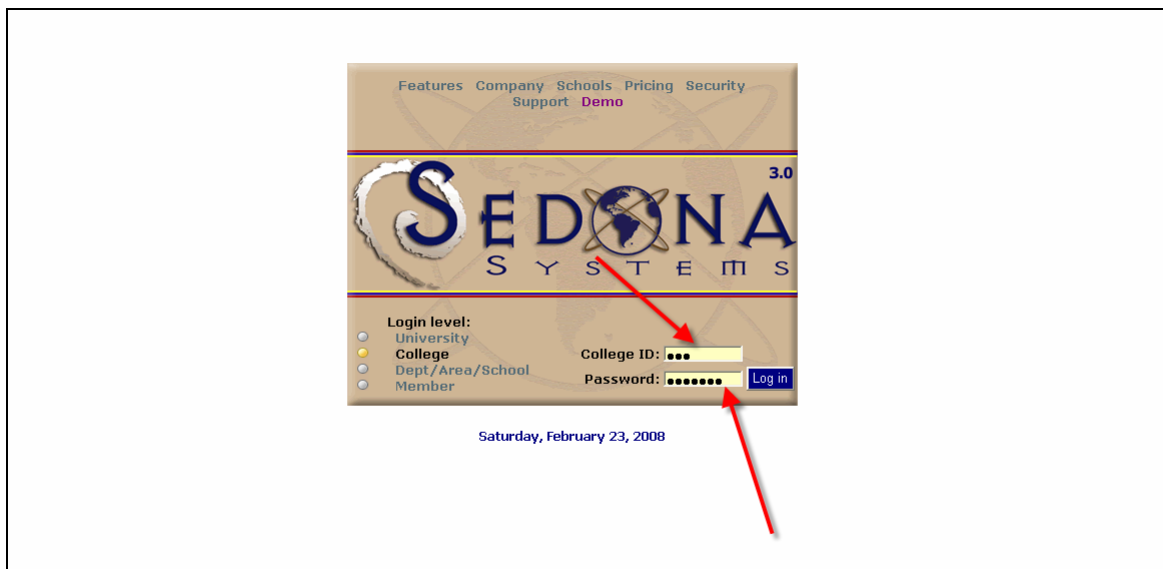


How to enter or modify templates in Sedona at the College, Department, or Faculty level:

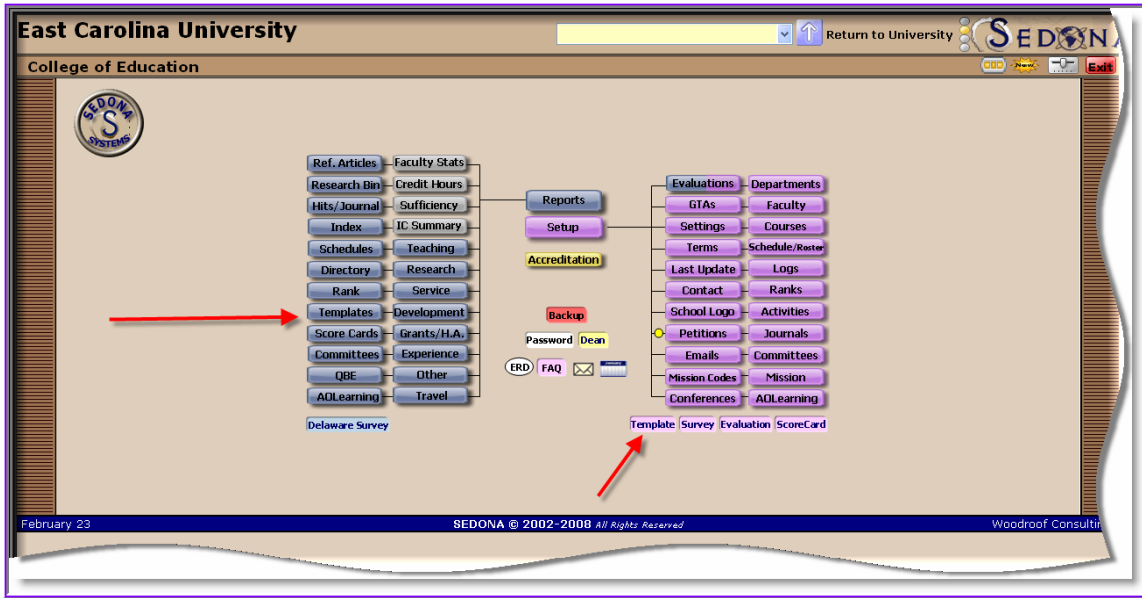
1. The process works the same way for all levels.
2. Remember that templates filter down. That is, a template created at the university level will be available at the College, Department, or Faculty levels. However, templates do not filter up automatically and do not show up across departments or colleges (unless they are copied at a higher level and made available).
3. When you work with a template created at a higher level (for example, a university level template that you want to modify or use at the college level), you must first copy the template. You can produce a report without copying the template but you cannot modify the template. However, if you copy the template, you can the modify it.

