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).
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:

![Create/Edit Person Screen]

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

![Relationships Screen]

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.

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.
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 cannot 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.

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).
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.

![Image of the People Management Center screen](image)

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.

![Image of the Bio screen](image)

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

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

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

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:

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:

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.

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 (i.e., websites that pull data from People Management). This does not affect who can edit the Bio.

OWNER GROUP
Self
Private
Active

SUMMARY
EDIT

RESEARCH OVERVIEW
EDIT

IMAGE
CHANGE

CONTACT INFORMATION
CHANGE

HOME: no address
WORK: no address
EMAIL: no address

CATEGORIES
SELECT

NO ITEMS

LAST UPDATE USER: MED\cryan

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.
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.

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.
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.

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.
1. 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.

2. Use the “Include” checkboxes to select which details to include.

3. 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).

4. Click the Edit links to edit the content of the detail.

The Link to Your Bio:
1. 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

After saving, click Preview to see the bio.

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

Owner Group  Self
Private      □
Active       ✓

Summary   EDIT

For this example, the ID number is 10101

2. 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