

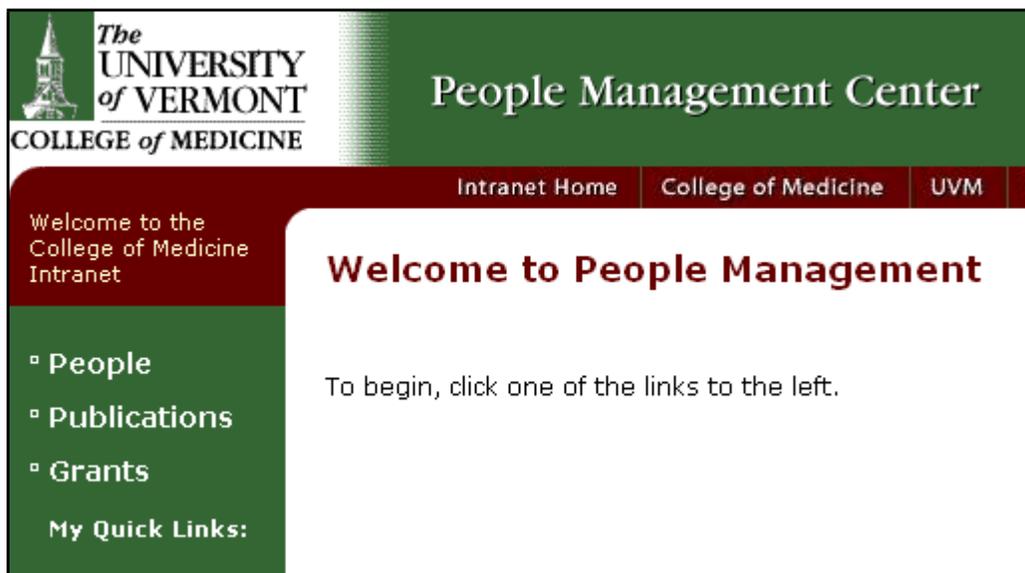
# Bio Builder Tutorial

This tutorial will assist you in creating and editing Bios in Bio Builder. If you need further assistance, please contact the College of Medicine helpdesk at 656-7300.

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## What is Bio Builder, what good is it, and where do I find it?



### What is it?

Bio Builder is a module within the People Management system. The People Management system contains information on people with whom the College of Medicine has a significant relationship. That includes students, faculty, staff, alumni, community preceptors, etc. Some biographical information that makes up the Curriculum Vitae (CV) is already in Bio Builder, and more information can be added. You can add and modify information in your own bio, or give someone else access to do so.

### What good is it?

The information in Bio Builder is used every day across the College for various purposes, such as the faculty reappointment process, grant proposal generation, public web site displays, etc. For example, an administrative assistant could compile the necessary bio information for several faculty for submission with a paper. Or a department can choose to automatically pull information from Bio Builder for their website - see the [Neurology Department's Faculty and Staff page](#) for an example (clicking on "Biography" for a person shows info from Bio Builder).

## Where do I find it?

The Bio Builder is within People Management, which can be found here:

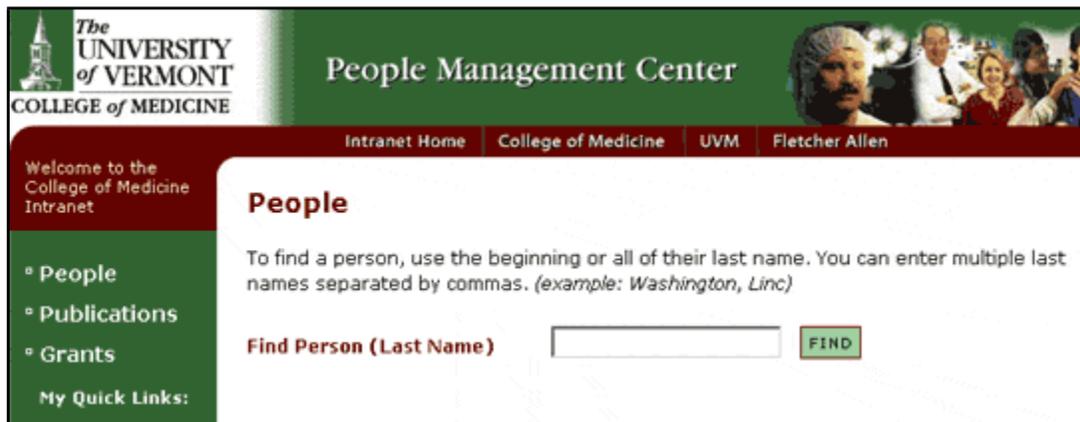
<https://comis.med.uvm.edu/peoplemanagement>. Note that if you are typing it in yourself, you need to include the "https://" part. You will see the screen shown above.

