

ePORTFOLIO

HOW TO CREATE 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

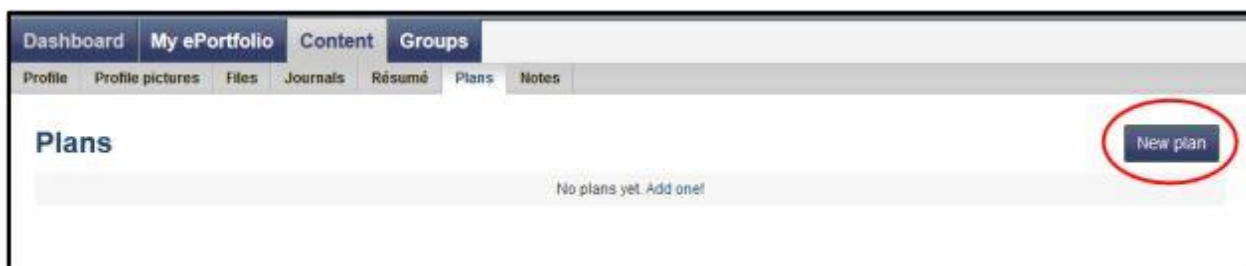
1. After logging into ePortfolio, click the "Content" tab.



2. Click "Plans".

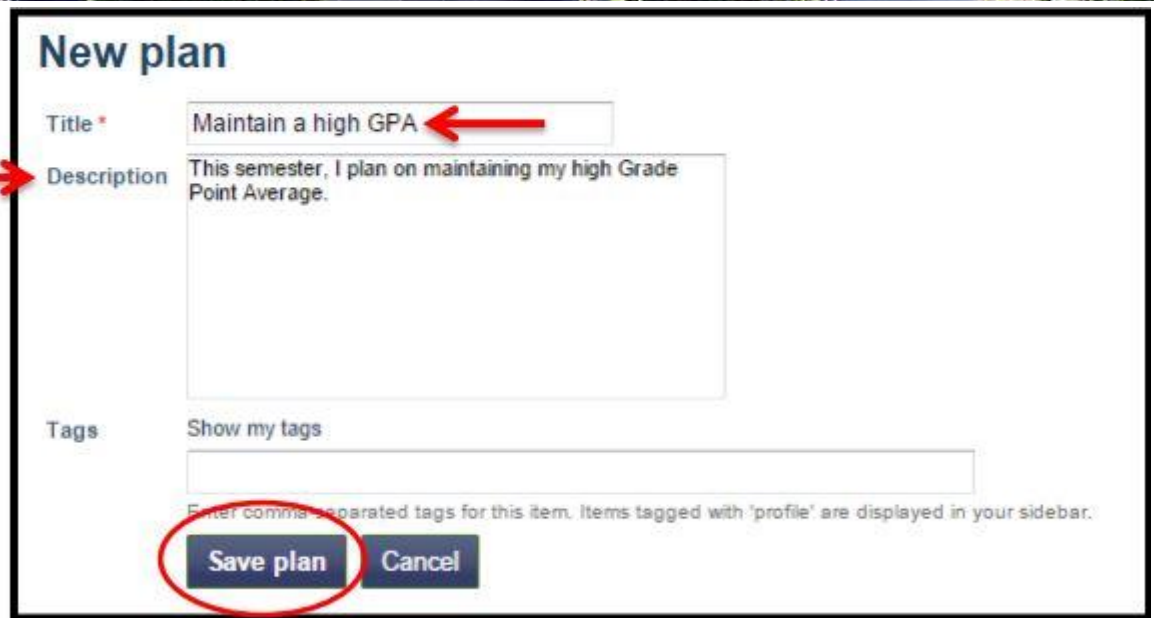


3. Click the blue “New Plan” button.



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

ePORTFOLIO



New plan

Title *

Description

Tags

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

Save plan **Cancel**

- 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.



✓ Plan saved successfully.

Plan 'Sample Plan' tasks.

Add tasks below or use the "New task" button to begin building your plan.

No tasks yet. Add one.

New task

- 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:

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.	☒	

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.

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.		 

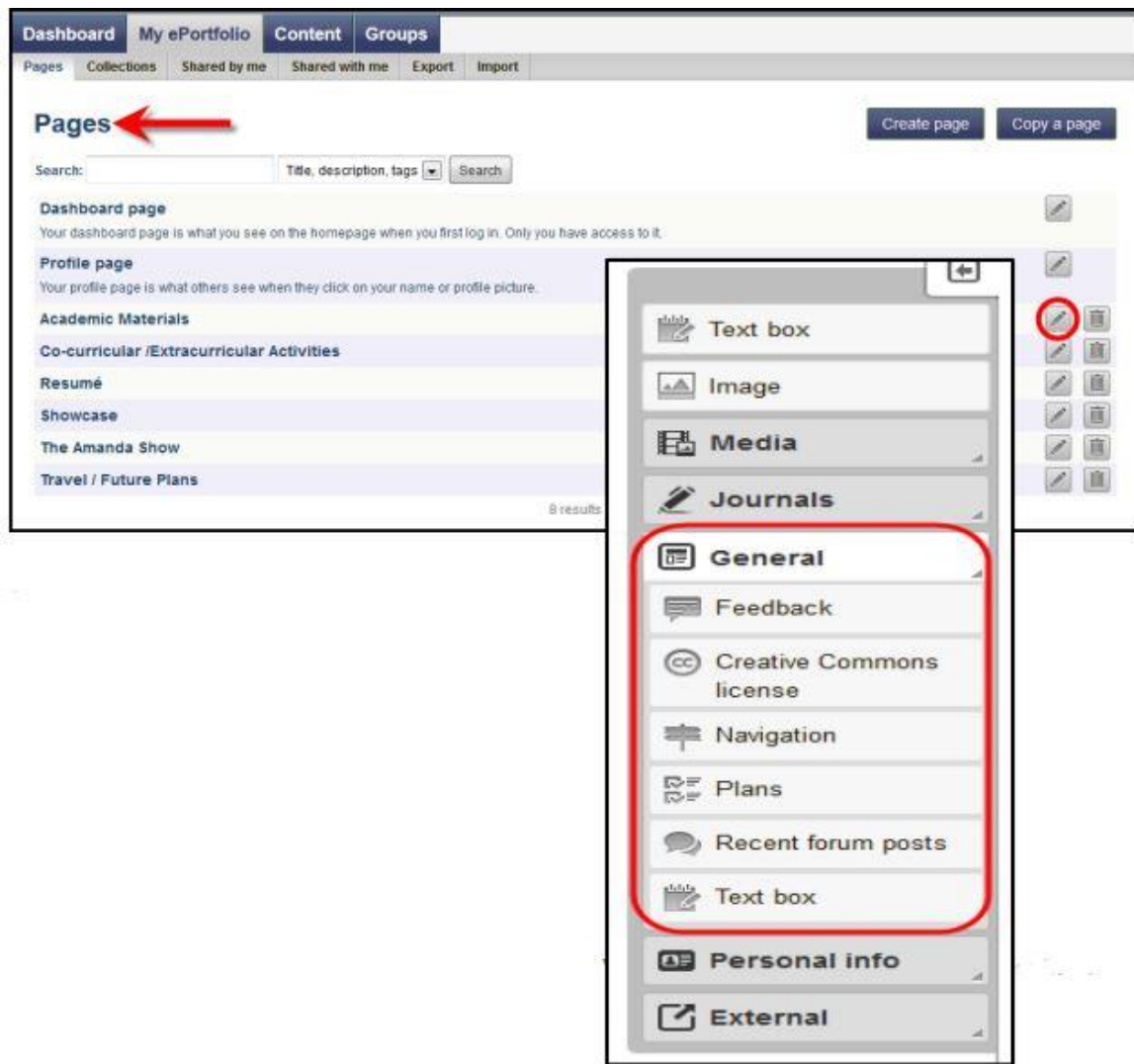
10. If a plan has not been checked as complete past the completion date, the task will turn red.

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

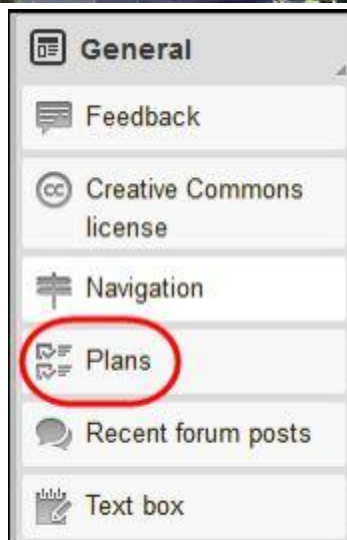
ePORTFOLIO

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

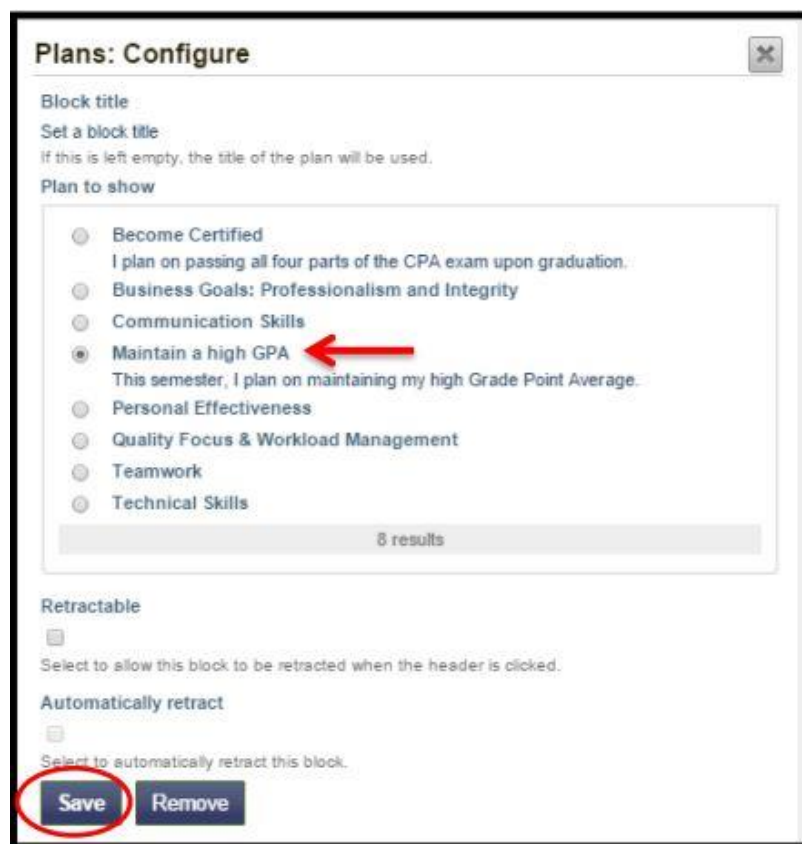
1. Under the "Portfolio" tab, click "Pages". Select the grey pencil icon next to the page where you wish to display your plan.



2. Click on the "General" tab.
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"**.





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: