

Quick Start Guide

Setting Up a Custom CV Template

Step 1: Initiate the Process

From the homepage, click the CV button under the "Generate" section and select **"Custom CV"** from the drop-down list. Click on **"Manage Templates"** at the bottom of the window.

Step 2: Create and Configure

Click **"New Template"** (or "Edit Template"), enter a descriptive name in the "Vita Template" textbox, and optionally use **"Pre-Set Options"** to instantly apply a standard baseline format.

Step 3: Adjust Content & Layout

In the editor, click any of the blue bars to expand specific display options.

- **Display:** Toggle prefaces, summary statistics, footnotes, and incomplete items.
- **Filter & Exclude:** Hide items by status, specific dates, entire categories, or hand-pick individual citations.
- **Reorder:** Use the **[Up]** and **[Dn]** links to reorganize main sections and subcategories.

Step 4: Save & Generate CV

Click **Save** to store your configuration. To the Generate a Custom Vita, select your template from the drop-down, and click **"Generate CV"** to produce your document.

Sharing Your Template: Want to let your delegates or colleagues use your layout? Expand the "Template Sharing Options" bar, check "Share this template with others," enter a description, and save.

Questions or Technical Issues?

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