

## How to create Actions and Packets

Please note: The following guidance is offered to support the changes that were introduced with Multiple Dossiers and is not comprehensive to all components of MyInfoVault.

### How to create an Action

1) Select “Start an Action” from your home page



2) Search for the Candidate, for whom you would like to create an action. Select their name from the results list and then select the action details (Action Type, Delegation of Authority, and Effective Date). Select “Start Action”.

**Start an Action**

Find a Candidate

Candidate Name:

Show  entries Find in all:

Account	School/College	Department
Bernasconi, Patrick J	Information and Educational Technology	Application Development

Showing 1 to 1 of 1 entries Previous  Next

Select Action

Select the action you want to start for the candidate listed above.

\* Action Type:  \* Delegation of Authority:

\* Effective Date:

If you have problems creating or viewing the action, please contact the MIV Project Team at [miv-help@ucdavis.edu](mailto:miv-help@ucdavis.edu).

3) You may then select “Home” if you wish to manage the action later – it is available via “Manage Open Action”. Or, select “Continue” if you would like to manage the action now.

### How to open a Packet Request

4) If you select “Continue”, you will notice the only change to the “Open Action” page is the addition of “Packet Request” at the bottom of the list. An open “Packet Request” is required in order for the candidate, or you as a proxy of the candidate, to submit their packet to the action.

You will open the packet request based on your own business processes. You may open it at the time you create the action and use the automatic email to communicate a deadline for the packet. Or, you may work with the candidate on their packet until the final moments and only open the packet request when you both know the packet is ready to be submitted to the department for review by the faculty.

5) Click on the “Request” button to open the packet request. Once the packet has been requested, the line will now display “Requested.”

## How to Manage Master-Level Data (Data Entry and Master Annotations)

6) Select in the upper right corner the link "Select a User's Account" to become a proxy of the candidate.

7) Enter data for the candidate using the Enter Data menu.

8) Select "Manage Master Annotations" from the "My Packets" menu. You may annotate the following master data: Creative Activities, Extending Knowledge, List of Evaluations, Publications, and List of Service.

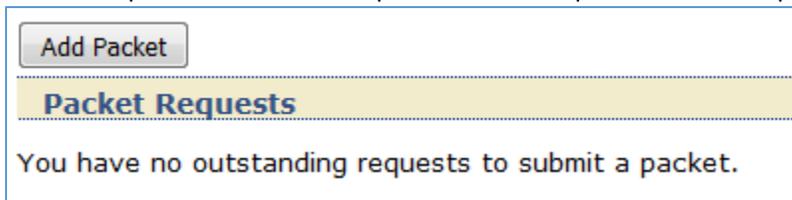
Master Annotations include:

- Label/line drawing above or below the item selected
- Master-level Footnotes
- Notations (+ = Major mentoring role and @ = Refereed).

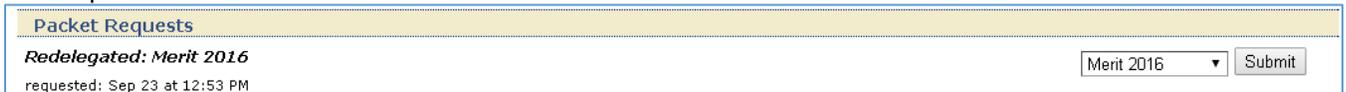
## How to Create a Packet

9) Once you are done entering data and managing Master Annotations, select "Manage My Packets" from the "My Packets" menu. You will find the following:

- An "Add Packet" button (see below).
- Packet Requests Section. Example of Packet Requests when a request is not open:

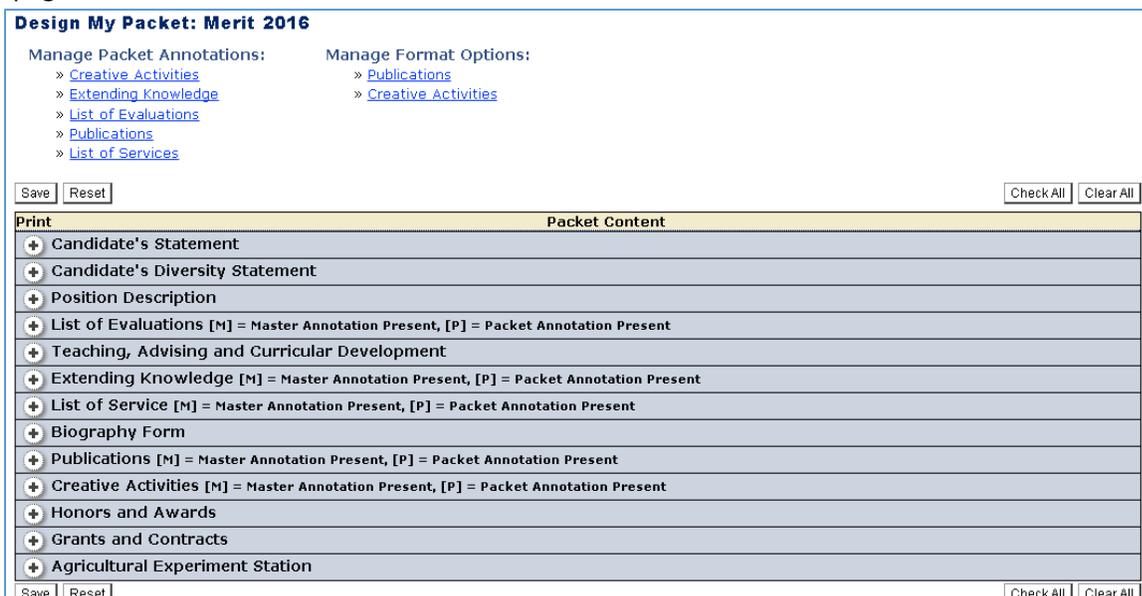


As soon as you open a Packet Request (mentioned in Step 4), the request will appear here as you can see in my example:



- Packets. Listed here will be a Template Packet or a Packet that represents a dossier that may already be in progress.

10) You may either Edit an existing packet or select "Add a Packet". In both cases, you are presented with a "Design My Packet" page.



11) Design the Packet by selecting what pieces of data you want to include in the packet. Select “Save” to save the data selection.

The screenshot shows a web interface for designing a packet. It features three main sections, each with a 'Check Section' and 'Clear Section' button:

- Honors and Awards:** Contains a checkbox for '2008 HR Leader Compass Award'.
- Grants and Contracts:** Contains a checked checkbox for '06/2010-12/2015 Research: Principal Investigator, Human Resource Development Strategies, US Dept of Health, Percentage Effort=100%'.
- Agricultural Experiment Station:** This section is currently collapsed.

At the bottom of the interface, there are 'Save' and 'Reset' buttons on the left, and 'Check All' and 'Clear All' buttons on the right.

12) Add packet-level annotations by selecting the appropriate links at the top of the Design My Packet Screen. Packet-level annotations include:

- Packet-specific footnotes
- Notations (\* = included in the review period and x = Most significant works)

13) When you are finished with packet annotations, return to the Manage My Packets page. The packet appears to be outdated (due to the addition of the packet annotations). Select “Edit” when you hover over the packet. Select “Save” on the Design my Packet page.

14) You can view the PDF version of the packet at any time by going to the Manage My Packets page and clicking on the “Preview [packet name]” link next to any packet.

## How to respond to a Packet Request

15) When a packet request is open, a drop down menu containing the names of all the Packets on the Manage My Packets page. Select the appropriate packet from the drop down menu and select the “Submit” button.

The screenshot shows a 'Packet Requests' form. It includes the following elements:

- A header bar labeled 'Packet Requests'.
- Text indicating the request status: 'Redelegated: Merit 2016'.
- A timestamp: 'requested: Sep 23 at 12:53 PM'.
- A dropdown menu currently set to 'Merit 2016'.
- A 'Submit' button.

16) When you return to your account and then view the open action, you will see that a link to view the PDF of the dossier has appeared on the Packet Request line. You can click this link, or the “View Dossier as One PDF File” link at the top of the open action, to see the packet data that is now a part of the dossier.