## Finding a Person in Bio Builder

The first step in editing a person's bio is to find the person in People Management. Click on the People link to search for a person.



You will then see the following screen:



You may enter an entire last name or just the first few letters of a person's last name. Or, you can leave the box blank and just click the FIND button to see all the people you have access to (this will vary greatly depending on your role at UVM, from having access to only your own information, to having access to thousands of people).



Welcome to the College of Medicine Intranet

- People
  - Publications
  - Grants
- My Quick Links:

## People

To find a person, use the beginning or all of their last name. You can enter multiple last names separated by commas. (example: Washington, Linc)

Find Person (Last Name)

Last Name	First Name	Middle Name
<u>Vermont</u>	David	C.

Showing 1 to 1 of 1

If your search returned more than 10 people, they will be listed on multiple pages. Use the NEXT and PREVIOUS buttons to move to another page. Once you find a person, simply click on their underlined last name to access their information.

If you can't find the person you need to work with, first double check your search by typing fewer letters of their last name (or just the first letter of their last name), or leaving the box blank and clicking "FIND". If you still can't find them, then that person will have to log onto People Management and grant you access to their information. See the next section for details of how to do this.

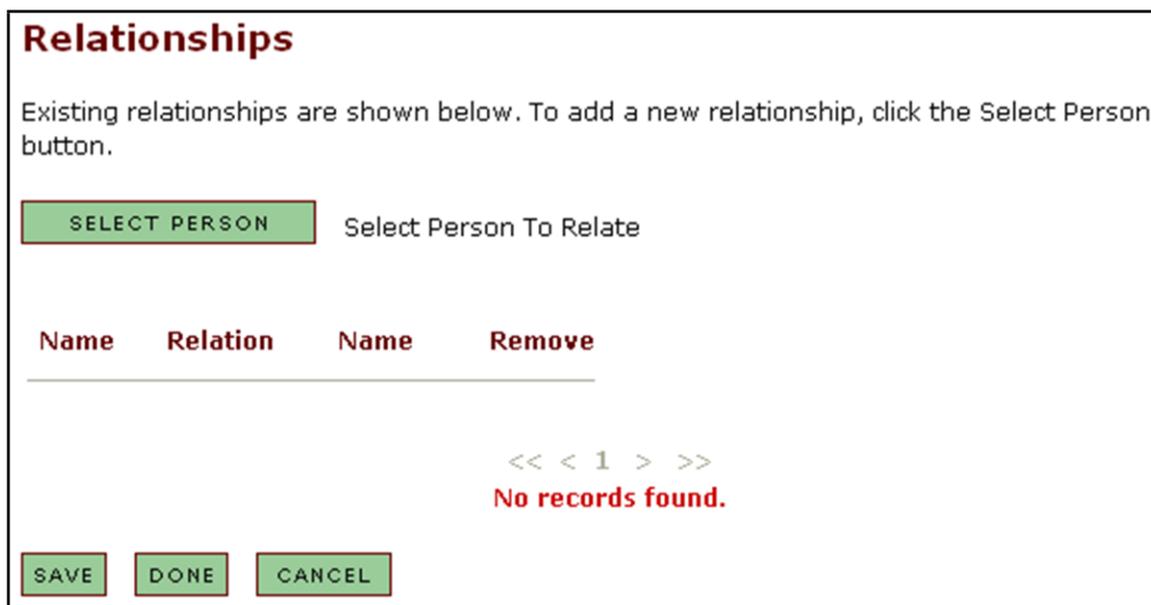
# Granting Access for Someone to Edit Your Bio (Relationships)

If another person is unable to find your name when they search in People Management (see the section on Finding a person), then you need to grant them access to edit your information, using the Relationships feature.

1. First, you must search for and find yourself (again, see the Finding a person section if you are unclear on how to do this).
2. Then, click on your underlined last name, to go to the "Create/Edit Person" screen, which is shown below:



3. Click on the **RELATIONSHIPS** button to go to the Relationships screen, which is shown below:



1. If any relationships have been established between you and another person, they will be listed. In this example, no relationships have been created. Click on the **SELECT PERSON** button, which brings you to the "Select Related Person" screen.
2. Find the person to whom you would like to grant access by typing in their last name, or just a few letters of their last name. When you find the person, click on their underlined last name.
3. You will be presented with a list of possible relationships between you and this person. Your name should be first, then a type of relationship, then the person to whom you want to grant access. Check off the box next to "Is Editable by", then click **DONE**. Click **DONE** a second time on the "Select Related Person" screen. The relationship will now be listed, and that person should now be able to find you in People Management, and edit your information.

# Bio Building Blocks - Addresses and e-mail Addresses

The first step in editing a person's bio is to find the person in People Management, as described in the Finding a Person section. Once you find a person, click on their last name to go to the "Create/Edit Person" page, as shown below.



The screenshot shows the People Management Center interface. At the top left is the University of Vermont logo and 'COLLEGE of MEDICINE'. The main header is 'People Management Center'. Below the header is a navigation bar with 'Intranet Home', 'College of Medicine', 'UVM', and 'Flet'. On the left is a sidebar with 'Welcome to the College of Medicine Intranet' and a menu with 'People', 'Publications', and 'Grants'. The main content area is titled 'Create/Edit Person' and contains several buttons: 'LISTS', 'GRANTS', 'PUBLICATIONS', 'ROLES', 'ADDRESSES', 'RELATIONSHIPS', 'BIOS', 'EMAIL ADDRESSES', and 'DEGREES'. A 'Find Person' link is also visible at the top of the main content area.

A Bio is simply a particular subset of the information saved for a person. You can have more than one Bio, since you may want to include different information in a Bio for a grant submission than a Bio for a UVM department website. Building a Bio means simply selecting which "chunks" of information you want included in a particular Bio. But first, you must create those "chunks" or building blocks. In this section, addresses and email addresses will be discussed.

## ADDRESSES

**To edit or add an address**, click on the **ADDRESSES** button. This will take you to the Addresses screen, as shown below. The addresses which are currently in the system for the selected person will be listed.

## Addresses

**CREATE ADDRESS** Create A New Address For This Person

Type	Address	Remove
Office Address	DU-Arnold Pav 3433	
<u>Office Address</u>	Medical Education Ctr. 113, Burlington, VT 05405, USA	<input type="checkbox"/>

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**SAVE** **DONE** **CANCEL**

### To Edit an Address

If the address type (in the "Type" column, such as "Office Address" above) is an underlined link, you can edit the address. If you can not edit it here in People Management, you must contact Human Resources. However, you can also simply add additional addresses and choose to use them in your Bios.

To Add a New Address, click the **CREATE ADDRESS** button.

### Add Address

**Address Type**

**Address 1**

**Address 2**

**Address 3**

**City**

**State/Province**

**Country**

**Postal Code**

**Phone**

**Phone**

**Organization**

**OwnerGroup**

**Is Private**

**Red labels indicate required fields**

**SAVE** **CANCEL**

Enter the new address (red-labeled fields are required) and then click **SAVE**.

### To Remove an Address

If the address has a check box to the right, in the "Remove" column, then you may remove the address by checking the box and clicking either the **SAVE** button (which saves the change, but keeps you on this screen) or the **DONE** button (which saves the changes and returns you to the previous screen).

The screenshot shows the People Management Center interface. At the top left is the University of Vermont logo and name. The main header is 'People Management Center'. Below this is a navigation bar with 'Intranet Home', 'College of Medicine', 'UVM', and 'Flet'. A left sidebar contains 'Welcome to the College of Medicine Intranet', 'People', 'Publications', 'Grants', and 'My Quick Links:'. The main content area is titled 'Create/Edit Person' and contains several buttons: 'LISTS', 'GRANTS', 'PUBLICATIONS', 'ROLES', 'ADDRESSES', 'RELATIONSHIPS', 'BIOS', 'EMAIL ADDRESSES', and 'DEGREES'. A 'Find Person' link is also visible.

**To edit or add an email address**, click on the **EMAIL ADDRESSES** button. This will take you to the Email Addresses screen. The email addresses which are currently in the system for the selected person will be listed.

**To Add a New Email Address**, click the **CREATE EMAIL ADDRESS** button. Enter the new email address (red-labeled fields are required) and then click **SAVE**.

### **To Remove an Email Address**

If the email address has a check box to the right, in the "Remove" column, then you may remove the email address by checking the box and clicking either the **SAVE** button (which saves the change, but keeps you on this screen) or the **DONE** button (which saves the changes and returns you to the previous screen).

# Bio Building Blocks - Bio Details

As mentioned in the previous section, before building a bio, it is helpful to set up all the building blocks, or pieces of information that will be used in the bio. A "Bio Detail" can be almost any type of information, such as publications, academic interests, volunteer work, etc. Once a Bio Detail has been added, you may use it in any Bio for the selected person.

To add a bio detail, first get to the following screen by finding the person you want to edit (see Finding a Person section) and clicking on their underlined last name.

The screenshot shows the People Management Center interface. At the top left is the University of Vermont logo and 'COLLEGE of MEDICINE'. The main header is 'People Management Center'. Below the header is a navigation bar with 'Intranet Home', 'College of Medicine', 'UVM', and 'Flet'. On the left is a sidebar with 'Welcome to the College of Medicine Intranet' and a menu with 'People', 'Publications', and 'Grants'. The main content area is titled 'Create/Edit Person' and contains several buttons: 'LISTS', 'GRANTS', 'PUBLICATIONS', 'ROLES', 'ADDRESSES', 'RELATIONSHIPS', 'BIOS', 'EMAIL ADDRESSES', and 'DEGREES'. A 'Find Person' link is also visible.

Click on the BIOS button to get to the Bio screen which is shown below. Any Bios that have already been set up will be listed.

The screenshot shows the 'Bios' management screen. At the top are two buttons: 'CREATE BIO' and 'CREATE A BIO DETAIL'. Below is a table with the following data:

ID	Bio Type	Description	Active	
15296	<a href="#">COMET</a>	COMET	Y	<a href="#">COPY</a>
10863	<a href="#">Comprehensive</a>	Comprehensive	Y	<a href="#">COPY</a>

At the bottom left is a 'BACK' button.

Click on the **CREATE A BIO DETAIL** button. This will take you to the Create/Edit Bio Detail screen which is shown below.

## Create/Edit Bio Detail

**Category**

**Detail Text**

**Active**

**Include on which bios?**  COMET  Comprehensive

**Last Update User**

**Last Update Date**

From the category drop down list, choose the type of detail you would like to add, such as "Awards and Honors". Then click the **EDIT** button, to get to the following screen:

The screenshot shows a rich text editor window. The top toolbar includes icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and text alignment. Below the toolbar, the font is set to Times New Roman, size 3, and style Normal. The main editing area is currently empty. At the bottom, there are three tabs: Edit (selected), Source, and Preview. Below the tabs are two buttons: OK and CANCEL.

You have a choice to make - you can either list all of the items for this category (such as all of your awards and honors) at once, or you can enter just one, and then repeat the steps for each item in the category. Although entering them one at a time takes longer, it allows you to pick and choose which ones to include on each Bio (for example, if you only want to include some of your awards and honors on a certain Bio - maybe just the ones that are pertinent to a certain grant application). If you list them all at once on this screen, they are treated as one block, and can only be included or left out of a Bio as a unit.

Enter your text on the Edit tab, and format it using the buttons, as you would in Word. The Source tab will show you any HTML that is being used to format your text. You do not need to know HTML, but if you do, you can format text yourself by entering HTML tags on the Source tab. The Preview tab should look the same as the Edit tab.

When you are finished, click the **OK** button.

