RiV Quick Start Guide for OSU Extension Employees

If you have printed this document, please make sure you are using the most recent version by checking out the "Helpful Documents" section at http://go.osu.edu/OSUErivHelp Check the "Quick Start Guide" posted and compare it to the date to the right.

12/2016

THE OHIO STATE UNIVERSITY

COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES
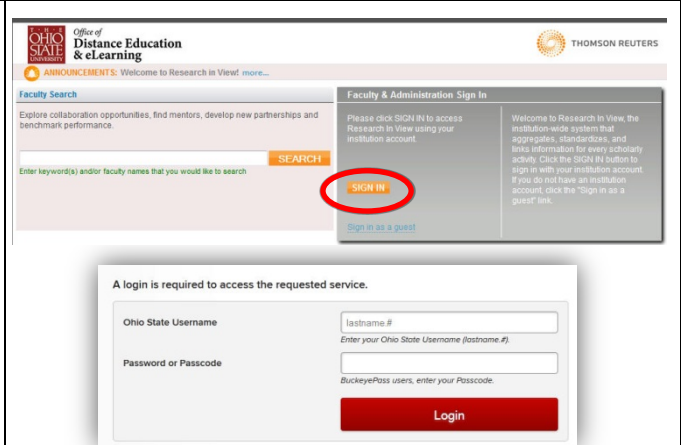
go.osu.edu/OSUErivHelp

Research in View (RiV) Extension Module Quick Start Guide

GETTING STARTED:

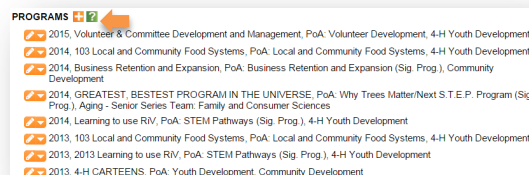|	
1. Log onto RiV using your lastname.# and Kerberos password. If you can't remember your password, go to http://my.osu.edu to reset or retrieve it. (http://go.osu.edu/RIV; click on the orange "SIGN IN" button) If RiV will not let you in or does not recognize you, please email riv@osu.edu, tell them who you are, your position with OSUE and ask them to activate your RiV profile. SKIP or say "NO THANKS" to the journal article search AND researcher ID affiliation offers. You are only given these options during the login process the VERY first time you log in to RiV. However, if you want to do either of them later, YOU CAN, so skip them for now.	
2. Click "Profile" [see red oval] If you do not have a "PROFILE" menu option this is considered a "technical difficulty", please email riv@osu.edu, tell them who you are, your position with OSUE and let them know that your account needs to be corrected.	
3. To view or add Extension Activity data including Extension Programs and associated Events, Goals, Specializations, or Extension Curriculum Development; in the navigation bar on the left-hand side of the screen, click on the bar labeled "NON-DOSSIER ITEMS," then click the plus symbol next to "Extension". Clicking "+" allows you to view items in the section; "-" hides items in the section. NOTE: The +/- symbols in the navigation bar do not work on iPads; you will have to scroll down manually to the NON-DOSSIER...Extension section	
4. If you need assistance trying to figure out what should go where, please contact Debby Lewis (lewis.205@osu.edu) or Kim Bahnsen Showalter (showalter.56@osu.edu) in the OSUE Program Development & Evaluation (PDE) Unit for further assistance.	

