INTRODUCTION

Welcome to Academic Portfolio. This user guide describes how the software functions, lists sources for help, provides guidance on what information goes where, and outlines steps to generate the Academic Performance Report.

About updates

Academic Portfolio was introduced in April, 2019. During the implementation phase, this document may experience improvements and updates. Please bookmark this location for reference instead of printing. To ensure academics are aware of new tips and additions, there will be change log for major updates at the end of this document. Additionally, more significant changes will be communicated through other means—including the Announcements & Help section within the tool.

What is in this guide?

- **Most tool-related guidance to support the merit assessment cycle:** This user guide is meant to be “one-stop shopping” for instruction on how to enter your academic activities into Academic Portfolio. In some instances, such as how to submit your report or add a support person, you may be directed to click a link to access a separate document.

- **Instructions for what information goes into each section of Profile and Activities:** Although much of the guidance on what to enter for each section is located at the beginning of, or in a Help “bubble” associated with, each section, some academics prefer to see the information in document form. Additionally, the user guide offers the opportunity to expand on how to handle data in some sections. **Tip:** Blue text will denote that these entries are copies of direction found within the tool.

- **Limited information on Tenure & Promotion:** Although Academic Portfolio supports the Tenure & Promotion process, you do not need to use it for entering data and generating documentation. You may, however, wish to use some optional functionality to generate part of your application packet. Consult the tip on Export a generic CV for more information.

Is Academic Portfolio the “new APR?”

Yes and no. Historically, both the report used for Merit review, and the previous tool, have been referred to as “APR.” While the academic performance report remains, the Academic Portfolio software replaces the information repository and adds several other features such as the ability to connect with colleagues, receive notifications, and the ability to automatically import batches of publications from scholarly databases.

The tool also replaces the role the Online Academic Document Management (OADM) system played in the Merit process. Academics can now generate a report from the tool and submit to their Department Head electronically.
How do I get access?
Academics automatically have access through the UCalgary portal. Follow the log in instructions for steps. If you experience any problems, consult the Get Help section for phone numbers and emails of support resources.

What if someone else needs access to my account?
Non-academics who need access to Academic Portfolio are called “Support Account Holders.” Consult the Request a Support Account instructions to ensure they have access to the system and your data. These instructions cover 1) where to obtain support account access, and 2) how the academic grants access.

Can I use this for my CV?
Academics may also choose to use the service as a central repository for CV information. Similar to the way it generates a report specifically for Merit review, it can also create a longer generic report. Using the tool for this function comes with two caveats: 1) additional historical data must be added, and 2) the output requires some degree of manipulation to meet users’ specific needs.
SUPPORT AND COMMUNICATION

Get help
The Academic Portfolio help begins with Scholar Services. See your Dean, Department, or applicable equivalent roles for information on “what goes where.” As has been the case in past years, contact your HR Advisor (Academic) in your faculty for information on the Merit process.

Tool Support
- Call Scholar Services 877-997-8807
- Email help@interfolio.com

HR Process Support
- Website: https://www.ucalgary.ca/hr/merit
- HR Advisor, Academic in your faculty

Content Support
- Your Dean/Equivalent
- Your Department Head/Equivalent

*April – August: Rollout Support by the Project Team
403.220.3070 or adp_project@ucalgary.ca

Announcements & Help
This page contains guidance from both the software service and U of C sources.
Guidance for Profile and Activities through context-sensitive help

Academic Portfolio has built-in instructions at the top of each of the Profile and Activities sections.

Where possible, you will get four types of instruction: description of what goes in the section; generic examples; clarification of commonly-confused entries and closely-related concepts; and guidance on the data—historical data loads, how and when to update, entering new information manually, and tips on possibilities to automatically import.

The application has built-in instructions in the Profile and Activities sections. Where possible, you will see four types of instruction:

1. A description of what goes in the section.
2. Generic examples.
3. Clarification on closely-related concepts or common areas of confusion.
4. Description of the data that could include: Where it came from (if it was pre-loaded); when to request updates and when to change things yourself; as well as if the information connects to the Canadian Common CV (CCV).
Where applicable, you will see links back to more detailed information contained in this manual.

Location of Help within Activities and Profile sections

Context-sensitive help is not in precisely the same place in both sections. Whereas the Profile section displays help when you click the Help “bubble,” the Activities section displays help at the top of each section.

Profile
Activities

Help to explain selection criteria

Where appropriate, the Help bubble provides further explanation of selection criteria.

Note

Please be aware that some definitions are not populated because they are self-explanatory.

Product Help

The company that manages this service has a robust set of help documents describing the general function of the software without any of the changes U of C has made.

- Your screen will look different than those in Interfolio’s instructions. Although the functionality is similar, the names, labels, and options can vary.
- At the U of C the various functions in this service and known, collectively, as Academic Portfolio. However, on the Interfolio site the different functions referred to with specific module names:
  - Faculty 180 is the data capture module.
  - Report, Promotion & Tenure (RPT) is the name—but not necessarily an accurate description of—the module used to facilitate processes. Although its title echoes
terms used in U of C processes, its main purpose is to automate how submissions and documents move from one party to another during the review cycles.

- **Dossier** is a tool similar to cloud-based storage such as Drop Box.
GET STARTED

Log in, get an overview of the software features, and find out what kinds of action items you might need to process.

Log in

1. Navigate to the ucalgary.ca. Click to expand the menu.
2. Click My UCalgary button.
3. Enter Username and Password into the Central Authentication Service.
4. Click Sign In.
5. Navigate to All about me → My job.
6. Click Academic Portfolio.

All U of C logins are set up to use the Central Authorization Service, or “single sign-on.” If you receive an error contact Scholar Services (877) 997-8807 (7 a.m. to 4 p.m. MST) / Email: help@interfolio.com or use one of the other available support mechanisms.

Academic Portfolio Interface

Once you are logged in, you will find the Home Screen which offers: limited user functions on the top right-hand side, several useful features on the left, and items for your attention in the middle.
Menu items

1. The **Home** Page displays “action” items* for your attention. These can be anything from letting you know the time to submit reports has been declared (or ready to submit), to a suggestion for adding additional descriptions to imported items. See the **Action Items** section for more examples.

2. The **Announcements & Help** section will contain the latest updates from the vendor as well as U of C FAQs and links to support. See the **Get Help** section for more explanation on information contained here along with tips on how to use the context-sensitive help features.

3. **Profile** data describes who you are as an academic. This data does not typically change much. Many sections can be edited but some require that you request the change from HR.

4. **Activities** describe what you do. Available year-round, this robust set of research, teaching, and service sections combine to showcase your activity.

5. **Forms & Reports** have not been customized* for any U of C purposes or processes. This item contains limited generalized functionality.

6. **Vitas & Biosketches** section* is where you can preview or produce a .pdf file for your Academic Performance Report. It also houses methods for integrating with other academic databases.

7. **Find Colleagues** is a handy tool to find colleagues with the same interests. Search capabilities are limited to what academics voluntarily enter into the **Researcher Profile and Interests** sections.

8. **Account Access** allows you to:
   - Grant someone else to access your account.
   - Keep track of the people who have access to your account.
For a limited time in the months prior to a Merit Assessment deadline, you may notice a special action item notifying you of the “open input period.” This link goes to a special view that constrains your data to the applicable Merit Cycle assessment period.

**Tip**

Although this view can make it easier to view the applicable items for your assessment cycle, you may miss some opportunities to pre-populate entries by changing the dates on historical data or employing the cloning feature from past entries.

**Navigate Menu Items with Lists**

While some menu items are limited to a few functions, those with lists—such as *Profile* or *Activities*—have three layers of detail showing increasing levels and detail and functionality.

**List View**

- Lists are a sequence of sections within a menu item. You have the ability to expand and collapse by clicking on the . To expand or collapse all list items at once, use the Show All / Hide All buttons.
- Navigate within a long list, use the Jump to Section button.

**Grid View**

When list items are expanded you are able to see more information displayed in a grid. This grid is a subset of all data contained in the record. If information has been loaded here, you will see a “record” displayed as an Entry under the Grid Header. Depending on the function and accessibility, sections will have one or more of these functions:
Types of Action Buttons

The **Add** button displays if the software is configured to allow data entry in this section.

The **Edit** button reveals more detail. If the section is editable, you may change some information.

The **Clone** button duplicates entries. You may find this feature convenient for leveraging existing or historical data. For example, if you go to the same conference in a subsequent reporting cycle, clone the old entry and change the applicable fields.

**Delete**

Deletes the entry. Warning: You may not recover deleted records!

Input View

The input view is where you can add data or view data that has already been loaded. This view may provide a variety of customized ways—i.e., text fields, links, and selections—to house your data.

As you navigate levels of detail in the software, the **Breadcrumbs** menu displays the path in the top left-hand corner. Use this feature to return to previous screens.
In the Input view, each selection typically has three or more sub-sections.

A. The Input Form section is descriptive with multiple fields available to provide details. Additionally, many activities allow you to add another collaborator.

B. Activity Classifications allow the Academic to frame the accomplishment relative to other criteria—including CCV fields.

   NOTE: If you see “CCV” before any fields, it does not mean you need to have a CCV to use them. It means those academics who choose to import their CCV, may (depending on how their data is entered) pre-populate some of these fields.

C. Attachments allow the Academic to upload files to further support the activity with tangible examples. The attachments function is available at the bottom of the page in each activity.

Caution! Attachments are not on the report.

At this time, attachments will not appear in the report when created as a Word document or a PDF. When submitting the Academic Performance Report, you will need to upload them as Additional Documents when submitting the report.
Add supporting documentation: links in citations and text fields

Academic Portfolio has several flexible options to add supplemental information.

<table>
<thead>
<tr>
<th>Method</th>
<th>Note</th>
<th>In Academic Performance Report?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Links in citations</td>
<td>The Research, Scholarship, and Creative Activity section provides an</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>option to “include link in citation.” See instructions: Add URL to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>citation output.</td>
<td></td>
</tr>
<tr>
<td>Links in rich text fields</td>
<td>Rich text fields offer the option to insert a link. Instructions</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>coming soon!</td>
<td></td>
</tr>
<tr>
<td>Links in plain text fields</td>
<td>Paste a link into a plain text field. The reviewer can copy and</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>paste into a browser or hover to click and follow the link.</td>
<td></td>
</tr>
<tr>
<td>Attachments section: URL or File</td>
<td>Enhancement being investigated for next Merit Review cycle. Report</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>submission may automatically embed any attachments uploaded into the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>section. See instructions: Using attachments.</td>
<td></td>
</tr>
</tbody>
</table>

* The report does not display a blue underlined hyperlinked address. However, reviewers can hover over the address to obtain the “hand” cursor enabling them to click and go to the location.

Using attachments

To use the attachments function, pick the Type, Browse for a file or Paste URL into field.

Attachments will be listed in this sub-section after you save your entries for the section.
Reminder

Attachments do not appear in the Academic Performance Report, you will need to attach them as an Additional Documents when submitting the report.

Saving your data

Unlike many desktop software programs, this web-based service does not save information automatically as you are entering information. You must remember to save often to avoid data loss. At the bottom of each input form you will usually see three or four choices:

1. **Save**: Safeguards the information you just entered but keeps you on the same page.
2. **Save and Add Another**: Saves the information and provides another set of sub-sections for you to add another entry in that section.
3. **Save and Go Back**: Saves the information and returns you back to where you were in the Activities list.
4. **Cancel**: Goes back to the Activities list without saving any information.

Quicklinks

Quicklinks are similar to Bookmarks or Favourites in a browser. Use them when you want a fast way to return to a page.

**Add a Quicklink**

1. Click the **Quicklinks** button function in the top right-hand corner of the screen.
2. Under the **Manage** section select **Add This Page as a Quicklink**.
3. The *Add Quicklinks* dialog box opens and displays a default name for the Quicklink.
   • Optional: Enter a custom name for the Quicklink in the **Name** field.

4. Click **Save**.

**Manage Quicklinks**

Quicklinks has a *Manage Quicklinks* function to organize the pages you choose to save.

1. Navigate to Quicklinks > Manage Quicklinks.

Your existing quicklinks appear in a list on the *Manage Quicklinks* screen.

2. Click on the desired icon to:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✍️</td>
<td>Edit the Quicklink’s name</td>
</tr>
<tr>
<td>🔢</td>
<td>Re-order multiple quicklinks.</td>
</tr>
</tbody>
</table>
Action Items (Home Page)

Action Items are requests or notifications that need your consideration or action. When you acknowledge the item, it no longer displays on your home page.

Note

Acknowledging the item makes it disappear from view. This does not mean the item is processed or complete.

Types of Action Items

The variety of messages you might receive are listed below with a short description. See the relevant procedures for steps to acknowledge these action items.

Responding to review cycles

<table>
<thead>
<tr>
<th>Academic Performance Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Merit Cycle takes place every two years. After the process is initiated, eligible staff receive a message in Action Items with relevant dates and activities.</td>
</tr>
<tr>
<td>Refer to the <a href="#">Submit Your Merit Report</a> section for instructions on how to generate and submit your report.</td>
</tr>
</tbody>
</table>

Requests to acknowledge

<table>
<thead>
<tr>
<th>Add more information to imported scholarly works</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you import publications, you may receive an action item requesting you to review them for details you may wish to add.</td>
</tr>
<tr>
<td>For full instructions on how to acknowledge this action item, see <a href="#">Add more information to imported scholarly works.</a></td>
</tr>
</tbody>
</table>
Note: Although these instructions appear in the Research, Scholarly, and Creative Activities section, they also apply to other types of import such as CCV, or ORCID.

Responding to collaboration items

Request for coauthor verification

Note
Co-collaborator or co-editor requests generate similar notifications.

User Menu

Click under your name in the top right-hand corner to access the User Menu.

The most important function in this menu is the Sign Out feature. To sign out, click under your name in the top right-hand corner. Failing to sign out could leave your account open to other users if you use a shared computer.

The Product Help link goes to the Interfolio vendor site. Although useful help documentation and information, the interface will look different as it is not customized for the U of C. See the Product Help section of this manual for more information.

Account Settings provide limited ability to customize your Academic Portfolio account.
CHECK YOUR PERSONAL (PROFILE) INFORMATION

The Profile section allows you to qualify the skills, experience, qualifications, and achievements collected over your career. Some of this information will have been imported from other sources such as Human Resources data but many sections are editable.

- Information in this section does not change often.
- You may edit and/or add a limited number of fields.
- Much of the information is imported from Human Resources Data.

Help within the Profile section.

The source data must be updated in its original system.

- If you wish to update information that came from PeopleSoft, consult the instructions provided in each section.
- For Profile sections, click the ? Help “bubble” to locate the instructions.

Tip

- To prioritize which information for which you should request updates or make adjustments please note:
  - Some fields are connected to CCV. If you leverage CCV for grant applications you will want to note which sections have a connection and update them with the CCV-related information.
  - You do not need to update all Profile sections for your Merit reporting cycle. This information resides in Academic Portfolio to provide a convenient central storage option in addition to harmonizing with CCV data. See table for snapshot of what appears on Academic Performance Report.
**Activities**

**If populated,** an Activity section will appear on the report.

**If empty,** nothing will appear.

<table>
<thead>
<tr>
<th>Profile</th>
<th>Appears automatically</th>
<th>Appears when populated</th>
<th>Omitted (even if populated)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Information (FirstName, LastName, email address))</td>
<td>Administrative Appointments</td>
<td>Language skills</td>
<td></td>
</tr>
<tr>
<td>Current Position</td>
<td>Additional Appointments</td>
<td>Work Experience</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rank and Promotion History</td>
<td>Biography</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Degrees</td>
<td>Researcher Profile</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Professional Licensures and Certifications</td>
<td>Interests</td>
<td></td>
</tr>
</tbody>
</table>

**Personal Information**

This section houses the name and country of origin of the Academic.

**Data**

- Populated from PeopleSoft.
- If incomplete or incorrect go to the My UCalgary Portal → All About Me → My Info. Please allow a few days for the systems to refresh.
- Only the First Name and Last Name in this section appear on the Academic Performance Report.
- Corrected information loaded weekly from PeopleSoft into Academic Portfolio.

**Contact Information**

This section contains both university and personal contact information.

**Data**

- Populated from PeopleSoft.
- To update University Contact Information, get in touch with the Contact Info Administrator in your faculty/department: http://contacts.ucalgary.ca/coordinators
To update Personal Contact information go to the My UCalgary Portal ➔ All About Me ➔ My Info to make changes. Please allow a few days for the systems to refresh. The work email in this section appears on the Academic Performance Report. Corrected information loaded weekly from PeopleSoft into Academic Portfolio.

Language Skills
Submit one record for each language, and indicate your ability to read, write, speak, and/or understand the language.

Data
- Academic enters and maintains data.
- This section is not used for merit assessment purposes; entries do not appear on the Academic Performance Report.
- Connects to Personal Information section in CCV.

Administrative Appointments
This section reflects any administrative appointments that you hold at the University. Academics appointed to these roles will already have an existing academic appointment.

Examples may include: Chair, Associate Dean, Department Head, Assistant Dean, Associate Deans, and Academic Program Director.

Data
- Populated from the HR PeopleSoft system.
- If incorrect, email hracadem@ucalgary.ca. For the 2019 Merit reporting cycle, contact your HR Advisor (Academic).
- Corrected information loaded quarterly from PeopleSoft into Academic Portfolio.

Additional Appointments
This section lists additional academic appointments. The Current Position section displays your primary academic appointment.

Data
- Populated from the HR PeopleSoft system.
- If this information is not correct, please email hracadem@ucalgary.ca to request an update.
- Corrected information loaded weekly from PeopleSoft into Academic Portfolio.

Rank and Promotion History
This section is populated from the HR PeopleSoft system. If incorrect, email hracadem@ucalgary.ca. Corrected information loaded quarterly from PeopleSoft into Academic Portfolio.
Current Position

The Current Position section lists your primary job. Joint appointments are listed in Additional Appointments.

Data

- Populated from the HR PeopleSoft system.
- If incorrect, email hracadem@ucalgary.ca to request an update.
- Current position appears on the Academic Performance Report.

Degrees

Use this section to list academic qualifications such as a Master’s, Bachelor’s, or Doctorate degrees.

This section does not include professional designations such as PEng, or FRCPC. Use the Professional Licensures and Certifications section to list these qualifications.

Data

- Populated once from the HR PeopleSoft system; however, it is based on information at the time of hire.
- Can be edited by academics if incorrect or incomplete. To keep information current, enter any missing degrees or additional degrees conferred.

Professional Licensures and Certifications

Use this section to list professional qualifications such as PEng, or FRCPC.

Data

- Historical data populated from the HR PeopleSoft system
- Can be edited by academics if incorrect or incomplete. To keep information current, enter missing or new licenses or certifications granted.

Work Experience

Work experience should be related to work done prior to an appointment with the University of Calgary.

Data

- This section is not used for merit assessment purposes; entries do not appear on the Academic Performance Report.
- Integrates with CCV.
Biography

• This section is not used for merit assessment purposes; entries do not appear on the Academic Performance Report.
• Integrates with CCV.
• Researcher Profile

Please be advised that:

• If you choose to enter information in this section, other Academic Portfolio users may search for it via the Find Colleagues function.
• This section is not used for merit assessment purposes; entries do not appear on the Academic Performance Report.
• Integrates with CCV.

Data entered and maintained by the academic.

Interests

Please be advised that:

• Any Teaching or Service entries in this section are searchable via the Find Colleagues function.
• This section is not used for merit assessment purposes; entries do not appear on the Academic Performance Report.
• Fields in this section connect with CCV.

Data entered and maintained by the academic.
ENTER ACCOMPLISHMENTS INTO ACADEMIC PORTFOLIO SYSTEM

Activities Overview

Activities are the categories the tool uses to capture, highlight, and categorize, relevant research, teaching, and service information. Twenty-three of the sections apply to the majority of U of C academic activities. Exceptions:

1. Clinical Activity is meant for faculties who do clinical work. This section does not cover CSM clinical activities.
2. Library and Cultural Resources, Student Enrollment Services, and Veterinary Medicine required unique selection criteria and fields not common. Academics in fields outside of these areas do not access these sections.

Tip

The tool is available year-round. You may enter your activities on a regular schedule to avoid a backlog of work required before producing the Academic Performance Report.

Some of this information will have been imported from other sources. For example:

- PeopleSoft (Awards and Honours, Student Advising / Supervision (Individual, and Teaching: Term-based)
• The U of C grants database populates *Grants* section on a quarterly basis.
• Other than Teaching: Term-based, the sections are fully editable.

**Note**

**Help within the Activities section.**
You do not need to click a ? Help bubble. Locate instructions for Activities sections at the top of each Grid or Detail view:

**Highlights**
This section is intended to capture activities you would like to highlight from this reporting period. **Data** in this section is entered and updated by the academic.

**Context**
This section is intended to capture situations or circumstances that provide context for your activities over the reporting period but may not be considered "highlights."

Please be advised:
• By entering information in this section, you are agreeing to share this information with your Department Head, Dean, and Committees.
• If you prefer, you may discuss these directly/privately with your Department Head and Dean.
Data in this section is entered and updated by the academic.

Administrative Appointment Work Details
This section is intended to capture those activities that fall under your administrative appointment.

Data in this section is entered and updated by the academic.

Teaching: Term-based
This section is intended to capture the courses which are taught on a University of Calgary term basis as shown in the Academic Calendar.

Maintaining course data

• This section connects with the Courses Taught section in CCV.
• You may see multiple years of course data.
  • Only courses taught within the Merit reporting period appear on your Academic Performance Report.
  • More than two years appear because academics may wish to make use of more years of data when generating a generic CV or connecting with CCV.
• Correcting data in this area is time-sensitive. There is a window for change within each term that, once closed, cannot be opened again. To ensure you notice incorrect information in time to request updates, access your Faculty Centre on the UCalgary portal (PeopleSoft > Faculty Centre > Self-Services > My Schedule).
  • PeopleSoft supplies Academic Portfolio with course information once a term, in the last week of each term.
  • Historical data does not update.
• Should you miss the window to update course information in the system of record (PeopleSoft):
  • Use the Course Not Taught selection box available when HR initiates the Merit reporting process.
  • Note corrections in the Course Comments for each term found in the Additional Comments section.
  • Do not use the reflective memos. The primary purpose of these fields is to provide an opportunity to reflect on the unique experiences or circumstances associated with a particular course.

Timing considerations for updating term-based course data

The following graphic illustrates timing for reviewing course data. During each term, the academic reviews courses in the system of record (PeopleSoft) and consults with appropriate parties to ensure course data is correct.
• Academics have almost the full length of the term to ensure correct information in PeopleSoft.
• Courses for each term load into Academic Portfolio at the end of the term.
• Data load confined to courses from the current term.
• Changes to historical data (i.e., from dates prior to the current term) are not loaded.
• Information not corrected before the last week of the applicable term will display incorrectly in Academic Portfolio.

Teaching: Term-based attachments

All attachments provide the option to note that it is a file or a URL. In the case of term-based teaching, however, Academic Portfolio offers the ability to categorize the attachment further depending on whether it is a Syllabus, Course Evaluation (e.g. USRIs), Peer Evaluation, or Other type of attachment.

Teaching: Additional Instruction

This section is intended to capture teaching/instruction activities that are not based on the University of Calgary terms.

Examples of additional instruction can include when you were:
• involved in a U of C credit course but not the instructor of record,
• designated as the course coordinator,
• teaching only one lecture or a course at another university, and/or
• teaching a course off-site.

Data in this section is entered and updated by the academic.

Teaching: Course / Program Development

This section is intended to capture more detailed course descriptions and highlight pedagogical approaches, major redesign efforts, and to summarize feedback from students and/or peers. In this section, you can also share materials associated with the development of courses or programs.

Data
• Entered and maintained by the academic.
• Connects with Course Development and Program Development sections in CCV.

Educational Leadership

Use this section to report educational leadership activities you were in charge of related to supporting and advancing teaching and learning in teaching practice; leading teams through course and curriculum design; and educational development.

Examples of activities you lead could include:
• Peer teaching consultations and feedback.
• Leading a community of practice.
• Leading a course, program, or curriculum review.

Clarification
• Participation in educational leadership activities where you were a participant—not a leader—should be reported under Professional Development.
• Participation in committees related to teaching/education should be reported in the University of Calgary Committees section. Named leadership roles (with a title and allocated time) and activities within that role are to be reported under Administrative Appointments.

Data in this section is entered and updated by the academic.

Released Activities

This section may be used by your faculty to capture information about any official releases which have been agreed to over the reporting period.

Clarification forthcoming: process pending.
**Student Advising (Group)**

Use this section to detail the number of hours spent guiding undergraduate and graduate learners.

Examples

- Group research meetings on the selection of their courses.
- Providing direction to take for student thesis or dissertation.
- Offering an additional tutorial for exam or midterm preparation.

This section is not intended to capture graduate supervision; this information should be entered into the **Student Advising / Supervision (Individuals)** section.

**Data** in this section is entered and updated by the academic.

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**Student Advising / Supervision (Individuals)**

This section is intended to capture activities related to Student Advising in the area of Supervision. Supervisory activities include guiding individual students through the planning of undergraduate, capstone, honours or thesis projects, from formulation of their research projects through establishing methodologies and discussing results, to presentation, and defense.

Enter /update details about the learners you advised as a supervisor or member of a supervisory committee as well as information about the type of supervision provided and numbers of hours.

**Clarification**: Advising is distinct from mentorship. Mentoring—whether done for colleagues, staff, or individual students—takes place outside the supervisory relationship.

**Data**

- Populated by PeopleSoft for formal supervision of Graduate Students.
- During 2017 – 2019 Merit Reporting cycle, incremental data refresh will not be done; users are to update /correct information in Academic Portfolio. In addition, complete this form to request the changes be made to the PeopleSoft Supervisory Records through the Faculty of Graduate Studies.
- Starting in Sept 2019 a quarterly incremental load will be done on the first Monday of each term (Jan, May, Jul, and Sept)

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**Mentorship**

This section is intended to capture activities related to mentoring. Mentoring activities include facilitating the growth and development of undergraduate and graduate students; postdoctoral students; and interns or other academic staff.

**Data**

- Entered and updated by academic.
- Connects to *Mentoring Activities* section in CCV.
Research, Scholarship, and Creative Activity

Use this section for research, scholarship, and creative works. It allows for both manual and automated input.

Data upload via manual input

The drop-down menu under manual input will open 13 separate screens in the following areas: Artistic Contributions; Books; Book Chapters; Case Studies; Conference Proceedings; Expert Witness Activity; Interviews and Media Relations; Journal Article; Knowledge and Technology Transfer; Other Publications; Other Teaching Materials; Patent and Intellectual Property; and Presentations.

Note: In-progress and unfunded research may be captured here.

Data upload via automated Input

• Using two “live” connections to scholarly databases—Medline/PubMed and Web of Science—you can perform a batch upload to import the publications directly into your Research, Scholarship, and Creative Activity section.

• Leverage any searches you have conducted for your publications via another database such as Google Scholar. Once you have saved the results in a BibTeX or RIS citation format, you can use this utility to import multiple publications.

• Tip! Consider making an ORCID connection with Academic Portfolio prior to performing your upload if you wish to take advantage of this persistent digital identifier.

Data is entered and maintained—whether via manual or automated input—by the academic. No refresh schedule applies as these options are available on demand.

Add an activity or publication

The manual and automated methods become available when you navigate to add a new record.

1. Click Activities on the User Menu.

2. Click Research, Scholarship, and Creative Activities.

3. Click the Add button.
Choose the manual or automated method.

Automated input via batch upload

Select the desired method for import.

1. On the Activity Input screen, click to select the desired database.
2. Click the Continue button.

Tip

This example uses Web of Science (WoS). However, you may wish to import publications using a BibTeX file from other bibliographic databases, such as Scopus, Google Scholar and Web of Science.
Define selection criteria.

1. Select desired **Maximum Records** value.
2. Select **Hide Duplicates** if desired.
3. Select desired selection criteria in the **Search Field**.
4. Enter search value in the **Search Word / Term** field.
5. Click Search.

Tip

There is no “Select All” function.

2. Click the **Import Selected** button.
Tips

- When importing, don’t forget to alter the Maximum Records field. The search returns the first 10 to 500 results it finds. If the search limit is too low, you may not capture all results.
- Hide duplicates unless you want to see all results.
- Interfolio has two more detailed videos to provide additional guidance and tips on data import. Keep in mind the software represented in the videos does not have the same customizations as the University of Calgary’s Academic Portfolio tool.
  - Import citations (Medline / PubMed)
  - Import citations using generic import (Google Scholar)
- You may wish to add another academic as a co-author, collaborator, or co-editor.
- You may click the pencil icon beside each publication to edit details. Depending on the type of activity, you may alter many of the same fields listed and described in the Manual Input section. For example: correct the publication date, add page numbers, alter the publication status, add a link, or indicate its level of review.

Tip

If you opt to create a file for the generic import, you may wish to use the Google Scholar functionality:

- Navigate to Google Scholar (https://scholar.google.ca/)
- Log into your personal Google Scholar profile.
  - Note: If you do not yet have a Google Profile you will need to create one, search for your articles, and add them to your profile.
- Select the individual articles you wish to export.
- Click Export.
- Select BibTex file format.
- Copy the text document representing the exported publications.
- Within the automated import function, select the Generic (RIS / BibTex) option.
- Click the Continue button.
- Select the BibTex format.
- Select the Copied Text option.
- Copy and paste the exported publications text document into the Text field.
- Click the Save button.

Add more information to imported scholarly works

Importing publications generates an action item notifying you to acknowledge some of the activity classifications for each item imported. To process, open each action item and assign information if desired.

1. On the Home page, click the Assign Activity Classifications for Imported Scholarly Works link.
2. In the Add Required Activity Information screen, click the Add button for each imported item.

Tips
- “Required” is a system-generated label. Academic Portfolio flags these items so academics do not miss any required or desired additional description or classification.
- The source can vary: Web of Science, PubMed, generic import (e.g. Google Scholar), CCV import, or ORCID.

3. In the Add Required Information page, select any additional criteria from the available fields.
4. Click Save.
Note: “required” refers to the screen name and any fields with asterisk.

You do not need to make any selections. Clicking the Save button lets the tool know you have acknowledged the item. The Action Item will disappear from your list once it is acknowledged.

Click Manual Input

The selections in the manual method’s drop-down menu generate an input form specific to that type of activity. If you have a CCV account, each one of these selections (except for Case Study) has a connection to CCV.

Select a Category of Manual Input

5. Select the desired category.
6. Click Continue.
Complete the relevant and mandatory fields within each of the three sub-sections.

Sub-section A: Input Form

Enter and select as many fields as you think will be sufficient to describe the activity. Unless you see an asterisk (*) beside the field, it is not information the software requires in order to save data on that page.

Status
Status is a mandatory field on all activities.

CCV_Type field
The CCV field is not only descriptive, it holds additional functionality. In this example, this field maps to each of the related fields in the generic CCV’s Artistic Contribution page. Select the appropriate criteria.
Add a URL to the citation output
Add an optional URL linking to a description of the activity. If you wish, you may include the URL and description in the report’s citations.
The citation listed on your Academic Performance Report displays the address as a hyperlink your readers can click for additional information.

Add a description to the citation output
You may include additional description for your activity.

Tip: The citation listed on your Academic Performance Report will include additional information about your publication or activity.

Refresh Citation
The software will also reformat the citation. Select a format (e.g. APA) and click Refresh Citation.
Note: Citation reformat applies to generic CV outputs, not the Academic Performance Report for Merit Review.

Activity Classifications

Complete the relevant fields for the activity.
Note:
• Some Activity Classifications sub-sections have CCV-related selection criteria.
• Where appropriate, the Help bubble provides further explanation of selection criteria.

Clinical Activity
This section is intended to capture clinical work which is not related to the Cumming School of Medicine or the Faculty of Veterinary Medicine.

Data entered and updated by the academic.

Libraries and Cultural Resources
Use this section to report activities that fall within the scope of your position, as set out in sections 4.6-4.8 of the Handbook for Academic Staff in Information Resources, 6th Ed.

Categories of activities included are:

a. Administrative/Management (excluding Administrative Appointments)
b. Information/Collection Management
c. Outreach
d. Leadership

See sections 4.6-4.8 of the Handbook for an inclusive range of responsibilities listed under each category for librarians, curators, and archivists, respectively. Consult with your Associate University Librarian as to how to apply these categories to your specific position.

Clarification

• Teaching and instructional activities should be reported in either Teaching: Term-Based, Teaching: Additional Instruction or Teaching: Course/Program Development, as appropriate.
• Scholarship activities should be reported under Research, Scholarship, and Creative Activity.
• Service activities should be entered under the University of Calgary Committees, Professional Service and Membership, or Academic Engagement and Service, as appropriate.
• Administrative appointment activities should be reported under Administrative Appointment Work Details.

Data entered and updated by the academic.

Student and Enrolment Services – Counselling
Use this section to report Counselling activities you engaged in working with undergraduate and graduate students at the University of Calgary.
Examples could include: individual and group counselling, supervision and supervision administration (reviewing and signing notes, review tapes), and direct client consultation.

Clarification

• Curriculum development related to counselling programs/groups should be reported under “scholarship” in the Research, Scholarship, and Creative Activity section.
• Participation in committees related to counselling should be reported in the University of Calgary Committees or Professional Service and Membership section.

Veterinary Medicine - Assessment and Student/Learner Review

Use this section to report faculty or program-level assessment activities that are outside the realm of typical didactic course-related assessment or student supervision. These can relate both to applicants and to student/learners of all types.

Examples of assessment activities could include:

• Applicant assessment, i.e., application review or MMIs
• DVM student assessment, i.e., OSCEs, Year IV assessments, Medical Record grading
• Judging of posters, reports, or presentations

Clarification

• Activities you undertake related to specific courses are reported in either Teaching: Term-based or Teaching: Additional Instruction, and are assumed to include assessment activities undertaken as part of the typical teaching/coordination role. This would include preparation and marking of standard examinations.
• Supervision of individual students is reported under Student Advising / Supervision (Individuals) and is assumed to include assessment activities undertaken as part of the supervisory role.

Veterinary Medicine - Clinical, EcoHealth, and Diagnostic Activity

Use this section to report clinical, diagnostic, and field work or rotations related to clinics, farms, community health, and ecosystems. Activities reported can be with or without learners.

Examples of Clinical, EcoHealth, and Diagnostic activities could include:

• Work in clinics or on farms, with or without learners
• Rotation supervision, i.e., Clinical, Diagnostic, Community Health
• Environmental or field investigations, with or without learners
• Phone or email consultations

Clarification

Activities you undertake related to specific Clinical Skills courses are reported in either Teaching: Term-based or Teaching: Additional Instruction sections.
Data entered and updated by the academic.

Veterinary Medicine - Clinical Trainees

Use this section to report supervisory or instructional activities related to clinical trainees, including residents and interns.

Examples of Clinical Trainee activities could include:

- Acting as faculty supervisor for an intern, resident.
- Participating in intern training such as Intern Clinical Skills Day.
- Overseeing an intern research project.
- **Clarification**: Supervision of non-clinical trainees is reported under *Student Advising / Supervision (Individuals).*

Grants

This research funding information includes both completed and ongoing projects as well as applications for grants that did not receive funding. Amounts indicated reflect the values on the application, original notice of award, agreement, or contract. All funding considered “research funding” will appear in the project holder's records.

Data

- Populated from the Research Services database. Note: Research Services records grants by fiscal year (ex. 04/01/2019–03/31/2020).
- Refreshed on a quarterly basis according to the fiscal year.
- Can be added, edited, or deleted. Please be advised:
  - As a best practice, contact Research Services to ensure data are also corrected in the source system.
  - You cannot recover deleted data!
- Integrates with CCV section: *Research Funding History.*

Use caution if you want to add a co-applicant. The communications function in the tool sends a notification to any/all name(s) you select.

Special considerations for entering Grants data

Most Academic Portfolio sections are included in or excluded from the Academic Performance Report if their start term or end term is covered by the reporting period. Grants have an additional factor: Status. Note that some grants will appear on your report even if they are out of the reporting period because Academic Portfolio recognizes these statuses as ongoing activity.

<table>
<thead>
<tr>
<th>Status</th>
<th>Term is Within Reporting Period &amp; Shows in Report</th>
<th>Term is Outside of Reporting Period &amp; Shows in Report</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*July 4, 2019*
Awards and Honours
This section is intended to capture awards and honours received during the reporting period.

Examples may include awards, medals, prizes, fellowship in scholarly and professional organizations, and other recognitions.

Data
- Entered and updated by the academic.
- Integrates with CCV section: Recognitions.

University of Calgary Committees
Use this section to add detail about your work on committees within the University of Calgary.

The Unit field allows you to identify the level the committee activities belong to—University, Faculty, or Department. Standing Committees are listed in the Committee dropdown by level. If you don't see your committee in the list, select Other and enter the name in the adjacent text box.

Clarification: Your work on committees outside of the University of Calgary should be added under Professional Service and Membership.

Data
Academic Portfolio populated with two forms of historical data:
- A list of known standing committees.
• Committees indicated in former Merit reporting systems for U of C and Cumming School of Medicine.

University of Calgary Service

Use this section to describe service and leadership activities performed for the University of Calgary, such as work in academic governance or development relevant to the progress and welfare of your department, unit, or faculty.

Do not use this section for describing your work on committees for the University of Calgary; this information belongs in the University of Calgary Committees section.

Data entered and updated by the academic.

Academic Engagement and Service

Use this section to capture activities that involve

• Providing a service to the community or other external organizations, applying your scholarly or professional knowledge and thereby bringing potentially distinction to the University
• Building and maintaining community connections and networks and establishing credibility with community partners to support current or future academic work.

Clarification

• Do not use this section to enter information about committees. Information about work on committees for the University should be entered in the University of Calgary Committees section.
• Information about work on committees outside of the University should be entered in the Professional Service and Membership section.