If this is the only detail you would like to add, click the **DONE** button. If you would like to add more details, either from the same category (for example, if you decided to list your awards and honors one at a time as described above) or a different category, click the **SAVE & ADD ANOTHER** button. Then change the category if necessary, and click the **EDIT** button. Repeat these steps until you have entered all your details.

### The Active Checkbox

On the "Create/Edit Bio Detail" screen, there is a checkbox labeled "Active". Unchecking this box will cause the detail to no longer appear on any bios to which it was assigned. The detail will still be listed when you go to edit the bio, but if you go to the preview of the bio, it will not appear. This allows you to quickly remove a detail from all bios to which it was previously assigned, without having to edit each Bio. Or, you can use this feature to create a detail and assign it to bios, but not actually have it appear until you want it to (for instance, until it is approved by someone).

### The Comprehensive Bio

Everyone has at least one Bio already - the Comprehensive Bio. This Bio contains all pieces of information that have been entered into Bio Builder. On the "Create/Edit Bio Detail" screen, there is the question "Include on which bios?". Comprehensive will be there, but the checkbox is not editable since all pieces of information are on the Comprehensive Bio. If you have already created other Bios, they will be listed here and you can check off the bios on which you would like this detail to appear.

## Creating a Bio

Now that all the pieces that make up the Bio have been created (see previous sections on addresses & email addresses and bio details), creating a bio is fairly simple. All you have to do is indicate which pieces of information should be included in a particular bio.

The screenshot shows the 'Create/Edit Person' interface within the University of Vermont People Management Center. The header includes the university logo and 'People Management Center'. A navigation bar contains links for 'Intranet Home', 'College of Medicine', 'UVM', and 'Fletch'. The main content area features a 'Find Person' link and a 'Create/Edit Person' section with several green buttons for selecting information to include: LISTS, GRANTS, PUBLICATIONS, ROLES, ADDRESSES, RELATIONSHIPS, BIOS, EMAIL ADDRESSES, and DEGREES. A left sidebar contains a 'Welcome to the College of Medicine Intranet' message and a menu with 'People', 'Publications', and 'Grants' options, along with a 'My Quick Links:' section.

From the "Create/Edit Person" screen, click on the BIOS button. You will be taken to the Bios screen which is shown below:

ID	Bio Type	Description	Active	
15296	COMET	COMET	Y	COPY
10863	Comprehensive	Comprehensive	Y	COPY

All existing Bios will be listed. Everyone has a Comprehensive Bio. Whenever a new Bio detail is created, it will be added to the Comprehensive Bio. Although you can remove the items if you choose, It is recommended that you do not remove items from the Comprehensive Bio - keep it as a reference of all the items (such as Bio details) that are available for use on other Bios.

You may have up to 10 different Bios, including the Comprehensive Bio. The Bio types that are available are:

1. COMET
2. Consulting
3. Curriculum Vitae
4. LINAT - LINAT/Leducq Project Bio
5. NIH Grant
6. Professional
7. Teaching
8. Web
9. Web2 - Alternative Web Bio

### Creating a New Bio

There are two ways to create a new Bio - you can either use the **CREATE BIO** button, or use the **COPY** button next to an existing Bio. The **COPY** buttons are handy if you want a new bio that is almost the same as an existing one.

## Creating a New Bio Using CREATE BIO Button:

### Add Bio Type

BioType	Description	Add
Web2	Alternative Web Bio	<input type="checkbox"/>
Consulting	Consulting	<input type="checkbox"/>
Curriculum Vitae	Curriculum Vitae	<input type="checkbox"/>
LINAT	LINAT/Leducq Project Bio	<input type="checkbox"/>
NIH Grant	NIH Grant	<input type="checkbox"/>
Professional	Professional	<input type="checkbox"/>
Teaching	Teaching	<input type="checkbox"/>

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1. Click the **CREATE BIO** button. The "Add Bio Type" screen will open:
3. Select a Bio type. Only types that haven't already been used will be listed (you can only have one bio of each type). In the above screen shot, the "COMET" and "Web" types are not listed because they have already been used.
4. Click the **DONE** button. You will now be returned to the Bios screen where you will see the existing bios listed, including the one you just created.

## Creating a New Bio Using the COPY Button:

[Bios](#)

**Copy contents of this biography**      -->      **To this unused biography**

COMET      Consulting

1. Click the COPY button next to one of your existing Bios on the "Bios" screen. You will see the following screen:
2. Select one of the unused bio types from the drop down list.
3. Click the COPY BIO button.
4. The new bio will be listed in the list of bios, along with the comprehensive bio and any other bios you have created.

# Editing a Bio

Once you've created a Bio, you may edit its contents. If you created a Bio by copying it, then it will have the same contents as the original. If you created a Bio from scratch, it will have very little to start with. To edit a Bio, click on its name (the bio type) on the Bio screen (to get to the Bio screen, find a person, click on their name, then click the BIOS button). Note: it is not recommended that you edit the Comprehensive Bio. Make a copy of it and edit the copy.

## Bios

[CREATE BIO](#) [CREATE A BIO DETAIL](#)

ID	Bio Type	Description	Active	
15296	<a href="#">COMET</a>	COMET	Y	<a href="#">COPY</a>
10863	<a href="#">Comprehensive</a>	Comprehensive	Y	<a href="#">COPY</a>

[BACK](#)

## PREVIEWING and EXPORTING

At the top of the screen for a particular Bio is a PREVIEW button. As the name implies, this will open a new window with a preview of the bio. One way to save or export the Bio is to do the following:

1. Click the PREVIEW button
2. Press Ctrl-A to select everything in the preview
3. Press Ctrl-C to copy everything
4. Open Word
5. Press Ctrl-V to paste everything into Word.
6. You may now edit and save the Word document as you like.

Note that we do not currently recommend that you use the EXPORT button.

## OWNER GROUP

Leave this on "Self".

## PRIVATE Checkbox

If you check off this checkbox, then only the you and your delegates (using Relationships) can see or edit this bio (but not other people, such as human resources, who normally have access to your Bios). The Bio will also not be displayed on other websites (ie. websites that pull data from People Management).

### ACTIVE Checkbox

If Active is unchecked, then the Bio will not be displayed on other websites (ie. websites that pull data from People Management). This does not affect who can edit the Bio.

<b>PREVIEW</b>	After saving, click <b>Preview</b> to see the bio.	
<b>EXPORT</b>	Saves the bio to a format that can be edited in Microsoft Word. <b>Requires Office XP or higher.</b>	
<b>Owner Group</b>	Self <input type="button" value="v"/>	
<b>Private</b>	<input type="checkbox"/>	
<b>Active</b>	<input checked="" type="checkbox"/>	
<b>Summary</b>	<input type="button" value="EDIT"/>	
<hr/>		
<b>Research Overview</b>	<input type="button" value="EDIT"/>	
<hr/>		
<b>Image</b>	<input type="button" value="CHANGE"/>	
<i>image not selected</i>		
<hr/>		
<b>Contact Information</b>	<input type="button" value="CHANGE"/>	
<hr/>		
<b>Home:</b>	<i>no address</i>	
<b>Work:</b>	<i>no address</i>	
<b>Email:</b>	<i>no address</i>	
<b>Categories</b>	<input type="button" value="SELECT"/>	
<hr/>		
<i>no items</i>		
<b>Last Update User</b>	<input type="text" value="MED\clryan"/>	
<b>Last Update Date</b>	<input type="text" value="11/9/2006 3:51:27 PM"/>	
<input type="button" value="SAVE"/>	<input type="button" value="DONE"/>	<input type="button" value="CANCEL"/>

### SUMMARY and RESEARCH OVERVIEW

These are text fields into which you can type whatever you like. Standard formatting buttons are available (similar to Word). You may also use HTML if you like, by viewing the Source tab.

## Image

You may upload an image (photo) to be included in your bio. To do so click the **CHANGE** button. It is recommended that the image be 150 x 200 pixels in size, or 200 x 300 maximum. If you want to use a certain image for more than one bio, you must upload it for each bio (unless the bio was created by copying a bio that already had the image - then the new bio will have the image).

## Contact Information

If no home, work, or email addresses have been selected, then this section will not appear in the bio at all (you can test this by using the preview button). To select addresses, click the **CHANGE** button.

### Select Contact Information

Using the select lists below, choose the contact information that you want displayed on this bio.

		Include Phone #	Include Fax #
Home:	<input type="text" value="No Address"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work:	<input type="text" value="No Address"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email:	<input type="text" value="No Address"/>		

You can then select addresses from the ones that have been previously entered (see the section on Bio Building Blocks - addresses and email addresses). You may also create new addresses using the buttons at the bottom. However, you can not *edit* existing addresses from this screen. To edit an existing address, see the section Bio Building Blocks - addresses and email addresses. You may leave any of these three addresses as "No Address", in which case the item simply won't show up on the bio.

## Categories

The Categories section of a bio is where the Bio Details are included, if you choose them to be. To include Bio Details, click the **SELECT** button.

## Add Category to Bio

To add a category to this bio, check the Add checkbox in the list of categories and then click the Save button.

Find Bio Category

FIND

Category

Add

Abstracts	<input type="checkbox"/>
Academic Appointments	<input type="checkbox"/>
Academic Interests	<input type="checkbox"/>
Administrative Interests	<input type="checkbox"/>
Appointments	<input type="checkbox"/>
Area of Interest	<input type="checkbox"/>
Awards and Honors	<input type="checkbox"/>
Board Certification	<input type="checkbox"/>
Book Chapters	<input type="checkbox"/>
Certification/Board Eligibility	<input type="checkbox"/>

<< < 1 2 3 4 5 > >>

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SAVE

DONE

CANCEL

All 47 possible categories are listed (across multiple pages), not just categories into which you have entered information. If you want to know which categories actually have information in them, check the Comprehensive Bio, which should list all Bio Details you've added.

To include a category, simply check off the Add checkbox and click **SAVE** (if you want to add other categories) or **DONE** (if you are finished adding categories). If you include a category which does not contain any details, you will have the chance to enter the details (see below). After clicking **DONE**, you will be returned to the Bio page.

Order	Category		Remove
1 <input type="button" value="v"/>	Academic Appointments	<a href="#">Details</a>	<input type="checkbox"/>
2 <input type="button" value="v"/>	Awards and Honors	<a href="#">Details</a>	<input type="checkbox"/>

The selected categories will be listed. You may change the order in which they appear using the drop down lists. You may remove a category from this bio using the remove checkbox (the category and its bio details are not deleted and can be added back at any time).

To check the contents of a category (and add details if necessary), click the **Details** link.

### Details

ADD NEW

Order	Detail		Include
1	Photography	<a href="#">Edit</a>	<input checked="" type="checkbox"/>
2	Playing the drums	<a href="#">Edit</a>	<input checked="" type="checkbox"/>
	Chess	<a href="#">Edit</a>	<input type="checkbox"/>
	Astronomy	<a href="#">Edit</a>	<input type="checkbox"/>

SAVE DONE CANCEL

- Any details for the selected category will be listed (shown at right is a sample of "Other Interests" details). You may add new details using the provided button. See the section Bio Building Blocks - Creating a Bio Detail for more info.
- Use the "Include" checkboxes to select which details to include.
- Included details can be ordered using the drop down lists (after checking off a detail to include it, click **SAVE** to see the order drop down for that detail).
- Click the **Edit** links to edit the content of the detail.

### The Link to Your Bio:

- Each bio has its own specific ID number, which is located at the top of the screen when editing your bio in People Management. Below is a picture of where you'll find it:

## Example Bio – UVM Web Template Bio Bio

Bio ID #10101

PREVIEW

After saving, click **Preview** to see the bio.

EXPORT

Saves the bio to a format that can be edited in Microsoft Word. **Requires Office XP or higher.**

Jump to:  
image  
contact info  
categories

Owner Group

Self

Private

Active

Summary

EDIT

For this example, the ID number is 10101

- The URL for your bio will be <http://www.uvm.edu/medicine/?Page=profile.php&bioID=10101>  
If you would like your bio to be listed in a specific department, then you'd place that department name after the medicine/ and before the /?Page=  
For example, if you're in the biochemistry department, your URL can be <http://www.uvm.edu/medicine/biochemistry/?Page=profile.php&bioID=10101>