Templates are colored coded (shaded) so that **university level templates are shaded in white**, **college templates are shaded in green**, **department templates are shaded in yellow**, and **faculty level templates are shaded in red**.

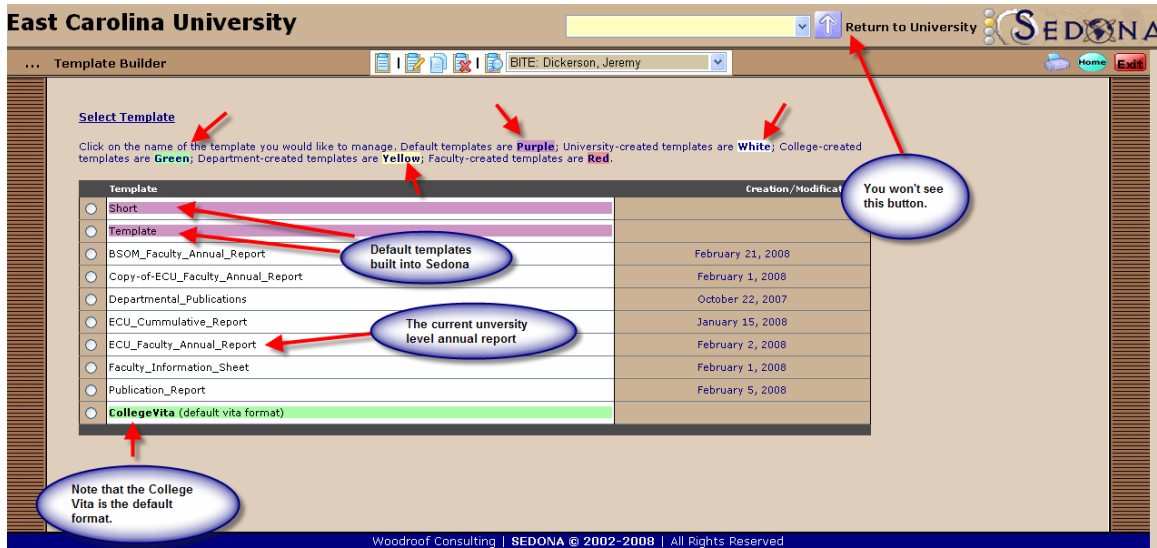
Step 1: Log into Sedona at the appropriate level. In this example, I will be working at the college level but the process is the same at all levels.



Step 2: Select the template button. Note there are two template buttons. Select the template button on the lower right hand side. This button is pink. Do not click on the grey template button to modify or copy templates.

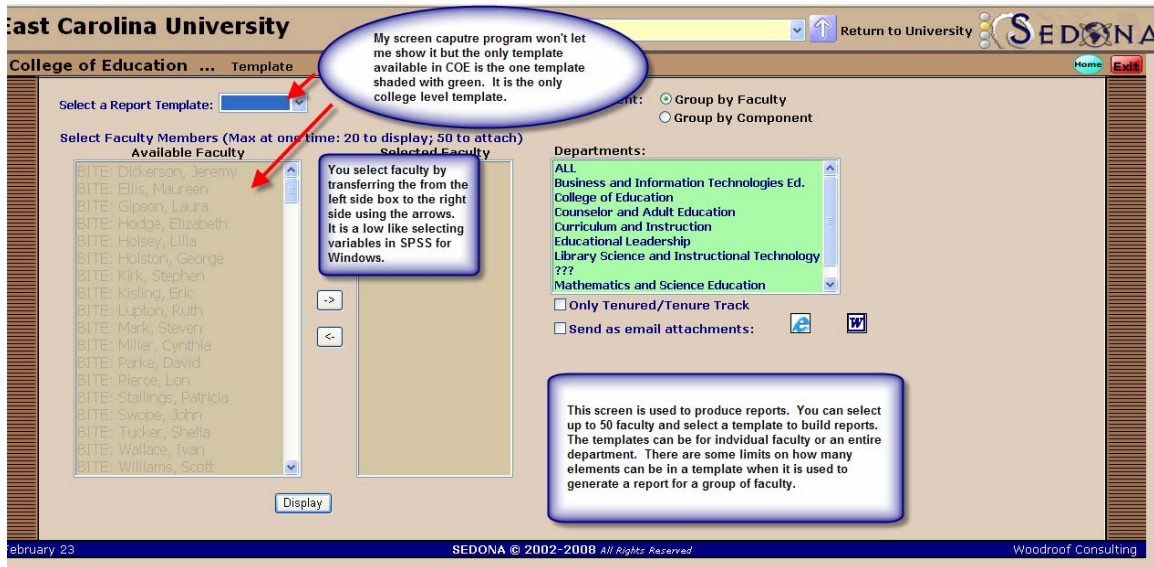


Note that I am using the College of Education in these examples. I am actually logged in at the university level, but you should see the exact same screens at the College level. If you select the correct template button, you will get a screen that looks like the following:



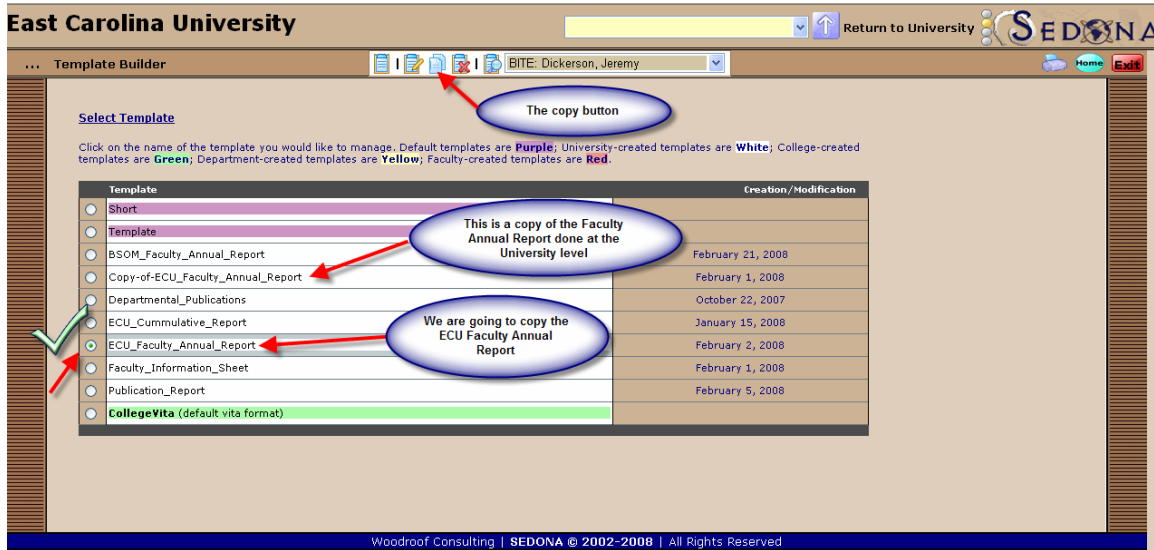
Note that default templates (built into Sedona) are purple, university level templates are shaded in white, college templates are shaded in green, department templates are shaded in yellow, and faculty level templates are shaded in red.

Note if you click the other (in this case the wrong grey) template button then you will see the following screen:



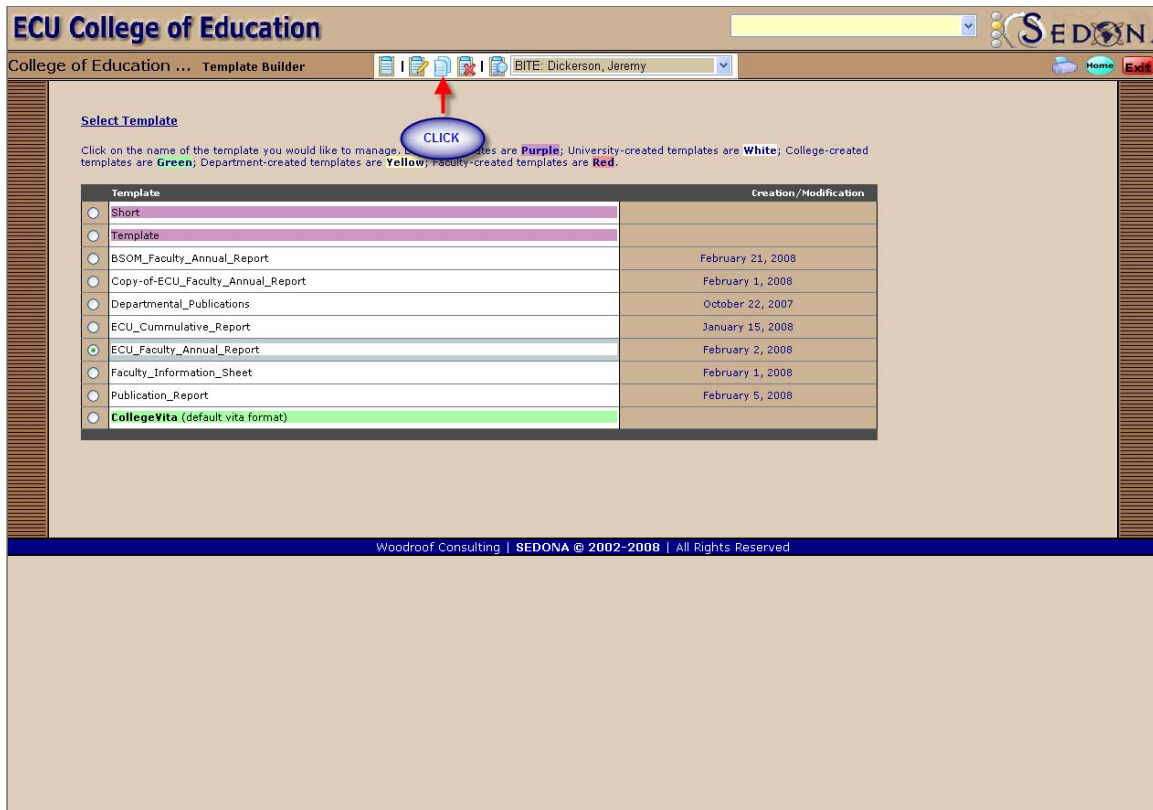
We won't do anymore with the above screen in this lesson.

Step 3: To modify your template, again click on the pink template button and select the template you want to modify and click on the copy button at the top of the page.

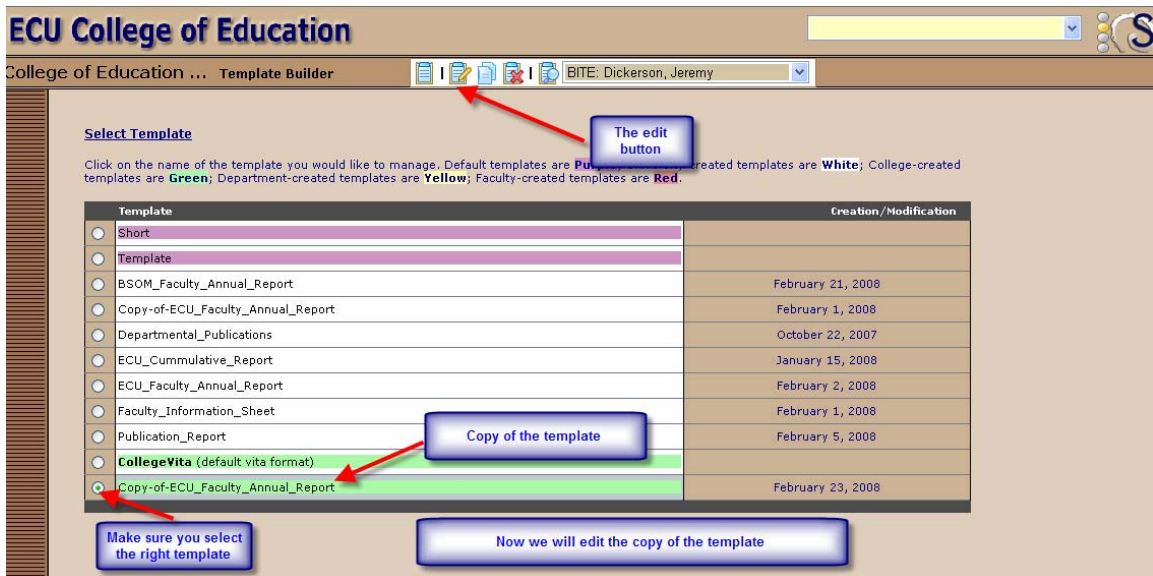



Once you click on the copy button, you will have a screen showing the new (copy) of the template. You can now modify the copy. **This takes much longer to explain than to do!**

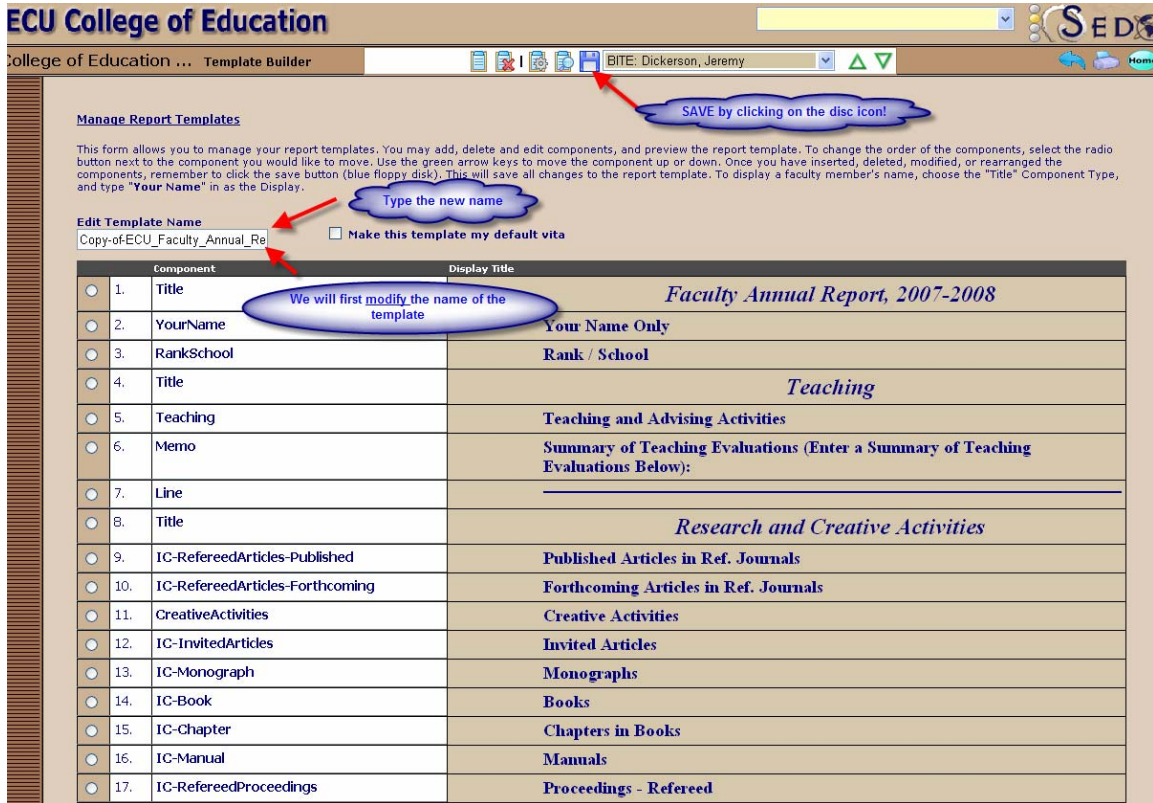
The screen below shows the copy template button:



Step 4: Next step is to edit the copy of the template.



Next we will change the name of the template. You will just type in the name you want to use. Make sure you hit the save button after every change you make to the template by clicking on the save button the **blue floppy disc icon**  which is at the top of the screen below.



Manage Report Templates

This form allows you to manage your report templates. You may add, delete and edit components, and preview the report template. To change the order of the components, select the radio button next to the component you would like to move. Use the green arrow keys to move the component up or down. Once you have inserted, deleted, modified, or rearranged the components, remember to click the save button (blue floppy disk). This will save all changes to the report template. To display a faculty member's name, choose the "Title" Component Type, and type "Your Name" in as the Display.

Edit Template Name

Copy-of-ECU_Faculty_Annual_Re Make this template my default vita

Component	Display Title
<input type="radio"/> 1. Title	<i>Faculty Annual Report, 2007-2008</i>
<input type="radio"/> 2. YourName	Your Name Only
<input type="radio"/> 3. RankSchool	Rank / School
<input type="radio"/> 4. Title	<i>Teaching</i>
<input type="radio"/> 5. Teaching	Teaching and Advising Activities
<input type="radio"/> 6. Memo	Summary of Teaching Evaluations (Enter a Summary of Teaching Evaluations Below):
<input type="radio"/> 7. Line	
<input type="radio"/> 8. Title	<i>Research and Creative Activities</i>
<input type="radio"/> 9. IC-RefereedArticles-Published	Published Articles in Ref. Journals
<input type="radio"/> 10. IC-RefereedArticles-Forthcoming	Forthcoming Articles in Ref. Journals
<input type="radio"/> 11. CreativeActivities	Creative Activities
<input type="radio"/> 12. IC-InvitedArticles	Invited Articles
<input type="radio"/> 13. IC-Monograph	Monographs
<input type="radio"/> 14. IC-Book	Books
<input type="radio"/> 15. IC-Chapter	Chapters in Books
<input type="radio"/> 16. IC-Manual	Manuals
<input type="radio"/> 17. IC-RefereedProceedings	Proceedings - Refereed

Step 5: our next step is to insert a new component. You will click on the insert new component key. Note that the name of the template has been changed.