Data

• Entered and maintained by the academic.
• Integrates with CCV section: Community and Volunteer Activities.

Academic and Professional Review Activity

In this section, enter review activities that include scholarly works, editorial work, conference adjudication, organizational/unit/program evaluation, or assessment of research and other funding applications.

Data

• Entered and maintained by the academic.
• Depending on which fields you choose to populate in this section, data may integrate with the following CCV sections: Editorial Activities, Journal Review Activities, Conference Review Activities, Organizational Review Activities, and Research Funding Application Assessment Activities.
Professional Service and Membership

Use this section to detail your work on committees, boards, or other groups that utilize your disciplinary or professional expertise to advance your area within associations, government and non-government organizations, international consortia etc.

Examples could include:

• Being a member of a group of university professors who received a federal grant to write a white paper on the future of the Ph.D. in the Humanities in Canadian institutions, or
• Assessing the work of other colleagues for tenure and promotion.

Clarification

To report other professional service such as peer review or other review activities, use the Academic and Professional Review Activity section.

Data

• Entered and maintained by the academic.
• This section links to CCV data from the following CCV sections: Memberships, Promotion/Tenure Assessment as well as International Collaboration Activities.

Professional Development

Professional development refers to a wide variety of professional learning activities, specialized training, or formal education intended to help you improve your knowledge, competence, skill, and effectiveness in all areas of their duties.

Examples could include a wide variety of activities such as:

• Attending a cultural sensitivity workshop.
• Participating in, as opposed to leading, educational leadership activities.
• Attending a course on effective presentations.

Data entered and updated by the academic.

Outside Professional Activity

“Outside Professional Activity” (O.P.A.) refers to those activities which the academic staff member performs as a community service unless otherwise contractually arranged with the Governors or those for which the academic staff member may receive remuneration. O.P.A. is normally restricted to activities associated with the academic staff member's major academic interests as an employee of the University of Calgary.

–Section 13 of the Collective Agreement between the Governors of the University of Calgary and the University of Calgary Faculty Association (TUCFA Agreement)

Clarification
• Please refer to Faculty Guidelines for Faculty specific information.
• See also: Article 6.1 of the Code of Conduct.

Data entered and updated by the academic.
COLLABORATION

The Grants and Research, Creative, and Scholarly Activities sections provide the ability to add other academics—both at the U of C or another institution—to your activity. The following example adds a collaborator to an Artistic Contribution activity.

Add another Academic to your activity

The section to add academics is located within the Input View of your activity. Depending on the screen it may include (but not be limited to) a Co-Author, Collaborator, or Co-editor.

Example: Conference Proceedings offers choice to add Co-Author(s) or Co-editor(s).

Add Faculty in a collaboration role

1. Click Add in the appropriate sub-section (e.g. Collaborator).
2. Click Select Faculty at Your Institution.

   Note: Once you arrive at the Select Faculty screen you have a choice to search for someone at your institution in the Search... field or use the Change button to navigate through the organizational hierarchy.

   Although you may employ either method, using the Search... field involves fewer steps.

Search for Faculty to add
1. Enter a portion of the person’s name into the search field.
   
   **Tip**
   
   If you prefer to search using the uCalgary organizational hierarchy, click the Change button to reveal additional faculties and units in the Standard Filters section.

2. Click the Find button.

3. Locate the name you want, click to select, and click the Select Single Faculty → arrow to add the name to the Selected pane.

4. Click Select Faculty.

The person(s) added receives a notification that you have added their name(s) to your activity. Persons receiving these notifications can consult Academic Portfolio: Getting Started section in this manual or the vendor’s documentation on accepting a co-authored work.

Accept a Coauthored Work

To accept a co-authored work, click the Action Item listed on your Home page. You can then accept or reject the coauthor verification, and edit your copy of the activity. If you edit an activity, only your copy of the activity will be changed—no changes will be made to the other co-author’s copy of the activity. If you reject the activity, the other coauthor will not be notified.

To respond to a coauthor verification request:

1. Click the Coauthor Verification action item on your Dashboard. The pop-up displays.
2. Click the desired option. If you click **Accept**, a message displays telling you that a new copy of the activity has been created.

   > The original activity on your colleague’s profile remains untouched!

3. The activity as a **Scholarly Contributions & Creative Productions** activity. Make any desired changes, then click **Okay** button.
**GRANT ACCESS TO ANOTHER USER**

Two things need to happen before someone else can see and edit an academic’s information: 1) the support person must already have access in Academic Portfolio, and 2) the academic must personally grant them access to their account.

If the support person’s account is set up, skip to the **Grant Access to a Support Account** section.

**Request a Support Account**

Some uCalgary non-academic staff members will need one of the following types of support accounts:

- **Limited Access** is for individuals who will be supporting academics by, for example, entering and managing their data.
- **Full Administrative Rights** are for HR Advisors who may need to set up and manage committees or manage faculty evaluation processes.

<table>
<thead>
<tr>
<th>Who</th>
<th>Limited Access</th>
<th>Full Administrative Rights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academics make requests for support</td>
<td>The HR Services team makes requests to add administrative accounts.</td>
<td></td>
</tr>
<tr>
<td>account holders.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What</th>
<th>Request to add a <strong>support account</strong>.</th>
<th>Request to receive administrative rights.</th>
</tr>
</thead>
</table>

**How**

In both instances, email the Talent Development Merit Team at academicportfolio@ucalgary.ca with the following information:

- Type of access (Limited access for a support account holder OR full administrative rights)
- Full name of person receiving access
- Faculty/Department
- Your UCID #
- Support account holder’s UCID #
- Email address
- Faculty/Department

The Talent Development Merit Team will provision access and provide instructions for the next steps.

**Grant Access to the Support Account**

Once the support person is listed as a user in the system, you can add them to your account and indicate how long you want them to have access.

**Navigate to Account Access function**

1. Click the **Account Access** item on the **User Menu**.
2. Click the **Add** button in the **Account Access** screen.
3. Click the **Select Faculty** button to find the person to whom you want to grant access.
Select Support Account

1. Make sure you select **Show Support Accounts** to ensure your search can access the relevant people.
2. Enter a portion of the person’s name into the search field.
3. Click the **Find** button.
   
   **Tip**
   
   If you prefer to search using the uCalgary organizational hierarchy, click the **Change** button to reveal additional faculties and units in the **Standard Filters** section.

4. Locate the name you want, click to select, and click the **Select Single Faculty** arrow to add the name to the **Selected** pane.
5. Click Select Faculty.
Define Access

1. Click to select the Emulate option.
2. Click in the Expiration Date field to launch the Calendar. Select the date you wish access to end.
3. Write a note if you wish to keep track of any aspects of the access.
4. Click Save to complete entry.

5. Click Okay button in the Access Added screen to confirm.
• The system does not generate an email notifying someone they now have access to your account.
• Please notify them they now have the ability to “emulate” you. This means they can see all of your information and make changes on your behalf.

Manage Access

The name you added now appears in the *Users Granted Access to My Account* section. Anyone listed in this section can log into Academic Portfolio to see all of your information and perform functions on your behalf. Use the **Edit** and **Delete** buttons to manage their access.
INTEGRATE WITH OTHER TOOLS

Academic Portfolio offers the option to establish a connection with two other tools geared to scholarly activities: Canadian Common CV (CCV) and the Open Researcher and Contributor ID ORCID

Considerations before you start:

- If you have more than one method by which you might import information, consider trying one at a time before committing to importing all possible sections. For example, you may prefer the way CCV imports your grants information as opposed to the pre-loaded data but find ORCID imports your publications better. Note: These methods depend greatly on the state of the data being imported!
- Do not import the following sections as you risk overwriting some of your U of C contact information or creating near-duplicate entries of other data:
  - Personal Information – Contact Information
  - Education
  - Personal Information – User Profile.

