Draft records in WebCV

(updated June 2014)

The following slides describe:
- How Draft records appear on your generated reports
- The most common reasons records are flagged as Draft
- How records are flagged as Draft and how to confirm them to take them out of their Draft state
- Troubleshooting tips

What are Draft records?

- Draft records are records that have been flagged in a WebCV account (either by the account holder or by the WebCV Team during the initial data entry of the account holder's CV).

- The most common reason records are flagged as Draft is because they are missing information integral to the record.

What do Draft records look like?

On your generated reports, Draft records appear as bold, underlined, and italicized text. Below is an example of a draft record in the *Presentations and Special Lectures* section of the generated CV:

2. NATIONAL

Invited Lectures and Presentations

2012 Jun 11   Invited Lecturer. The Canadian Rheumatology Association meeting.

How do I know if I have draft records in my WebCV account?

When you go to generate your report (e.g., CV or TER), select "Include Draft Records" or "Only Draft Records":

- "Include Draft Records" will generate your report with all applicable records, including Draft records
- "Only Draft Records" will generate your report with only the records that have been flagged as Draft
- "Exclude Draft Records", on the other hand, will generate your report without any of the Draft records

If you have draft records on any of your generated reports, then a warning will appear at the top of the document if you have chosen either "Include Draft Records" or "Only Draft Records" when generating your report:

Curriculum Vitae

Mark Bold
Dept of Medicine

The following report contains draft records that are identified by bold italics and grey highlighting. To finalize these records, click the Confirm button beside the draft records in Web CV.

The second sentence in the above warning tells you to press the "Confirm" button to finalize the draft records. To do this, you have to go back to your WebCV account, find the applicable Draft records, and confirm them.

Confirming Draft records

Back in WebCV, Draft records in individual sections are denoted in the "i" column with the word "DRAFT". Press the "i" column header to sort the column and bring all the Draft records together (pressing on the "i" column header once will push all of the Draft records to the bottom of the list. Pressing it a second time will bring them all to the top).

To quickly take a record out of Draft state, you can click the "Confirm" button. The next time you generate your report, the record will no longer be flagged as Draft. However, if you are not sure why the record has been flagged as Draft, then you should "Edit" the record to open it and investigate why the record has been flagged.

Presentations and CE Activities

Enter ID

Refresh   Add New   To Excel   Import

Date Range   ---   —   pres.

Grid Columns

Bulk Edit Options

	i	Type	Geographical Scope ▲	Date ▼	Organizer	Country	Province	City	Prese
Edit Copy Delete Confirm	DRAFT	Invited Lectures and Presentations		2014/05/02	3rd Congress in Movement Disorders				Parkinson' Symptoms Relieving F
Edit Copy Delete		Invited Lectures and Presentations	Provincial / Regional	2014/05/02	McMaster University Medical Centre			Hamilton	Corneal Gr
Edit Copy Delete		Invited Lectures and Presentations	International	2013/12	International Movement Disorders Symposium				Headlines Care
Edit		Invited			International Movement				Designing

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Confirming Draft records

In the open record, scroll down and look for the "Other Details (doesn't print)" field. If this record was entered by the WebCV team during the initial entry of the CV, then this field will indicate the reason why the record has been flagged.

In this example, the message from the WebCV team asks that you add a "Geographical Scope" to this record because it was not possible to determine the Scope based on the CV you submitted to the Team for data entry. You can then add the necessary information in the "Geographical Scope" field near the top of the record.

You will know a message concerning a Draft record comes from the WebCV team if the message begins with the acronym "DA" (which stands for "Data Analyst", a WebCV Team Member's position title)

Presentations and CE Activities

Enter ID [   ] Go

Highlight Related Fields For	--- Select Report ---
Type	Invited Lectures and Presentations
Geographical Scope	--- Select Geographical Scope ---
Date	2014 May 2
Trainee Presentation	☐
Competitive	☐
Presentation Role	Invited Speaker
Title	Parkinson's: Improving Symptoms and Relieving Pain.
Organizer	3rd Congress in Movement Disorders
Country	--- Select Country ---
Province/State	--- Select Province/State ---
City	
Presenter(s)	
Description	
URL	
Total Hours	
Teaching Evaluation Score	
Teaching Evaluation Details	
Linked Publication ID	N/A
Other Details (doesn't print)	DA: Please add a "Geographical Scope" and any other relevant information to this presentation.
Interprofessional Education	☐

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Confirming Draft records

After you've made the necessary adjustments to the record, then look further down the record for the "Save As Draft Entry" field. When records are saved as Draft, the box for this field will be checked:

Save As Draft Entry

To confirm the record and take it out of its Draft state, then uncheck the "Save As Draft Entry" box:

Save As Draft Entry

You can then save the record, and the next time you generate your Report, this record will print normally and will no longer appear as Draft.

