

How to Update Records and Import New Records into Snapshots in eFilePlus

In eFilePlus, there are a few ways to add or update new records in a Snapshot. After the Snapshot Import has completed, you may need to remove records, add records, or modify/edit existing entries.

Note: The role required for changing Snapshots is the File Preparer role, typically reserved for academic personnel staff. A Snapshot can only be modified when it is with the File Preparer in the initial stage of departmental review.

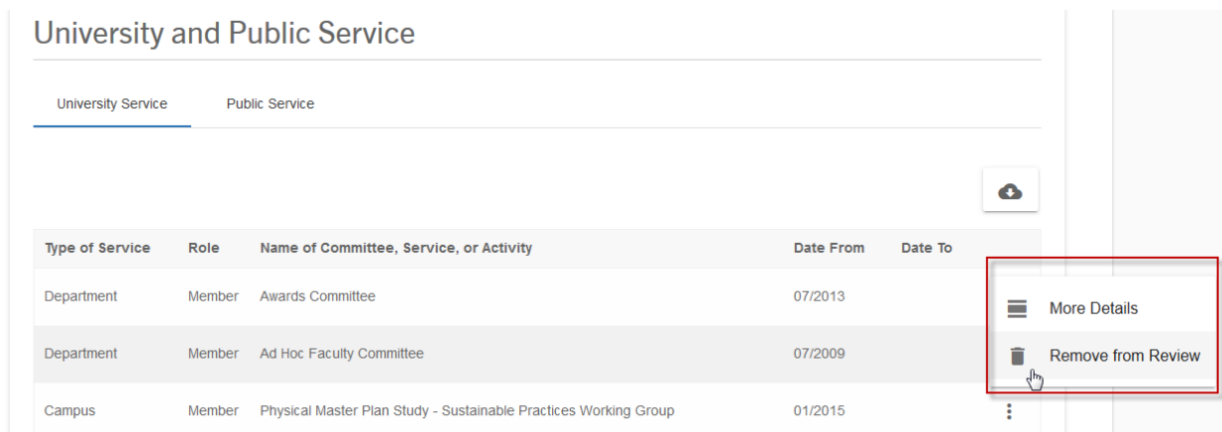
For UCR policy on changes to a Snapshot, refer to the CALL, under Procedures: http://academicpersonnel.ucr.edu/the_call/18-19/18-19AY%20the%20CALL.pdf

Login to the eFilePlus system by navigating to <https://efileplus.ucr.edu>.

Removing Records from a Snapshot

1. Open the Snapshot and navigate to the section you wish to modify. Click on the menu next to the entry and choose “Remove from Review”.

Please note: Removing a record from the Current Bibliography (Publications, Creative Activity, or Patents) will also remove the corresponding record from the Difference List. These records cannot be on the Difference List unless they are also listed on the Current.



The screenshot shows the 'University and Public Service' section of the eFilePlus system. It features two tabs: 'University Service' and 'Public Service'. Below the tabs is a table with columns for 'Type of Service', 'Role', 'Name of Committee, Service, or Activity', 'Date From', and 'Date To'. A context menu is open over the second row of the table, showing options for 'More Details' and 'Remove from Review'.

Type of Service	Role	Name of Committee, Service, or Activity	Date From	Date To
Department	Member	Awards Committee	07/2013	
Department	Member	Ad Hoc Faculty Committee	07/2009	
Campus	Member	Physical Master Plan Study - Sustainable Practices Working Group	01/2015	

Adding Records to a Snapshot

1. Open the Snapshot and navigate to the section you wish to modify.



2. In the heading area of the section, click the import “cloud” icon to choose additional records.

3. From the pop-up window, choose the records you would like to import, then click “Import Selected”.

i Both new and updated records are listed.

University Service

Type of Service	Role	Name of Committee, Service, or Activity	Date From	Date To	
Department	Member	Advancement Committee	07/2008	06/2012	<input checked="" type="checkbox"/>
College	Member	Research Support Allocation Process Review	05/2013	07/2013	<input checked="" type="checkbox"/>

Cancel **Import Selected**

Important: The Import window will only display the following:

- Records that are not already included in the Snapshot
- Records that have changed since they were last imported into the Snapshot


The import function displays all records that have changed or are not currently in the Snapshot. In this way, records that are not considered part of the review period CAN be imported into a Snapshot. Most often, this functionality is used to add records that were not originally pulled into the Snapshot during initial creation.

Modifying or Editing Records in a Snapshot

There are two ways to change records that are already part of a Snapshot

- Modify the record directly within the Snapshot
- Modify the record in the eFile and then update the record in the Snapshot

Modify a record directly in the Snapshot

1. Next to the record in the Snapshot, use the  icon to open the menu and choose “Edit”.
2. Make changes to the data and then click the Save button. This will update the record in both the Snapshot and the eFile.

Modify a record in the eFile and then update the record in the Snapshot

1. Open the eFile and navigate to the section you wish to modify. Modify the record and click Save.
2. Open the Snapshot and navigate to the section you wish to modify.



3. In the heading area of the section, click the import “cloud” icon to choose additional records.
4. From the pop-up window, choose the record(s) you modified, then click “Import Selected”.

i Both new and updated records are listed.

University Service

Type of Service	Role	Name of Committee, Service, or Activity	Date From	Date To	
Department	Member	Advancement Committee	07/2008	06/2012	<input checked="" type="checkbox"/>
College	Member	Research Support Allocation Process Review	05/2013	07/2013	<input checked="" type="checkbox"/>

Important: The Import window will only display the following:

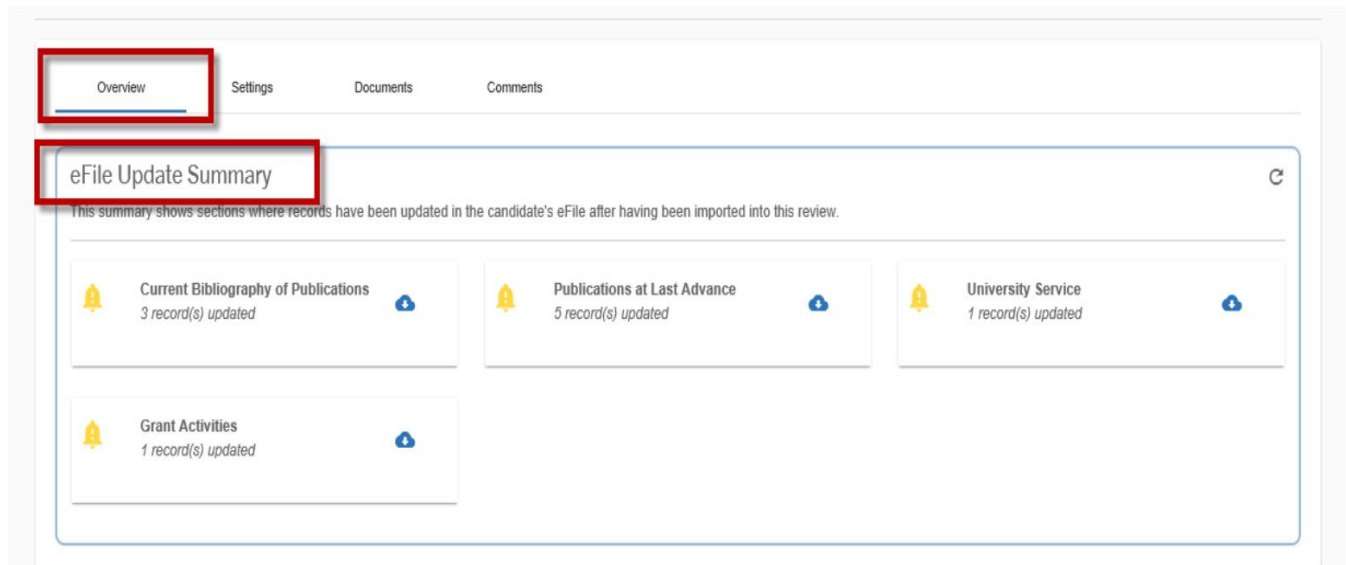
- Records that are not already included in the Snapshot
- Records that have changed since they were last imported into the Snapshot

The import function displays all records that have changed or are not currently in the Snapshot. In this way, records that are not considered part of the review period CAN be imported into a Snapshot. Most often, this functionality is used to add records that were not originally pulled into the Snapshot during initial creation.

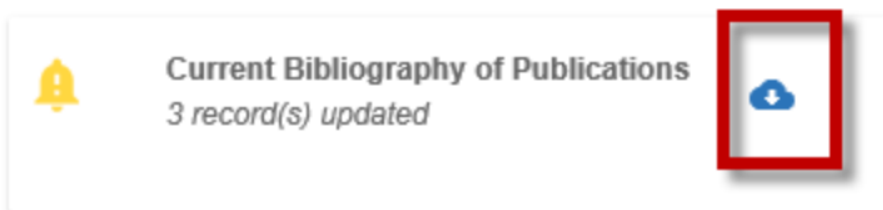
Tracking Changed Records in a Snapshot

This functionality provides the File Preparer the ability to see which items in a Snapshot have been changed in the corresponding eFile. This supports a common scenario during Snapshot preparation in which the candidate makes changes to data in their eFile and then asks the File Preparer to update the Snapshot.

When a change has been recorded by the system, the user will see the following screen under the Snapshot Overview tab.



To view the changes, click on the cloud.



The following information and options are available.

- Updated eFile Records – These are records that were updated in the candidate's eFile and are already a part of the Snapshot. These records have a "date changed" date that is newer than the "date changed" date of the corresponding record in the Snapshot.
- eFile Records Not In Snapshot – These are records that were updated in the candidate's eFile and are not in the Snapshot.

To import one of the entries shown into the Snapshot, put a check the box next to the item and the click "Import Selected".

Updated eFile Records | eFile Records Not In Snapshot

Import Current Bibliography of Publications

I. Technical/Scholarly

A. Abstracts

Published

4. zur Nieden, N.I., Kempka, G., Price, F.D., Rancourt, D.E., Ahr, H. 2003. In vitro differentiation of embryonic stem cells into osteoblasts and chondrocytes. Canadian Stem Cell Network 2nd Annual General Meeting. Vancouver, BC, Canada. Conference/Meeting Date: 09/15/2003 THIS IS A TEST (10/30). (Refereed)

11. Davis, L.A., zur Nieden, N.I., Price, F.D., Rancourt, D.E. 2004. Expression Profiling of Osteogenesis and Chondrogenesis in Embryonic Stem Cells. 2nd Canadian Developmental Biology Symposium. Banff, AB, Canada. Conference/Meeting Date: 04/01/2004 THIS IS A TEST II (10/28). (Refereed)

G. Conference And Symposia Proceedings

Published

6. Ding, H., Seeliger, A., Keller, K.C., zur Nieden, N.I. 2012. Wnt5a and Wnt3a alternate to steer embryonic stem cell differentiation into osteoblasts. Journal of Stem Cells and Regenerative Medicine 8(2). p.73 TEST III (10/30). (Refereed)

Cancel | Import Selected

These are general system guidelines and this document is not meant to replace policy. Please refer to the CALL for the most current policy information: <https://academicpersonnel.ucr.edu/the-call>.