

WebCV Research Awards Data Summary Report

(updated June 2014)

The following slides describe:

- How users can generate the **Research Awards Data Summary Report** from their WebCV account
- What data from WebCV is used to populate the Report (with examples)
- Troubleshooting tips

How to generate the Research Awards Data Summary Report

Go to the "Reports" menu tab, choose "Research Awards Data Summary" in the "Select Report" field, and click the "Generate Report" button.

The screenshot displays the WebCV Project interface for the University of Toronto Faculty of Medicine. The user is logged in as Bold, Mark, with a last login of 5/13/2014 2:32:22 PM. The current role is Faculty Member. The interface includes a search bar and a navigation menu on the left. The 'Reports' menu item is highlighted with a red circle and a green '1' in the top left corner. The main content area shows the 'Reports' section with a dropdown menu for 'Select Report :'. The 'Research Awards Data Summary' option is selected in the dropdown, indicated by a red circle and a green '2' in the top right corner. Below the dropdown, there are fields for 'Select Date Range :' and 'Select Draft Handling :'. At the bottom of the main content area, the 'Generate Report' button is circled in red with a green '3' in the top right corner.

Click on the [Click here](#) link, and you will be prompted to either “Open” or “Save” your Report (the Report is generated as a Word rtf document).

The screenshot shows the University of Toronto Faculty of Medicine WebCV interface. The top left features the university logo and the name 'UNIVERSITY of TORONTO Faculty of Medicine'. Below this, the user's name 'Bold, Mark' is displayed, along with their last login time '5/13/2014 2:32:22 PM' and current role 'Faculty Member'. A search bar is present, and a navigation menu on the left includes links for 'Home Page', 'Curriculum Vitae (CV) View', 'All Activities View', 'Reports', 'Export Data to Common CV', 'General', 'Help', and 'Logout'. The 'Reports' section is active, showing a 'Select Report' dropdown set to 'Research Awards Data Summary' and a 'Select Date Range' dropdown set to '2013 Jul -- 2014 Jun --'. A file download dialog box is open in the foreground, titled 'Opening RschAward_mark.bold_2014514123226.rtf'. The dialog indicates the file is a Rich Text Format (7.3 KB) from 'https://www.torontocv.ca'. It asks 'What should Firefox do with this file?' and offers three options: 'Open with: Microsoft Word (default)' (selected), 'Save File', and 'Do this automatically for files like this from now on.' (unchecked). The 'Click here' link in the background is circled in red.

Sample Research Awards Data Summary Report

Research Award Data Summary Report

Professor Mark Bold Jr.

Year	Peer Reviewed Grants Agency	Awards	Role
2013	Heart and Stroke Foundation of Canada (HSFC)	1,000,000.00 CAD	Co-Investigator
2011		3,000,000.00 CAD	Principal Investigator
2008	National Institutes of Health (NIH) (USA)	75,000.00 USD	Co-Investigator
2005	Heart and Stroke Foundation of Canada (HSFC)	350,000.00 CAD	Co-Principal Investigator
		500.00 CAD	Other
Year	Non Peer Reviewed Grants Donor	Awards	Role
2010	William Cone Memorial Fund	40,000.00 CAD	Principal Investigator
Totals		4,390,500.00 CAD	
		75,000.00 USD	

Notes:

1. Awards are listed according to their Start Dates.
2. Awards are included if they are ongoing or ended during the selected reporting period.
3. Dollar amounts are assumed to be Canadian unless otherwise specified.

Data used to populate the **Research Awards Data Summary Report** is only taken from one section in your WebCV account: *Grants, Contracts and Clinical Trials*.



The following fields in a **Grants, Contracts and Clinical Trials** record are used in the **Research Awards Data Summary Report**: *Role, Grant Status, Peer Reviewed, Funding Source, Total Grant Amount, Currency, Start Date*

Funding Type	Grants
Role	Principal Investigator
Grant Status	Funded
Peer Reviewed	<input checked="" type="checkbox"/>
Short Title (Only Used for Common CV) Title	
Description	Title of the grant. Description of the grant.
Funding Source	Heart and Stroke Foundation of Canada (HSFC)
Funding Program Name	
Grant and/or Account #	
Total Grant Amount	1000000.00
Currency	CAD = Canadian dollar
Total Amount Attributed to Faculty Member	
Principal Investigator (Last Name, First Name)	
Collaborators	
Start - End Dates	2013 Apr - 2015 Mar

The *Grants, Contracts and Clinical Trials* record from the previous slide would appear as follows on the **Research Awards Data Summary Report**:

Year	Peer Reviewed Grants Agency	Awards	Role
2013	Heart and Stroke Foundation of Canada (HSFC)	1,000,000.00 CAD	Principal Investigator
Totals		1,000,000.00 CAD	

Each line in the Report is related to the start year of a grant (or multiple grants):

If a second grant record is entered with the **same** start date, funding source, and role (and the same \$1,000,000 amount as the one above), then it would be accounted for on the same line of the Report:

Year	Peer Reviewed Grants Agency	Awards	Role
2013	Heart and Stroke Foundation of Canada (HSFC)	2,000,000.00 CAD	Principal Investigator
Totals		2,000,000.00 CAD	

As more records are entered in WebCV, then the funding amounts in the “Awards” column will alter if the grant agency, currency, *and* role are the same, or new lines will appear in the table if records have been entered with different grant agencies, currencies, *or* roles. Here are some examples of a user populating their WebCV *Grants, Contracts and Clinical Trials* section, and how their **Research Awards Data Summary Report** changes with each additional record:

1

Year	Peer Reviewed Grants Agency	Awards	Role
2013	Heart and Stroke Foundation of Canada (HSFC)	2,000,000.00 CAD	Principal Investigator
		1,000,000.00 CAD	Co-Investigator
Totals		3,000,000.00 CAD	

A new record was entered with the same start year, funding source, and currency, but with a *different* role. A new line is created within the same funding source to account for the different role.

