

TUTORIAL

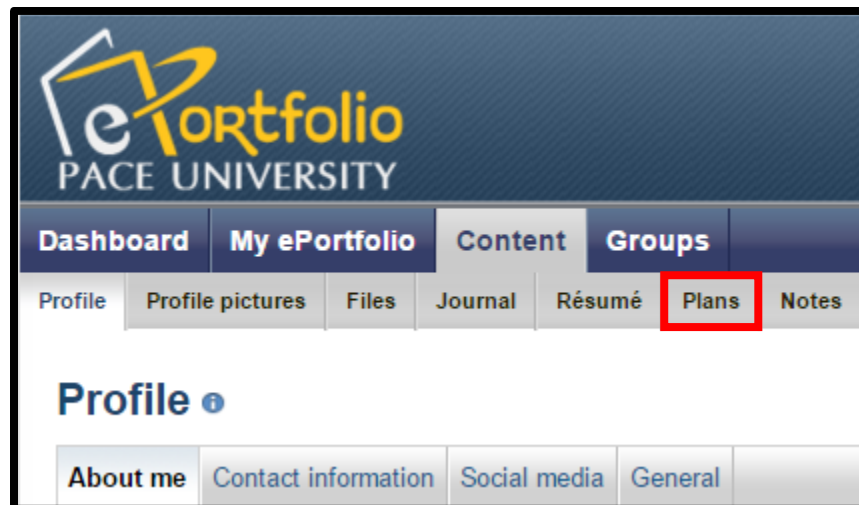
CREATING A PLAN

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

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

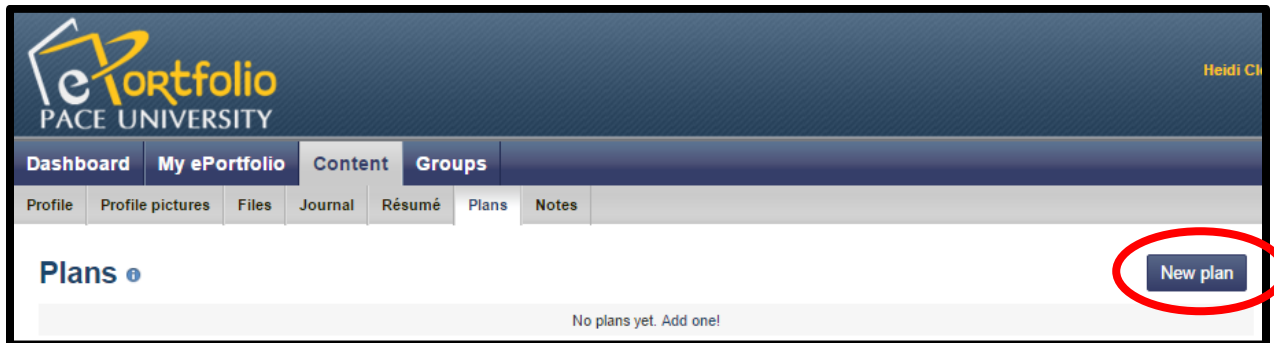


2. Click “Plans”.



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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 'Title' field is labeled 'Title *' and contains the text 'Maintain a high GPA'. The 'Description' field is labeled 'Description' and contains the text 'This semester, I plan on maintaining my high Grade Point Average.' Below the description field is a 'Tags' section with a 'Show my tags' button 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 are two buttons: 'Save plan' and 'Cancel'. The 'Save plan' button is circled in red. Red arrows point 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 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.

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.

Completion date	Title	Description	Completed
15 December 2014	Timeliness	Complete every homework assignment on time.	<input checked="" type="checkbox"/>


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8. Turn the **completed box** to **YES**, 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 **YES** 

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.	<input checked="" type="checkbox"/> 	 

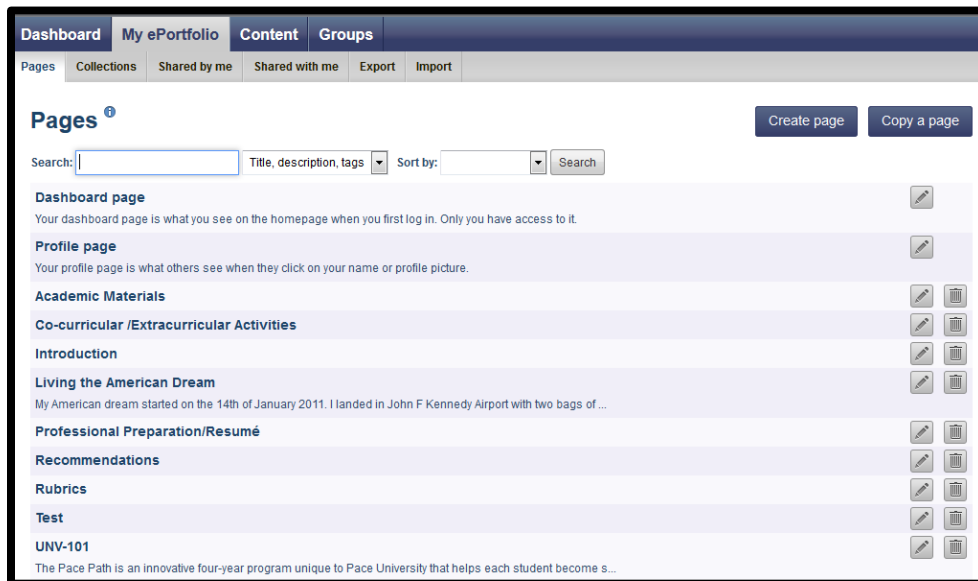
10. If a plan has not been checked as complete past the completion date, the task will turn red.

Plan 'Maintain a high GPA' tasks.				New task
Completion date	Title	Description	Completed	
1 September 2014	Timeliness	Complete every homework assignment on time.	<input type="checkbox"/> 	 

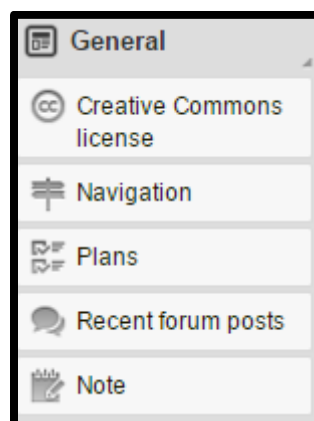
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Your plan will remain private until you choose to display it on one of your ePortfolio pages. To do this, follow the instructions below:

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

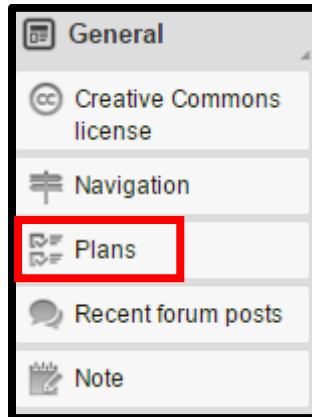


2. **Click on the “General” tab.**

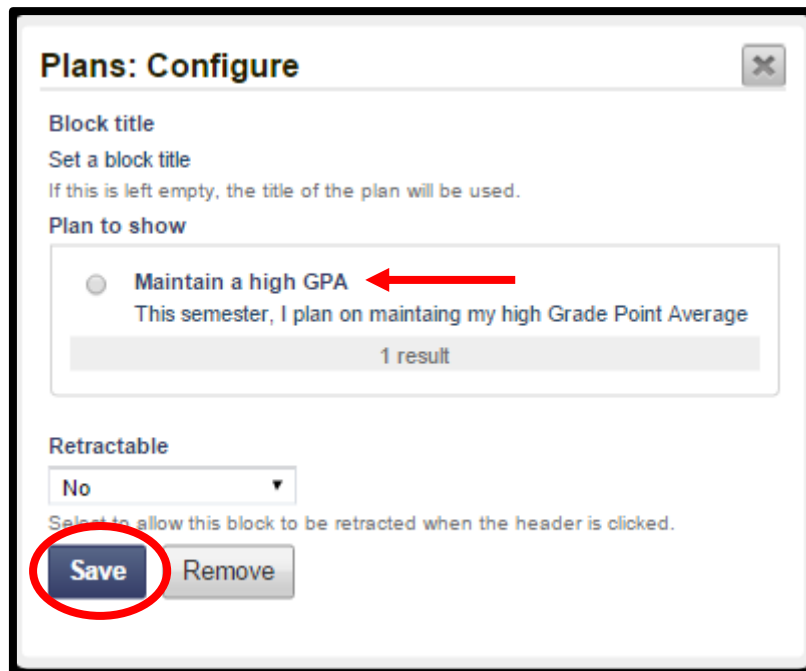


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3. Select the “Plans” bar and **drag it** anywhere on your page.





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  

This semester, I plan on maintaing my high Grade Point Average

Completion date	Title	Completed
5 March 2016	Task	

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](#).