CREATING AN ADVANCEMENT PORTFOLIO DOCUMENT

INTRODUCTION: There are two basic approaches. For both approaches it is suggested that you create a folder in your network drive dedicated to this and store all files related to your portfolio in that folder.

- Approach One: Use *Microsoft Word* and then **SAVE AS** a pdf.
  - o Advantages:
    - ▪ Most faculty are already familiar with *Word* and thus eliminates having to learn a new program.
    - ▪ When the *Word* document is saved as a pdf all links remain intact so you do not have to relink them in *Adobe Acrobat*.
    - ▪ Having all of the written, reflective content in one document may be preferable to some.
  - o Limitation: If you already have several pdf documents that you want to incorporate into the portfolio document, you will still need to use *Adobe Acrobat* for final touches.
- Approach Two: If you have just a collection documents already, you can create a Table of Contents page in *Word* and gather all documents into one file using *Adobe Acrobat Pro*. It will accept a wide range of file types including *Word* documents, pdf files, graphic files, etc. Finally, you will create links to the supporting documentation from the Table of Contents page.
  - o Advantage: If you have already converted all your artifacts (evidences) to pdf documents and you have your philosophy and other content as separate *Word* or pdf files, this may be a quicker solution.
  - o Limitation: You have to do more in *Adobe Acrobat Pro*, which may mean learning a new program. Basic instructions for each approach are included below.

APPROACH ONE:

1. Open *Microsoft Word* and begin typing your content according to the organization stipulated in the *Faculty Development and Advancement System Manual.* Include documentation needed by inserting graphics, text or objects as you normally would.
   A. There are a variety of ways to include artifacts in your portfolio document. You can capture images of other documents, pdf documents, images, web pages, etc.
   - Use the **Screenshot** function in **Word**.
     - ▫ Open the document from which you need the screenshot (an email for example).
     - ▫ From the main menu choose **Insert>Screenshot.**
     - ▫ You can choose from the thumbnail sketches of available windows open and it will put the image right in your document.
     - ▫ Edit the screenshot as needed. For example, you might want to crop the image to just the pertinent information that demonstrates the criteria.
     - ▫ Alternatively, you can choose **Insert>Screen Clipping** and choose just the section of the image that you want to insert into the *Word* document.
     - ▫ Instructions for inserting screenshots or screen clippings can be found here.
     - ▫ Format the image for text to wrap around it.

- Right click on the image.
- Choose **Wrap Text**.
- Choose **Square** or **Tight**.
- Resize and/or move the image to the desired location in the document.

- Use the **Windows Snipping Tool.**
    - [These instructions](#) show how to use the snipping tool.
    - After you get your "snip" choose **Edit>Copy.**
    - Then move to the *Word* document, right click and choose **Paste**.
    - Format the image. (See instructions above under using the screenshot function.)
- You can also use your **cell phone** or **digital camera** to take photos of documentation. Examples include the diplomas or certificates, charts or tools that you use in class, thank you notes from colleagues or students, or photos of students engaging in class activities. B. To [include a pdf document](#).
- In *Microsoft Word* move to the location where you want the pdf to appear.
- Choose **Insert>Text>Object** and choose **Adobe Acrobat Document**.
- Locate the pdf document you want to insert and select **Open**.
- The pdf document will appear as a graphic in the *Word* document. The user can double click on the image to open the file in *Adobe Reader*. Plesae note the following limitations.
    - Even though that pdf document is now embedded in the *Word* document (clicking on it will open the document in *Adobe Reader*), when the *Word* document is converted to a pdf, this function will be lost so you will only have an image of the first page of the document. If your pdf document has only one page, this is the quickest way to get it in your document.
    - If your pdf document has more than one page and all pages are critical to your documentation, then you will need to use *Adobe Acrobat Pro* later to add that document to your portfolio as an appendix. You can also embed spreadsheets this way.
2. At the end of the document you can add appendices containing artifacts or documentation as needed.
3. Go to the beginning of the document and create a table of contents. Indicate the page numbers where each section of your portfolio can be found. You can type the contents manually or have *Word* [generate the table of contents for you](#).
4. Add hyperlinks.
   A. Link to a website:
      - Select text to link.
      - Right click on it and choose **Hyperlink.**
      - Type (or copy/paste) the URL into the address bar in the dialog box.
   B. Link to a document in your public_html folder (if you don't know what this is don't worry about it)
         Select text to link.
      - Right click on it and type the path to your public-html folder.

- This is the general format to use, but add the path to your own course and document. Adding public_html to the path is not necessary and will cause the link to break.
  https://home.bju.edu/academics/courses/ED300/index.html
- You cannot link to documents within your private network folders or to folders and documents on the hard drive of your personal or University computer/laptop. You can only link to publicly accessible folders like your course public_html folder. Links to your private folders will work for you but not anyone else, since you are the only one with rights to those folders. C. Link to a place within the document itself.
- Move to the location in the document that you want to link to (for example, Appendix A).
- Click at the beginning of the Appendix.
- Choose **Insert, Bookmark.**
- Name the bookmark something to identify the location – AppendixA, for this example.
- Now move back to the text you want to link to the Appendix.
- Select the text.
- Right click.
- Choose **Hyperlink.**
- On the left side of the dialog box, choose **Places In This Document.**
- Select the bookmark you created (AppendixA).
- The text will now move to Appendix A when you **Control>Click** on it.

5. When the document is complete and all links and artifacts have been added, save it to your network folder. Then save the document as a pdf.
   A. **File>Save As**
   B. Click on **Save As Type** and choose pdf from the list.
   C. You now have a pdf document as well as a *Word* document. All links should work in the new pdf.
   D. To add other documents to this one, you can follow the instructions below for using Adobe Acrobat Pro.

APPROACH TWO:

1. Create a Table of Contents page to serve as a "home" page. This document will direct the reviewer to the main parts of your portfolio and documentation. Suggestions and an example are in the manual on page 33. Make sure your page numbers are accurate.
   A. If you used approach one above and you added a table of contents page in your *Word* document, your numbering should be fine.
   B. If you already have a pdf portfolio document and you just created the table of contents as a separate *Word* document, your pagination will be off in the final documentation because you will be **adding** the table of contents to the beginning of that document.
2. Copy the entire portfolio folder to the desktop of your computer, including all documentation (artifacts) that you wish to link to.
3. Open *Adobe Acrobat Pro*. Access to the program is available in the START menu on your University laptop.

4. Choose **Create>Merge Files From a Single PDF** (also available in the Combine menu).

5. In the dialog box on the upper left, choose **Add Files** and then **Add Folder**.

6. Navigate to the folder (on the desktop) with all your portfolio documents and artifacts. Select the folder and click OK. You should see all the files in that folder show up in a list in the dialog box.

7. Arrange the documents in the order you wish them to appear in the final document by dragging them to the correct location in the list.

8. Select **Combine Files** in the lower right hand corner of the dialog box.

9. *Adobe Acrobat* will combine all of the files you selected into one pdf document and present you with a dialog box asking for a document name (it suggests binder1.pdf) and location for saving. Save the file in your network folder. **NOTE**: *Acrobat* will convert most of the standard file formats to pdf, but not all. Any *Office* document will be fine, as well as standard graphic formats like jpg, bmp, gif, tiff and png. It will not, however, accept an email file saved from *Outlook* (msg files). Take screenshots of emails with the *Snipping Tool* or save them in .txt format.

10. Insert hyperlinks.

   A. In your new pdf document, move to the first page (Table of Contents).

   B. Select the text that you want to link FROM (the text that will be the hyperlink to something else).

   C. RIGHT click and choose **Create Link**.

      ▫   For **Link Type** choose **Visible**

   Rectangle. ▫   For **Line Style** choose

   Underline. D. Click the **Next** button.

   E. **Scroll or move to the location in the document that you want to link TO**.

   F. Click on the **Set Link** button**. It's important to follow step E. above, and it's easily missed. If you don't your link will go to the same page you're linking FROM.**

   G. Test the link. If it doesn't move to the right location, undo (**CTRL>Z**) and try again.

   H. Continue until all links are created. Remember to include links that take the reviewer back to the place they were reviewing in the document. I. Save the document.

   J. If you need to delete an incorrect link follow the steps below steps:

      ▫   From the menu at the top, choose **Tools.**

      ▫   Choose **Select Object Tool**.

      ▫   Click on the link. You should see the blue handlebars/outline of the link rectangle.

      ▫   Press the delete key and it should disappear.

      ▫   Now you can link to the proper location.