ACADEMIC TECHNOLOGIES (ITS)
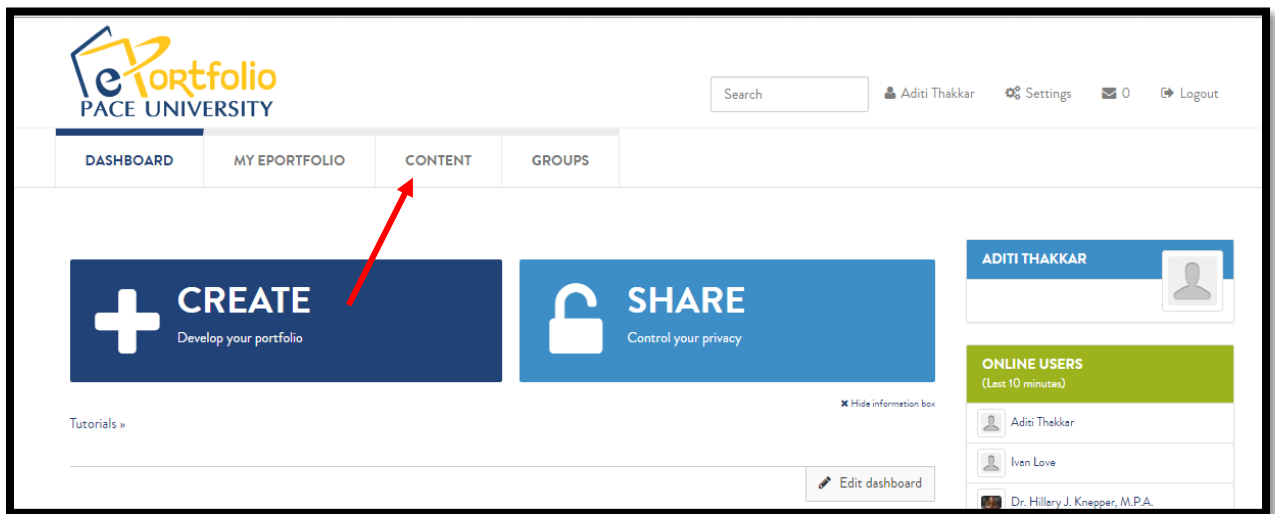
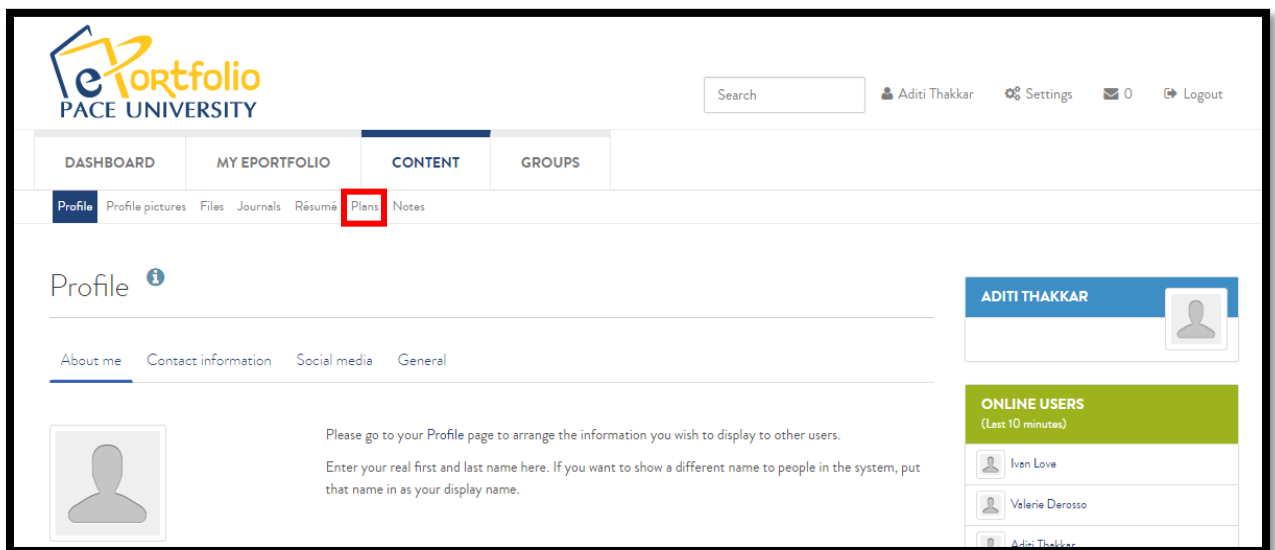PACE UNIVERSITY
Work toward greatness.

CREATING A PLAN

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

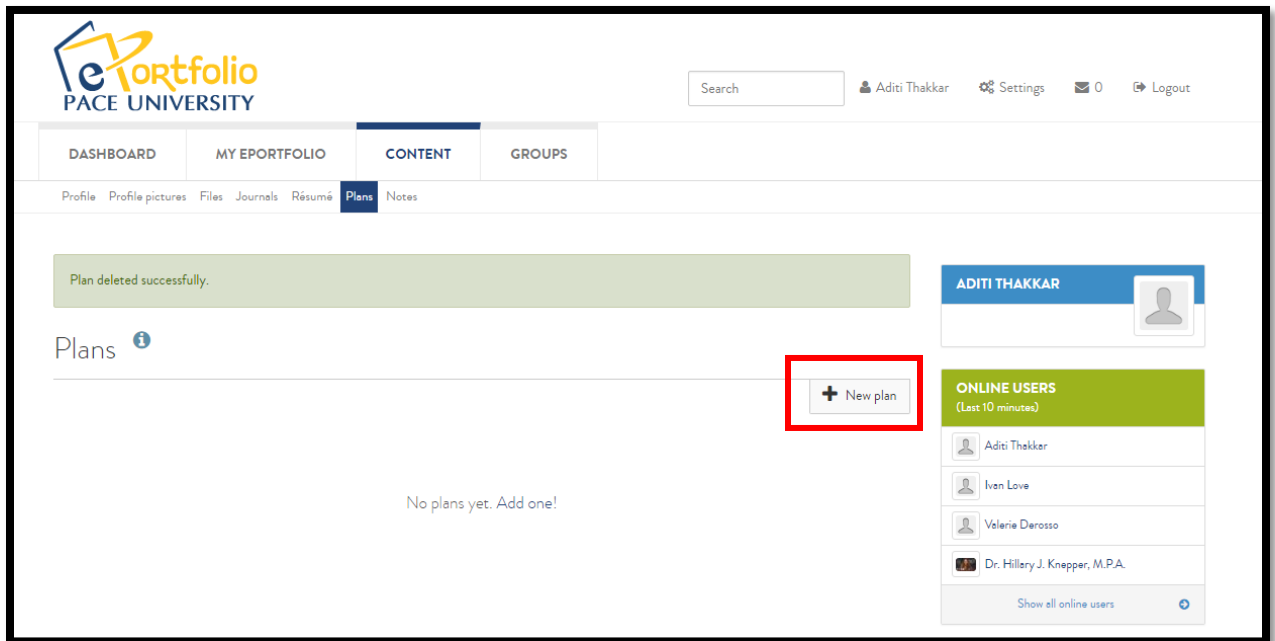1. After **logging into ePortfolio,** click the **"Content"** tab.

2. Click "**Plans**".

3. Click the "**New Plan**" button.

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

help.pace.edu
Last Updated:
September 13, 2016

Page **2** of **12**

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)
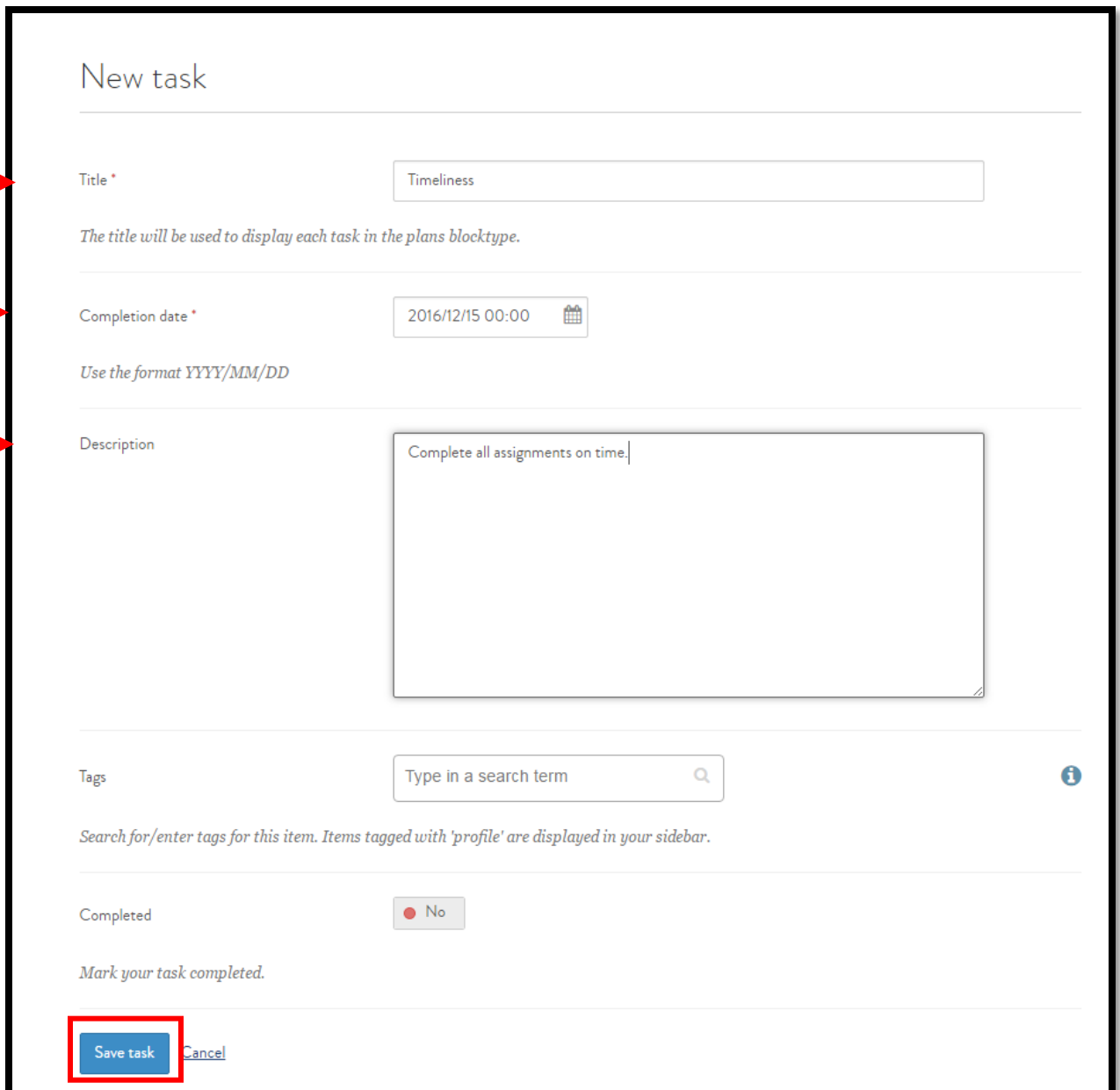
5. Now you may **create a series of tasks,** which represent smaller steps necessary to complete your plan. Click the "**New Task**" button to add a task.

help.pace.edu
Last Updated:
September 13, 2016

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

Page **3** of **12**

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

help.pace.edu
Last Updated:
September 13, 2016

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

Page **4** of **12**

New task

Title *   Timeliness

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

Completion date *   2016/12/15 00:00

Use the format YYYY/MM/DD

Description   Complete all assignments on time.

Tags   Type in a search term

Search for/enter tags for this item. Items tagged with 'profile' are displayed in your sidebar.

Completed   ● No

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 pencil icon** across from the task.

help.pace.edu
Last Updated:
September 13, 2016

Page **5** of **12**

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

8. Turn the **completed box** to **YES**, and then click "**Save Task**".

help.pace.edu
Last Updated:
September 13, 2016

Page **6** of **12**

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

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

help.pace.edu
Last Updated:
September 13, 2016

Page **7** of **12**

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

TUTORIAL

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

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 "**My ePortfolio**" tab, click "**Pages**". Select the **pencil icon** next to the page where you wish to display your plan.
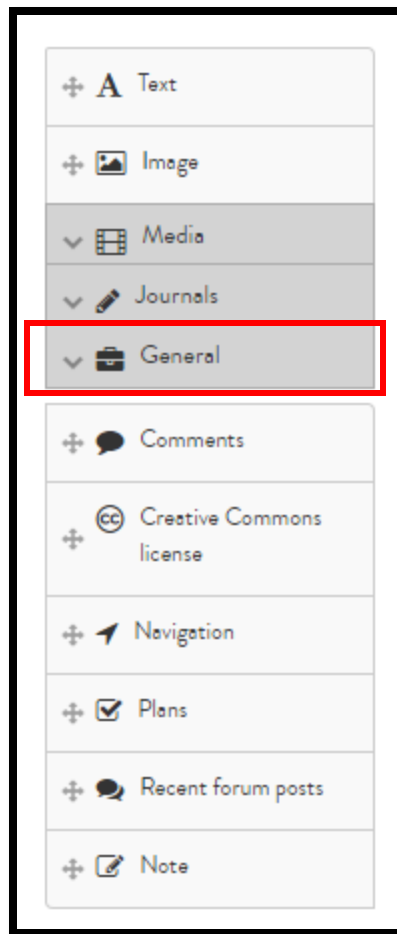
help.pace.edu
Last Updated:
September 13, 2016

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

Page **8** of **12**

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

help.pace.edu
Last Updated:
September 13, 2016

Page **9** of **12**

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

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

help.pace.edu
Last Updated:
September 13, 2016

Page **10** of

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)
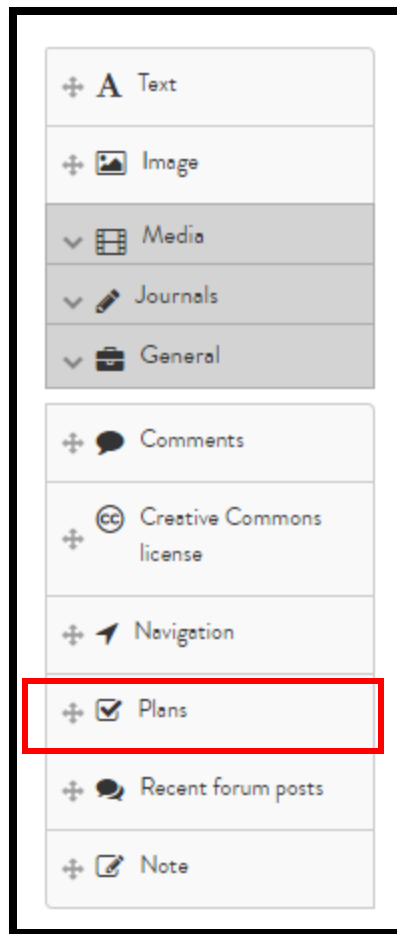
4. A pop-up window will appear, listing all the plans you have created. **Click** on the **plan** that you would like to display, then **click "Save".**