Manage Report Templates

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Edit Template Name
 Make this template my default vita

Component	Display Title
1. Title	<i>Faculty Annual Report, 2007-2008</i>
2. YourName	Your Name Only
3. RankSchool	Rank / School
4. Title	<i>Teaching</i>
5. Teaching	Teaching and Advising Activities
6. Memo	Summary of Teaching Evaluations (Enter a Summary of Teaching Evaluations Below):
7. Line	
8. Title	<i>Research and Creative Activities</i>
9. IC-RefereedArticles-Published	Published Articles in Ref. Journals
10. IC-RefereedArticles-Forthcoming	Forthcoming Articles in Ref. Journals
11. CreativeActivities	Creative Activities
12. IC-InvitedArticles	Invited Articles
13. IC-Monograph	Monographs
14. IC-Book	Books
15. IC-Chapter	Chapters in Books
16. IC-Manual	Manuals
17. IC-RefereedProceedings	Proceedings - Refereed
18. IC-Software	Software

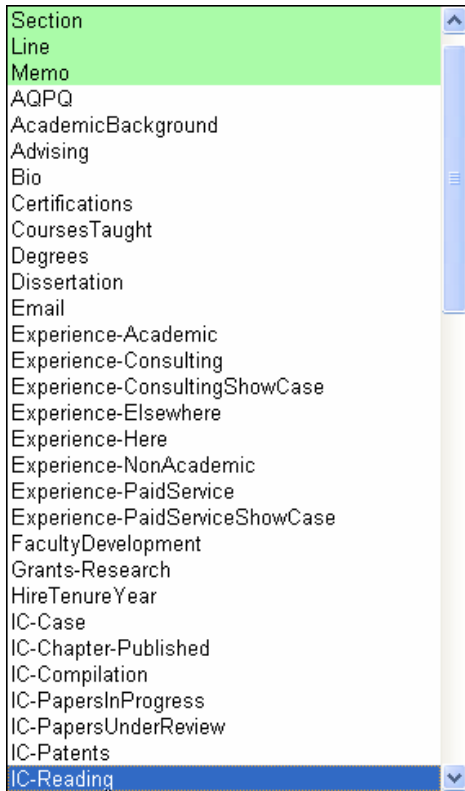
We continue by selecting where we want to insert the new component.

The screenshot shows the SEDONA web interface with a list of components. The components are numbered 8 through 34. A red arrow points to the 'Insert new component' button above item 9. Another red arrow points to item 11, 'CreativeActivities'. A blue callout bubble contains the text: 'You have to select where to place the new component. It will go above the selected component'.

8.	Title	
9.	IC-RefereedArticles-Published	Published Articles in Ref. Journals
10.	IC-RefereedArticles-Forthcoming	Forthcoming Articles in Ref. Journals
11.	CreativeActivities	Display Title: Creative Activities
12.	IC-InvitedArticles	Invited Articles
13.	IC-Monograph	Monographs
14.	IC-Book	Books
15.	IC-Chapter	Chapters in Books
16.	IC-Manual	Manuals
17.	IC-RefereedProceedings	Proceedings - Refereed
18.	IC-Software	Software
19.	IC-Supplement	IC: Supplement
20.	IC-Non-RefereedArticles	Non-RefereedArticles
21.	IC-Non-RefereedProceedings	Proceedings - Not Referred
22.	IC-Other	Other Research Activities
23.	IC-PresentationRefereed	Paper Presentations-Refereed
24.	IC-PresentationNotRefereed	Paper Presentations-Not Refereed
25.	IC-ResearchGrants	Research Grants
26.	Grants-Service	Grants - Service
27.	Grants-Teaching	Grants - Teaching
28.	Grants-Training	Grants - Training
29.	IC-Grid	Grid
30.	Line	
31.	Title	<i>Service</i>
32.	Service-University	Service: University
33.	Memberships	Memberships in Professional Organizations
34.	Service-Professional	Service: Professional

When you click on the insert button you will get a drop down box which allows you to select the component to insert. You may have to experiment to find the component you want. If something is not in SEDONA then you may want to insert two lines and title for the component to be entered in WORD. This is how we are handling the summary of teaching evaluations.

Some of the components are shown below:



I am going to add **IC-PapersProgress** because the College of Education wants to include this information for the College and department level evaluation of faculty. Other colleges do not want this information and it is not on the standard annual report. The IC prefix stands for intellectual contribution. Notice that inserting a new component requires three steps.

SEDONA - Microsoft Internet Explorer provided by East Carolina University

Address: <https://sedonaweb.com/>

ECU College of Education

SEDONA

Component: BITE: Dickerson, Jeremy

1.	Title	Faculty Annual Report, 2007-2008
2.	YourName	Your Name Only
3.	RankSchool	Rank / School
4.	Title	Teaching
5.	Teaching	Teaching and Advising Activities
6.	Memo	Summary of Teaching Evaluations (Enter a Summary of Teaching Evaluations Below):
7.	Line	
8.	Title	Research and Creative Activities
9.	IC-RefereedArticles-Published	Published Articles in Ref. Journals
10.	IC-RefereedArticles-Forthcoming	Forthcoming Articles in Ref. Journals
Component Type		Display
IC: PapersInProgress		Papers in progress (workpapers)
		Insert Cancel
11.	CreativeActivities	Creative Activities
12.	IC-InvitedArticles	Invited Articles
13.	IC-Monograph	Monographs
14.	IC-Book	Books
15.	IC-Chapter	Chapters in Books
16.	IC-Manual	Manuals
17.	IC-RefereedProceedings	Proceedings - Refereed
18.	IC-Software	Software
19.	IC-Supplement	IC: Supplement
20.	IC-Non-RefereedArticles	Non-RefereedArticles
21.	IC-Non-RefereedProceedings	Proceedings - Not Referred
22.	IC-Other	Other Research Activities
23.	IC-PresentationRefereed	Paper Presentations-Refereed

Done Internet

You can also delete components!

Manage Report Templates

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Edit Template Name
 COE_Faculty_Annual_Report Make this template my default vita

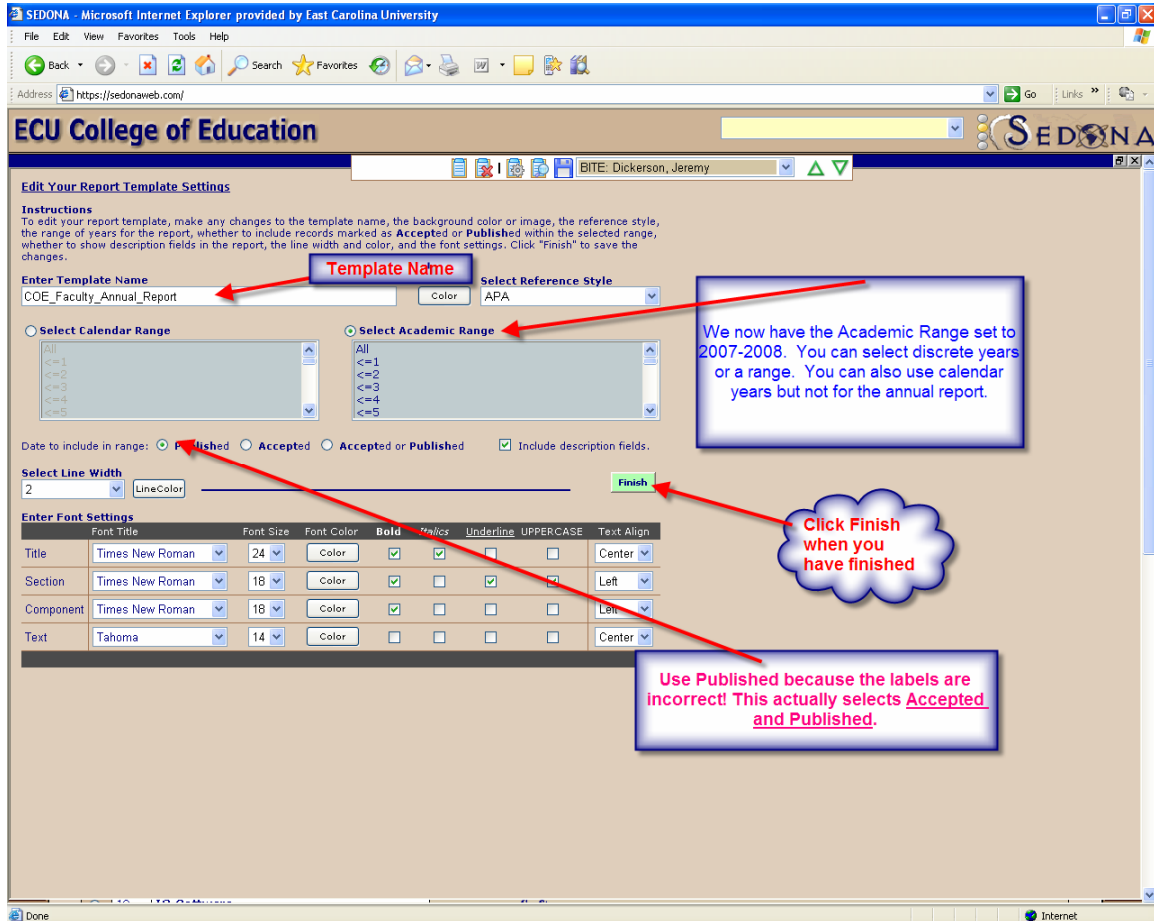
Component	Display Title
<input type="radio"/> 1. Title	<i>Faculty Annual Report, 2007-2008</i>
<input type="radio"/> 2. YourName	Your Name Only
<input type="radio"/> 3. RankSchool	Rank / School
<input type="radio"/> 4. Title	<i>Teaching</i>
<input type="radio"/> 5. Teaching	Teaching and Advising Activities
<input type="radio"/> 6. Memo	Summary of Teaching Evaluations (Enter a Summary of Teaching Evaluations Below):
<input type="radio"/> 7. Line	
<input type="radio"/> 8. Title	<i>Research and Creative Activities</i>
<input type="radio"/> 9. IC-RefereedArticles-Published	Published Articles in Ref. Journals
<input type="radio"/> 10. IC-RefereedArticles-Forthcoming	Forthcoming Articles in Ref. Journals
<input checked="" type="radio"/> 11. IC-PapersInProgress	Display Title: <input type="text" value="Papers in progress (workpapers)"/>
<input type="radio"/> 12. CreativeActivities	Creative Activities
<input type="radio"/> 13. IC-InvitedArticles	Invited Articles
<input type="radio"/> 14. IC-Monograph	Monographs
<input type="radio"/> 15. IC-Book	Books
<input type="radio"/> 16. IC-Chapter	Chapters in Books
<input type="radio"/> 17. IC-Manual	Manuals
<input type="radio"/> 18. IC-RefereedProceedings	Proceedings - Refereed
<input type="radio"/> 19. IC-Software	Software


Step 7: Last, I will show you how to edit the template settings. You probably don't want to do this for the annual report because they should be correct! But you need to know how to make changes. **You start by clicking on the edit the template settings button.**

The screenshot shows the SEDONA Template Builder interface. At the top, there is a navigation bar with the text "College of Education ... Template Builder" and a user profile "BITE: Dickerson, Jeremy". A red arrow points to a button labeled "Edit the template settings". Below this, the "Manage Report Templates" section contains instructions and a form to "Edit Template Name" with the value "COE_Faculty_Annual_Report" and a checkbox for "Make this template my default vita". The main part of the page is a table with two columns: "Component" and "Display Title".

Component	Display Title
1. Title	<i>Faculty Annual Report, 2007-2008</i>
2. YourName	Your Name Only
3. RankSchool	Rank / School
4. Title	<i>Teaching</i>
5. Teaching	Teaching and Advising Activities
6. Memo	Summary of Teaching Evaluations (Enter a Summary of Teaching Evaluations Below):
7. Line	
8. Title	<i>Research and Creative Activities</i>
9. IC-RefereedArticles-Published	Published Articles in Ref. Journals
10. IC-RefereedArticles-Forthcoming	Forthcoming Articles in Ref. Journals
11. IC-PapersInProgress	Papers in progress (workpapers)
12. CreativeActivities	Creative Activities
13. IC-InvitedArticles	Invited Articles
14. IC-Monograph	Monographs
15. IC-Book	Books
16. IC-Chapter	Chapters in Books
17. IC-Manual	Manuals
18. IC-RefereedProceedings	Proceedings - Refereed

Once you click on the edit settings button, you will see a screen like this. I have maximized the view so you can more easily see what you can do on this screen.



After you finish editing the settings and clicking finish you will return to the template builder screen. Remember to click on the **save icon**  before clicking on home or **EXIT**. **Exit will take you out of SEDONA.** **Home** will take you back to your main page.