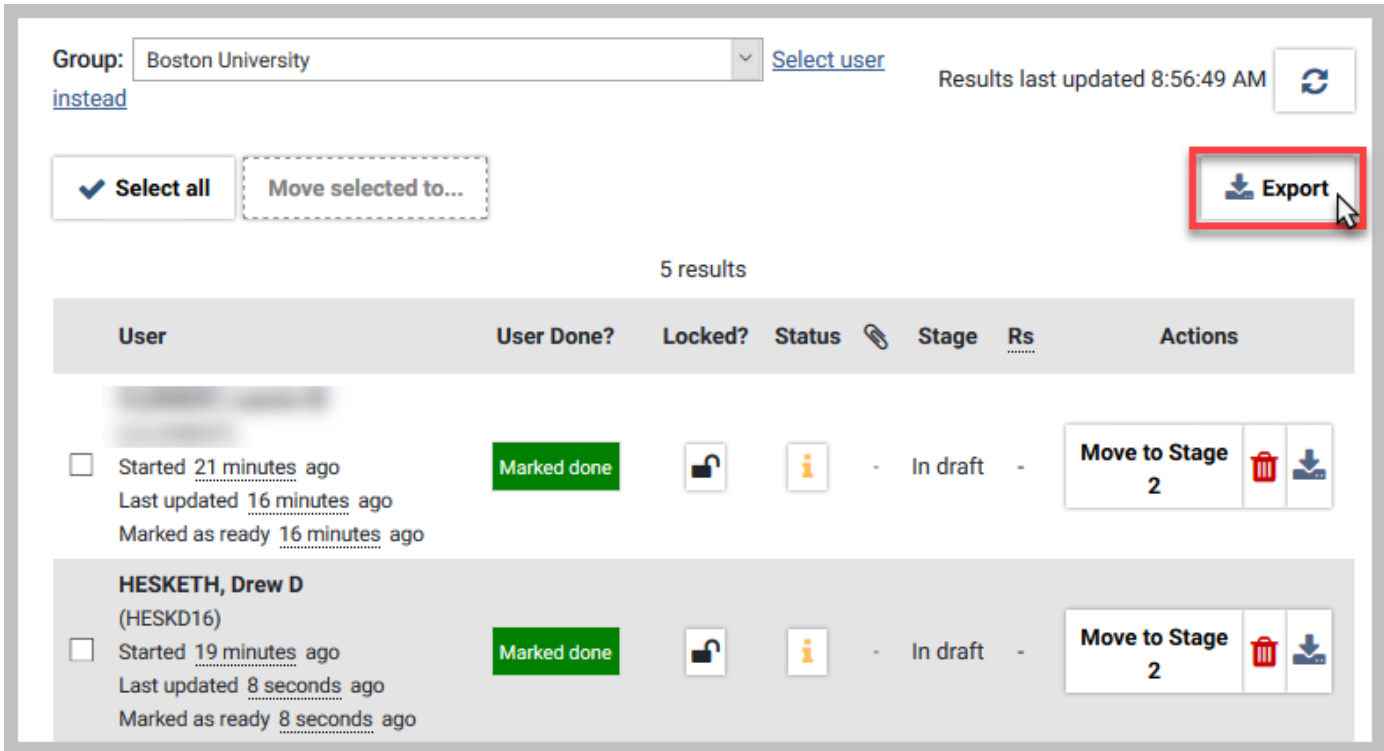


*Note: faculty level reports can only be produced once a faculty member has started his or her FAR by clicking the **Start** button on the FAR introductory page.*

## 7.2 FAR level reports

Both the **Faculty Annual Report (full version)** and **Faculty Annual Report (1 page summary)** can be produced at the FAR level. Exporting at the FAR level will generate a collection of reports for all assigned faculty who have started their FAR.

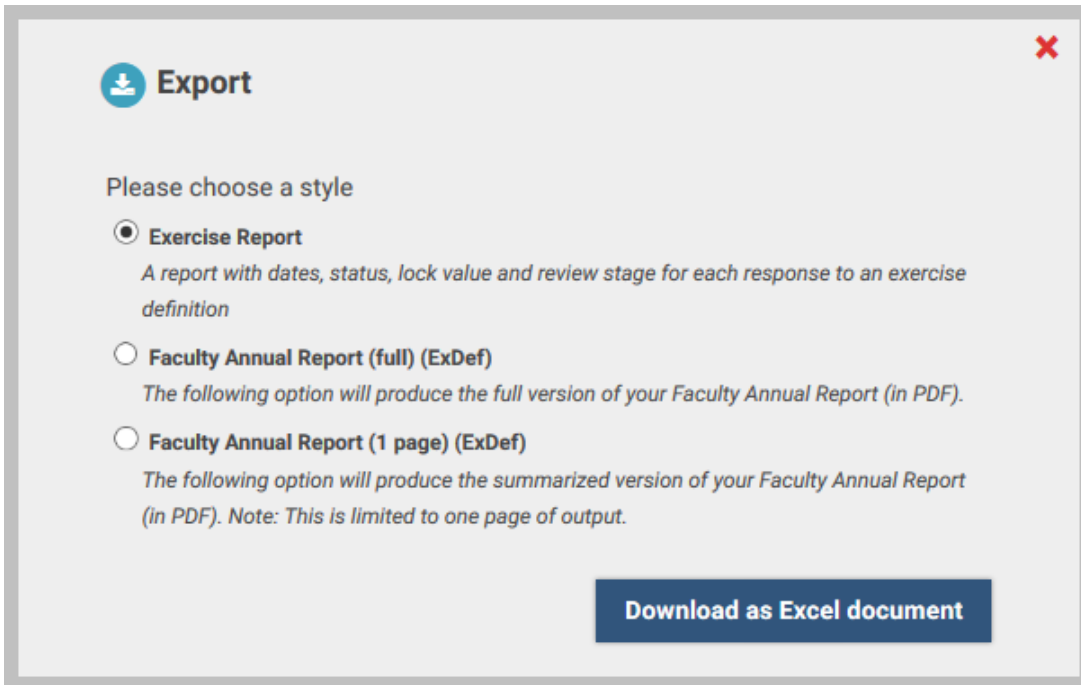
To produce FAR level reports, click on the **Export** button located to the upper right of the dashboard.



The screenshot shows a dashboard for FAR level reports. At the top left, there is a 'Group:' dropdown menu set to 'Boston University' and a 'Select user' link. To the right, it says 'Results last updated 8:56:49 AM' with a refresh icon. Below this, there are two buttons: 'Select all' and 'Move selected to...'. On the right side, the 'Export' button is highlighted with a red box. Below the buttons, it says '5 results'. The main content is a table with the following columns: User, User Done?, Locked?, Status, Stage, Rs, and Actions.

User	User Done?	Locked?	Status	Stage	Rs	Actions
<input type="checkbox"/> Started 21 minutes ago Last updated 16 minutes ago Marked as ready 16 minutes ago	Marked done			- In draft -	-	Move to Stage 2
<b>HESKETH, Drew D</b> (HESKD16) <input type="checkbox"/> Started 19 minutes ago Last updated 8 seconds ago Marked as ready 8 seconds ago	Marked done			- In draft -	-	Move to Stage 2

A pop-up window will display and provide two export options. Select the report you wish to produce and then click “Download as PDF.”



**Exercise Report:** This export will produce an MS Excel report showing the dates, status, lock value and review stage for each assigned faculty.

**Faculty Annual Report (full) (ExDef):** This export will produce a collection of the full versions of the assigned faculty’s FARs.

**Faculty Annual Report (1 page summary):** This export will produce a collection of the 1 page summarized version of the assigned faculty’s FARs, as they will appear to the Provost. A mapping document that provides guidance as to what is printing on the report is located on the [My CV Project Website](#).



*Note: FAR level reports will only display data for those assigned faculty who have started their FAR by clicking the **Start** button on the FAR introductory page.*



*The **Exercise Report** can also be produced for the EAR.*

## 8. Additional Resources

More information about My CV, including contact information for your My CV Liaisons, additional User Guides, Frequently Asked Questions, and training videos can be found on the [My CV Project Website](#).