

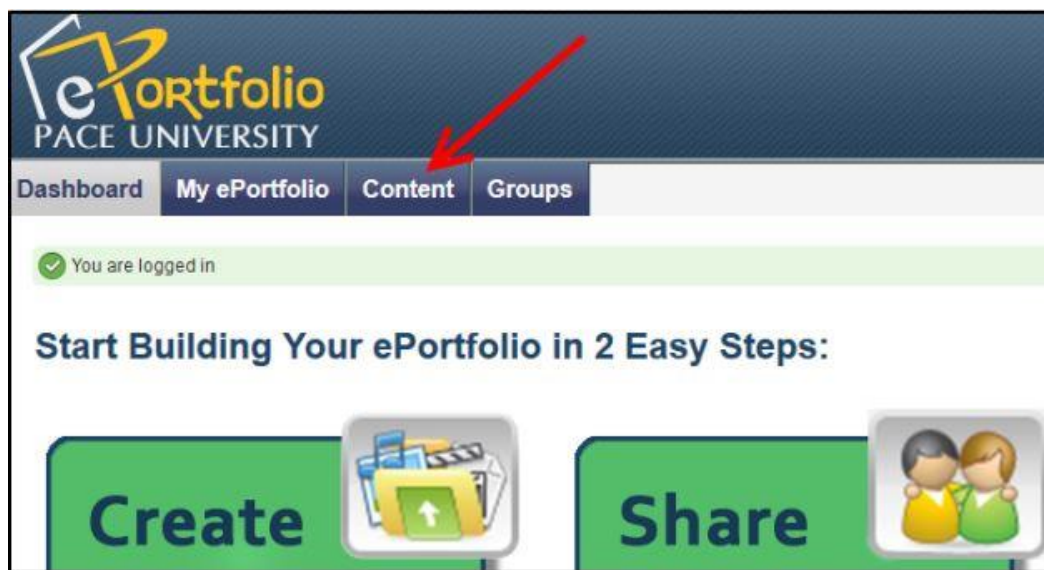
TUTORIAL

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.

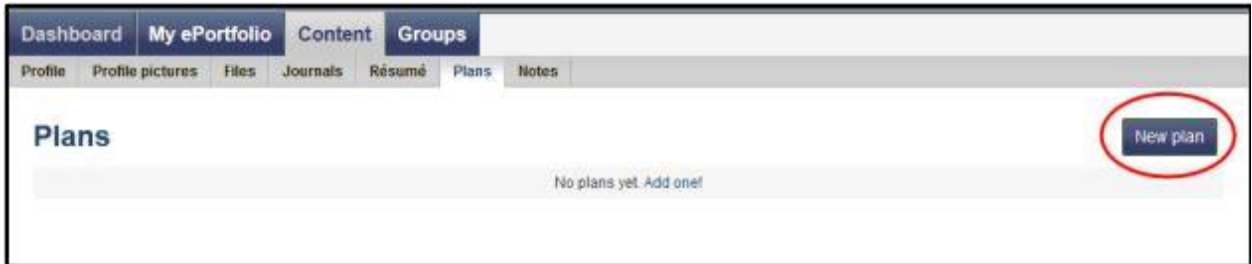


2. Click “Plans”.



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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”.

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 task”** when finished.

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 ☒ YES Mark your task completed.

Save task

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.

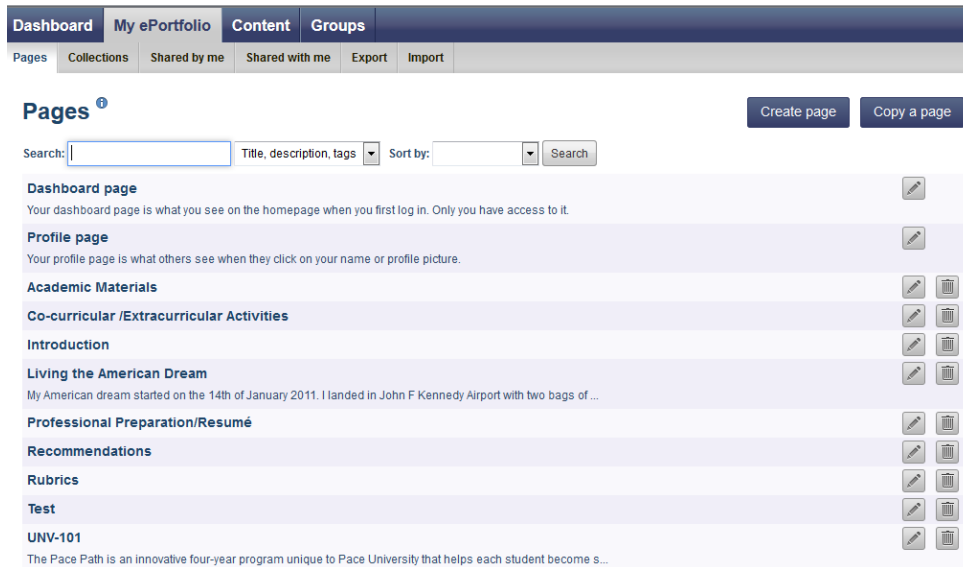
Plan 'Maintain a high GPA' tasks. New task

Completion date	Title	Description	Completed
1 September 2014	Timeliness	Complete every homework assignment on time.	

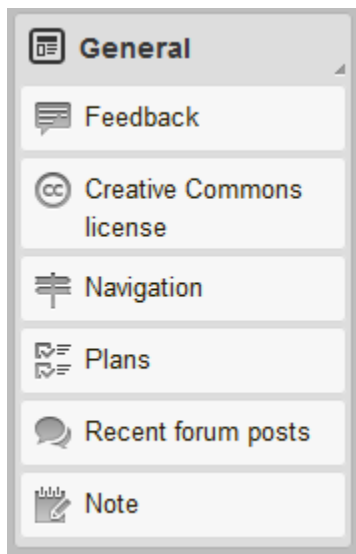
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Your plan will remain private until you choose to display it on one of your ePortfolio pages. To do this, follow the instructions below:

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

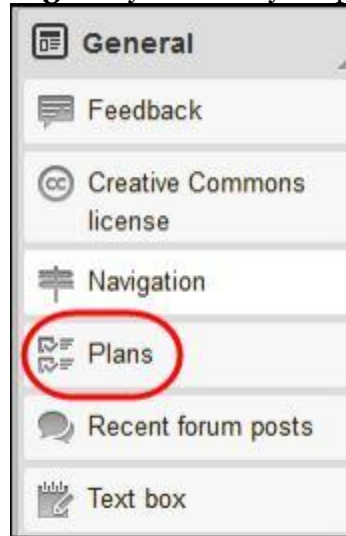


2. **Click** on the “**General**” tab.



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



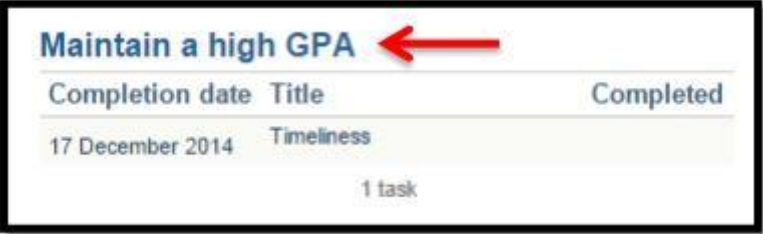
4. A pop-up window will appear, listing all the plans you have created. **Click** on the **plan** that you would like to display, then **click “Save”**.

A pop-up window titled "Plans: Configure" with a close button in the top right. It contains the following sections:

- Block title**: "Set a block title. If this is left empty, the title of the plan will be used."
- Plan to show**: A list of plans with radio buttons. The plan "Maintain a high GPA" is selected and highlighted with a red arrow. Below the list, it says "8 results".
- Retractable**: A checkbox with the text "Select to allow this block to be retracted when the header is clicked."
- Automatically retract**: A checkbox with the text "Select to automatically retract this block."
- At the bottom, there are two buttons: "Save" (circled in red) and "Remove".

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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: