

How to Generate a Form 1 or Form 2



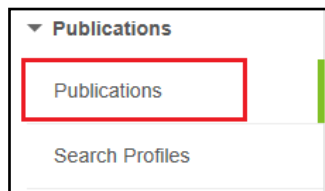
This is a condensed version of the UnivRS Information Guide - CV Activities and Contributions Module. It is intended to help generate a Form 1 and Form 2 in UnivRS.

Updating existing records in UnivRS

Once a CV record is validated in UnivRS, the owner of the record may identify those that should surface in a Form 1 or Form 2. Research-related projects will automatically be included in Form 1 and 2.

To identify those CV records that should be included:

1. Login at <https://univrsapp.usask.ca/converis/secure/client/login> and switch to your researcher role; if necessary. To switch your role, click on the role at the top right-hand side of the screen, click **Switch Role** and select the **Researcher** role.
2. Select the **Publications** or **CV Activities** list page from the left-hand menu to access existing records.



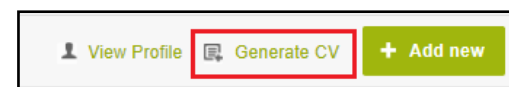
3. Click the title to open the record.
4. Under the Key Information tab, locate the field **Include in Annual Review Form 1 or 2** and select 'Form 1' or 'Form 2'. Ensure the field **Exclude from Public Reports** has been marked 'No'.
5. If 'Form 2' was selected in the previous step, select the appropriate drop-down item in the field **Previous CV Category for Form 2** to identify where it was previously listed in your U of S Standardized CV.

6. Click the **Save & Update Status** button at the bottom of the screen, select **Validated** in the pop-up window and then click the **Done** button. An additional pop-up window may identify fields that must be completed to set the workflow. Saving the workflow status to **Validated** signifies that the record is complete and will be included in a Form 1 or Form 2 generated by UnivRS.

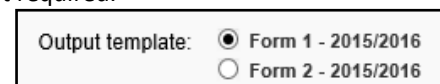
Generating a Form 1 or Form 2

To generate a Form 1 or Form 2 in UnivRS:

1. On your dashboard, click the **Generate CV** text.



2. Select the desired Form 1 or Form 2 in the **Output template** section. Three academic years will be provided at any given time. All content will be checked by default; start and end dates are not required.



3. Click the **Generate CV** button. It may take a few minutes to generate the form.

Once generated, you will be prompted to open, save or cancel the document on the bottom of your screen. Click the desired option to retrieve or cancel the form.

