

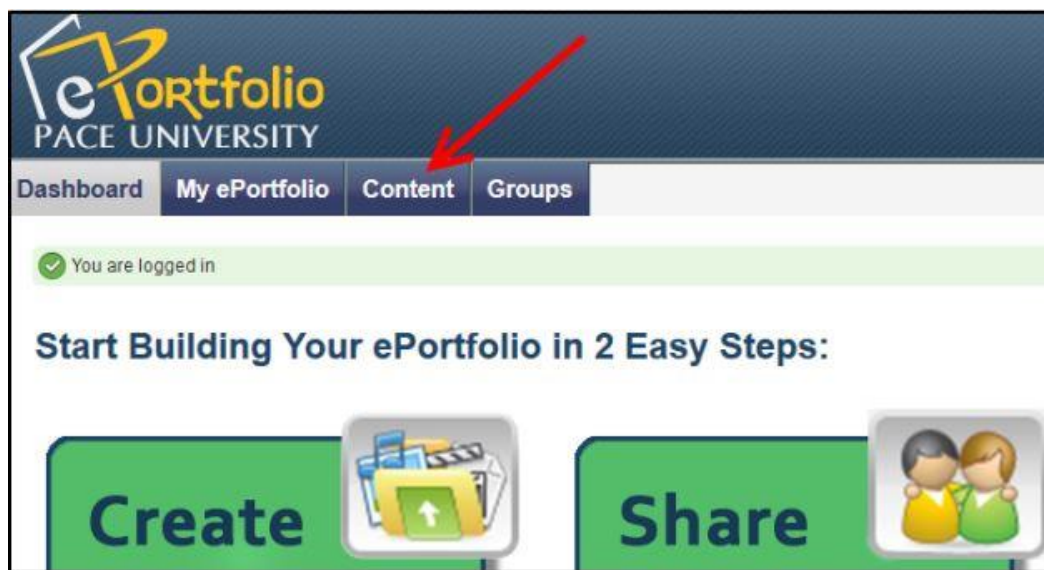
TUTORIAL

CREATING A PLAN

This tutorial will show you how to create a plan to track your goals

<http://www.help.pace.edu> PLV: 914 773 3338 NYC: 212 346 1583

1. After **logging into ePortfolio**, click the “Content” tab.

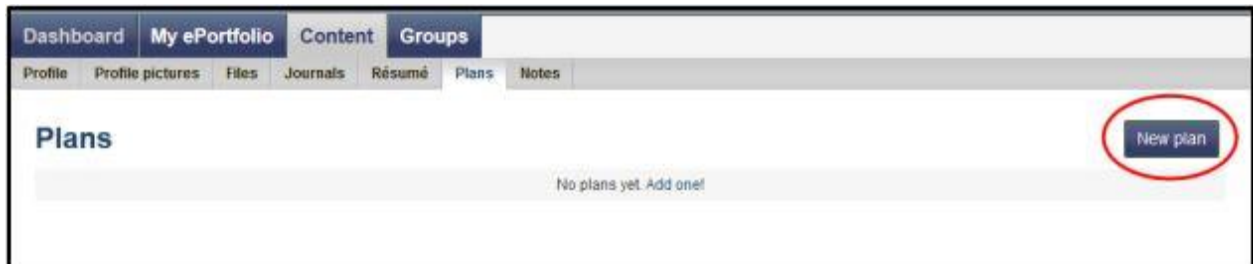


2. Click “Plans”.



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3. Click the blue “New Plan” button.



4. Enter the title of your plan. You may also enter in a description. When finished, click “Save Plan”.

A screenshot of the 'New plan' form. The form has a title 'New plan' at the top. Below it, there are three main sections: 'Title', 'Description', and 'Tags'. The 'Title' field is a text input with the value 'Maintain a high GPA'. The 'Description' field is a larger text area with the value 'This semester, I plan on maintaining my high Grade Point Average.' The 'Tags' section has a label 'Show my tags' and a text input field. Below the tags field, there is a note: 'Enter comma separated tags for this item. Items tagged with 'profile' are displayed in your sidebar.' At the bottom of the form, there are two buttons: 'Save plan' and 'Cancel'. The 'Save plan' button is circled in red. There are also red arrows pointing to the 'Title' and 'Description' fields.

5. Now you may create a series of tasks, which represent smaller steps necessary to complete your plan. Click the blue “New Task” button to add a task.



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6. **Add a title, completion date and a description** of the tasks needed to complete the plan. **Click “Save”** when finished.

New task

Title *

The title will be used to display each task in the plans blocktype.

Completion date * 

Use the format YYYY/MM/DD

Description 

Tags

Enter comma-separated tags for this item. Items tagged with 'profile' are displayed in your sidebar.

Completed ☐

Mark your task completed:

Save task **Cancel**

7. **Repeat steps 5 and 6** whenever you wish to add a new task. To mark a task as completed, **click the grey pencil icon** across from the task.

Plan 'Maintain a high GPA' tasks.

[New task](#)

Completion date	Title	Description	Completed
15 December 2014	Timeliness	Complete every homework assignment on time.	

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8. Check the completed box, and then click “Save Task”.

Editing task

Title *
The title will be used to display each task in the plans blocktype.

Completion date *
Use the format YYYY/MM/DD

Description

Tags
Enter comma-separated tags for this item. Items tagged with 'profile' are displayed in your sidebar.

Completed ☒
Mark your task completed.

Save task **Cancel**

9. Now a green check will appear next to the task.

Plan 'Maintain a high GPA' tasks.				New task
Completion date	Title	Description	Completed	
15 December 2014	Timeliness	Complete every homework assignment on time.		

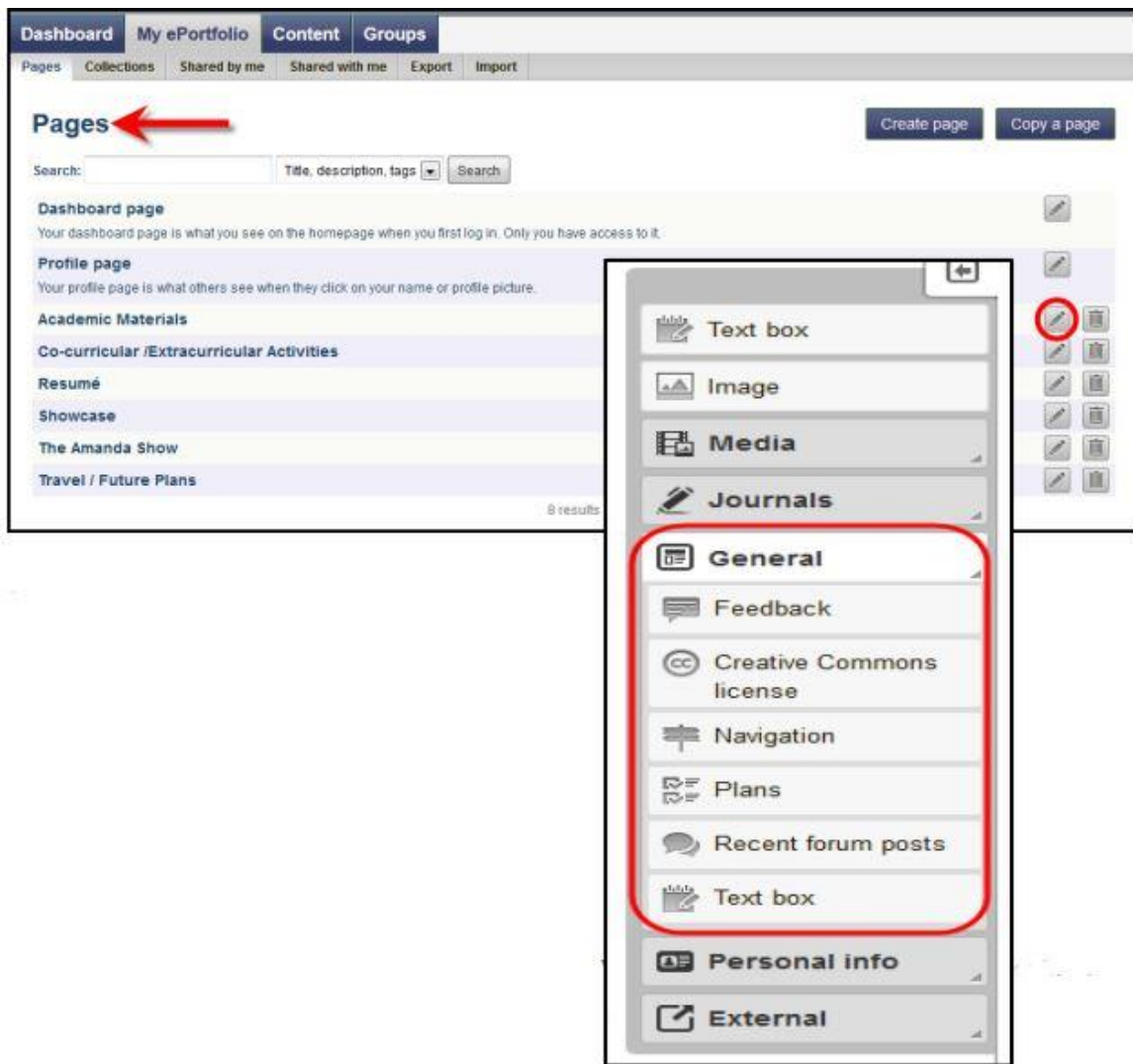
10. If a plan has not been checked as complete past the completion date, the task will turn red.

Plan 'Maintain a high GPA' tasks.				New task
Completion date	Title	Description	Completed	
1 September 2014	Timeliness	Complete every homework assignment on time.		

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Your plan will remain private until you choose to display it on one of your ePortfolio pages. To do this, follow the instructions below:

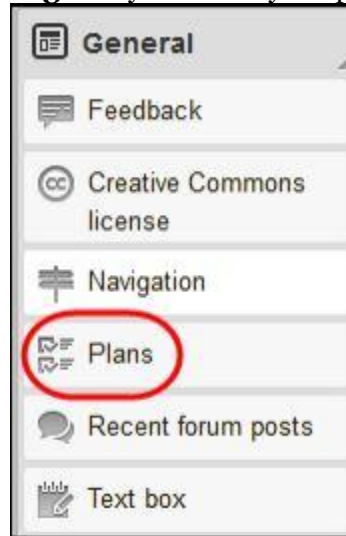
1. Under the “Portfolio” tab, **click “Pages”**. **Select the grey pencil icon** next to the page where you wish to display your plan.



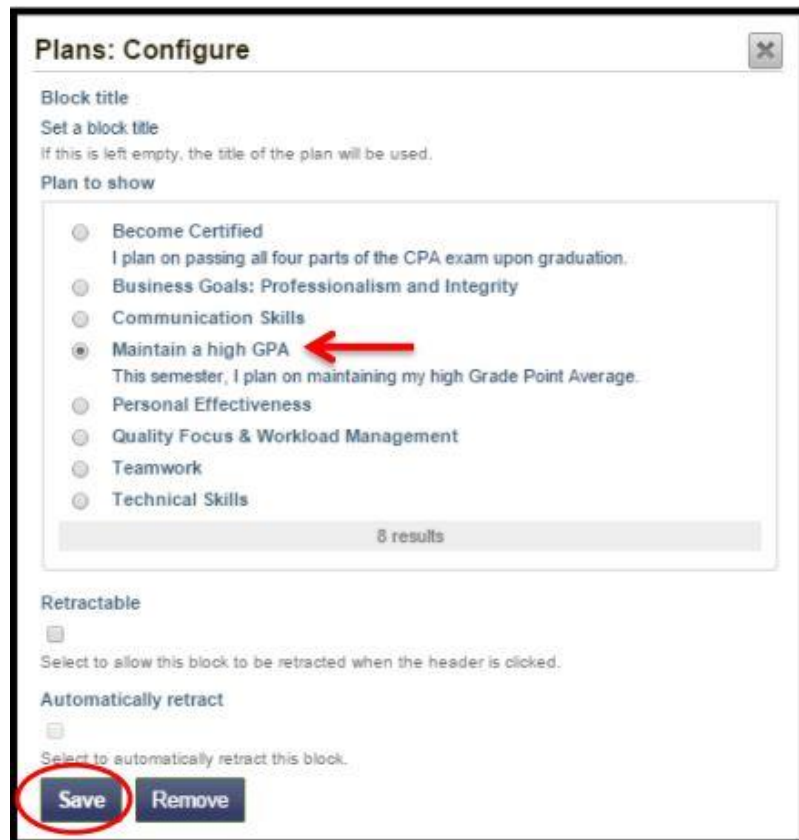
2. **Click** on the “**General**” tab.

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3. Select the “Plans” bar and **drag it** anywhere on your page.



4. A pop-up window will appear, listing all the plans you have created. **Click** on the **plan** that you would like to display, then **click “Save”**.



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5. Your plan will now appear on your page.



Maintain a high GPA		
Completion date	Title	Completed
17 December 2014	Timeliness	
1 task		

If you would like others to see this page with your plan, be sure to set the **page permissions** under the “**Share Page**” tab. For instructions on posting a file on a page, please see the tutorial titled “How to Share Pages and Collections” located in our ePortfolio [toolkit](#).

My Notes: