

# Electronic Tenure Portfolio Submission Guidelines

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*Agriculture/Agribusiness Department*

*University of Wisconsin - Extension*

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## Table of Contents

Introduction .....	1
Technical Standards .....	1
Technical Support .....	1
Software Requirements .....	1
Hardware Requirements .....	2
File & Folder Structure .....	2
File Formats .....	2
Electronic Tenure Portfolio Document Structure .....	3
Section G of Appendix C .....	4
Required Processes .....	4
Backup, Backup, Backup .....	4
Collecting and Organizing Electronic Files .....	4
Windows XP or Windows Vista .....	4
Windows 7 .....	7
File Naming .....	9
Saving Files as Exhibit PDF Documents .....	9
Creating the Microsoft Word Portfolio Document .....	10
Initial Portfolio Document Creation .....	10
Adding Content to the Portfolio .....	11
Updating Table of Contents .....	11
Creating Hyperlinks to Exhibits .....	13
Creating the Final Portfolio Document .....	15
Creating Distribution Media .....	17

## Introduction

**Candidates who choose to submit their portfolio electronically must also submit a traditional hardcopy of the portfolio to their SRP committee primary and secondary reader and any other SRP committee member who requests one.**

**The candidate must also submit two traditional hard copies, plus any additional number of hard copies requested by the FTAC committee when submitting to the FTAC committee.**

**Candidates are required to use the template and process outlined in these guidelines for preparing their electronic document.**

**The electronic portfolio must follow all page formatting, layout requirements, and section length restrictions as indicated in Appendix C Tenure Portfolio Guidelines Agriculture/Agribusiness Department**

This set of guidelines is intended for faculty who submit an electronic version of their tenure portfolio. The standards, processes and steps identified within these guidelines are meant to provide a consistent method of preparing materials that will be the most accessible and usable to the people reviewing the portfolio.

This document starts by setting the standards which must be met to submit an electronic version of a tenure portfolio and is followed by a set of instructions on how to use the standards to produce the electronic version of the tenure portfolio.

## Technical Standards

### Technical Support

Technical support for the processes identified in these guidelines is provided by Cooperative Extension Technology Services staff. Please contact staff in the following order:

1. Tony Roman, tony.roman@ces.uwex.edu , 800.760.7610
2. Lisa Linfield, lisa.linfield@ces.uwex.edu , 608.265.4957
3. Greg Johll, greg.johll@ces.uwex.edu, 608.262.9486

### Software Requirements

The following software is a required minimum to be able to submit and review an electronic version of a tenure portfolio:

- Microsoft Office 2007 or Microsoft Office 2010
- Adobe Acrobat Reader version 9 or later

Microsoft Office 2010 is available to county based faculty at no charge for installation on work computers and for \$8 (billed to county office) for a work-at-home disc. Contact Greg Johll if you

need Microsoft Office 2010. Campus based faculty and staff should contact their network administrators for access to the appropriate versions of the software.

Adobe Acrobat reader is free and may be downloaded at: <http://get.adobe.com/reader/>. Please contact your county or department IT staff if you have policy in regard to installing software on your computer.

If software other than Microsoft Office or Adobe Acrobat Reader is required to view, listen or interact with any electronically submitted material, it will be the responsibility of the candidate to ensure anyone reviewing the portfolio has access to the software needed to view/interact with the material.

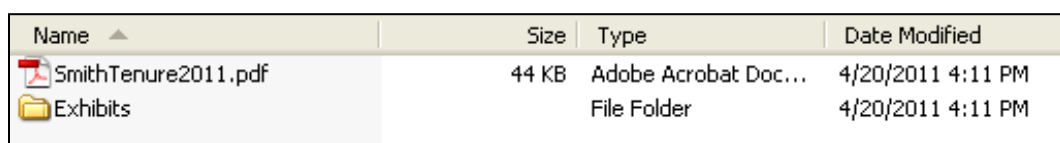
### Hardware Requirements

The media formats on which the materials are to be submitted are CD-ROMs or Flash Drives (also known as Jump or Thumb drives) that connect via the computer’s USB port. While DVD-ROM is an option, if the materials do not fit on CD-ROM, a Flash drive is recommended to ensure greatest accessibility by the reviewers.

### File & Folder Structure

The following describes the structure of files and folders on the media (CD-ROM or Flash Drive) being submitted for review. This structure provides an organized way to easily identify the primary tenure document and the documents provided as the supporting exhibits.

The primary tenure document will be located in the main (root) folder of the media. This is the file a reviewer will open to begin the process of reviewing the electronic portfolio. It will contain links to the documents to the exhibits. A sub-folder named **Exhibits** will contain all supporting files referenced via links from the primary tenure document. When viewing the contents of the media, the image below is what a reviewer will see. To begin the process of reviewing they only need to double click on the PDF file.



### File Formats

This table lists standard formats for many document types and what the final format for submission in electronic format will be.

Initial File Format	Default File Extension	Final Format and Extension
Microsoft Word	.docx	.pdf
Microsoft PowerPoint	.pptx	.pdf
Microsoft Excel	.xlsx	.xls or xlsx*
Microsoft Publish	.pubx	.pdf
Any other document format		.pdf
Any audio file format	.wma, .ogg, .mp3 etc.	.mp3***
Any video file format	.wmv, .avi, .mov	.wmv***

Web page	.html, .aspx, .cfm etc.	.pdf ****
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\* Microsoft Excel spreadsheets are typically used to perform calculations. To preserve the reviewer’s ability to interact with the spreadsheet keep the Excel format. Unless required, save as an .xls (Office 2003) version for greatest accessibility. If interactivity is not required PDF format is recommended.

\*\* .mp3 format is the standard format for podcasts and many other audio file distribution services such as music downloads.

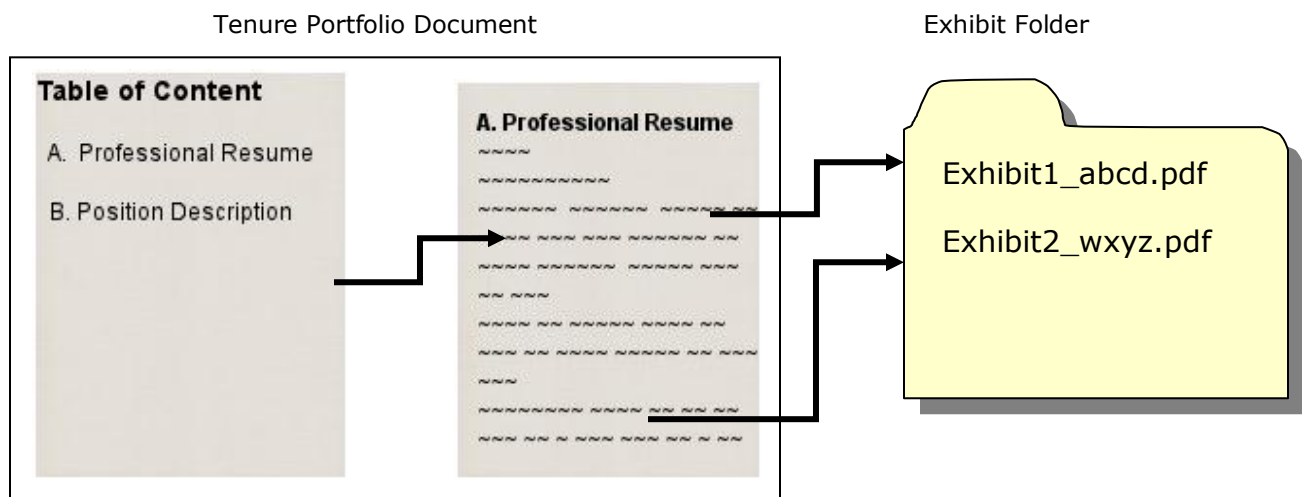
\*\*\* Most reviewers will be using a Windows based computer to review electronically submitted portfolios. The .wmv video format may be viewed by the default Windows Media Player that comes standard on a Windows computer.

\*\*\*\* A screen capture method that allows the candidate to paste an image into a Microsoft Word document that is saved as a PDF file is the recommended method for displaying web based content. If a web site is interactive and it is critical for the reviewers to be able to interact with the site, it should be noted that a live internet connection is required to review the exhibit along with an active hyperlink to the site.

### Electronic Tenure Portfolio Document Structure

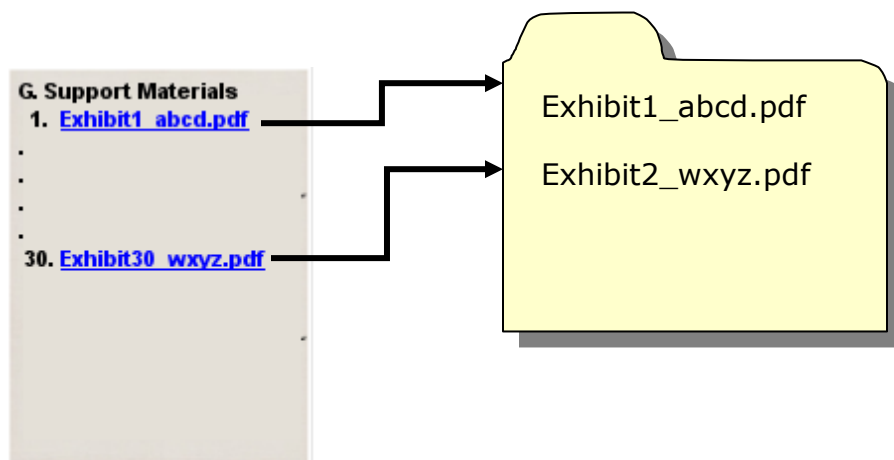
The electronic version of the tenure portfolio document will be a PDF file that consists of a Table of Contents that links to sections A through G as identified in part VI of Appendix C – Tenure Portfolio Guidelines Agriculture/Agribusiness Department.

Where appropriate within each section, links to the corresponding file within the exhibits folder will be created. The links to the supporting exhibit files will open in a new window.



## Section G of Appendix C

In the electronic submission of portfolios, Section G is a secondary table of contents listing each of the exhibits which are links to the exhibit within the **Exhibits** folder.



**For the traditional hardcopy version, Section G will be a print out of the exhibits. If an exhibit is an audio, video or Excel spreadsheet meant to be manipulated, an electronic version on CD or flash drive will be provided.**

## Required Processes

While a candidate is able to use their own process to put the electronically submitted portfolio in the format described above, the following processes are provided as examples and best practices.

### Backup, Backup, Backup

The portfolio is the most important document you will create towards achieving tenure. It is highly recommended to have multiple backup copies of your portfolio kept in different locations. Backing up your portfolio can occur in many ways from fully automated to fully manual processes. Check with your county, unit or departmental IT staff for information on how files on your work computer are backed up. You may also want to keep a copy on flash drives or on a remote file storage service “in the cloud”. You may contact the CE Tech Services help desk for more assistance at 800.760.7610.

## Collecting and Organizing Electronic Files

### Windows XP or Windows Vista

In general, the process for creating the electronically submitted portfolio consists collecting and organizing the files on your computer, converting them to the appropriate format if necessary, and creating the electronic version of the portfolio document following the guidelines in *Appendix C – Tenure Portfolio Guidelines Agriculture/Agribusiness Department*.

On your hard drive, in the **My Documents** folder, create a folder called **Portfolio**. In the Portfolio folder create two sub-folders, **Working Documents** and **Final Documents**.

My Documents\Portfolio			
Name	Size	Type	Date Modified
Final Documents		File Folder	4/20/2011 4:11 PM
Working Documents		File Folder	4/20/2011 4:09 PM

The Working Documents folder will contain all of your documents in original format.









My Documents\Portfolio\Working Documents			
Name	Size	Type	Date Modified
Exhibit_18_Dairy_nutrition_calves_to_prefresh.ppt	6,906 KB	Microsoft Office Po...	2/10/2011 3:39 PM
Exhibit_01_Bluff_Country_Master_Gardener_Newsletter.pdf	528 KB	PDF File	2/10/2011 3:39 PM
Exhibit_02_Guide_to_Raising_Healthy_Pigs.pdf	675 KB	PDF File	2/10/2011 3:39 PM
Exhibit_03_Big_Spread_Exists_on_Hours_Needed_to_Raise_Calves.pdf	163 KB	PDF File	2/10/2011 3:39 PM
Exhibit_04_UWEX_Western_Wisconsin_Foliar_Fungicide_trials_o.doc	50 KB	Microsoft Office Wo...	2/10/2011 3:39 PM
Exhibit_05_Summary_of_the_2008_Strip_Trials_for_Foliar_Fungi.doc	544 KB	Microsoft Office Wo...	2/10/2011 3:39 PM
Exhibit_06_Garlic_Mustard_Timing_Trial.doc	232 KB	Microsoft Office Wo...	2/10/2011 3:39 PM
Exhibit_07_Variant_Western_Corn_Rootworm_Survey_Results_2007.doc	6,491 KB	Microsoft Office Wo...	2/10/2011 3:39 PM
Exhibit_08_Foliar_Fungicides-Do we need them in corn product.pdf	1,906 KB	PDF File	2/10/2011 3:39 PM
Exhibit_09_.doc	90,950 KB	Microsoft Office Wo...	2/10/2011 3:39 PM
Exhibit_09_Real_Herds_Real_Heifers_the_cost_ofrais.pdf	37,874 KB	PDF File	2/10/2011 3:39 PM
Exhibit_10_JCEP 2008 Version.ppt	3,761 KB	Microsoft Office Po...	2/10/2011 3:39 PM
Exhibit_10_Soybean_cyst_nematodes_and_aphids.pdf	73 KB	PDF File	2/10/2011 3:40 PM
Exhibit_11_.doc	32,229 KB	Microsoft Office Wo...	2/10/2011 3:40 PM
Exhibit_11_Evaluation of Dietary Phosphorus on Reproduction .pdf	502 KB	PDF File	2/10/2011 3:40 PM
Exhibit_11_evaluation.ppt	4,875 KB	Microsoft Office Po...	2/10/2011 3:40 PM
Exhibit_12_UW_Center_for_Agriculture_safetyandhealth_2007_co.doc	59 KB	Microsoft Office Wo...	2/10/2011 3:40 PM
Exhibit_13_West_central_Wisconsin_Specialized_Agricultural_P.pdf	121 KB	PDF File	2/10/2011 3:40 PM
Exhibit_14_wkbt_letter_of_recognition.pdf	567 KB	PDF File	2/10/2011 3:40 PM
Exhibit_15_LaX_Cty_UWEX_Horticulture_Survey_Winter_05_06.pdf	76 KB	PDF File	2/10/2011 3:40 PM
Exhibit_16_LaX_Cty_UWEX_Agriculture_Survey_Winter_05_06.pdf	89 KB	PDF File	2/10/2011 3:40 PM
Exhibit_17_MilkMoney.pdf	248 KB	PDF File	2/10/2011 3:40 PM
Exhibit_18_dairynutrition_calves_to_prefresh.doc	61,816 KB	Microsoft Office Wo...	2/10/2011 3:40 PM
Exhibit_18_dairynutrition_calves_to_prefresh.pdf	706 KB	PDF File	2/10/2011 3:40 PM
Exhibit_19_Dairy_Herd_Health_and_Management_Clinic_2006_Prog.doc	37 KB	Microsoft Office Wo...	2/10/2011 3:40 PM

When completed the **Final Documents** folder will contain two files and the **Exhibits** sub-folder.

My Documents\Portfolio\Final Documents			
Name	Size	Type	Date Modified
Exhibits		File Folder	4/20/2011 4:11 PM
SmithTenure2011.pdf	44 KB	PDF File	4/20/2011 4:11 PM
Smith Tenure Portfolio.docx	10 KB	Microsoft Office Wo...	4/22/2011 11:10 AM

**Note: When you make the media (CD or Flash Drive) to distribute to the reviewers, the PDF file and the Exhibits folder and its content will be copied to the media. The Word document will not be distributed to the reviewers.**

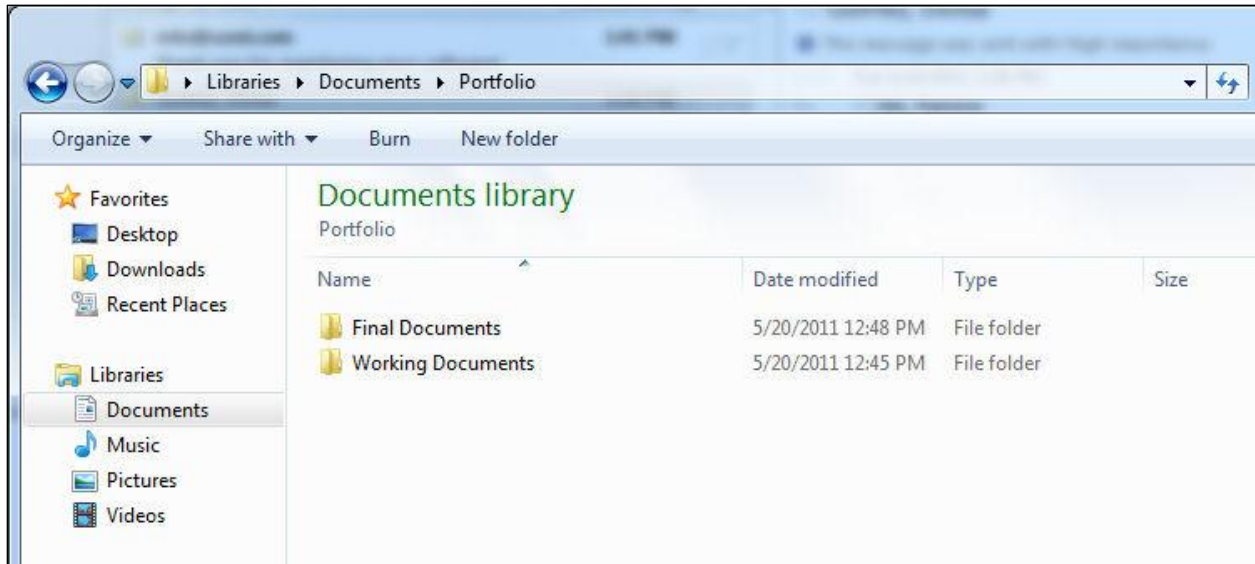
The **Exhibits** folder will contain the exhibits in final format as described above.

My Documents\Portfolio\Final Documents\Exhibits			
Name ▲	Size	Type	Date Modified
 exhibit_13_West_central_Wis...	121 KB	PDF File	2/10/2011 3:40 PM
 Exhibit_01_Bluff_Country_Ma...	528 KB	PDF File	2/10/2011 3:39 PM
 exhibit_02_Guide_to_Raising...	675 KB	PDF File	2/10/2011 3:39 PM
 exhibit_03_Big_Spread_Exists...	163 KB	PDF File	2/10/2011 3:39 PM
 Exhibit_08_Foliar Fungicides-...	1,906 KB	PDF File	2/10/2011 3:39 PM
 exhibit_09_Real_Herds_Real_...	37,874 KB	PDF File	2/10/2011 3:39 PM
 Exhibit_10_Soybean_cyst_ne...	73 KB	PDF File	2/10/2011 3:40 PM
 Exhibit_11_Evaluation of Diet...	502 KB	PDF File	2/10/2011 3:40 PM

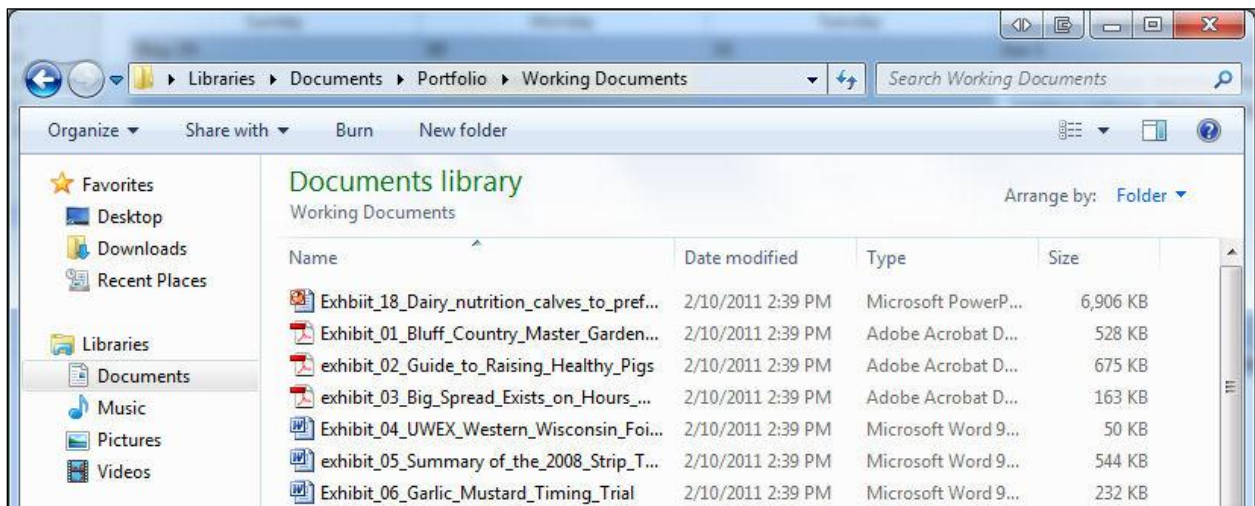
## Windows 7

In the Windows 7 operating system, the **My Documents** folder does not exist. Instead Windows 7 has Libraries.

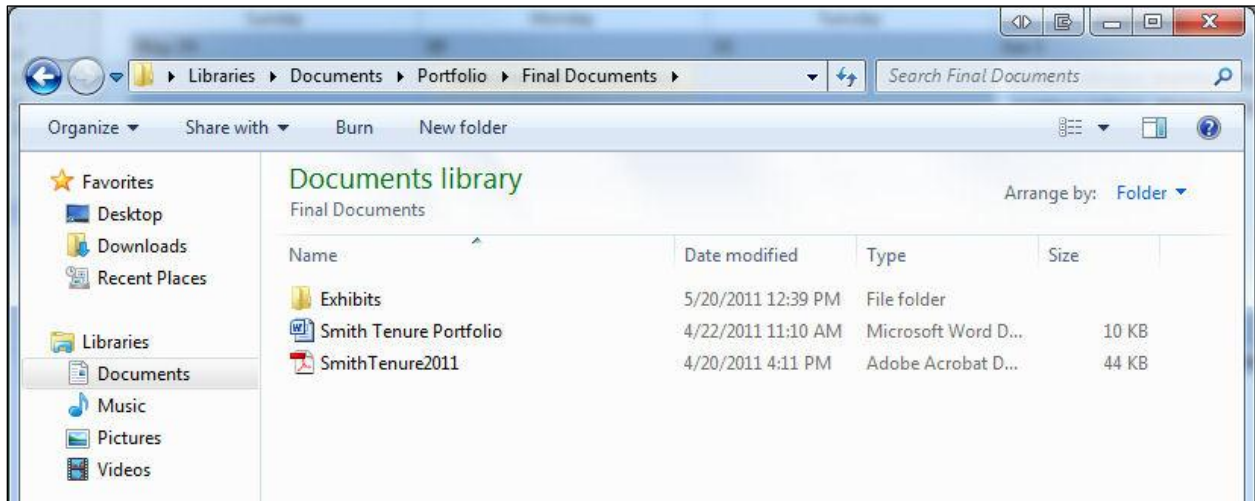
On your hard drive, in the **Documents Library**, create a folder called **Portfolio**. In the Portfolio folder create two sub-folders, **Working Documents** and **Final Documents**.



The Working Documents folder will contain all of your documents in original format.

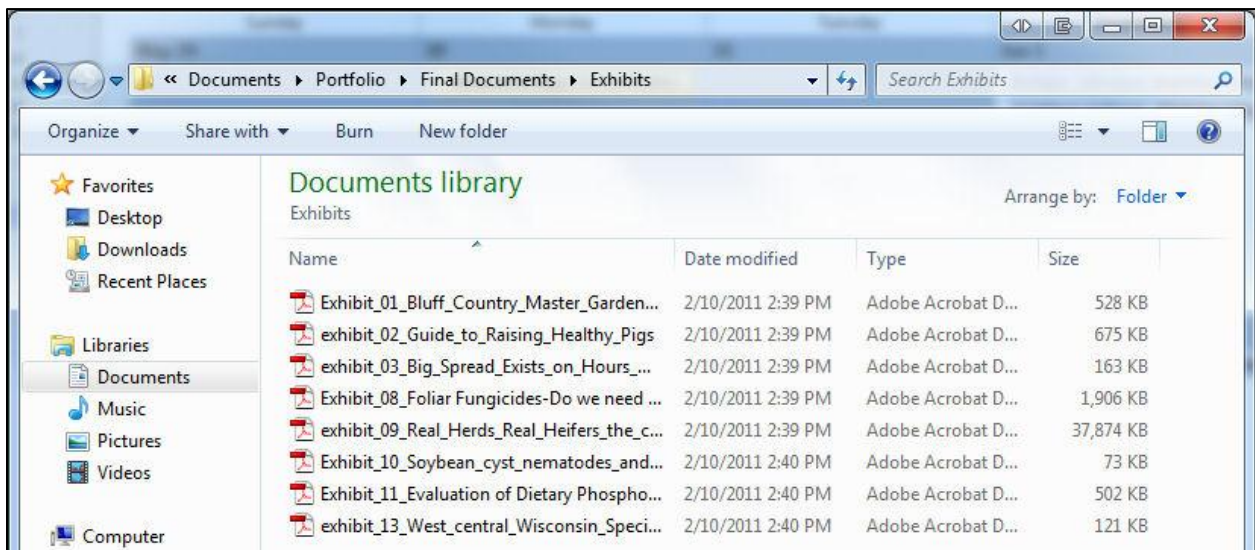


When completed the **Final Documents** folder will contain two files and the **Exhibits** sub-folder.



**Note: When you make the media (CD or Flash Drive) to distribute to the reviewers, the PDF file and the Exhibits folder and its content will be copied to the media. The Word document will not be distributed to the reviewers.**

The **Exhibits** folder will contain the exhibits in final format as described above.



## File Naming

Consistent file naming will make it easier to manage and locate files for both the candidate and the reviewers. Within the **Exhibits** folder the following standard naming convention will be used:

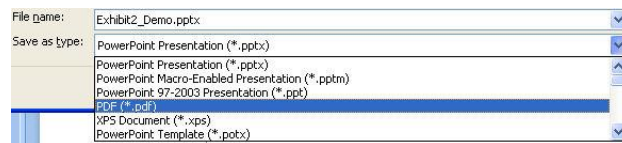
Exhibit[x]\_NameOfFile.[pdf, xlsx, mp3, wmv]

where x = the exhibit number and the file extension is one of the accepted file formats from the above table.

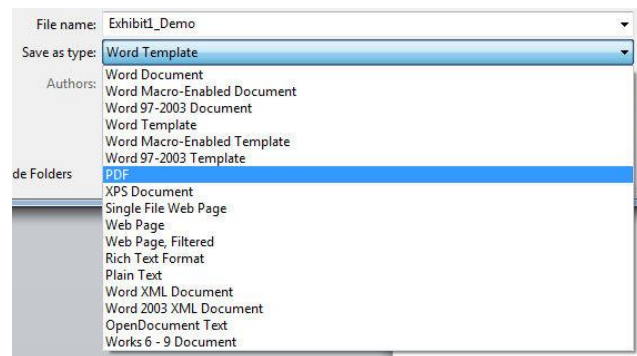
Examples: Exhibit1\_AllStaffConference2010Presentation.pdf  
Exhibit12\_LocalDairyProducersPresentation4-12-2011.pdf  
Exhibit34\_CornVarietyTrialResultsPodCast10-27-2009.mp3  
Exhibit48\_RationCalculationSpreadSheet.xls  
Exhibit52\_MilkingParlorSafetyVideo9-6-2010.wmv

## Saving Files as Exhibit PDF Documents

Microsoft Office 2007 and 2010 will allow you to save as a PDF file from within the application by choosing **Save As** and the selecting PDF (.pdf) from the **Save as Type:** pull-down menu.



Microsoft Office 2007



Microsoft Office 2010

Be sure to save these PDF files in the **Exhibit** folder as described above.

## Creating the Microsoft Word Portfolio Document

As mentioned previously, this document requires the use of Microsoft Office 2007 or 2010. As seen above on Page 3 of this document the finished product will be a PDF file with a table of contents that links to sections A through G, as identified in part VI of Appendix C – Tenure Portfolio Guidelines Agriculture/Agribusiness Department.

To achieve the ability to create the table of contents and the final links within the PDF file, the portfolio document must be created using the *Table of Contents* and *Formatting Styles* features of Microsoft Word. There are two ways to accomplish this:

1. Manually insert a table of contents in your portfolio and use the heading styles for the section headers A through G, making sure you update the table of contents as you complete the document.
2. Use the preformatted Microsoft Word file, **Ag Tenure Portfolio Template.docx** which includes a cover page, the table of contents, appropriate section style formatting, and page numbering in the footer. Be sure to update the table of contents as you complete the document (see below).

For purposes of this document, the **Ag Tenure Portfolio Template.docx** file will be used. Questions related to the use of formatting styles are addressed in training available via Cooperative Extension Technology Services and may be specifically addressed to Lisa Linfield.

### Initial Portfolio Document Creation

In Microsoft Office Word 2007 or 2010, open the file **Ag Tenure Portfolio Template.docx**. The first page of the template is the cover page. This is a formal construct of the document. Do not delete this page. Instead, replace the text (including the brackets []) with what you want for a cover page.

[REPLACE THIS TEXT WITH YOUR COVER PAGE]

After placing information such as your name and the year, do a **Save As** where you give the file a new name (*e.g.* Smith Tenure Portfolio) and save it in the **Final Documents** folder so as to create the structure described above.

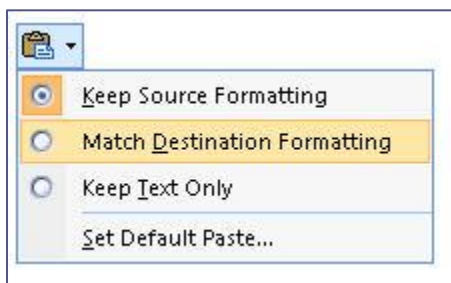
## Adding Content to the Portfolio

The **Ag Tenure Portfolio Template.docx** document template includes a heading for each section A through G as identified in *Appendix C – Tenure Portfolio Guidelines Agriculture/Agribusiness Department*. Your content goes directly after the section heading and replaces the text holder [REPLACE THIS TEXT WITH YOUR *Section Name*].

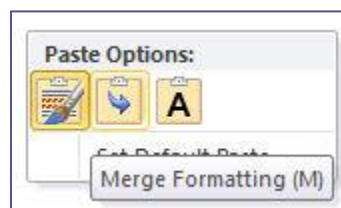
### Professional Resume

[REPLACE THIS TEXT WITH YOUR PROFESSIONAL RESUME]

You may either type directly into or use copy/paste to insert your content into the appropriate section. If you use copy/paste, you may select Keep Source Formatting, Match Destination Formatting, Keep Text Only (Office 2007), or Keep Source Formatting, Merge Formatting or Keep Text Only (Office 2010). Select whichever looks best.



Microsoft Office 2007



Microsoft Office 2010

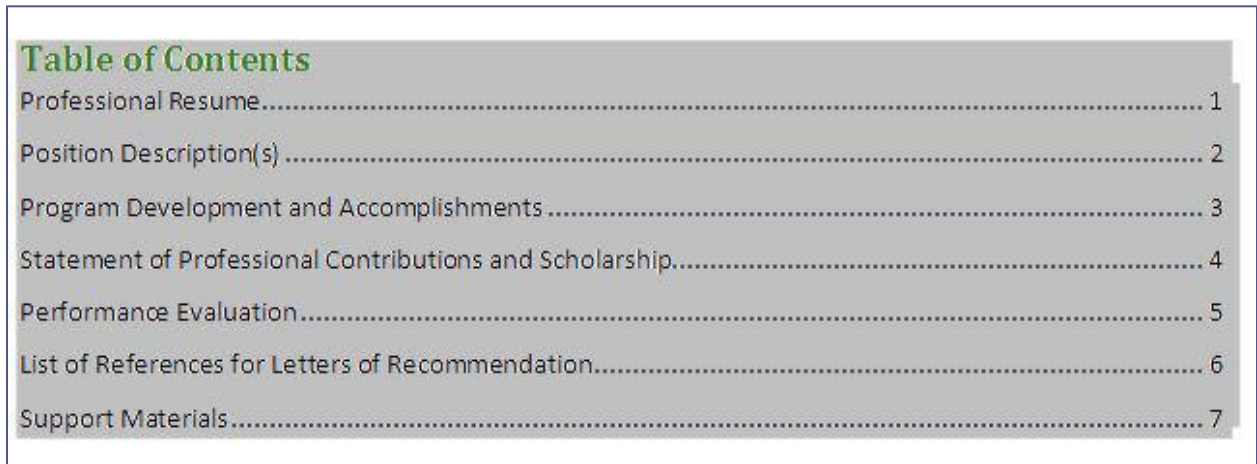
## Updating Table of Contents

As you add content to the different sections of your document section labels for each of the sections will move down onto a different page. For example, say your professional resume is five pages long. The next section, Position Description now starts on Page 6, but the Table of Contents still indicates it is on Page 2.

### Table of Contents

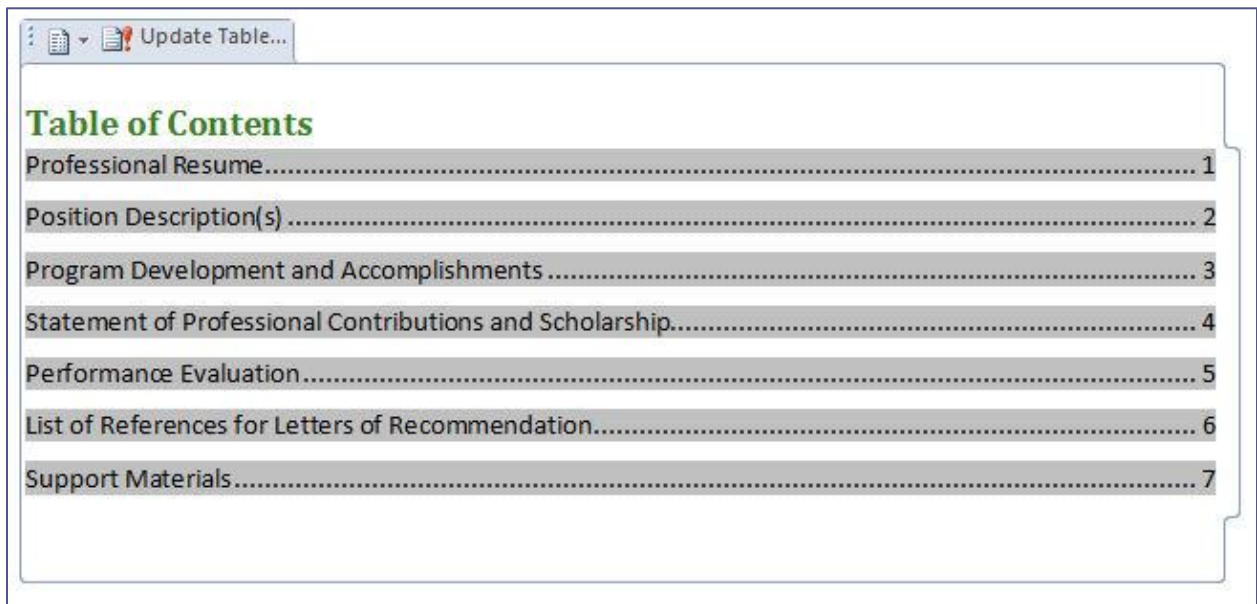
Professional Resume.....	1
Position Description(s).....	2
Program Development and Accomplishments.....	3
Statement of Professional Contributions and Scholarship.....	4
Performance Evaluation.....	5
List of References for Letters of Recommendation.....	6
Support Materials.....	7

To update the Table of Contents, place the cursor within the Table of Contents and left-click once with the mouse. This will highlight the table of contents.

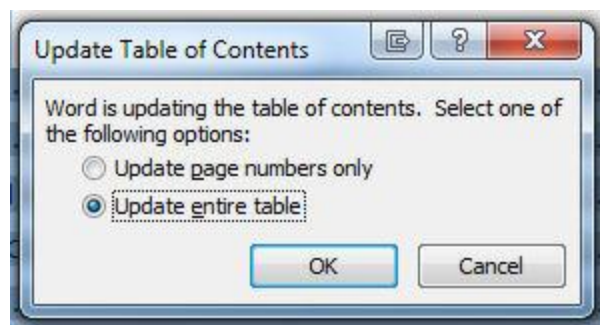


<b>Table of Contents</b>	
Professional Resume.....	1
Position Description(s) .....	2
Program Development and Accomplishments .....	3
Statement of Professional Contributions and Scholarship.....	4
Performance Evaluation.....	5
List of References for Letters of Recommendation.....	6
Support Materials.....	7

Move the mouse towards the upper left corner of the table of contents and a menu to update the table of contents will appear and the highlighting will change.



Click on **Update Table...** and the Update Table of Contents pop-up window will appear. Click the radio button to the left of Update Entire Table and click on **Ok**.



You now have an updated Table of Contents. It is **very important** to update the Table of Contents whenever you add content so the final PDF document provided to the review committee functions properly.

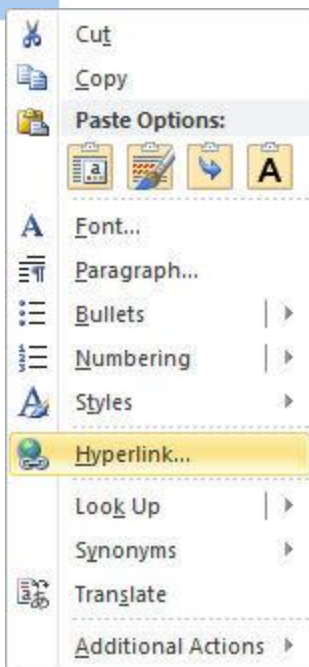
<b>Table of Contents</b>	
Professional Resume.....	1
Position Description(s) .....	6
Program Development and Accomplishments .....	7
Statement of Professional Contributions and Scholarship.....	8
Performance Evaluation.....	9
List of References for Letters of Recommendation.....	10
Support Materials.....	11

### Creating Hyperlinks to Exhibits

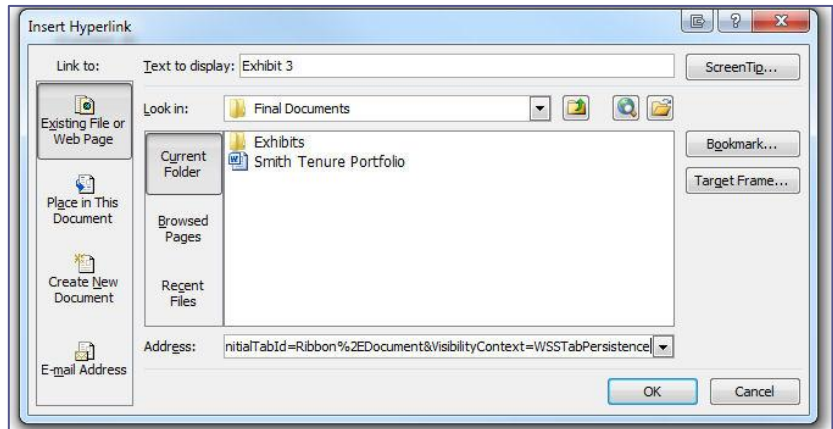
Throughout your portfolio document you will want to create links to exhibits that support your application for tenure. The hyperlink will allow the reviewer to click on the link and have the exhibit open in a new window, examine the exhibit, close the window and be back to the location of the hyperlink within your portfolio document.

To create the hyperlink, highlight the text which is to become the link. To view the context menu, right-click with the mouse on the highlighted text.

(Exhibit 3)

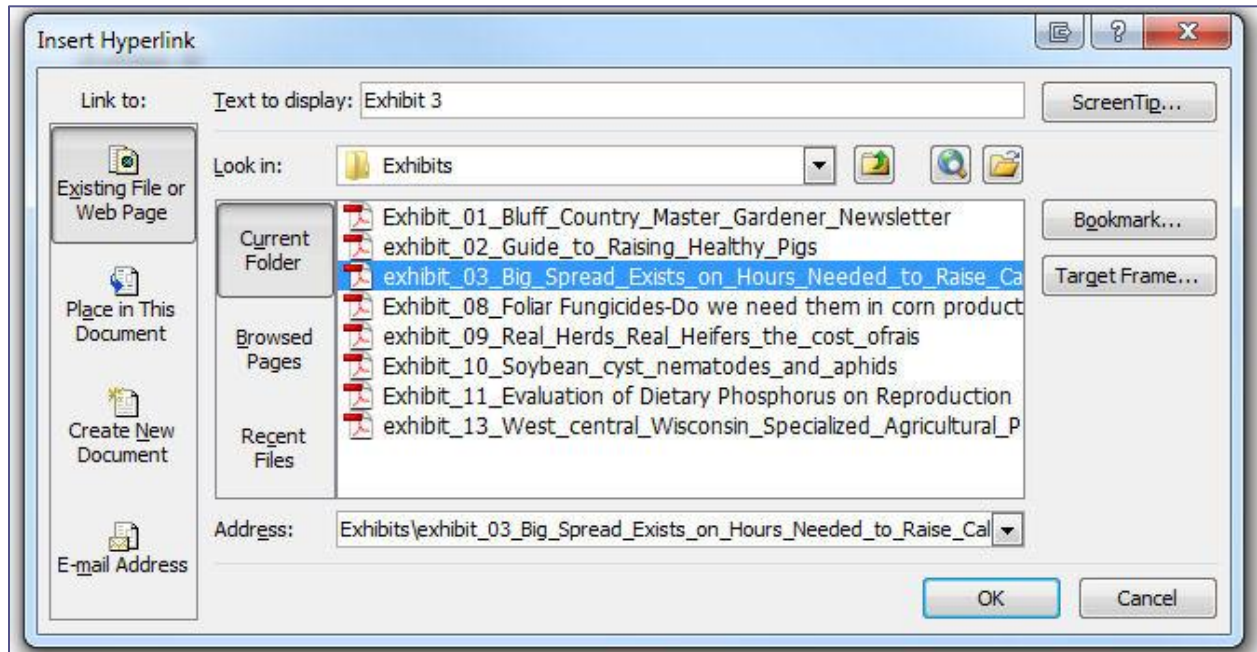


Select **Hyperlink...** from this menu and the Insert Hyperlink pop-up window appear.



Notice that you are in the **Final Documents** folder where you saved your portfolio document as described above.

Double click on the **Exhibits** folder to view the list of documents in that folder. Click on the name of the file to which you want to link. Click on the **Ok** button.



The highlighted text will now become an underlined hyperlink.



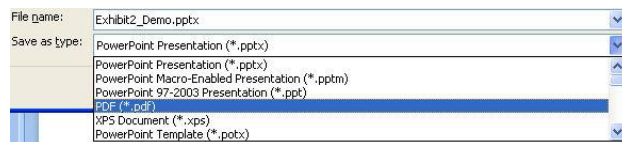
While in Microsoft Word, the link will work correctly if you hold down the Ctrl (Control) key and then click the link. Once the Word document is converted to a PDF file, the link will function as a normal link without using the Ctrl Key.

## Creating the Final Portfolio Document

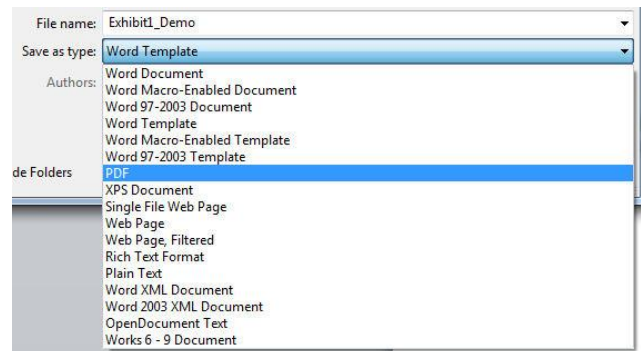
Now that you have finished putting all of your content into your portfolio document and have created all the hyperlinks to supporting exhibits, it is time to create your final portfolio document. This is the PDF file that will be distributed along with the exhibits to your review committee.

But first... **Update the Table of Contents!** As instructed above, go through the process of updating the Table of Contents one last time. This is a critical step to ensure the PDF file created in this step will function properly for members of your review committee.

To create the PDF file, click on **Save As As** and the selecting PDF (.pdf) from the **Save as Type:** pull-down menu.



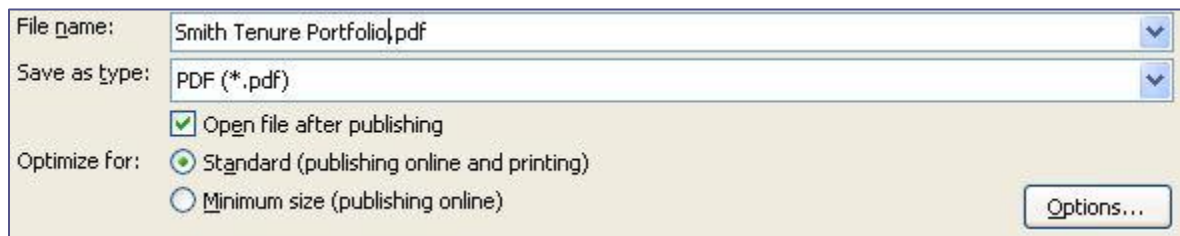
Microsoft Office 2007



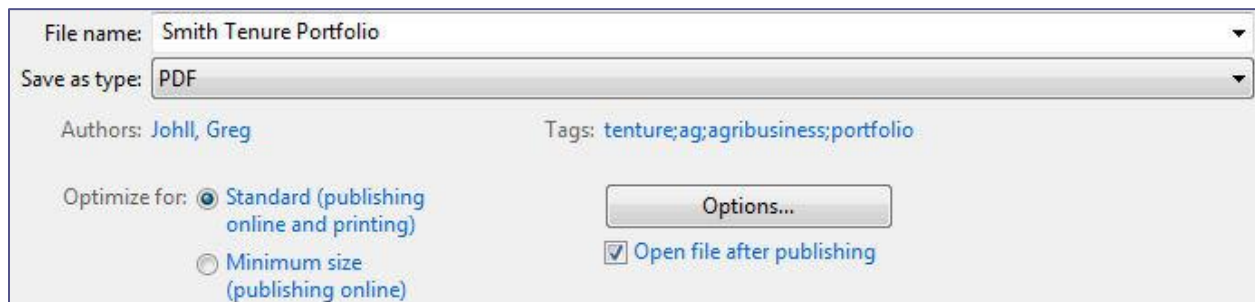
Microsoft Office 2010

The pop-up window will change and an **Options** button will appear.

In Microsoft Office 2007 it will appear like this:



In Microsoft Office 2010 it will appear like this:



Click on the **Options** button. The **Options** pop-up window will appear.

Place a check in the checkbox to the left of *Create bookmarks using* and be sure the radio button for *Headings* is selected as illustrated here.

This is another critical step that creates the bookmarks that allow a reviewer to use links to move throughout your portfolio PDF file.

Click on **Ok**.

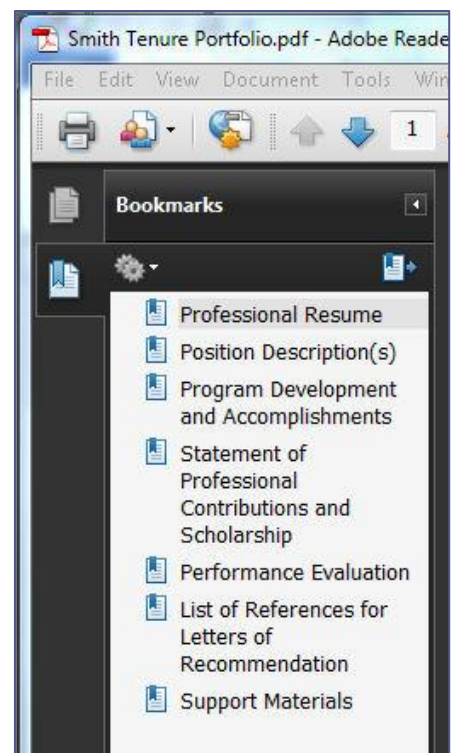
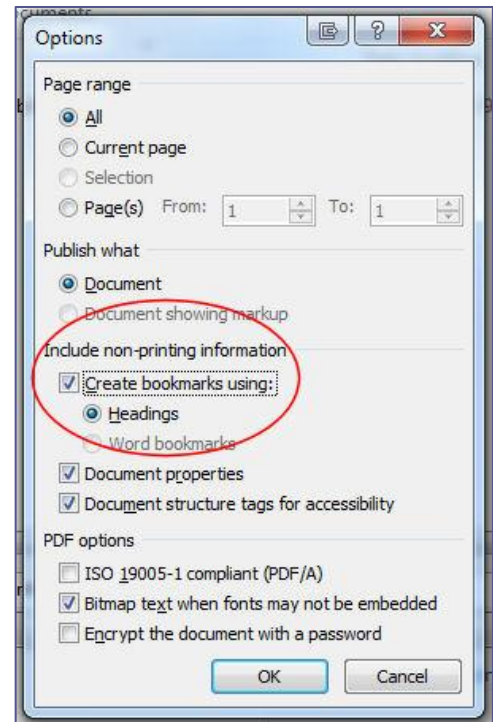
Back on the **Save As** window, make sure that you are saving this PDF file in the **Final Documents** folder as you did the Microsoft Word document as to create the file structure as described above.

Click the **Save** button.

Typically, the default settings in Microsoft Word, when saving as a PDF file, will open the PDF file in Acrobat Reader once it is created.

You have now created your electronic portfolio as a PDF file with bookmarks that link to each section within the document and links to exhibits that open in new windows.

For the reviewer, when they open your PDF file, on the left of the screen they will see a bookmark icon that may be clicked on to expand and show the sections of the document. By clicking on the name of the section, Acrobat reader will take them to that section.



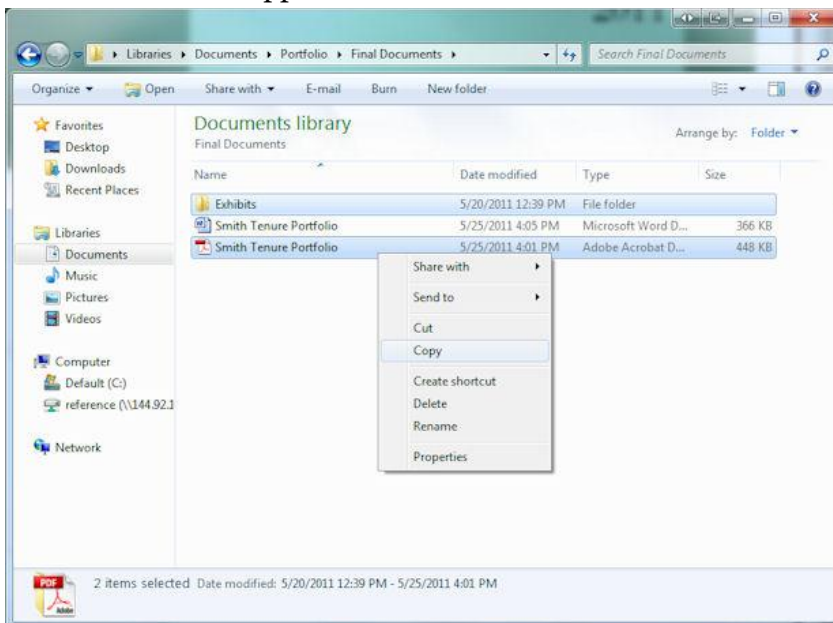
## Creating Distribution Media

To be able to submit your tenure portfolio to members of your review committee you will need to move your materials onto a data CD/DVD or a flash drive (also referred to as thumb or jump drive).

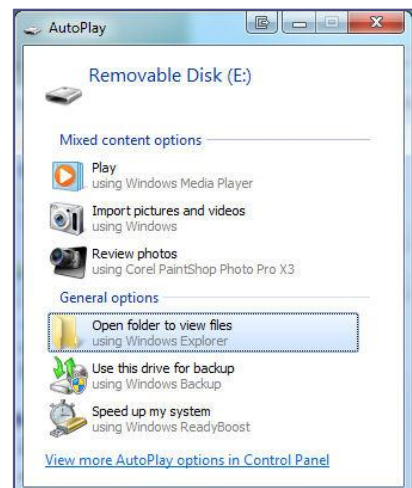
When creating the distribution media you will copy the PDF file that is your tenure portfolio document and the **Exhibits** folder to the CD/DVD or flash drive.

### Flash Drive

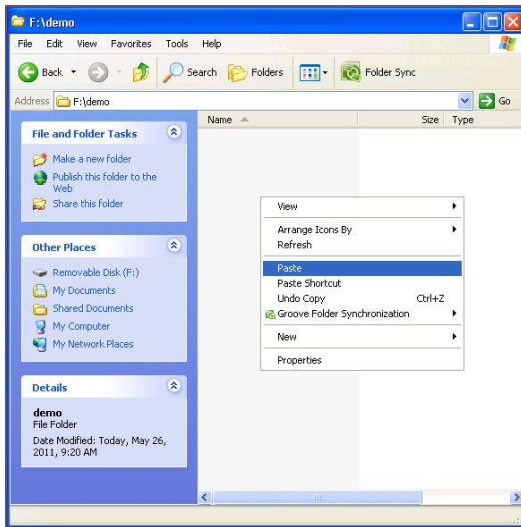
1. Open **My Computer** and navigate to the **Final Documents** folder.
2. Hold down the Ctrl key and click on your tenure portfolio document and the **Exhibits** folder to highlight those two items.
3. With the mouse, right-click on one of the highlighted items and choose **Copy** from the context menu that appears.



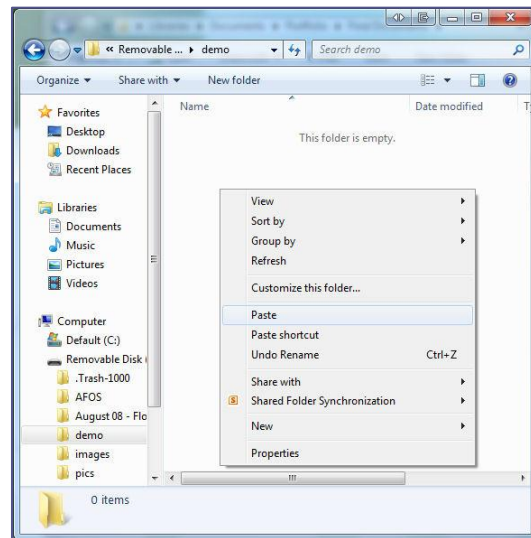
4. Insert a flash drive into a USB port on your computer.
5. When the AutoPlay window pops up, select **Open folder to view files**.



- When the new Windows Explorer window opens up, right-click with the mouse and choose **Paste** from the context menu. The file and folder will be copied to the flash drive.