EXTENSION PROGRAMS / EVENTS:
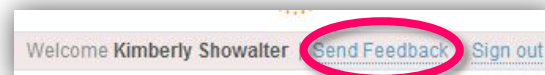
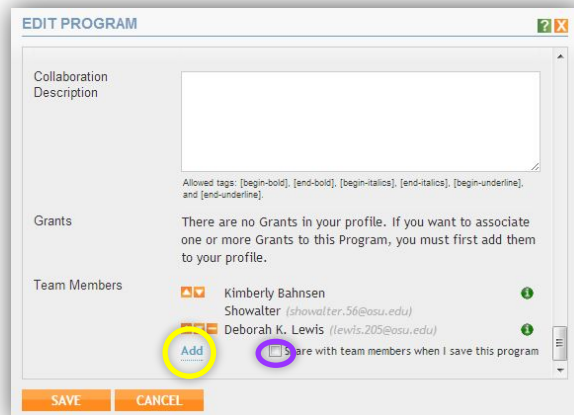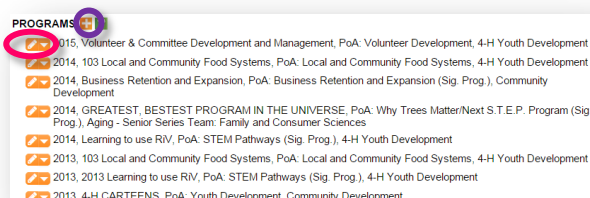|	
5. Click on "Programs," under the Extension section of NON-DOSSIER ITEMS. The outline view of your profile in the main pane of RiV (on the right) will auto-scroll down to the "Programs" section. You will notice that immediately after the scrolling ceases, an orange arrow will point to the header for "PROGRAMS" (for about 2 seconds). If you are new to OSU Extension / RiV, you will not have a list of programs.	
6. ***If you do not have a list of your previous Extension programs and you believe you should***, do NOT start from scratch! Use the "Send Feedback" link in RiV to contact the RiV team (or email riv@osu.edu). Someone from RiV will contact you with further instructions. Please be sure to report and describe any technical problems with the system to the RiV team using these methods. IF they do not know about the problem, they cannot fix it for you. The OSUE PDE Unit cannot help you with this type of problem.	
7. To EDIT an existing PROGRAM...click on the "edit" icon (a pencil inside an orange box, see <u>red circle</u> in image to the right) next to your program titles to update / edit information in existing Programs. **Please ONLY EDIT 2016 programs. DO NOT edit a previous year's programs and change the reporting year to 2016...if you do, you have effectively DELETED this program from your profile as it will no longer exist in the previous year! You may COPY a previous year's program, which will add another copy of the program to your profile and then you can change the reporting year for the COPY!!** 8. To add a NEW PROGRAM for 2016, click the "add" icon (a plus symbol in an orange box next to the PROGRAM section header, see <u>purple circle</u> in top-most image to the right). Select "2016" from the reporting year dropdown box. Then continue to complete all the fields. • Remember, you MUST fill in "days planned" and "days spent" (see <u>green oval</u>, in image to the right) to have a program display properly in your annual performance appraisal report.* • In the "Activities/Products" field, list any of the events you will associate with the program that were your sole teaching responsibility (e.g., "Lewis taught Money Management sessions at two Volunteer Training Workshops with a total of 40 attendees and collected EEETs at both sessions"). • You must also associate an Extension EVENT with EACH of your programs where you select a 2016 date in the date field. You must enter a 2016 date for the associated EVENT or the PROGRAM will not print on your report. (See Step 11 below for a screen shot of the Extension Event date field.) • Having "2016" in your program TITLE is NOT the same as associating a 2016 Extension Event with the program. • Please do not include the year in your program title, it will confuse you when you add EVENTS to that program.	 *The formula for DAYS PLANNED / SPENT is on the last page of this document

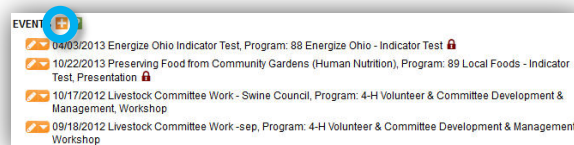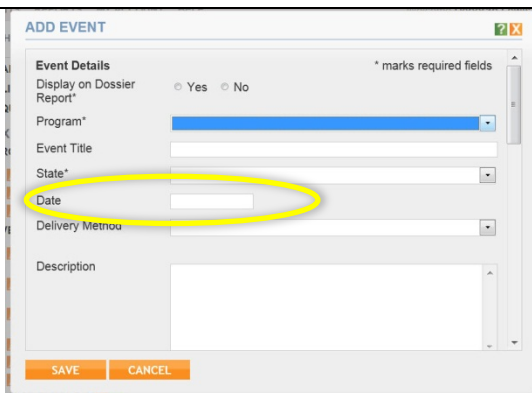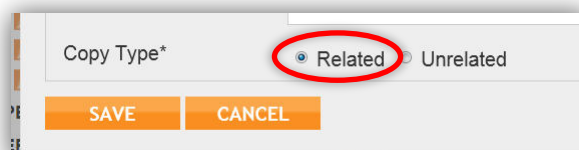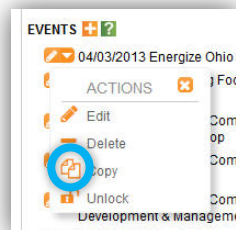|		
9.	When adding **team members** to a PROGRAM… first, please communicate with the team to determine who will do the initial data entry. ALL fields for the PROGRAM should be completely filled out BEFORE you add team members. Click on the "Add" link (yellow circle in image to right) next to the "Team Members" field and type "lastname, first initial" in the window that opens to search for team members; **NOT** name.# and **NOT** e-mail addresses. When you are ready to share the PROGRAM with your team members, click on the checkbox next to "Share with team members when I save this program" (purple circle in the image to right) and the Program will be added to their profile. The team members can then choose to accept or reject the SNAPSHOT of the program in *their* profile. If you were added as a team member, you can change anything in that PROGRAM, and it will ONLY change the program in YOUR profile (not anyone else's). • Don't forget to update the "days planned" and "days spent" to reflect YOUR efforts for the program. • You MUST add an Extension EVENT with a 2016 date selected in the date field for the event (see Step 11 below) for the PROGRAM to print on your Extension Annual Performance Document.	
10.	Click on "add" icon next to the EVENT section header to add / associate an EVENT to / with your PROGRAM (blue circle in image to the right). NOTE: Events are listed in reverse chronological order, alphabetized by PROGRAM title, which is listed after the title for the EVENT. You may copy PROGRAMS from year to year, but copy EVENTS only WITHIN the current program year. DO NOT COPY previous years' EVENTS; it will confuse RiV.	
11.	When you add an EVENT, you MUST select an associated program from the drop down list (highlighted in blue in the image to the right). You must have the PROGRAM added to your profile before you can associate events with it. Please look at the drop down list and choose a program title carefully; the list of programs is being displayed alphabetically in reverse chronological order. The year listed at the beginning of the program titles is the programming year you have assigned. The EVENT is where you will report your quantitative data for direct and indirect contacts and indicators. The DATE field (yellow oval in the image to the right) MUST be during the current reporting year in order for it to show up properly in your Extension Annual Performance Document or a Core Dossier Document. When you click in this field a calendar option will open to today's date. Please make sure you have selected a 2016 date in this field for your EVENT. Typing "2016" in the TITLE of your event, does NOT make it a 2016 event.	

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12. If you had multiple EVENTS during the year where you taught the same topic, select the "Copy" icon ( ) from the drop down list next to the title of the ORIGINAL or first occurrence of an EVENT to add another instance of the EVENT to your profile. At the bottom of the "Copy Event" window, select "Related" as the "Copy Type" (red oval in image to right). You only get this option the first time you COPY an Event. If you edit an existing <u>copied</u> event, you will not be able to change this selection. Selecting "Related" for the copy type will ensure that when you **print** a Core Dossier Document, the "Extension Events" table will display correctly (i.e., RiV will tally all associated EVENTS and sum all direct contacts for the EVENTS to display as a single line in your "Extension Events" table). Please note that RiV copies ALL your original event data (including date, direct contact numbers, volunteer numbers, etc.). PLEASE make ALL necessary changes before saving the copy of your EVENT to avoid confusion with the original!!	
13. If you are thinking about going for promotion sometime in the future, select "Yes" for the "Display on Dossier Report" field at the top of the Extension EVENTS window for any EVENT you want to appear on a Core Dossier Document. Remember to make the title of the ORIGINAL INSTANCE of the EVENT reflect what was **taught** and put your dossier theme in parenthesis following the event title (e.g., event title (theme name)). Also keep in mind that this EVENT will display in the TEACHING section of your dossier so use it only on appropriate EVENTS where you actually taught / provided education. If you have used the "Copy" icon to add multiple instances of an EVENT, the "Display on Dossier Report" field will only be viewable in the window of the ORIGINAL instance of the Event. Also, if you used the "Copy" icon to add multiple instances of an event, RiV will sum contacts and tally events to include all those instances of an event in ONE line of your EXTENSION EVENTS table of your CORE DOSSIER printout (example in bottom image to the right) and will display the title of the ORIGINAL INSTANCE of the EVENT. REMEMBER: The Promotion / Tenure committees will now be expecting to see TWO Extension tables in Teaching Section 4 of your promotion document. The "*Extension*" table will have items you entered into TEACHING...Extension & Continuing Education Instruction (corresponds to Teaching Section 4 in the Core Dossier; step 21 below describes the type of teaching to enter in this section) and the "*Extension Events*" table will list the EVENTS (that you checked "yes" for "Display on Dossier") entered under your Extension Program / Events in the NON-DOSSIER Extension module of RiV.	

SPECIALIZATIONS:

14. Under the "NON-DOSSIER ITEMS"..."Extension" section, click the link for "Specializations". You may select 2, one from each drop down.	
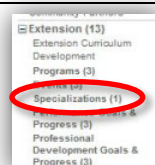
GOALS:

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15. Under the "NON-DOSSIER ITEMS"…"Extension" section, click the link for either "Performance Goals & Progress" or "Professional Development Goals & Progress" to navigate to the Extension Goals section. For the 2016 reporting year (due January 15, 2017), please keep in mind that: • CURRENT = 2016 reporting year and • NEXT = 2017 reporting year • PREVIOUS = 2015 and earlier NOTE: If you used RiV last year, you should have a list of goals labeled "current, next, and previous". You may copy goals if you like. Any goal labeled "next", you should re-label as "current" and record your 2016 progress against that goal. "Current" goals in your existing list should be changed to "previous". HELPFUL TIP: Add the reporting year in parenthesis next to the goals to keep them straight.	
16. Progress on Goals…for your CURRENT (2016) goals, fill in the "Progress" box below each goal. If you need to add new goals, add them individually by clicking on the "add" icon next to the appropriate PERFORMANCE / PROFESSIONAL DEVELOPMENT GOALS section title. You must select a goal number for each! Remember to document your PROGRESS on only your CURRENT (2016) goals (both PERFORMANCE and PROFESSIONAL DEVELOPMENT GOALS). If you did not accomplish a CURRENT goal (in 2016) like you planned, explain why in the "Progress" box. DO NOT just delete the goal!	
17. Goals for the NEXT reporting year (2017)…in both the PERFORMANCE and PROFESSIONAL DEVELOPMENT GOALS" sections, add your goals for 2017, by selecting "Next" for the "year" field when adding or editing the goal (blue circle in image to right). Again, add goals individually, by clicking on the "add" icon next to PERFORMANCE / PROFESSIONAL DEVELOPMENT GOALS section headers and don't forget to select a goal number for each! You may COPY a "previous" year's goal, but please do not EDIT a "previous" year's goal and change it to a "current" or "next" year's goal or you have effectively deleted that goal from your profile! DO NOT add progress against goals for **NEXT** year (2017) as they will not print on your Extension Performance Appraisal Document.	
18. Refer to the OSUE PDE website for help on the appropriate number and how to write goals (http://go.osu.edu/OSUEgoals).	

EXTENSION CURRICULUM DEVELOPMENT:

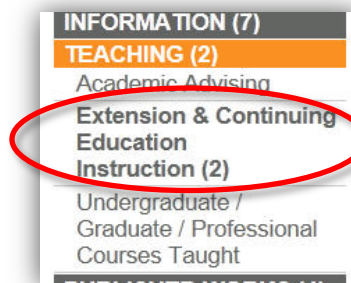|	
19. Navigate to the Extension Curriculum Development section (listed under NON DOSSIER... Extension...Extension Curriculum Development; red oval in image to right). This feature was created to let you keep track of Extension Curriculum Development during a single reporting year. The field prints on an Extension Annual Report, but not your Core Dossier Report. Eventually, if you go for promotion, you should be able to copy and paste these narratives to help create your CORE DOSSIER Curriculum Development Narrative.	
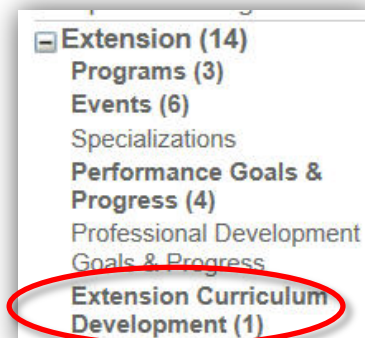
CORE DOSSIER SECTIONS:

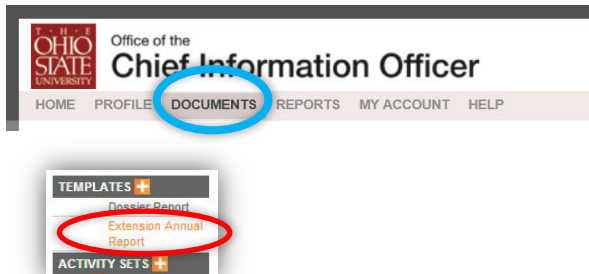|	
20. Complete sections of the "Core Dossier" as appropriate for your position to finish entering data for your 2016 Extension Annual Report.	
21. Remember you should enter your Extension Activity data into the "NON-DOSSIER...Extension" sections as outlined in the steps above so that data can be used for federal, state, and local reporting purposes and appear in the proper sections of your Extension performance appraisal document. **Only enter one-off teaching activities (i.e., not related to your major PROGRAMS), Guest Lectures, and Individual Instruction into the "TEACHING...Extension & Continuing Education Instruction" section of RiV (red oval in image on the right). Items entered here print on your core dossier report in the Extension table of Teaching Section 4. They will also print on your Extension Annual Performance Report (in section 2a). You may also enter Extension programs conducted prior to 2015 (or greater than one calendar year old) in this section <u>when going for promotion</u>. If you are not going for promotion, do not enter historical data.** **DO NOT under any circumstances enter your data in BOTH places.**	
22. Refer to help sheet found here (http://go.osu.edu/rnJ). Points to the "helpful documents" page of the PDE website; click on PDF of the "Extension Annual Performance Report Help Sheet"; you will need to open / save the document. The appropriate sections of RiV are indicated by square brackets [ ] in this document.	

PRINTING YOUR ANNUAL EXTENSION PERFORMANCE APPRAISAL DOCUMENT:

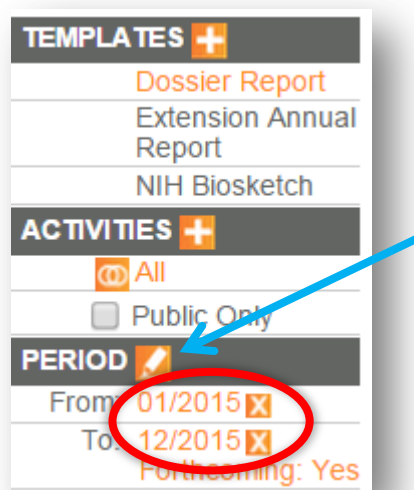|	
23. Click on the DOCUMENTS link (blue oval in top image to right) in the upper-left corner of RiV Then, in the menu on the left-hand side of the screen, click to select "Extension Annual Report" (red oval in bottom image to right)	
24. When printing your Extension Annual Performance Report, you must use **01/2016 to 12/2016** as your date range (see red oval in image) or your report will NOT print properly. To change the time frame of your report, select the edit icon next to "Period" in the left hand menu (see blue arrow). Enter the appropriate dates in the pop-up window and select "SAVE". A DRAFT of your report will appear in the working window of RiV. To generate a PDF of your document, click on the PDF icon (🅿) in the upper right-hand side of the RiV window (located below "Sign out"). **Please check over your report before sending it to your supervisor.**	
25. If there are sections on your report not printing the way you think they should, first, read back over the steps above and make sure you have entered your data correctly. If there is still a problem, use the "SEND FEEDBACK" link in the upper-right corner of RiV (next to your name) to send a message to the RiV team and tell them specifically the trouble you are having. OR you may use the riv@osu.edu email address.	
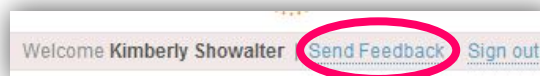
From Step 8 above...

DAYS PLANNED = time allocated to this program in the NEXT reporting year.
- 251 STAFF DAYS = 1 STAFF YEAR (this excludes holidays and weekends)...This indicates the number of days necessary to plan and implement this specific project or program. As you are documenting programs in RiV, please remember that 60% of your 251 available staff days per year should reflect planned programming. That 60% would be approximately 100-140 total days.
- If you PLAN to do the program NEXT year, enter the number of days planned in this field and the TITLE of the program will appear in the proper section of your Annual Extension Performance Report.

DAYS SPENT = time that is ACTUALLY spent on this program / project during the CURRENT reporting year.
- Input into this field the days actually spent (keeping in mind the formula for days planned)
- NOTE: There MUST be a value listed in the DAYS SPENT field for the program to appear on your Annual Extension Performance Report.

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Last updated 12/2016