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Creating Draft records

Records in WebCV are not *only* flagged as Draft by the WebCV Team during the initial data entry of your CV. Account holders can themselves flag a record as Draft if they feel a record is incomplete:

a) Once a report is generated with the option "Include Draft Records", the flagged entries will appear as bold, underlined and italicized text. This will remind account holders that there are records in their WebCV that need more information.

b) The ability to Draft a record allows account holders to at least begin entering a record, but then exclude it from their generated reports because it is incomplete. They can then include it in their reports only later when the record is complete and has been taken out of Draft status.

Save As Draft Entry ☑

To save a record as Draft, just edit the applicable record and click on the "Save As Draft Entry" checkbox (as was shown earlier). Also be sure to add a comment to the "Other Details (doesn't print)" field so that you remember why you saved the record as Draft.
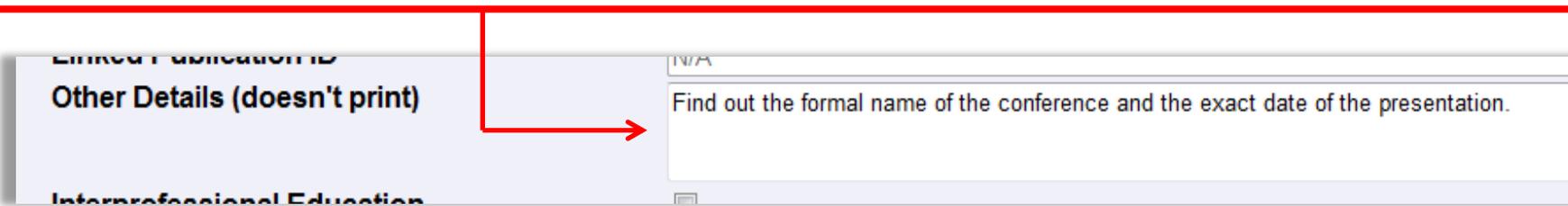
Other Details (doesn't print) — Find out the formal name of the conference and the exact date of the presentation.

Troubleshooting

Problem	Possible Explanation
You know you have Draft records in your account, but you cannot see them on your generated Report(s), or you cannot find them in your WebCV account	If you don't see the Draft records in your generated Reports, then please ensure that you have chosen to "Include Draft Records" when generating your Report. When looking for the Draft records in your WebCV account in order to investigate/confirm them, be sure that you are in the correct section where the Draft records are, since Draft records are not all listed in one section in your account: rather, they may be spread out in different sections. So if you know you have a Draft "Publication" record, then be sure to go to the "Publications" section. Once you are at the appropriate section in your account, be sure the "Date Range" at the top of the screen is set to the default date range in order to list all of your records in that section (i.e., "--- to pres."). Then, sort the records using the "i" column in order to bring your Draft records to the top of the list of records. If none of this works, and you still can't find your Draft records, then call the WebCV Team.
You know you have Draft records in your Teaching and/or Clinical Supervision section(s), but you don't see them on your CV despite including draft records when generating the Report	Teaching and Clinical Supervision records do not print on the CV, they only print on the Annual Academic Activity Report (AAR) and the Teaching and Education Report (TER). If you have Draft records in either of these two sections, then you'll be able to see them on those two Reports if you choose to "Include Draft Records" when generating the AAR or TER.
You have a number of Draft records in your account and you would like to confirm them all at the same time without editing them individually	It's recommended that you investigate the reasons why some records have been entered as Draft in your account after the WebCV Team's initial data entry of your CV by going into each Draft record individually. The Team flags records because we think some integral piece of information is missing, or there was some confusion when entering information from your original CV. During the first training session that's offered to you after your CV has been entered in WebCV, the WebCV Team member who is training you will go through your Draft records with you and explain the issues. If you ultimately decide that you would just like to confirm all of the Draft records, then you can use the "Bulk Edit Options" in individual sections of your WebCV account to confirm all of the Draft records in those sections.