Windows XP/Vista



Windows 7

- Once the materials have been copied to the flash drive remove it from the USB port.
- Repeat this process for each flash drive you need to create by going back to step #4

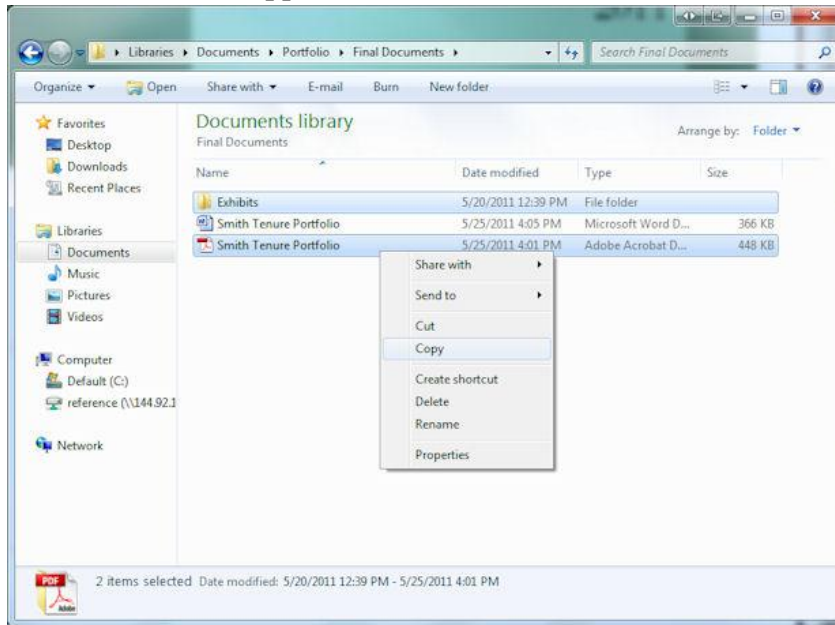
### Data CD

The recommended format is a data CD. However, if the aggregate file size of the **Exhibits** folder exceeds the capacity of a CD, a flash drive is recommended. Your computer will also require a CD-RW (read/write) drive that is capable of burning a CD. If the CD drive door does not have RW on it, it probably will not burn CDs.

There is a variety of different CD burning software that often comes installed by default on computers. The Windows operating system is also capable of burning a data CD. This document only includes instructions for Windows. If you need assistance creating the data CD please contact the CE Technology Services Help Desk at 800.760.7610.

- Open **My Computer** and navigate to the **Final Documents** folder.
- Hold down the Ctrl key and click on your tenure portfolio document and the **Exhibits** folder to highlight those two items.

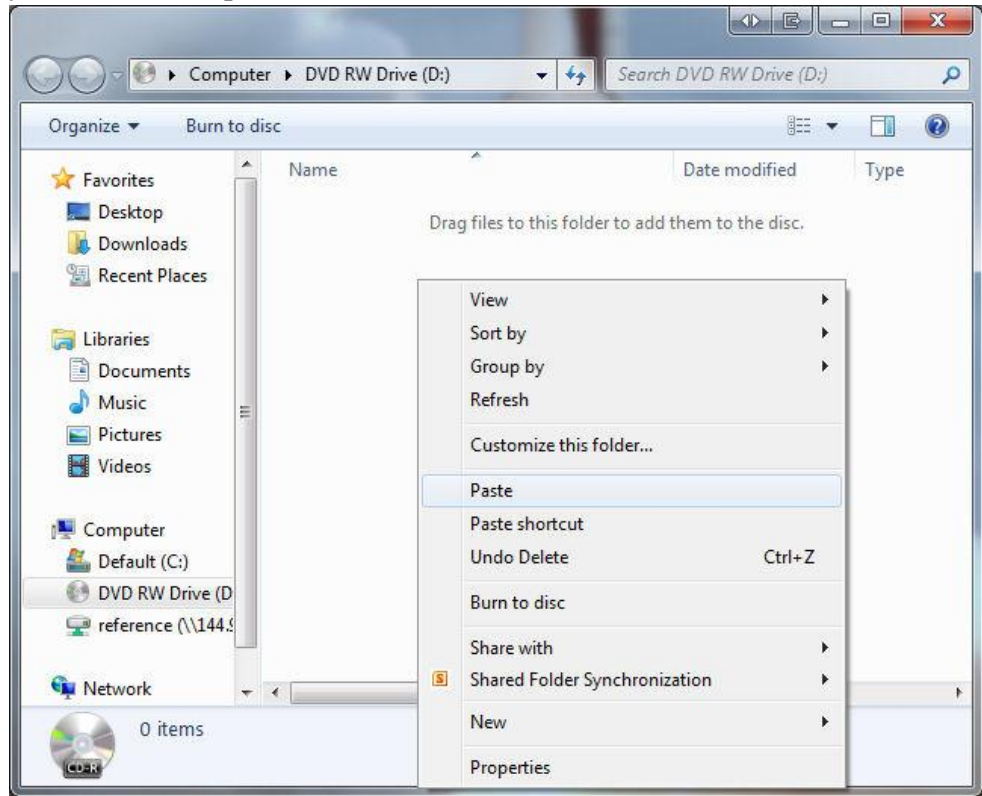
3. With the mouse, right-click on one of the highlighted items and choose **Copy** from the context menu that appears.



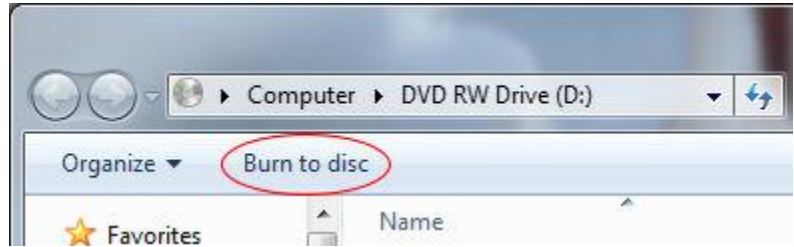
4. Place a blank CD into the CD drive of your computer.
- a. Windows 7 (Windows XP and Vista go to step b. below)
    - i. An **AutoPlay** window will pop up.
    - ii. For the Disc title, type in your name.
    - iii. Click **Burn files to disc**.
    - iv. A **Burn a Disc** window will pop up. Check the second radio button for **With a CD/DVD player**.
    - v. Click the **Next** button.



- vi. This will bring up a Windows Explorer window where you right-click with your mouse and paste the file and folder into this window.



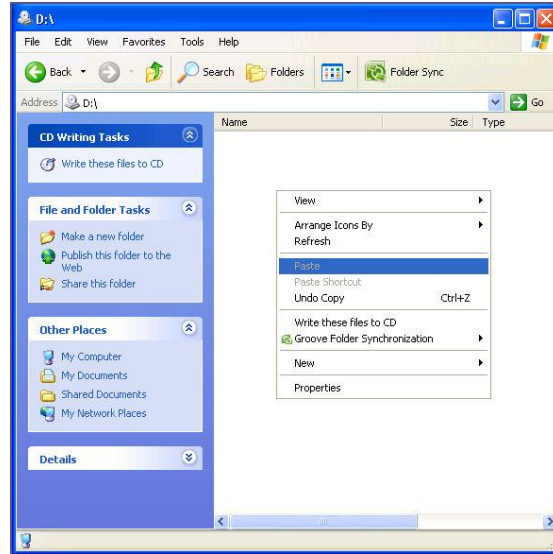
- vii. Once your file and folders are listed in this window, click **Burn to disc**.



- viii. Once the materials have been copied to the CD remove it from the drive.
- ix. Repeat this process for each CD you need to create by going back to step #4

b. Windows XP and Vista

- i. Go to **My Computer** and double click on the CD-RW Drive. This will open a Windows Explorer window.
- ii. Right-click with the mouse to bring up the context menu and select **Paste**.



- iii. Once the files have been copied, click on **Write these files to CD** in the **CD Writing Tasks** pane.



- iv. Once the materials have been copied to the CD remove it from the drive.
- v. Repeat this process for each CD you need to create by going back to step #4