2

Year	Peer Reviewed Grants Agency	Awards	Role
2013	Heart and Stroke Foundation of Canada (HSFC)	1,000,000.00 CAD	Co-Investigator
2011		3,000,000.00 CAD	Principal Investigator
Totals		4,000,000.00 CAD	

A new record was entered with the same funding source (HSFC) and role (PI) that was already on the Report, but with an earlier start date than the previous PI records (2011). The “Principal Investigator” line shown here includes two records, one for 2011 and one for 2013, but it reads “2011” in the date column because that is the start date of the earliest record from that grant agency with that same role.

3

Year	Peer Reviewed Grants Agency	Awards	Role
2013	Heart and Stroke Foundation of Canada (HSFC)	1,000,000.00 CAD	Co-Investigator
2011		3,000,000.00 CAD	Principal Investigator
2008	National Institutes of Health (NIH) (USA)	75,000.00 USD	Co-Investigator
Totals		4,000,000.00 CAD	
		75,000.00 USD	

A new record was entered with a different funding source and currency, and with an earlier start date than previously entered records. A new line is created for that funding source.

At the bottom of the table, a new total amount figure appears to account for the new currency.

4

Year	Peer Reviewed Grants Agency	Awards	Role
2013	Heart and Stroke Foundation of Canada (HSFC)	1,000,000.00 CAD	Co-Investigator
2011		3,000,000.00 CAD	Principal Investigator
2008	National Institutes of Health (NIH) (USA)	75,000.00 USD	Co-Investigator
2005	Heart and Stroke Foundation of Canada (HSFC)	350,000.00 CAD	Co-Principal Investigator
Year	Non Peer Reviewed Grants Donor	Awards	Role
2010	William Cone Memorial Fund	40,000.00 CAD	Principal Investigator
Totals		4,390,000.00 CAD	
		75,000.00 USD	

A new HSFC grant was entered with a different role, and with an earlier start date than other HSFC records and the lone NIH record. HSFC now appears twice in the "Peer Reviewed Grants Agency" column because of the disparity in the start date and the role.

A non peer reviewed grant was entered, so this appears in a new section at the bottom of the table.

The values in the "Totals" rows will account for all funding values in the table, whether they are peer reviewed or not.

Troubleshooting

Problem	Possible Explanation
You believe a record from your Grants, Contracts and Clinical Trials section is not appearing on your Report	Go to the applicable record in your WebCV account, and make sure the <i>Grant Status</i> field is set to “Funded”. Only funded grants will appear on the Report, so if the Grant Status field is set to any other value (or is left blank), then the record is correctly being excluded from the Report.
A record appears on your Report, but a cell in the Date/Peer Reviewed Grants Agency/Award column is blank	If a cell in a column in your Report is empty, it would mean that the applicable field for that record has not been filled in. Make sure that the <i>Start-End Dates</i> field has been entered in the record (particularly the start date, since this is the date that is used to populate the Report). Also make sure that the <i>Funding Source</i> and <i>Total Amounts</i> fields are filled in, for they are used to populate the “Peer Reviewed Grants Agency” and “Awards” columns.
A record appears on your Report with the value of “Other” in the “Role” column	This means that the <i>Role</i> field in the applicable record has been left blank. Edit the record, and select one of the standard options in the <i>Role</i> dropdown menu. If none of the standard options apply, you can select “Other-specify” to manually enter your role, and this role will then appear on your Report, but it’s recommended to adhere to the standard roles that appear in the <i>Role</i> dropdown menu.

Troubleshooting

Problem	Possible Explanation
<p>You have a number of grant records with the same funding source (e.g., NSERC) and the same role (e.g., PI) that have different start dates, but they seem to be appearing on only one line of the Report</p>	<p>This is correct. The format of the Report has been designed with the Faculty of Medicine’s promotional requirements in mind. If you have a number of records from the same funding agency where you had the same role, then these will appear <i>on one line</i> in the Report. For example, you have been the PI on \$3,000,000 worth of grants from NSERC since 2009. “2009” will then appear in the “Date” column because that is the earliest date of your PI grants from NSERC. Then the cell in the “Awards” column will read “\$3,000,000” as this is the total combined amount for all NSERC PI grants.</p>
<p>You have a number of grants from the same funding source (e.g., NSERC), but the name of the funding agency is not appearing consistently on the Report (e.g., “NSERC” vs. “Natural Sciences and Engineering Research Council of Canada (NSERC)”)</p>	<p>You should be consistent with how you enter the name of the funding source in your Grants, Contracts, and Clinical Trials records. If you sometimes enter the acronym (NSERC) and at other times enter the full name (Natural Sciences and Engineering Research Council of Canada (NSERC)), then WebCV is unable to group these records appropriately on your Report despite being from the same funding source. Always be consistent in how you enter the name of the funding source in your records.</p>