Canadian Common CV (CCV)

(CCV) is a tool that streamlines applying for grants with Canada’s tri-council agencies. This section explains aspects you should consider before importing, lists cautions for which sections might overwrite data you wish to keep, and outlines the steps to import all (or some) of your Canadian Common CV (CCV) into Academic Portfolio.

Before you import your CCV

Is your CCV up to date? Are you planning on updating it in the future?

The main purpose for CCV integration is to support academics as they enter data for the Merit Assessment cycle. Ideally, the CCV information is up to date. However, academics may wish to import whatever information they have in order to utilize it in time for Merit reporting. Should the CCV information be updated in the future, a subsequent import would bring updated and new information into the relevant Academic Portfolio sections.

Is the data entered in a standardized way?

While every effort has been made to map the information appropriately from each section and field, sometimes a user’s data does not import the way they expected. Examples include, but are not limited to:

- Not populating date fields within the record of a CCV publication entry does not give Academic Portfolio enough information to assign the Term. In lieu of this information it may assign an arbitrary term.
- Using an incorrect delimiter to separate multiple authors within a publication. Academic Portfolio’s import function would read this information as an indicator that no more authors exist—and assign only the first author in the list.
Not following CCV’s format for a field can interfere with the way the information is supposed to appear. For example, using a full name instead of an initial can cause the first and last names to reverse when the prescribed method isn’t followed:

Warning

Some sections, such as User Profile and Personal Information could overwrite your U of C information imported from PeopleSoft. Also, exercise caution when importing sections with pre-populated data. For example, Education Degrees could overwrite Degrees section in Academic Portfolio’s Profile. Other cautions include potential duplications in grants, student advising, and publications. Although the tool produces an action item alerting the user to potential duplication (along with the option to reject the import of that record), duplication could occur if there are slight variations in the way the information was entered into CCV.

Access your CCV function from Academic Portfolio

- Locate the User Menu on the left side of the screen and click Vitas & Biosketches.
- Scroll down to view the sub-section called Vita/Profile Systems. Click on the Canadian Common Vita link to launch the CCV login page in new browser tab.
- Go to the CCV login in the tab you just opened. Enter your Username and Password,
- Click Login.
- Navigate to Utilities → Export CV XML to access the Export CV screen.

Export your CCV information

- On the Export CV screen, click the I’m not a robot selection box on the reCAPTCHA utility. The screen will refresh to display a green check mark.
Click the Export button.
Click Save File and OK to confirm the download.

Access the downloaded file

• If your browser did not present a Save As dialog box giving you the option browse to a location of your choice, the file will be in your Downloads folder.
• Click the bottom bar of your browser or navigate to C:\Users\user.name\Downloads to access the file.
• Locate the file.
• Tip! The file name starts with “CCV” followed by an 8-digit number. Example: CCV-10151654

Import your CCV data into Academic Portfolio

• Return to the Academic Portfolio tab in your browser.
• If you are not already in the Vitas & Biosketches page, locate it on the left-hand menu.
• Scroll down to view the sub-section called Vita/Profile Systems.
• Locate the Canadian Common Vita item in the table. Click the Choose File button to the right of the field in the Import column.
• In the Choose Files to Upload dialog box navigate to your XML file in the Downloads folder (or other location you may have used.)
• Click the Open button to select the CCV file.
• Once the file is selected, click the Upload button to import the data.

Review, select, and import CCV sections into Academic Portfolio

• Before the upload function places the CCV data into your Academic Portfolio fields, you can choose which individual sections you would like to import.
• Check boxes next to each section you wish to select – OR - click Select All/None to import every section*.
• Click Import Selected Sections to import your CCV.
• Click the Finished button to close the dialog box.
• Review the results to see:
  • Which items imported successfully.
  • Which items imported successfully.
  • Any duplicates that were identified and not imported.
  • Which sections of Faculty180 the various CCV sections mapped to. Examples:
    o Education Degrees maps to Profile > Degrees.
    o Contributions Book Chapters maps to Research, Scholarship, and Creative Activity.
• Tips
  • If you want to see your latest CCV Import Report, go to Vitas & Biosketches and click on link in the View Previous Import column.
  • Review the imported data for accuracy. Note any areas where you need to make adjustments as these tips could come in handy for future imports.
Open Researcher and Contributor ID (ORCID)

ORCID is a registry of unique identifiers for researchers and scholars that is open, non-proprietary, transparent, mobile, and community-based. ORCID provides a persistent digital identifier to distinguish researchers from their peers, automatically linking their professional activities.

How to import data from ORCID to Academic Portfolio

Before Academic Portfolio can receive information from ORCID, you must authorize the connection. Once the two software systems can “talk” to each other, you may import one or more of the following sections into Academic Portfolio.

<table>
<thead>
<tr>
<th>ORCID section</th>
<th>Academic Portfolio section</th>
<th>In Academic Performance Report?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works</td>
<td>Research, Scholarship, and Creative Activity</td>
<td>Yes</td>
</tr>
<tr>
<td>Funding</td>
<td>Grants</td>
<td>Yes</td>
</tr>
<tr>
<td>Education and Qualifications</td>
<td>Degrees</td>
<td>Yes</td>
</tr>
<tr>
<td>Employment</td>
<td>Work Experience</td>
<td>No</td>
</tr>
</tbody>
</table>

Note

- Academics can edit the Degrees section in Academic Portfolio. You may not wish to select the Education and Qualifications section to import from ORCID.
- The import function omits qualifications from ORCID’s Education and Qualifications section. Only degrees will be imported. Tip! Ensure you are not importing information similar to the entries imported from the PeopleSoft system (e.g. Degrees). You may end up with near-duplicate entries.

Warning

Selecting the only me privacy setting in ORCID blocks access to other systems attempting to access the information. Use the trusted parties or everyone setting to ensure Academic Portfolio’s import function is free to extract the ORCID records.
Authorize the connection between Academic Portfolio and ORCID.

1. On the left-hand menu, click on **Vitas & Biosketches**. Scroll down to view the sub-section called **Vita/Profile Systems**.
2. Locate and click the **Create or connect your ORCID ID** button on the right-hand side of the second row.

3. Academic Portfolio will request access to ORCID so it can connect with the information in your profile. When prompted, log in to your ORCID account.
4. Click the **Sign into ORCID** button.
5. Click the **Authorize** button.

**Note**

A note in the **Authorize Access** column confirms you are logged in. It also instructs you that, if you wish to revoke access, you must revoke it in both Academic Portfolio and ORCID Registry.

**Import data from ORCID**

1. Click the **Import** button in the **Import** column to access the import management function.
2. In the *Import from ORCID* screen, click to select which sections you wish to import.
3. Review the results and edit any editable fields. Click the **Save** button to complete the import.

4. Click the **Save** button.
Your import history displays in the Vita / Profile Systems section

How the data populates Academic Portfolio

Note
- Certifications or qualifications listed in ORCID did not import into the Degrees section of Academic Portfolio.
Academic Portfolio User Guide

Work Experience

<table>
<thead>
<tr>
<th>Role</th>
<th>Organization</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>Organization C</td>
<td>(2017-Ongoing)</td>
</tr>
</tbody>
</table>

Add

Grants

<table>
<thead>
<tr>
<th>Title</th>
<th>Sponsor</th>
<th>Award Date</th>
<th>Status</th>
<th>Term</th>
<th>Total Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant 1</td>
<td></td>
<td></td>
<td>Funded - In Progress</td>
<td>Winter 2019</td>
<td>20,000.00</td>
</tr>
<tr>
<td>Award - ORCID - Title</td>
<td>Award - Funding Agency - ORCID</td>
<td>Completed</td>
<td>Fall 2013</td>
<td></td>
<td>100,000.00</td>
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<tr>
<td>Contract - ORCID - Title</td>
<td>Contract - ORCID Agency</td>
<td>Completed</td>
<td>Fall 2014</td>
<td></td>
<td>2,000,000.00</td>
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<tr>
<td>Grant - ORCID - Title</td>
<td>Grant - ORCID - Organization</td>
<td>Completed</td>
<td>Fall 2019</td>
<td></td>
<td>3,000,000.00</td>
</tr>
<tr>
<td>Salary Award - ORCID - Title</td>
<td>Salary Award - ORCID - Organization</td>
<td>Completed</td>
<td>Fall 2019</td>
<td></td>
<td>4,000,000.00</td>
</tr>
</tbody>
</table>

Add

Research, Scholarship, and Creative Activity

Use this section for research, scholarship, and creative works. It allows for both manual and automated input.

Data upload via manual input

Search:

<table>
<thead>
<tr>
<th>Type</th>
<th>Title</th>
<th>Outlet</th>
<th>Year Pub</th>
<th>Status</th>
<th>Term</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference Proceedings</td>
<td>A Conference Attendee's Ultimate Guide to Conferences</td>
<td>Sci-Con</td>
<td></td>
<td>Completed/Published</td>
<td>Fall 2017</td>
<td></td>
</tr>
</tbody>
</table>

Add

Imported into Academic Portfolio
Tip:
ORCID helps with the following problems:

- Researchers who worry about getting credit for their research because their name is common or they have publications under multiple aliases
- Researchers who struggle to keep track of all of their research outputs
- Researchers who are annoyed by having to enter the same information over and over in various research systems.
**TIPS & TRICKS**

Check grammar and spelling within text entry boxes

Academic Portfolio does not perform a grammar and spelling check of what you enter in the fields. A workaround is to apply the Grammarly (or other) add-in for your preferred browser. Rich-text fields in Academic Portfolio display a symbol letting you know the toolbar is monitoring spelling and grammar.

**Note**

If you choose to employ this method, please be aware that the toolbar may be stripped from standard browser offerings due to periodic updates and upgrades.

Fix screen irregularities

If a user arrives at a screen that doesn’t look the way they expected it to, they should try refreshing it before assuming it is a problem. Sometimes the information or screen pauses slightly before displaying or delivering a result.

```
Tip: What to do if something does not look or act as it usually does in Academic Portfolio.

Because Academic Portfolio is a web-based tool, sometimes the browser can affect the way it behaves or displays (e.g. a button did not appear or link did not open). To get the tool to display normally again, try the following tips:

- Refresh your browser. (Press F5 key click Refresh button). Some of the data or buttons and links may not have loaded the first time.
- Check the updates in Announcements & Help to see if the tool had an upgrade.
- Clear your browser cache. Follow these instructions to do it yourself, or contact the IT Department if you require additional help.
```

Windows and menus

Like many web-based programs, the windows in Academic Portfolio re-size dynamically to adjust for different computer and device sizes. If a feature or field seems to have disappeared, check the scroll bars and menus to see if they are temporarily hidden.

**Scroll Bars**

- If the window is sized too large you can lose sight of all the data fields. Use the scroll bars to the right and bottom of your screen to ensure you see all available data and function.
Show and Hide Menu

- If you re-size the window to be much smaller, the menu hides to make more of the tool visible.
- Click on the menu icon  to make it appear again.
PREPARE, GENERATE, AND SUBMIT YOUR ACADEMIC PERFORMANCE REPORT

Preparing for the Merit Process

You may update your Academic Portfolio information year-round. However, when Merit Process begins, it is called the Academic Performance Report Input Period. You have the option of a different view of this information: 1) Your view shows only those two years applicable to the upcoming Merit cycle, and 2) You have an extra option to qualify your course information in the Teaching: Term-based section.

You will know the cycle has begun when you receive the following action item.

What you can do

When you click on the action item, you will notice the applicable dates for, status of, and ability to preview your report.

When you mark the report completed, you have processed the action item and this view is no longer available. This DOES NOT mean your report is submitted. Submission steps are forthcoming [April 23, 2019]

Mark courses not taught

The “input period” is the only time the Academic Portfolio tool allows you to note courses added to your information in error. Within this “input” view, navigate to Teaching: Term-based, locate the applicable course(s), and select the Courses Not Taught option.
Note: Marking Courses Not Taught does not send a notification to scheduling staff, nor does it make any changes to PeopleSoft data.

Once you have entered accomplishments and checked to ensure the existing information is up to date and accurate, generate the report to submit for Merit process review.

Export the academic performance report
Use the following steps if you wish to view a CV (or Merit report prior to the beginning of a Merit cycle “input period”).

1. Click Vitas & Biosketches on the User Menu.
2. Click View icon beside the Academic Performance Report.
3. Select the correct institutional report in the drop-down menu.
4. Enter appropriate Begin and End dates.
5. Click Export/Share.
6. Select PDF.

Tip: The Export/Share button offers additional formats:

- Select Microsoft Word for an editable format. You may wish to use this option if you find you need to move information from one section to another.
- Generate a Web Link if you wish to share a web-style format. Note:
  - Attachments—both URL and File—display when clicked.
  - The vendor has not indicated a length of the link will persist. This is considered a temporary sharing format.
  - Web link is NOT USED for the Academic Performance Report.
Tip

Before generating the report, you can if you scroll down in the Vitas & Biosketches screen to see what will appear on the generated report.

Export a generic CV

You may wish to export a CV for other purposes—perhaps a conference, or even as part of your Tenure & Promotion documentation package. Follow the steps above with two changes:

- Change the date range to one appropriate for the activity you wish to cover.
- Choose the Word format when you export so you can manipulate the output.
Warning

Selecting All as the Date Range may be appropriate in some scenarios—such as when you have only two years’ worth of entries, or you want to export all years of activity for a generic CV. However, this selection has been known to return an error. To avoid this problem, select specific dates when generating reports from Vitas & Biosketches.
• **More information:** If you hover over the end of these entries, a magnifying glass will appear. Click to see the complete data within that record.

Submit your Academic Performance Report

Submitting your report happens when the HR Advisor, Academic initiates a process within Academic Portfolio. This initiation varies from faculty to faculty in accordance with the internal deadlines. Click [here](#) to preview the steps you will perform once you receive the notification from Interfolio.com.
## CHANGE LOG

<table>
<thead>
<tr>
<th>Change</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added additional cautions and an example to “Before you import your CCV” section. This section lists some items and principles academics should consider before importing their CCV information.</td>
<td>July 4(^{th}), 2019</td>
</tr>
<tr>
<td>Updated instructions for Student Advising and Supervision (Individuals) clarify how information is updated.</td>
<td>June 7(^{th}), 2019</td>
</tr>
<tr>
<td><strong>Special consideration</strong> for entering Grants data. The <strong>Status</strong> field, in addition to <strong>Term</strong> and <strong>Year</strong>, dictate whether the record is included within the Academic Performance Report.</td>
<td>May 30(^{th}), 2019</td>
</tr>
<tr>
<td>See new <strong>ORCID</strong> instructions and additional <strong>CCV</strong> tips and cautions including which fields to avoid importing. [Coming soon: reference table showing you where the data for most CCV sections go in Academic Portfolio.]</td>
<td>May 23(^{rd}), 2019</td>
</tr>
<tr>
<td>Clarification on attachments section contained within each section of <strong>Profile</strong> and <strong>Activities</strong>: Attachments <strong>do not appear on the Academic Performance Report</strong>.</td>
<td>May 5, 2019</td>
</tr>
</tbody>
</table>

*NOTE: This information has been part of the instructor-led delivery since the end of April, 2019.*