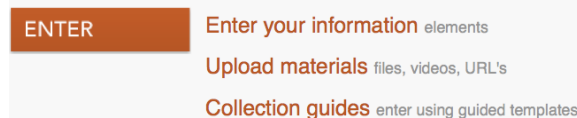


Step by Step How to guide

Enter Information

1. Click on Enter or “Enter your information (elements)”



2. Under View and Manage Existing Elements

3. Click “Expand”

Most students will use the data tree to enter information. Choose which category heading you feel fits what you want to upload (personal, education, career, skills, professional practice or recognition). Then choose a sub-category.

VIEW AND MANAGE EXISTING ELEMENTS

[View element map](#)

 A screenshot of the 'VIEW AND MANAGE EXISTING ELEMENTS' interface. It features a search bar with a 'GO' button and an 'Advanced Search' link. Below the search bar is a list of categories: PERSONAL INFORMATION, EDUCATION, CAREER, SKILLS, PROFESSIONAL PRACTICES, and RECOGNITION. To the left of the categories are links for 'Expand/collapse all elements', 'Share selections', and 'Delete selections'. To the right are sections for 'Apply a tag to selections' (with 'Your public tags' and 'Your private tags' dropdowns) and 'Attach materials to selections' (with a 'Select a file or URL' dropdown and an 'Attach' button).

Other ways to enter information on the “Enter your information (elements)” page

If you know where you want to enter information

1. Click on “Create a new element”

OR

Some programs use “Collection Guides” which are guided formats for collecting specific pieces of information and reflections.

There are also some generic guides to use: Career, Learning, etc..

To use the “Collection Guides”

2. Click on “Use a collection guide” and choose a campus or general drop down

Expand category and subcategory

3. Click “Create new”

4. Fill out fields - Title is required*

5. Click

Attach Material

You have three ways to attach material

When you are entering information (elements) and click

Save

You will see a box appear to the right of your screen

You will see ways to attach material...

1. Upload New File

Browse to find a video, word document, etc...

2. Link to Web Page

Share information your found on a URL

3. Attach Existing

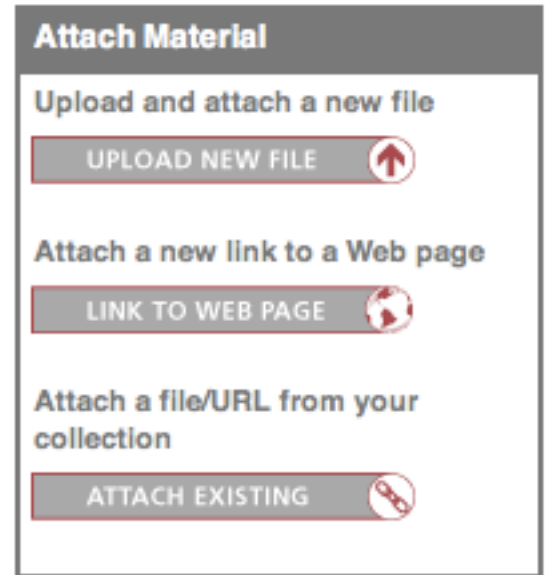
Attached a file/URL from your collection

4. After you have chosen a way to attach material - Name and describe

Click **"Save & edit"** (if you want to add a tag)

Or click **"SAVE"** (if not adding a tag) to return to element area. You will now see your attachment on the right side of the page.

5. Click **Back button** to return to data tree area



Other ways to upload information into ePortfolio



1. Click on Upload Materials

2. Choose:

- * Upload a new file
- * Add a new link
- * Upload files using the Portico

3. Follow steps 4 & 5

Quick Share Presentation

1. Choose "expand" to show everything in your ePortfolio or choose one of the six categories to expand (personal, educational, career, skill, professional or recognition) or use the search feature to quickly find something to share (see last page for information).

Identification Data		
Name of Record		
Select	Actions	Name
<input type="checkbox"/>	View	Primary

3. Check the checkbox in front of each piece of information you want to share.

4. Scroll to top of the data tree and click "Share Selections".

Share selections

5. **Presentation:** (Title, describe, choose Public or Choose Selected, Choose Never Expires or Choose an Expiration Date, Choose Allow Easy Download if you want).
6. Rearrange content (if you want)
7. Click "Next"

QUICKSHARE: Set Up Portfolio & Arrange Content

ENTER A TITLE AND DESCRIPTION:

TITLE: *Required

DESCRIPTION:

MAKE PUBLIC (available to the entire Web via a URL, an expiration date is required)

CHOOSE SELECTED VIEWERS (available to viewers you choose, available for viewing through Portfolio)

EXPIRES: NEVER EXPIRES

ALLOW EASY DOWNLOAD (this will create a button on your portfolio that allows viewers to download your portfolio and attachments into one directory on their computer)

CUSTOMIZE ARRANGEMENT:

PROFESSIONAL PRACTICES

Professional Documentation

Order	Element Type/Title	Public Tags	Attachments	Actions				
1	Professional Practices Documentation : Reflection on 2007-2008 year	none	<table border="1"> <thead> <tr> <th>Order</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Reflections of 2007-2008</td> </tr> </tbody> </table>	Order	Name	1	Reflections of 2007-2008	Remove from portfolio
Order	Name							
1	Reflections of 2007-2008							

Portfolio Creation Steps:

- Step 1: Set Up Portfolio & Arrange Content
- Step 2: Choose Viewers & Notify

Portfolio Tip

Expiration: This allows you to choose how long the portfolio is valid. After the date specified, this portfolio will disappear so others cannot see it.

Need assistance? Contact your campus help desk via phone or email portfoli@umn.edu.

QUICKSHARE: SELECT & NOTIFY VIEWERS

Portfolio Title: testing

SHARE WITH:

User Id: Add to viewer list [Directory Lookup \(pop-up\)](#)
(e.g. goph0001)

Guest E-mail: Add to viewer list
(e.g. goldy@yahoo.com)

VIEWING PRIVILEGES

The following individuals will have access to this portfolio:

+ Lisa Reeves (MEMBER) [Remove](#)

Notify Viewers

Your Message:

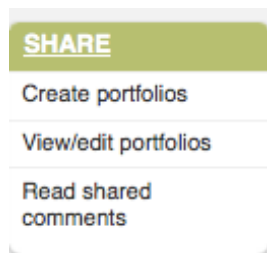
8. Choose Viewers
 - If U of M student, faculty, or staff - use USERID only (this is everything before the @d.umn.edu). If off-campus, use the entire email address (emailme@hotmail.com)
 - Click "Add to viewer list"
 - Name should be who you want and should say (MEMBER) after it if it is a U of M person. Off campus will have (GUEST) after their name.
9. Click notify viewers box - create email message - click cc yourself.
10. Click "Save & Finish"
11. Preview Presentation

See "Other Features Page" for a way to filter or search for something in your portfolio and create a quick share presentation

CC: Yourself

Create a Portfolio

Under Share Heading - Click "**Create portfolios**"



Step 1 : Set up a Portfolio: Create title and description. Choose **settings** : Private (default) or Public, Easy Download (if you want). **Choose an Expiration Date:** never or set one). Now **Select a template:** Custom (default) , General, or Department (your major department will let you know if they have one for you to follow). Click **Continue**

Step 2: Choose Content (check the checkboxes of the information you want to share)Click **Save and Continue**

Step 3: Arrange content and attachments (if you choose) **TIP:** your best items should be at the top. Click **Save and Continue**

Step 4: Choose Style - add a preset graphic to your presentation. Click "**Save and Continue**"

Step 5: Choose Viewers

- If U of M student, faculty, or staff - use USERID only (everything before the @d.umn.edu) - click "**Add to viewers list**"
- If off campus - use entire email address - click "**Add to viewers list**"
- Click Notify Users - create message, CC yourself. Click "**Save & Finish**"

Add to Existing Portfolio (or EDIT)

Click "**View/edit portfolios**" under the **SHARE** heading - this is creating "value in your time" particularly if you need to add to a presentation throughout the semester. Save yourself time by not creating multiple portfolio views - who has the time?

Click "**EDIT**" by presentation you have already created

To add/remove content - Click Step 2 - if this is all that is needed - click "**save & finish**" or "**save & continue**" if more is needed

To Arrange Content - Click Step 3 - if this is all that is needed - click "**save & finish**" or "**save & continue**" if more is needed

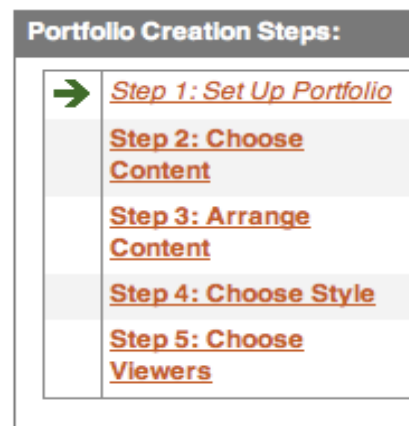
To Choose or Change Style - Click Step 4 - if this is all that is needed - click "**save & finish**" or "**save & continue**" if more is needed

To Choose or Change Viewers & to Notify them - Click Step 5 - click "**save & finish**"

If you click Save and Finish after a step you will get a message: "Are you sure you want to finish? You have not selected any viewers yet." If you setup viewers in your original Portolio - you can just click "OK."

TIP: you can now create/edit a portfolio and send just uploaded material (or attachments) without having to create a new element (as you did in the ENTER area) for it. However, remember creating a new element allows for more specific detail and reflection, so check with your instructor as to what they want. Sending just as an attachment is a great, quick way to share something and should be used this way.

To just upload an attachment already loaded into your ePortfolio - when choosing content scroll to the bottom of the list and choose item(s) you want to share.



Other New Features

Where is it? Trying to find something quickly but can't quite remember where you created & saved it?

Use the:

SEARCH in elements
[Advanced Search](#)

Searching will find information you created (elements), materials you uploaded, portfolios you created or have been shared with you, tags, etc... You don't need to remember the title - just a keyword will do. Once you see your results - if you want to quick share it - click the checkbox and choose *Share Selections (directions on page 3)*



The Portfolio Portico - This allows you to upload more than one document at a time into your ePortfolio account.

Go to *upload materials*

Click on [Upload files using Portico...](#)

Follow directions to download the portico to your desktop.

Are you really reading what I share?

Now you can find out if people are reading the portfolios you are sharing.

- Go to *view/edit my portfolios*

Find the portfolio you shared and look for following

icons: = read, = unread

Bookmark a page -

like any other browser bookmark.

Save as a bookmark in your browser

When you click on the bookmark in your browser
login

You'll go right to the ePortfolio page you are looking for.

NEW: Sending Uploaded Files only - We've heard that sometimes you just want to send uploaded files without the hassle of creating elements to attach them to and we have responded.

Simply start the same way you create any portfolio

1. Click on *Create a portfolio*
2. Give it a title and description & choose settings
3. Click *continue*
4. Scroll to the bottom of the content page and choose items
5. *Save and Continue*
6. Arrange content
7. *Save and Continue*
8. Choose style
9. *Save and Continue*
10. Choose Viewers
11. *Save and Finish*

Still Confused? Help is available

email help: portfolio@umn.edu