

# How to automate the generation of academic activity reports

The data in UNIWeb can be used to create reports and academic CVs. You can develop document templates so that researchers can download automatically generated reports as editable Word files. Researchers spend less time producing reports while the consistency of the reporting documents benefits reviewers with more efficient and faster evaluations.

Here we present the full pipeline of how a new report template is designed by administrators and used by reviewers and researchers.

A report template dictates what data is included in the document, and the way the document is styled, summarized and presented.

With only a few clicks, researchers can download well-designed progress reports and academic CVs.

## 1. START WITH AN ASSESSMENT



The first step in creating a new type of report is to determine the CV data that will be needed to generate it. Begin by meeting with the Vice-Deans of Research and the team of reviewers that will be reading the reports to learn what they need.

Compare the needs of reviewers with the data collected by UNIWeb, which by default gathers the same data as the CCV. Determine if additional data is required for the report. For example, reviewers might need to know if funding is internal or external, or if collaborations are local or international. That information is not captured in the CCV, so, if needed, it will require appropriate input fields in the UNIWeb CV.

Custom fields are marked with a special icon that tells users that they are meant for internal use.

## 2. ADD INPUT OPTIONS

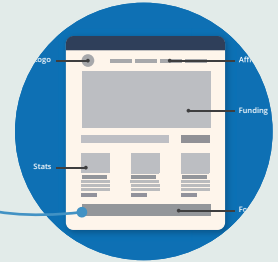
You can extend the UNIWeb CV with new sections and fields so that researchers have a place to enter information needed for new report types. It's okay to add new fields to existing CCV sections: UNIWeb will know not to export that data to the CCV.

With the results of the needs assessment, define in concrete terms where in the UNIWeb CV users will enter any additional piece of data that is required for the new report type that you are creating.

You can also provide help-text to guide users as they enter data in the newly added fields.

A layout defines things like tables, text styles, data sorting, and data aggregation rules.

## 3. DESIGN THE LAYOUT



Once you know that all the data needed to generate the report will be available in the UNIWeb CV, you can proceed to define how the information should be presented in the document when it's downloaded, as well as decide how the document should look.

You can model the layout on similar reporting documents from the target academic unit, or you can start from scratch.

Since the documents will be generated by UNIWeb instead of manually by each researcher, you can choose an ambitious design that presents the data in ways that minimize review time: use formulas to sum up information based on specific criteria, and perform statistical data aggregations that highlight the main data that reviewers need to evaluate. Neither the researchers nor the reviewers have to do the math.

Input templates are optional and can be created during the design phase.

## 4. ENGAGE YOUR RESEARCHERS



After making a new report type in UNIWeb, ensure that the faculty are informed and understand their part in the process. Explaining the new document type to the researchers who will use it is a crucial step that directly influences its adoption rate.

While researchers will only need a few clicks to generate the document, they will still want to know about how the document is generated, the motivation behind its design, and how the report will be evaluated by its reviewers.

Workshops and tutorial videos can be used to answer the most common questions.

## 5. SIMPLIFY DATA ENTRY

FUNDING TEMPLATE

University of Ottawa  
Generic

University of Ottawa  
Faculty of Medicine

Vanier-Banting  
Vanier-Banting Academic

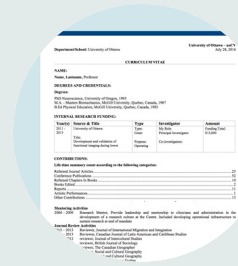
VCHRI  
VCHRI Innovation and Transl

Some reports might ask users for data that is only meaningful in certain academic units. In such cases, consider offering input templates.

Input templates improve the user experience by letting researchers select the target report (or funding application) when entering data. The template hides all the sections and fields that are not required to be filled in.

It is possible to define a default input template based on the unit affiliation of each researcher.

## 6. ONE CLICK REPORTS



Once users complete their UNIWeb CV, they can download reports as editable Word files. They simply select the report type from a list to have it automatically generated in seconds.

Users can customize important aspects of the report before downloading it. Options include: the date range for the data (eg. 3 years back from a given date); the citation style (APA, Chicago, MLA); and which sections to include.

Administrators can also download reports in batches, efficiently gathering reports for an entire academic unit.

## Extension packages

The design of a new document type can be time consuming. Instead, start with one of UNIWeb's extension packages. These packages include professional needs assessments, input options (data schema) and report designs.

## Reuse Data: CCV+

The data collected by the Canadian Common CV is very rich, and will likely have most of the data that you need, but not necessarily all of it. By shifting to a CCV+ mindset, you can maximize data reusability and increase research productivity.

## Batch Report Downloads

The ability to download pre-designed documents in batches from a group of users is an effective way of dealing with departmental deadlines. Simply ask researchers to have their UNIWeb CV up-to-date by a certain date, and then download the reports that you need from them.