help.pace.edu
Last Updated:
September 13, 2016

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

Page **11** of **12**
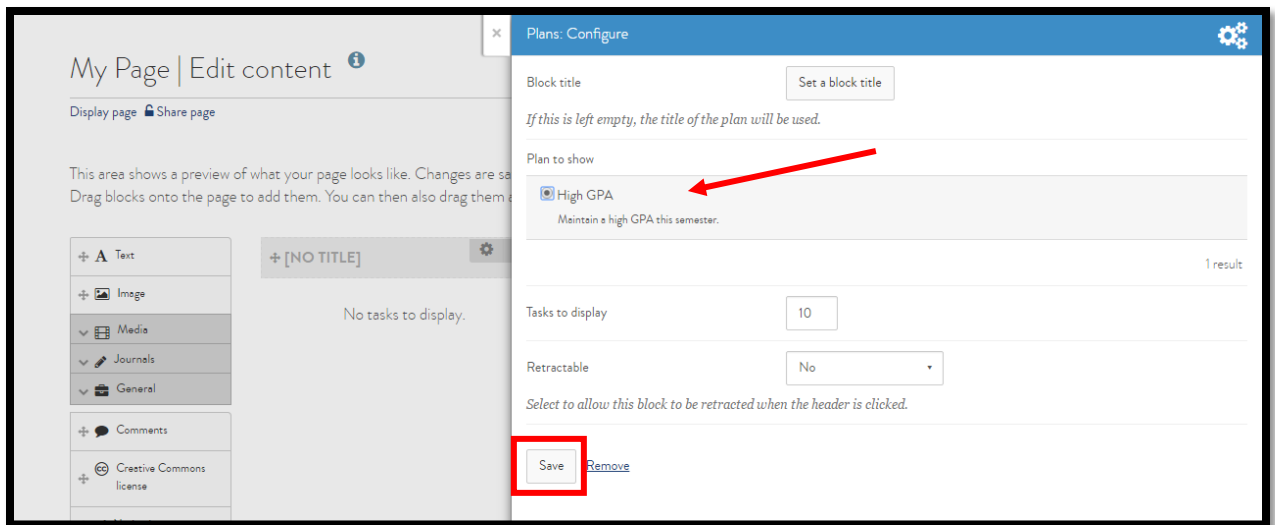
5. Your plan will now appear on your page.

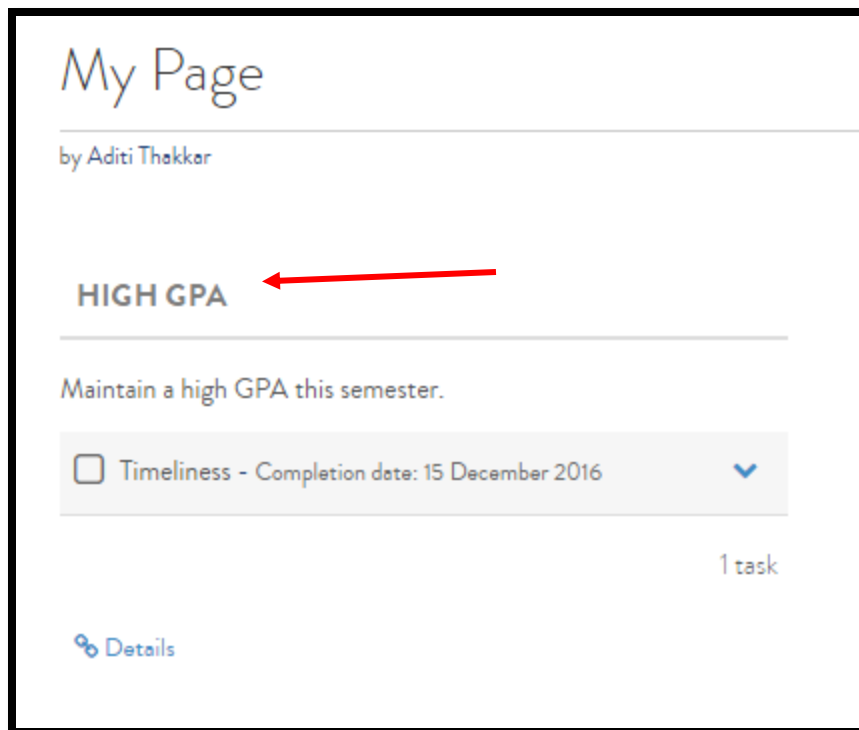If you would like others to see this page with your plan, be sure to set **the page permissions** under the "**Share Page**" tab. For instructions on posting a file on a page, please see the tutorial titled "How to Share Pages and Collections" located in our ePortfolio toolkit.

help.pace.edu
Last Updated:
September 13, 2016

Acadtech@pace.edu
www.pace.edu/digitaltoolkit
914 773 3664 (PLV)
212 346 1661 (NYC)

Page **12** of