



ePortfolios and the CLE Portfolio Tools



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Acknowledgements

Community is the heart of open source, and this document is a product of community. *ePortfolios and the CLE Portfolio Tools* contains information on three ePortfolios that The rSmart Group developed with and for Kapi'olani Community College, Rider University, and the Rhode Island Network for Educational Technologies. These organizations understand that the knowledge embodied in their work is of the greatest value to them if it is shared with others in the community. They understand that this work will serve as the basis for the construction of new knowledge that they, in turn, will benefit from. Each of the three organizations graciously agreed to feature their portfolios in this document. In addition, Charles Sturt University of Australia provided funding to produce the collective work.

If you find value in this work, know that it is available to you because these four institutions believe in the value of open collaboration driving the open source movement in education. We at rSmart are pleased and proud to take part in such a rewarding collaboration that exemplifies the value of community.

Chris Coppola
President, The rSmart Group

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Preface

ePortfolios and the CLE Portfolio Tools is intended for educators and support personnel who are exploring the possibility of using electronic portfolios at their institutions.

“Chapter 1: Overview” explains what ePortfolios are and presents a few of the common uses for them.

“Chapter 2: Sample Portfolios” focuses on three sample portfolios. It explains the components of each portfolio, provides a workflow diagram for its creation and use, and shows the screens that make up the final product.

“Chapter 3: Using the CLE Portfolio Tools” provides step-by-step instructions for using tools in the CLE to create portfolios and their substructures.

The final chapter offers suggestions for adding to the Sakai library of information on portfolio tools.

Please note that the functionality described and screen prints shown in this document are from rSmart’s Sakai CLE version 2.2. *You may notice differences between the tools and screens covered here and those on your Sakai instance. These differences are caused by differences between rSmart’s 2.2 release and the Sakai community’s 2.2 release or are due to the differences between 2.2 and whatever release you are on.* The rSmart CLE contains some but not all of the tools released with Sakai 2.2 and also contains additional tools not yet available with Sakai. Furthermore, rSmart customizes its software to better meet the needs of some of its customers, and this customization results in other small differences.



Chapter 1

Overview

An electronic portfolio (or ePortfolio) is a collection of web pages that presents information of your choosing to a selected or general audience. The rSmart Sakai CLE features a rich set of tools with which to create electronic portfolios.

Portfolios for Personal Representation

Portfolios serve many purposes at academic institutions. The most traditional use of portfolios is for personal representation. This type of portfolio can be created for personal development alone or as a showcase of one's experience, skills, and/or interests. Personal portfolios may take the form of a resume or curriculum vitae or the more traditional form of an art portfolio, writing portfolio, or engineering portfolio. Posted online, these portfolios provide ready access to information by potential employers, educational institutions, mentors, peers, parents, and other interested parties.

An example of a personal representation portfolio might be a resume that students construct based on skills and accomplishments acquired during a four-year degree program. They can then share the resume with prospective employers or use it in a graduate education admissions process.

Portfolios for Teaching and Learning

Another common use of portfolios is for teaching and learning. This type of portfolio requires careful thought by educators in constructing learning outcomes, objectives, standards, or other criteria to represent the goals of the teaching and learning process. The teaching and learning portfolio becomes a way for students to demonstrate their proficiency in relation to the learning outcomes identified by their institution or instructors. Students examine the desired outcomes, select evidence of their learning they have already accumulated or create new evidence to demonstrate their mastery of these outcomes, reflect upon the degree to which their evidence satisfies each outcome, and submit their evidence and reflections to their instructors

for evaluation.

For example, students in a teacher education program may be asked to collect multimedia evidence of their progress in learning to teach in accordance with the program's standards for teaching performance.

Portfolios for Assessment and Accreditation

Teaching and learning portfolios can also serve another purpose: They can be used to assess the performance of an instructor, a program, or a department in fostering the learning their stated outcomes have predicted. In fact, more and more institutions are using portfolios in just this way.

An example of this might be a first-year writing program portfolio. The portfolio clearly states the program's desired learning outcomes, presents them to students in the process of learning to write, requires students to supply evidence of and reflection on their progress in meeting those outcomes, asks instructors to evaluate that evidence, and later gathers the evidence of learning within student portfolios to assess the degree to which students have learned to write in accordance with the stated outcomes.

The results of assessment portfolios are a valuable resource for the accreditation process. Accrediting agencies require institutions to state their learning outcomes and demonstrate that these outcomes have been achieved. Portfolios provide a rich source of information about the actual results of teaching and learning. The portfolio reporting process aggregates and analyzes data about the evaluation of student learning in relation to stated outcomes. Institutions may present this data along with representative artifacts to demonstrate their progress in fostering learning in accordance with their goals.

For example, an institution that has identified a set of institutional values or core competencies for graduation may use a portfolio to gather evidence of student performance in relation to institutional values or core competencies and present this evidence during the accreditation process.

Three Sample Portfolios

In this document, we have chosen three institutional implementations

of the rSmart CLE to demonstrate these three types of portfolios. Rider University has created an on-line resume for personal representation of student accomplishments. Kapi'olani Community College has created a General Education portfolio to support the teaching and learning process. The Rhode Island Network for Instructional Technology (RINET) has created an assessment and accreditation instrument to support Graduation Portfolios in Rhode Island high schools.

The next chapter outlines and shares these three portfolios for possible adaptation by other institutions.



Chapter 2

Sample Portfolios

This chapter covers three sample portfolios:

- ✍ A personal representation portfolio in the form of a resume
- ✍ A teaching and learning portfolio to support outcomes for General Education
- ✍ An assessment and accreditation portfolio used to track progress toward state-mandated goals

In examining each example, you will learn why the portfolio was created, the components it contains, the work flow involved in creating and using it, and what a completed portfolio looks like.

Kapi'olani Community College: Portfolios Supporting Teaching and Learning


Kapi'olani Community College is one of seven ACCJC-accredited community colleges in the University of Hawaii system. Offering 43 degrees and certificates to approximately 7,300 students, KCC has received national recognition for excellence in culinary studies, health sciences, emergency medical services, and legal assistance programs.

In August 2005, Kapi'olani Community College (KCC) became the first college in the University of Hawaii system to experiment with ePortfolios. Initiative and funding for ePortfolio development came from Title III and NSF grants and from institutional participation in the National Coalition for Electronic Portfolio Research.

Working with rSmart, KCC designed and developed four portfolios. One of these, the General Education portfolio, enables students to demonstrate that they have met General Education requirements for graduation with an Associate of Arts degree. This portfolio also encourages students to reflect on their achievements and allows them to showcase their best work in an online presentation designed, in part, by the students themselves.

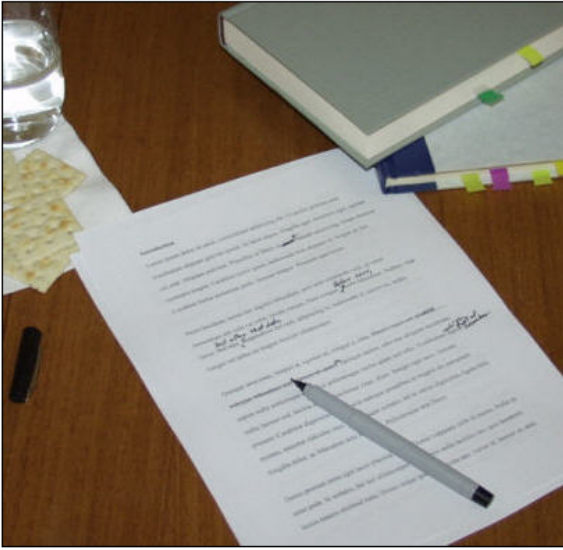
The final result for each student is a General Education portfolio that can be shared with employers, admissions offices, mentors, peers, or parents. This portfolio is a set of web pages that display or link to the student's works, provide context for these works, and include the student's reflections on his or her progress. Viewers can enter comments on each page of the presentation.

A typical page from a KCC portfolio presentation is shown on the next page.



General Education - Level 1

Intro	Written Communication	Critical Thinking	Information Retrieval and Technology	Quantitative Reasoning	Oral Communication	Understanding Self and Community
-----------------------	------------------------------	-----------------------------------	--	--	------------------------------------	--



I wish writing came more easily to me. Seems as though I should be able to get it right the first time. Instead, I seem to revise and revise.

Written Communication

Standards:

Written communication is an integral part of every content area and discipline. Use writing to discover and articulate ideas.

1. Identify and analyze the audience and purpose for any intended communication.
2. Choose language, style, and organization appropriate to particular purposes and audiences.
3. Gather information and document sources appropriately.
4. Express a main idea as a thesis, hypothesis, or other appropriate statement.
5. Develop a main idea clearly and concisely with appropriate content.
6. Demonstrate mastery of the conventions of writing, including grammar, spelling, and mechanics.
7. Demonstrate proficiency in revision and editing.
8. Develop a personal voice in written communication.

General Education Form:

<p>"France: An Ode" by Samuel T. Coleridge</p>	<p>Context of Work: English 101 - English Literature</p> <p>Dates of Work: November 2006</p> <p>Description of Work: An analysis of Coleridge's poem about the French Revolution and the nature of true liberty</p> <p>Self-Evaluation of Work: I put a lot of time into thoroughly researching this poem and documenting sources. I think I was successful in expressing a main idea as a thesis and developing it clearly and concisely. Since I got an A+ on the paper, my professor seemed to appreciate my writing conventions, so I also demonstrated mastery of the conventions of writing, including grammar, spelling, and mechanics.</p>
--	--






Figure 1 Sample portfolio page, KCC's General Education matrix

Much of the content for the KCC presentations comes from an online matrix that students are responsible for completing. KCC's General Education matrix looks like the following sample.

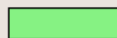
Manage Matrices

This matrix provides a way for students to demonstrate their ability to meet General Education requirements for graduation.

Click on a cell to view/revise

General Education	Level 1	Level 2	Level 3
Written Communication	 		
Critical Thinking	 		
Information Retrieval and Technology			
Quantitative Reasoning			
Oral Communication			
Understanding Self and Community			

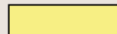
Legend



Ready



Completed



Pending



Locked

Figure 2 KCC's General Education Matrix

In this matrix:

- ♦ Row headings represent six General Education learning outcomes shared by all KCC academic programs. KCC faculty have agreed that all coursework will work to meet these outcomes and that every course will provide some means for students to improve in relation to one or more of these outcomes. Each outcome is further defined by a set of no more than ten standards displayed in glossary pop-ups and listed within each of the cells for the row.
- ♦ Column headings represent three levels of achievement in student progress toward graduation. Each subsequent level requires students to address an increasing number of standards for the row with an increasing number of works from their academic and co-curricular activities at KCC.
- ♦ Cells in the matrix represent intersections of skills and levels of achievement. The content of each cell includes the standards for the learning outcome, guidance for students in meeting the

requirements for work in the cell, a means of submitting work and reflection for formative feedback and summative evaluation, and a means for the reviewer and evaluators to provide feedback and evaluation. In the example shown above, only three cells contain data. A typical cell in the matrix looks like this:

Written Communication - Level 1

Demonstrate your ability to communicate in writing at the introductory level.

Guidance

Read the instructions, rationale and examples to determine what is expected of you.

Instructions

Contribute at least two examples of coursework from a completed, required foundation course, and define and discuss the relevance of your works to at least one of the following standards.

Use the General Education form to describe your evidence and the Reflection form to reflect upon your growth in relation to the evidence.

Standards:

Written communication is an integral part of every content area and discipline. Use writing to discover and articulate ideas.

1. Identify and analyze the audience and purpose for any intended communication.
2. Choose language, style, and organization appropriate to particular purposes and audiences.
3. Gather information and document sources appropriately.
4. Express a main idea as a thesis, hypothesis, or other appropriate statement.
5. Develop a main idea clearly and concisely with appropriate content.
6. Demonstrate mastery of the conventions of writing, including grammar, spelling, and mechanics.
7. Demonstrate proficiency in revision and editing.
8. Develop a personal voice in written communication.

Additional Guidance

[Click here to view the full guidance](#)

Items	Owner	Last Modified
General Education Evidence Two (General Education)		
Add Form Select Existing Form		
<input type="checkbox"/> "France: An Ode" by Samuel T. Coleridge Revise Delete	Chantoya Mostrom	04-02-2007
<input checked="" type="checkbox"/> France An Ode.docx Delete	12KB Chantoya Mostrom	04-02-2007

Select Additional Items

Reflection

[Reflection on Coleridge paper](#)
[Revise](#)

Submit for Evaluation confirmation

Feedback	Owner	Creation Date
<input type="checkbox"/> Feedback		

Back to the Matrix

Figure 3 Sample cell in KCC's General Education matrix

Portfolio Components

KCC's General Education portfolio is made up of the following components:

- ◆ Four forms:

A General Education Evidence form for students to supply required information about each item of work submitted to the cell

A Reflection form for students to reflect upon the quality of the evidence supplied

A Feedback form for instructors to offer formative feedback at any time

An Evaluation form for instructors to provide a summative evaluation of the work after the student has submitted it for evaluation.

- ◆ A matrix consisting of:

Six rows listing the General Education learning outcomes

Three columns listing progressive steps for meeting each outcome

Eighteen cells, each specifying standards for one of the outcomes, instructions for meeting the outcome at one of the levels, and four forms for students to describe and reflect upon the evidence and for instructors to provide formative review and summative evaluation of the evidence and reflection contained in the cell

- ◆ One matrix portfolio that allows each student to display the contents of the six cells in one of the columns, including all artifacts and forms in each cell. In creating this portfolio, the student also has the option of supplying a title, subtitle, contact information, images for each page, and captions for each image as a means of personalizing the portfolio for specific purposes.
- ◆ Report templates that allow the institution to capture information contained in the matrix, including an indication of student progress in completing the matrix and aggregation of faculty evaluations of the evidence of student learning within each cell and across cells.

Table 1 KCC portfolio components

<i>Component</i>	<i>Notes</i>
Contact Information form	Fields prompt students to provide this information: <ul style="list-style-type: none"> ◆ Student name ◆ Address ◆ Phone number(s) ◆ Email address(es)
General Education Evidence form	Fields prompt students to provide this information: <ul style="list-style-type: none"> ◆ Context of work ◆ Dates of work ◆ Description of work ◆ Self-evaluation of work
Reflection form	Fields prompt students to explain: <ul style="list-style-type: none"> ◆ Origins of the work ◆ Why the student chose the subject matter ◆ How the work fulfills the standard ◆ How the work has challenged the student to grow personally, academically, and professionally ◆ How the work might contribute to the student's lifelong learning
Feedback form	A single field prompts reviewers to enter comments.

<i>Component</i>	<i>Notes</i>
Evaluation form	<p>Fields prompt evaluators to provide this information:</p> <ul style="list-style-type: none"> ◆ Evaluation level (options are: exceeds expectations, meets expectations, needs more work, and incomplete) ◆ Comments on the work
Matrix	<p>Made up of six rows and three columns.</p> <p>Row headings link to extended explanations in an online glossary. Each row heading specifies a learning outcome:</p> <ul style="list-style-type: none"> ◆ Written communication ◆ Critical thinking ◆ Information retrieval & technology ◆ Quantitative reasoning ◆ Oral communication ◆ Understanding self & community <p>Column headings link to extended explanations in an online glossary. Each heading specifies a level of achievement (1-3).</p> <p>Each matrix cell contains a means to display guidance to students and enter or attach:</p> <ul style="list-style-type: none"> ◆ One or more completed General Education Evidence forms. ◆ One or more multimedia files as evidence. ◆ Faculty members with appropriate permissions may then: ◆ View the matrix and matrix cells of

<i>Component</i>	<i>Notes</i>
	<p>any student from a read-only perspective.</p> <ul style="list-style-type: none"> ◆ Use one or more Feedback forms to provide formative feedback within any cell at any time. ◆ Upon student submission of the cell for evaluation, evaluate the cell via the Evaluations form for the cell displayed in the Evaluations tool.
Portfolio template	<p>Consists of:</p> <ul style="list-style-type: none"> ◆ An .xsl file for determining pathways for inclusion of content from matrix cells, images, and the contact information form ◆ An .xsd file for inclusion of the title, subtitle, and captions for images ◆ A .css file that determines the look and feel of the portfolio ◆ A .gif file for the banner ◆ A .js file for additional script in the portfolio template
Report template	<p>Report templates that allow the institution to capture information contained in the matrix, including an indication of student progress in completing the matrix and aggregation of faculty evaluations of the evidence of student learning within each cell and across cells.</p>

Portfolio Users

Creating and implementing the KCC General Education portfolio begins with the creation of a portfolio site. Within this site, KCC assigns users to several different roles, each of which allows people

assigned to that role to perform an appropriate set of activities. The following table enumerates the roles, users, activities, and tools.

Table 2 KCC roles, users, activities, and tools

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities:</i>	<i>Using these CLE tools:</i>
Organizer	Site owner	<p>Design the forms, matrix, and portfolio template and write instructions for using them.</p> <p>Set up and publish the matrix, glossary terms, and portfolio template in the CLE.</p> <p>Identify participants, reviewers and evaluators and assign permissions.</p> <p>Introduce users to the tools they will use.</p> <p>Create reports on progress by site users.</p>	<p>NA</p> <p>Matrices, Glossary, Portfolio Templates</p> <p>Site Setup, Matrices, Evaluations</p> <p>Varies by user</p> <p>Reports</p>
Program Admin	Assistant to site owner	Help with or take on part of the site owner's work.	Varies
Tech Support	XML programmer	<p>Create or locate source files needed for forms and the portfolio template and add them to the CLE.</p> <p>Assist with portfolio template creation.</p>	<p>Resources</p> <p>Portfolio Templates</p>
Participant	Students	Fill out the matrix cells; review feedback on cells and revise work as needed; submit matrix cells for evaluation; review evaluator comments.	Matrices, Resources

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities:</i>	<i>Using these CLE tools:</i>
		Create and publish portfolio; view and manage comments on portfolio; and revise work as needed.	Portfolios, Matrices, Resources
Reviewer	Reviewers	Review work in matrix cells and provide formative feedback one or more times.	Matrices
Evaluator	Evaluators	Evaluate work in matrix cells and provide summative feedback on it.	Evaluations
Guest	Audience members	View participant portfolios and comment on them.	Portfolios

Workflow: Using the Portfolio for Teaching and Learning

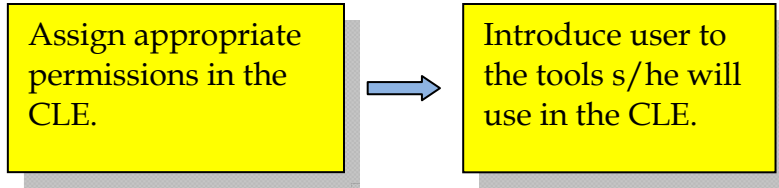
The process of using the General Education portfolio for teaching and learning involves four major steps:

- 1 Involve users.
- 2 Complete matrix cells.
- 3 Create portfolios.
- 4 Assess the program.

The following subsections show the workflow for each step. A key at the bottom of each page indicates which user is responsible for each activity.

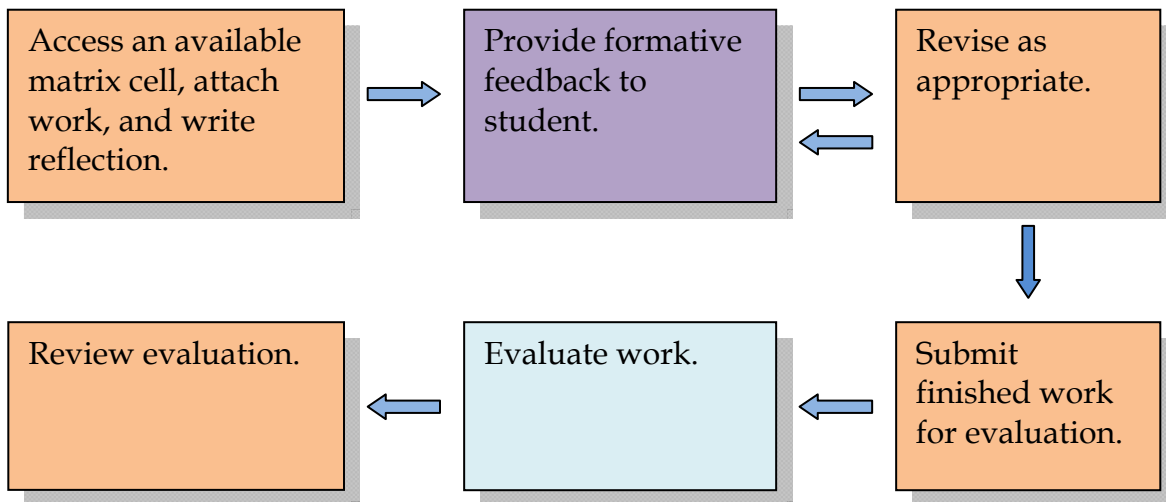
Involve Users

For each student, reviewer, and evaluator who will be involved:

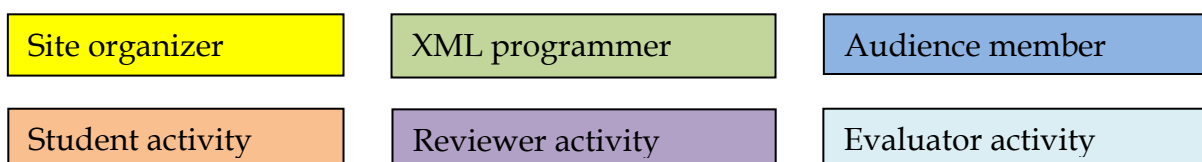


Complete Matrix Cells

As each cell in the matrix becomes accessible:

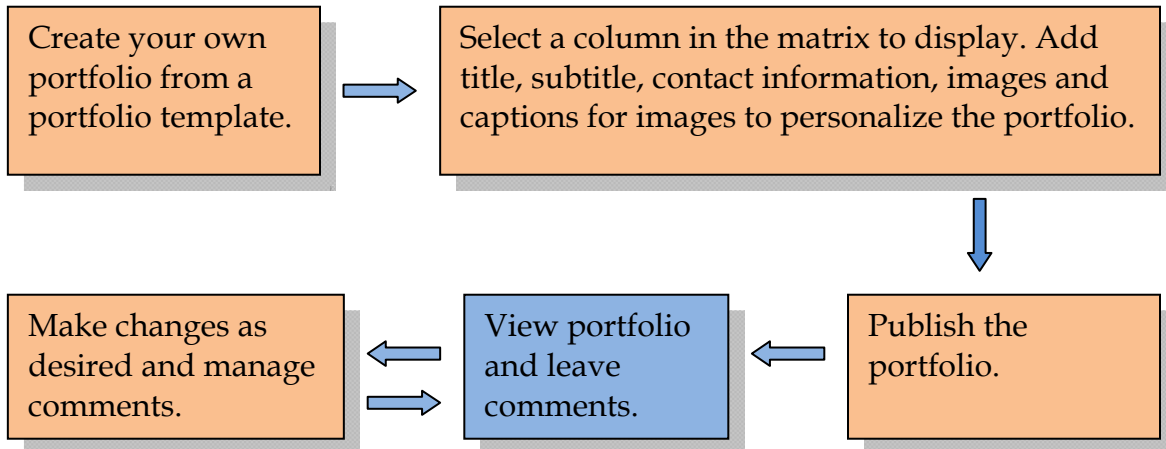


Key:



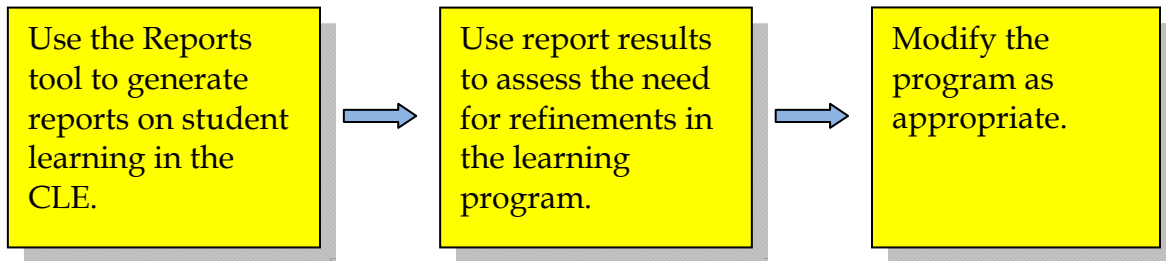
Create Portfolios

As work in matrix cells is completed:

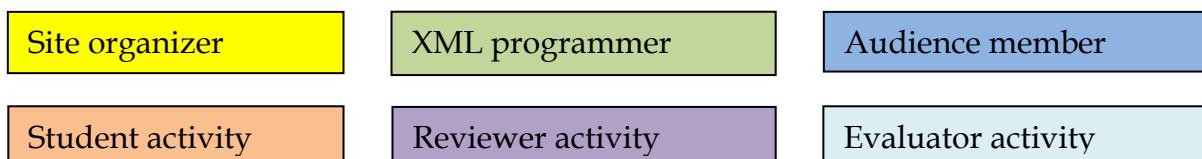


Assess the Program

At any time after students have begun working in the matrix:



Key:



Developing the Data Structures

The process of creating any portfolio begins with analyzing the process it will support and determining requirements for portfolios that support that process. After you have identified the requirements, the workflow for developing data structures for the KCC General Education portfolio involves two major steps:

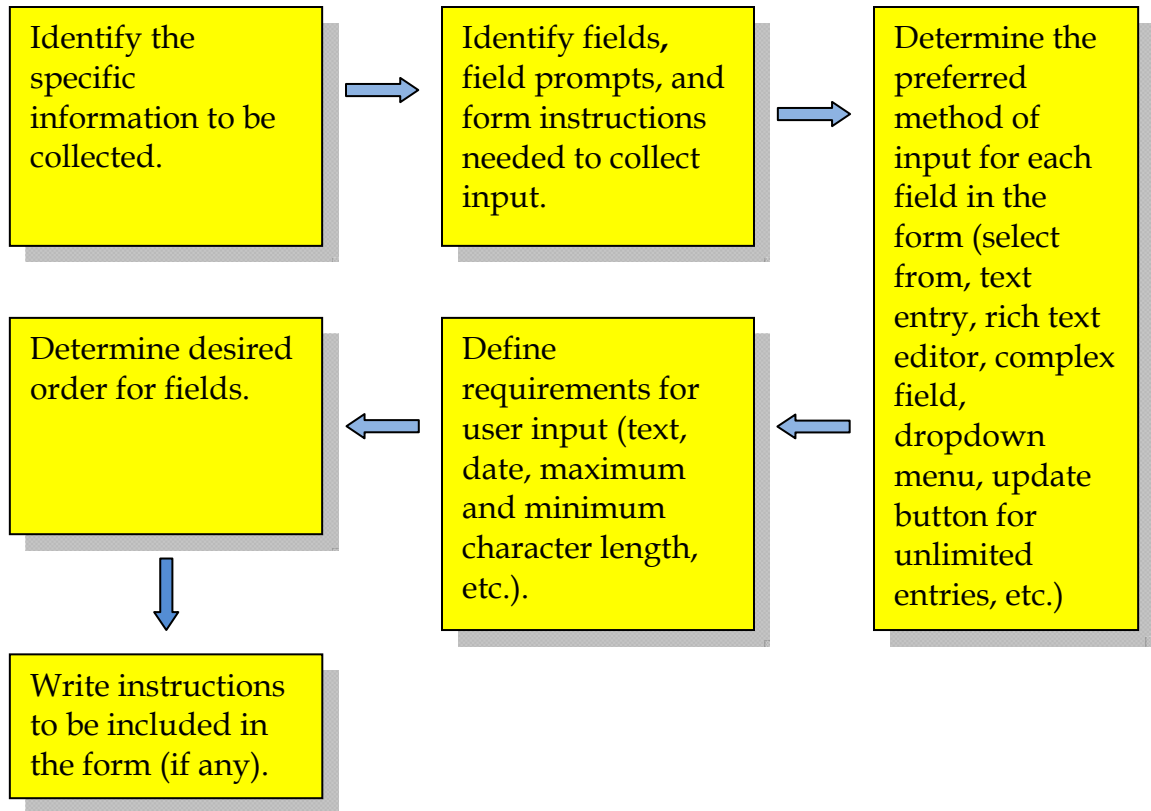
- 1 Design data structures.
- 2 Create data structures.

The following subsections show the workflow for each step. A key at the bottom of each page indicates which user is responsible for each activity.

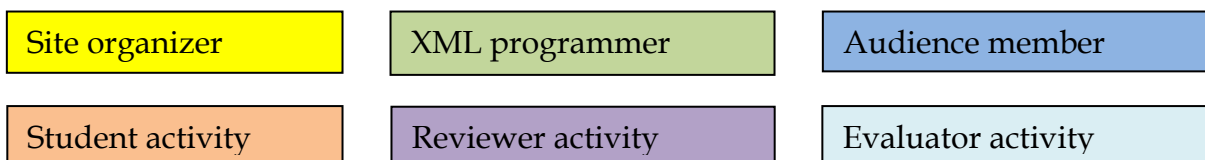
Design Data Structures

Design the Forms

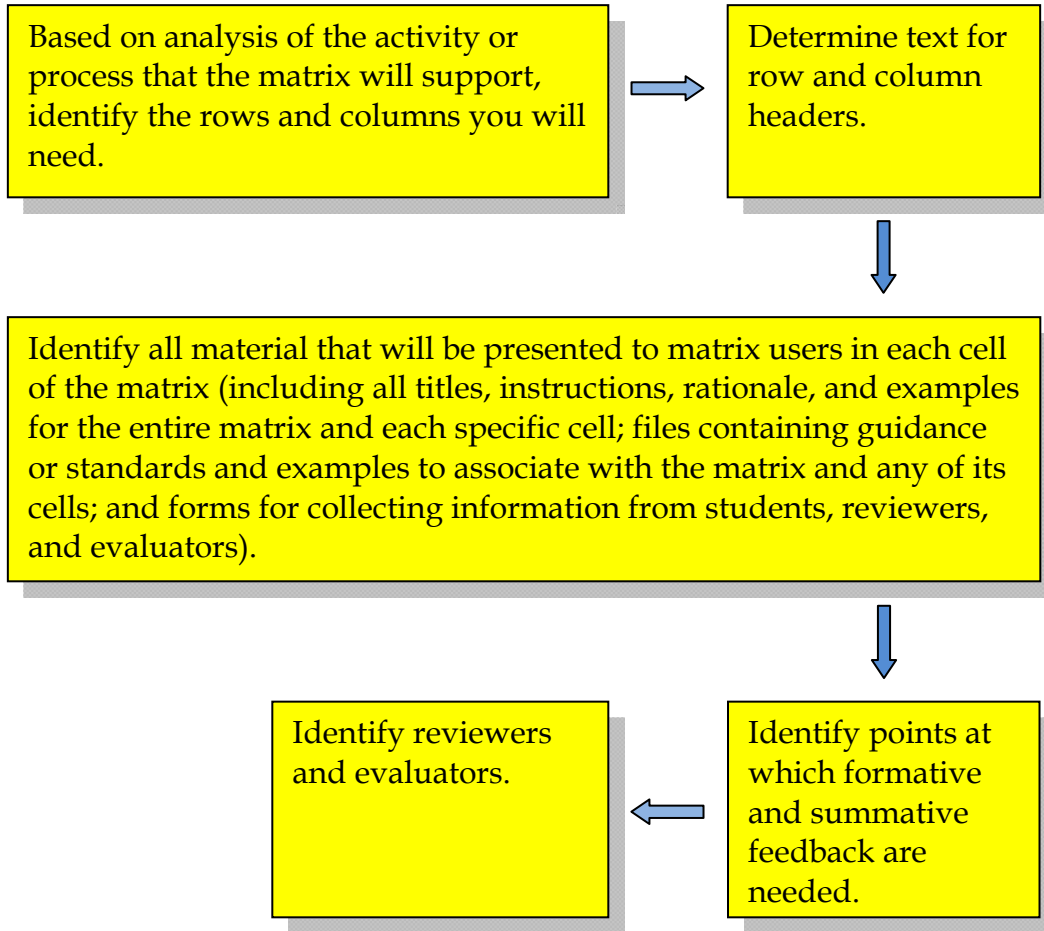
For each form:



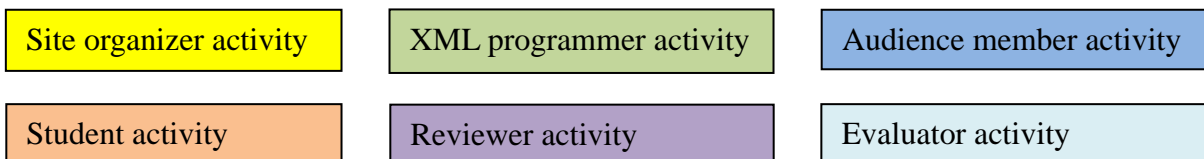
Key:



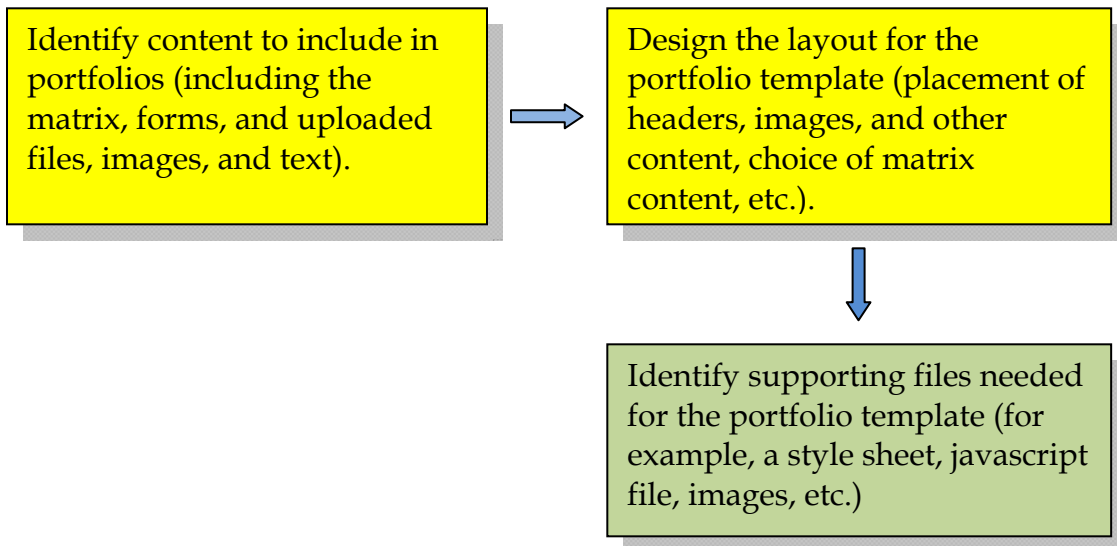
Design the Matrix



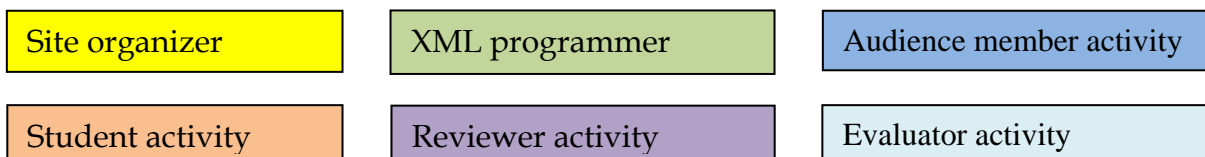
Key:



Design the Portfolio Template



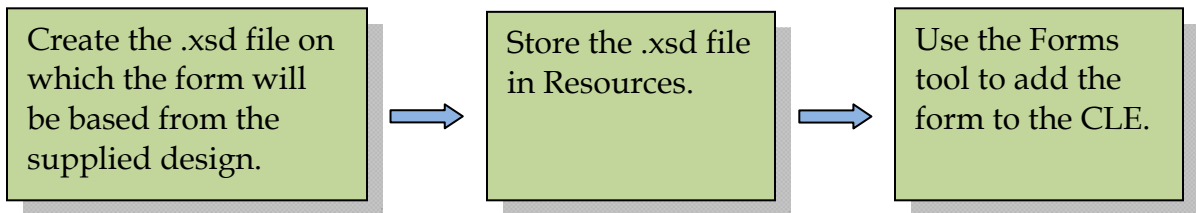
Key:



Create Data Structures

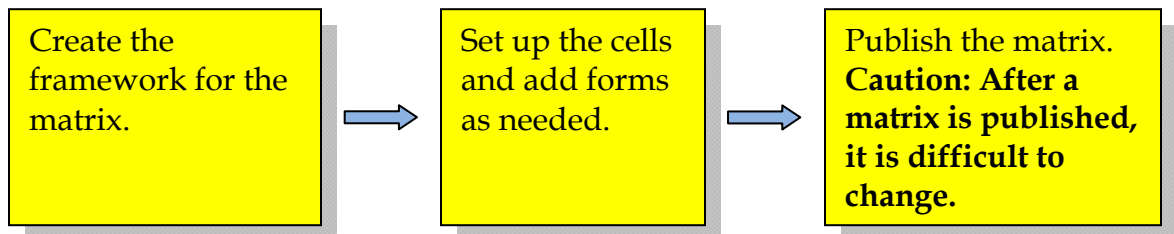
Create the Forms

For each form needed for the matrix and/or the portfolio template:

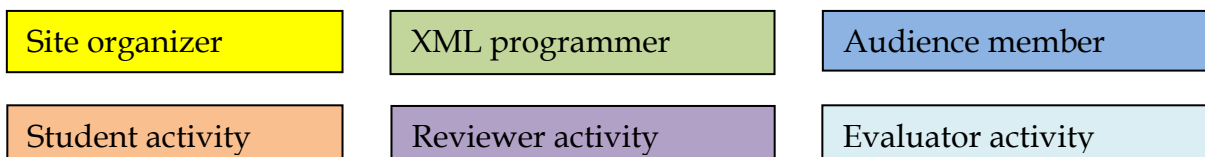


Create the Matrix

Using the Matrices tool:

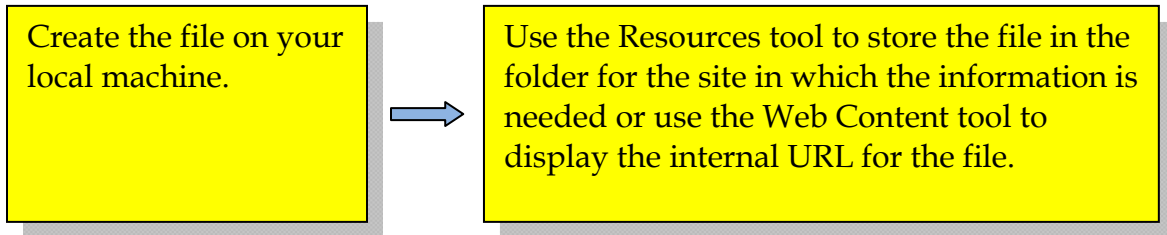


Key:

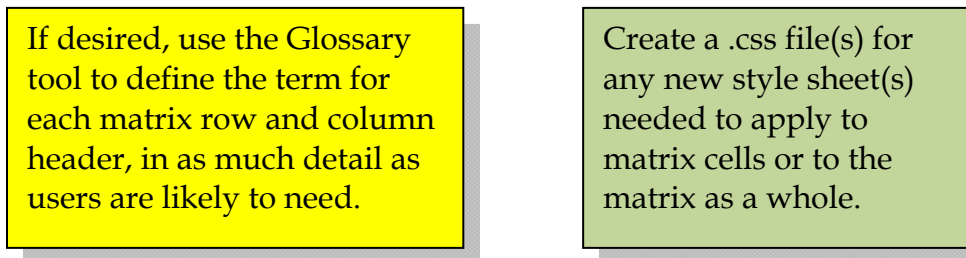


Create Other Basic Components

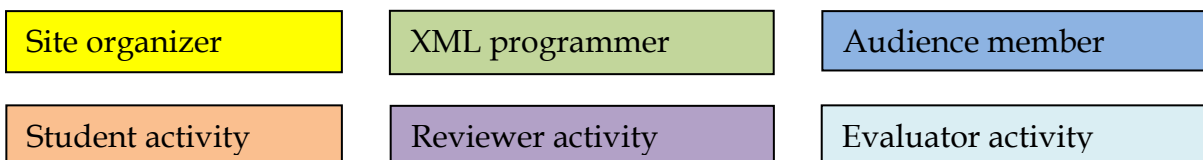
For each file that will display to users to supply additional information, instructions, examples, etc.:



Additionally, in any order:

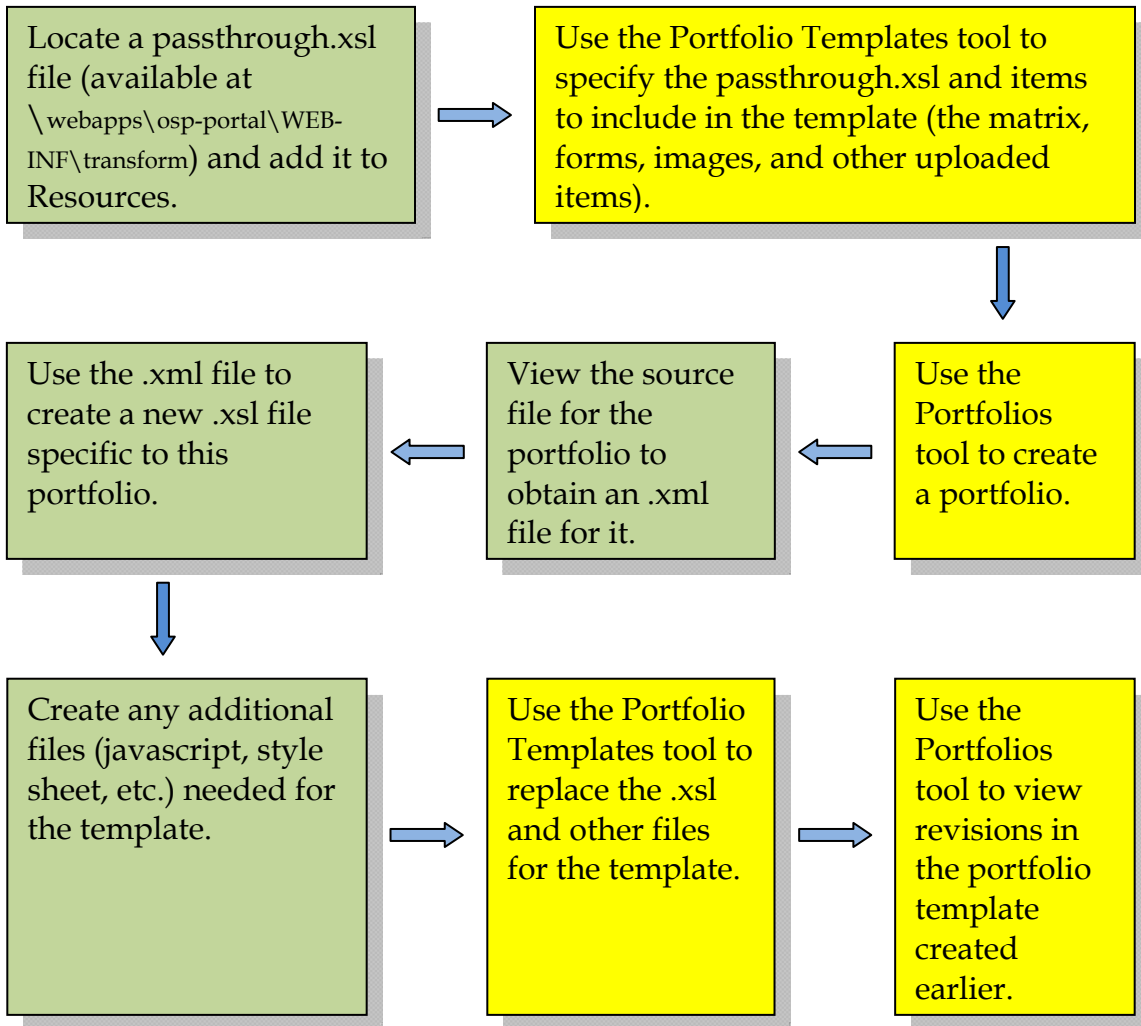


Key:

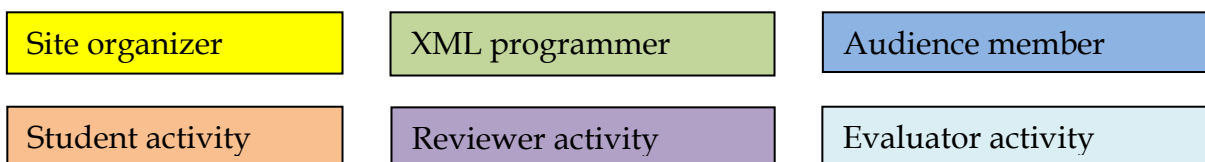


Create the Portfolio Template

For the portfolio template to be used to create student portfolios:



Key:



Rider University: Portfolios for Personal Representation

Rider University is a private, coeducational university in New Jersey. It prides itself on offering a truly student-centered education that “connects meaningful studies in the classroom with relevant hands-on experiences in the laboratory, community, marketplace and the world.” Rider’s two campuses—one in Princeton and the other in Lawrenceville—serve approximately 5,800 students in four academic colleges. The university is also home to the renowned Westminster Choir College.

Rider University began a strategic plan to use ePortfolios to create and maintain information on student learning in 2005. The initial ePortfolio project provides a co-curricular transcript in support of a co-curricular graduation requirement. The second Rider ePortfolio project offers students three on-line resumes to assist them in career development and the job search. Both of these projects were organized by the Office of Information Technology in partnership with Career Services.

This documentation illustrates one of the Rider on-line resumes, the Chronological Resume. The Chronological Resume supplies an attractive format for the inclusion of specific information currently recommended by career development professionals. A typical student resume is shown on the next page.

Brett G. Donovan

brettdonovan97@yahoo.com

Campus Address

4532 East University Drive, Apt. 14B
Lawrenceville, New Jersey 03664
409-771-7863

Home Address

7654 West Broadway Road
Hamilton, New Jersey 03445
703-255-5673

OBJECTIVE

High-energy individual seeks entry-level human resources position with large company.

EDUCATION

The College of New Jersey, West Trenton, NJ

MA, Computer Science May 2006

Major: Computer Science

Minor: Business

GPA: 3.5 Major GPA: 3.8

Rider University, Lawrenceville, NJ

Bachelor of Science in Business January 2004

Major: Human Resources Management

Minor: Economics

GPA: 3.4 Major GPA: 3.8

HONORS

Dean's List all semesters, Henry J. Rider Scholar, Newcomb-Garson Award, Sigma Tau Delta Honor Society, President's Award - Outstanding Community Support

CERTIFICATION

CompTIA A+® Certification - Feb. 2007

Diversity Training Certificate - March 2006

Water Safety Instruction Certificate - May 2006

ESL Endorsement - New Jersey

RELEVANT EXPERIENCE

2006 - present

Johnson & Johnson, New Brunswick, NJ

Accounting Specialist

Create spreadsheets for company finances. Maintain accurate and up-to-date financial records. Designed and created specialized spreadsheets for the company's Human Resources department.

2004 - 2005

The College of New Jersey, West Trenton, NJ

Student Assistant

Maintained accurate files of student financial aid forms. Retrieved data for professional staff and financial aid advisers as requested. Responded to and transferred telephone calls from parents and students. Strong interpersonal skills essential when communicating with clients.

2003 - 2004

Rider University, New Brunswick, NJ

Cafeteria busboy

Bussed tables in 400-seat cafeteria

Willing to Travel

U.S. Citizen

Comments on this Portfolio:

Currently there are no comments about this portfolio.

Add new comment about this portfolio:

Add Comment (required fields are noted with an *)

* Title:

* Comment:

Make this comment visible to:

- Only Me
 The Owner and I
 Everyone

Figure 4 Sample Rider resume portfolio presentation

This resume uses a wizard to assist students in using forms and uploading files to collect information on and examples of their education, experience, skills, and accomplishments. The first page of the wizard has links to each form needed to create a resume. That page looks, in part, like this:

Chronological Resume Portfolio

To assist with the creation of Chronological Resume Portfolio.

Instructions

Use this wizard for guidance in creating your resume portfolio. When you believe that your resume is complete, fill out the reflection form below and submit the entire wizard for evaluation.

Rationale

Examples

Items	Description
Chronological Resume Portfolio	To assist with the creation of Chronological Resume Portfolio.
▼ Overview	For guidance in creating forms to document personal information in your resume.
• Header	Use this page to document ways in which you can be contacted. Include your home and work residences in the forms you create.
• Objective	Use this page to specify your career objective for this resume. Each resume you create can contain a different objective.
• Footer	Use this form to specify whether you are willing to travel and/or relocate and to specify your citizenship.
▼ Education	For guidance in creating forms to document educational information in your resume.
• Education	Use this page to document your educational history in the form of degrees, certificates, and other activities.
• Honors	Use this form to specify any honors you have received.
• Certifications	Use this form to specify any certifications you have received. Specify the certifying body, the certification, and the date.
• Relevant Courses	Use this page to document courses you have taken that are relevant to your career objective.
▼ Experience	For guidance in creating forms to document career information in your resume.
• Relevant	Use this page to document work experience(s) relevant to your career objective.

Figure 5 First page of Rider resume wizard

Students may then select from their accumulated forms and uploaded files to populate versions of their resumes to share electronically with different individuals for different purposes. A typical form is shown here.

Select Item

Select an existing item from Resources or add a new item from your computer. Once you've made your selection, select 'Finish', or select 'Cancel' to return without making any changes.

Modify item properties and then choose 'Update' at the bottom. Required items marked with *

Location: Resumes Resources / My Workspace

* **Title**

Form Type objective

Use this form to specify your career objective for this resume. Each resume you create can have a different objective.

Objective

Properties

Description

Access

Display to non-members (publicly viewable)

Display to site

Created By Brett Donovan

Creation Time 4/2/07 9:25 am

Last Modified 4/2/07 9:25 am

Last Modified By Brett Donovan

Figure 6 Objective form for Rider resume

Portfolio Components

Rider's portfolio is made up of the following components:

- ◆ 20 forms for collecting specific types of data to include on resumes
- ◆ Two additional forms for collecting reflections and feedback in the wizard
- ◆ An online wizard to guide users through the process of creating a resume
- ◆ A portfolio template for creating a chronological resume
- ◆ A report template that allows the institution to capture information on student progress in completing information related to the resume development process.

Table 3 Rider portfolio components

<i>Component</i>	<i>Notes</i>
Activities form	A single, repeatable field prompts students to provide the name of one or more activities in which they have participated.
Certifications form	A single, repeatable field prompts students to provide the name of one or more certifications they have received.
Community service form	Fields prompt students to provide the following information for one or more community service activities: <ul style="list-style-type: none"> ◆ Role/Title ◆ Organization
Computer skills form	A single, repeatable field prompts students to note one or more computer skills they have acquired.
Education form	Fields prompt students to provide the following information for one or more educational endeavors: <ul style="list-style-type: none"> ◆ Order (in relation to the other entries in

<i>Component</i>	<i>Notes</i>
	<p>the form)</p> <ul style="list-style-type: none"> ◆ Institution ◆ City and State of Institution ◆ Degree ◆ Date of Degree ◆ Major(s) ◆ Minor(s) ◆ GPA ◆ Major GPA ◆ Additional Information (for example, honors received if the Honors form is not used)
Experience form	<p>Fields prompt students to provide the following information for one or more work-related experiences:</p> <ul style="list-style-type: none"> ◆ Order (in relation to the other entries in the form) ◆ Employer ◆ City/State ◆ Dates ◆ Title ◆ Description of Responsibilities
Footer form	<p>Fields prompt students to indicate:</p> <ul style="list-style-type: none"> ◆ Choice One (willingness to relocate and/or travel) ◆ Choice Two (citizenship)
Header form	<p>Fields prompt students to provide the following information:</p>

<i>Component</i>	<i>Notes</i>
	<ul style="list-style-type: none"> ◆ First Name ◆ Middle Name ◆ Last Name ◆ One or two addresses, including: <ul style="list-style-type: none"> Type (Campus or Home) Street Address City State Zip Phone ◆ Email address
Honors form	A single, repeatable field prompts students to enter the name of one or more honors received.
Interests form	A single, repeatable field prompts students to enter the name of one or more noteworthy interests.
Language skills form	A single, repeatable field prompts students to specify one or more language skills they have acquired.
Leadership form	Fields prompt students to provide the following information for one or more leadership activities: <ul style="list-style-type: none"> ◆ Role/Title ◆ Organization Name
Memberships form	A single, repeatable field prompts students to enter the name of one or more organizations of which he or she is a member.
Objective form	A single field prompts students to enter their career objective.

<i>Component</i>	<i>Notes</i>
Presentations/ Publications form	<p>Fields prompt students to provide the following information for one or more presentations they have given or pieces they have published:</p> <ul style="list-style-type: none"> ◆ Title of Presentation/Publication ◆ Additional Information (including co-authors or presenters, publication volume numbers, and/or presentation locations) ◆ Date(s) ◆ Organization/Publisher
Professional Development Activities form	<p>Fields prompt students to provide the following information for one or more professional development activities in which they have participated:</p> <ul style="list-style-type: none"> ◆ Presentation/Workshop Attended ◆ Organization or School (sponsoring the event)
Relevant courses form	A single, repeatable field prompts students to enter the name of one or more courses he or she has taken.
Relevant Experience form	<p>Fields prompt students to provide the following information for one or more relevant work experiences:</p> <ul style="list-style-type: none"> ◆ Order (in relation to the other entries in the form) ◆ Employer ◆ City/State ◆ Date(s) ◆ Title ◆ Description of Responsibilities
URL form for	Fields prompt students to provide the

<i>Component</i>	<i>Notes</i>
including live URLs in resumes	<p>following information for one or more URLs that provide supporting information for this resume:</p> <ul style="list-style-type: none"> ◆ Name of URL ◆ URL Link ◆ Description (for notes only; does not appear in the resume itself)
Travel form	A single, repeatable field prompts students to note one or more relevant travel experiences he or she has participated in.
Feedback form	A single field prompts reviewers to enter formative comments on the work done in the wizard.
Reflection form	A single field prompts students to reflect on the experience of creating this resume.
Resume wizard	<p>A hierarchical wizard consisting of eight categories, with one page for each form in a category:</p> <ul style="list-style-type: none"> ◆ Overview, which allows users to collect data via the Header, Objective, and Footer forms ◆ Education, which allows users to collect data via the Education, Honors, Certifications, and Relevant Courses forms ◆ Experience, which allows users to collect data via the Relevant Experience and Experience forms ◆ Skills, which allows users to collect data via the Computer Skills, Language Skills, and Travel forms ◆ Professional Activities, which allows users to collect data via the Presentations/Publications, Membership,

<i>Component</i>	<i>Notes</i>
	<p>and Professional Development forms</p> <ul style="list-style-type: none"> ◆ Activities, which allows users to collect data via the Interests, Activities, Leadership, and Community Service forms ◆ Supporting Materials, which allows users to collect uploaded files and live URLs (via the URL form) to support other information in the resume ◆ Creating a Portfolio – a link to a separate page that presents instructions for creating a portfolio presentation.
Portfolio template	<p>Consists of:</p> <ul style="list-style-type: none"> ◆ An .xsl file for determining pathways for inclusion of content from forms and uploaded files ◆ An .xsd file that determines additional information that users will type or copy and paste into a text editor during the resume creation process ◆ A .css file that determines the look and feel of the portfolio.
Report template	<p>For instructors or administrators with appropriate permission, a report indicating the progress users have made in creating information for resume portfolios.</p>

Portfolio Users

Creating and implementing a resume portfolio similar to that used at Rider University begins with the creation of a portfolio site. Within this site, Rider assigns users to several different roles, each of which allows people assigned to that role to perform an appropriate set of activities. The following table enumerates the roles, users, activities, and tools.

Table 4 Rider roles, users, activities, and tools

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities:</i>	<i>Using these CLE tools:</i>
Organizer	Site owner	<p>Design the forms, wizard, and portfolio template and write instructions for using them.</p> <p>Set up and publish the wizard and portfolio template in the CLE.</p> <p>Identify participants and reviewers and assign permissions.</p> <p>Introduce users to the tools they will use.</p> <p>Create reports on progress by site users.</p>	<p>NA</p> <p>Wizards, Portfolio Templates</p> <p>Site Setup, Wizards</p> <p>Varies by user</p> <p>Reports</p>
Program Admin	Assistant to site owner	Help with or take on part of the site owner's work.	Varies
Tech Support	XML programmer	<p>Create or locate source files needed for forms and the portfolio template and add them to the CLE.</p> <p>Assist with portfolio template creation.</p>	<p>Resources</p> <p>Portfolio Templates</p>
Participant	Students	<p>Fill out the wizard pages; review feedback on pages and revise work as needed.</p> <p>Create and publish portfolio; view and manage comments on portfolio; and revise work as needed.</p>	<p>Wizards, Resources</p> <p>Portfolios, Wizards, Resources</p>
Reviewer	Reviewers	Review work in wizard pages and provide formative feedback one or more times.	Wizards

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities:</i>	<i>Using these CLE tools:</i>
Guest	Audience members	View participant portfolio pages and comment on them.	Portfolios

Workflow: Using the Portfolio to Create a Resume

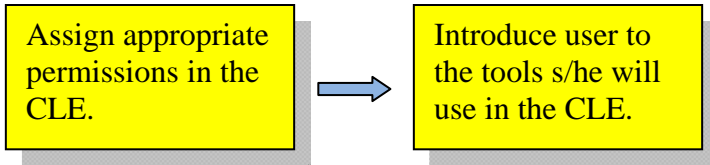
The process of using the Rider portfolio to create a resume involves four major steps:

- 1 Involve users.
- 2 Complete wizard pages.
- 3 Create portfolios.
- 4 Assess the program.

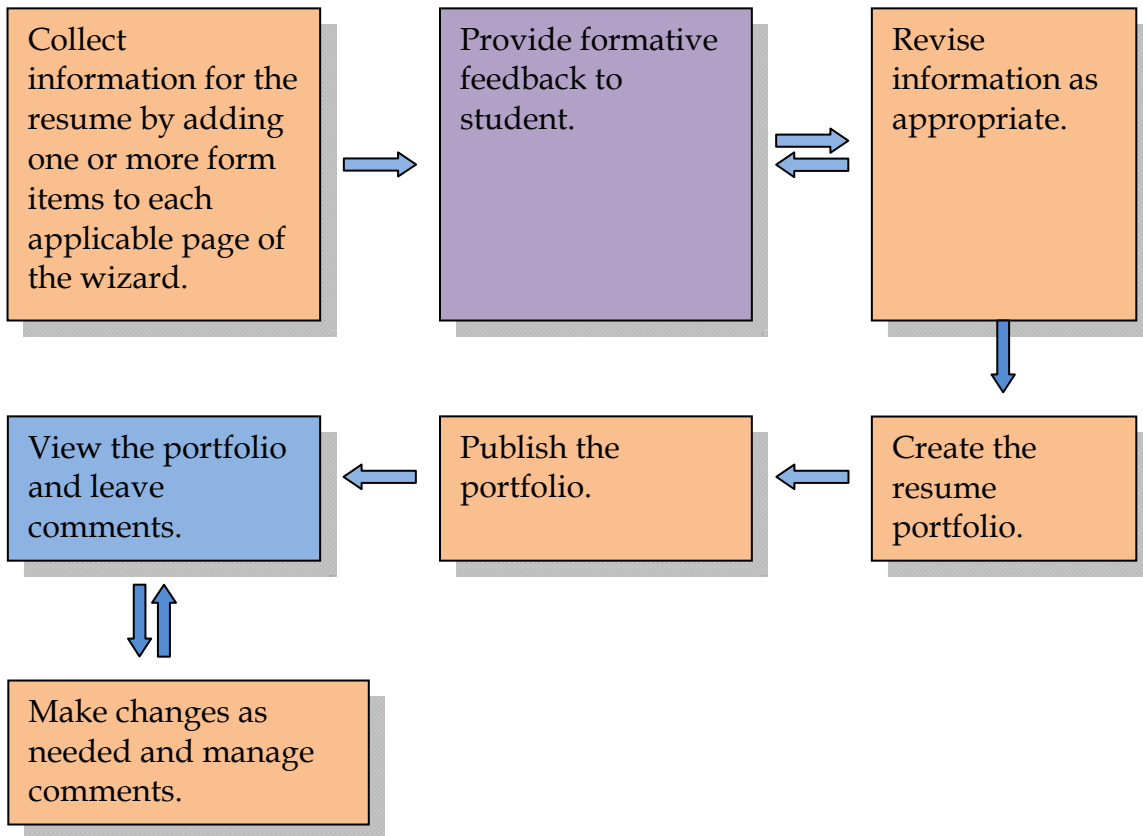
The following subsections show the workflow for each step. A key at the bottom of each page indicates which user is responsible for each activity.

Involve Users

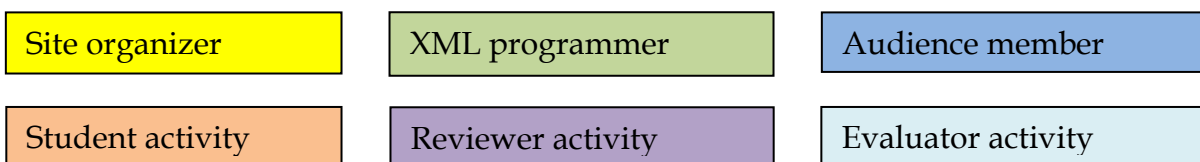
For each student and reviewer who will be involved:



Complete the Wizard

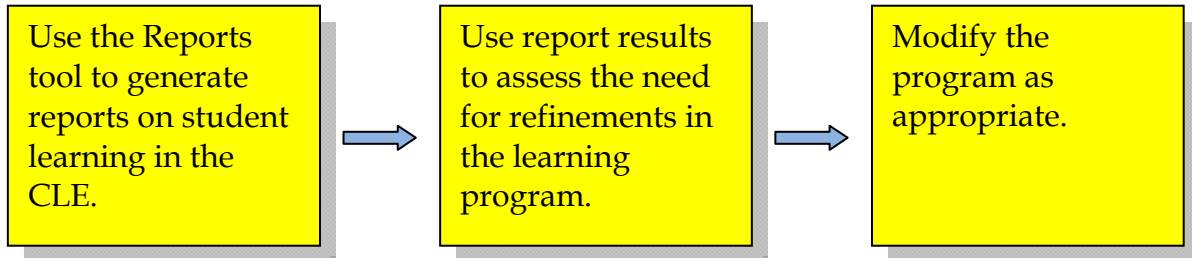


Key:

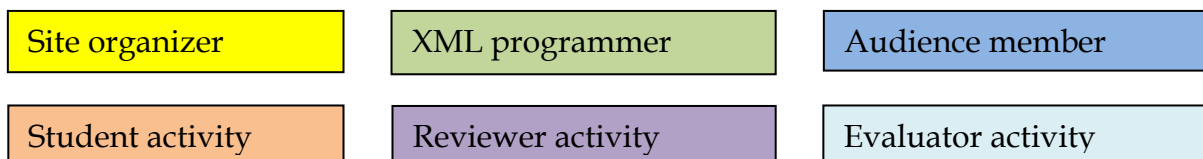


Assess the Program

At any time after students have begun working in the wizard:



Key:



Developing the Data Structures

As in the previous example, before you can develop data structures, you must first analyze the process they will support and determine the portfolio requirements. After you have identified the requirements, the workflow for developing data structures for the Rider University Chronological Resume portfolio involves two major steps:

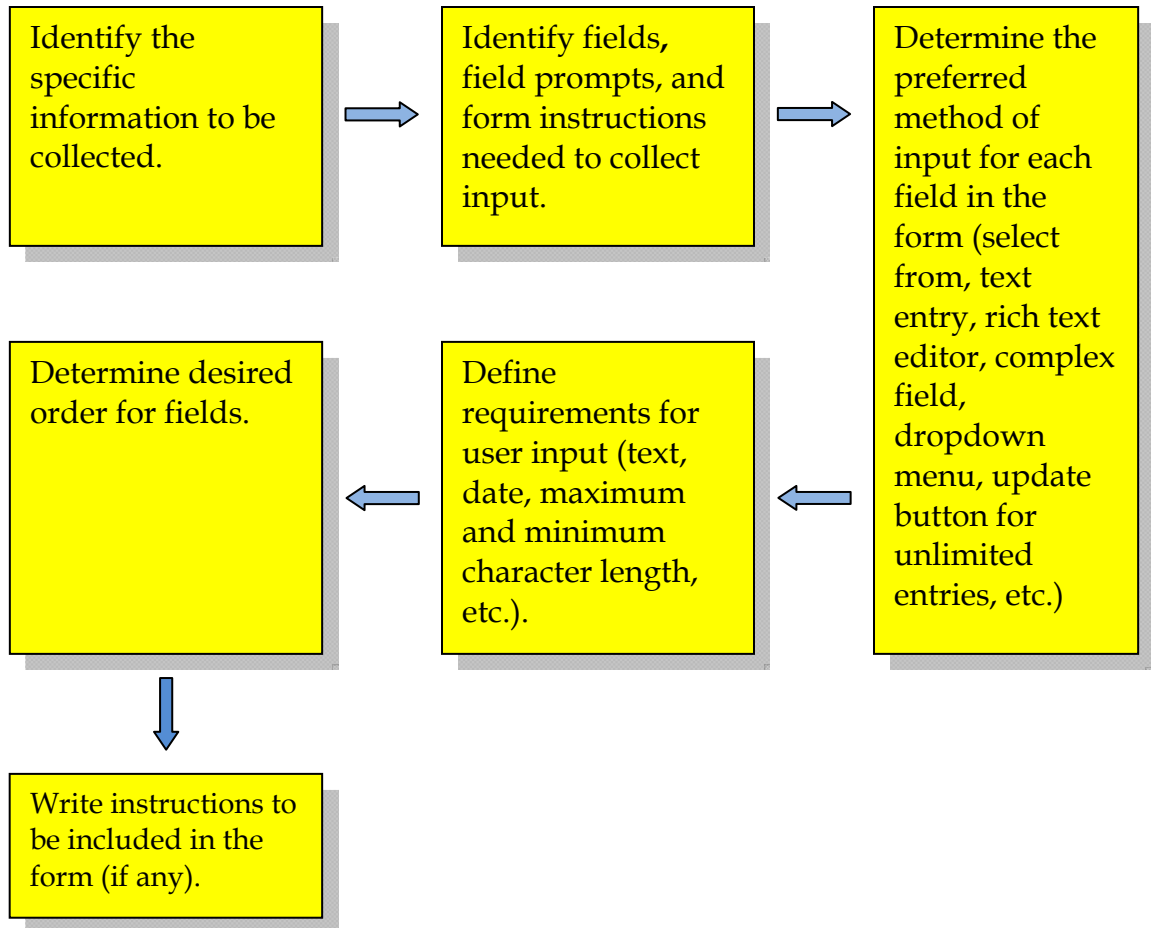
- 1 Design data structures.
- 2 Create data structures.

The following subsections show the workflow for each step. A key at the bottom of each page indicates which user is responsible for each activity.

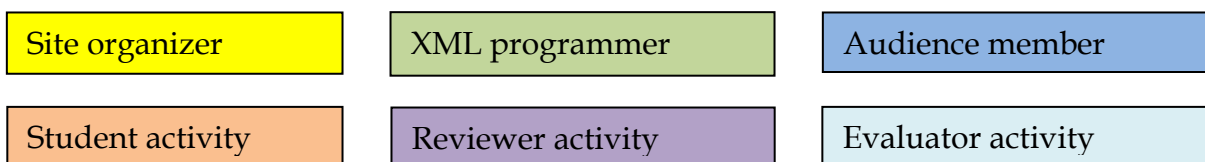
Design Data Structures

Design the Forms

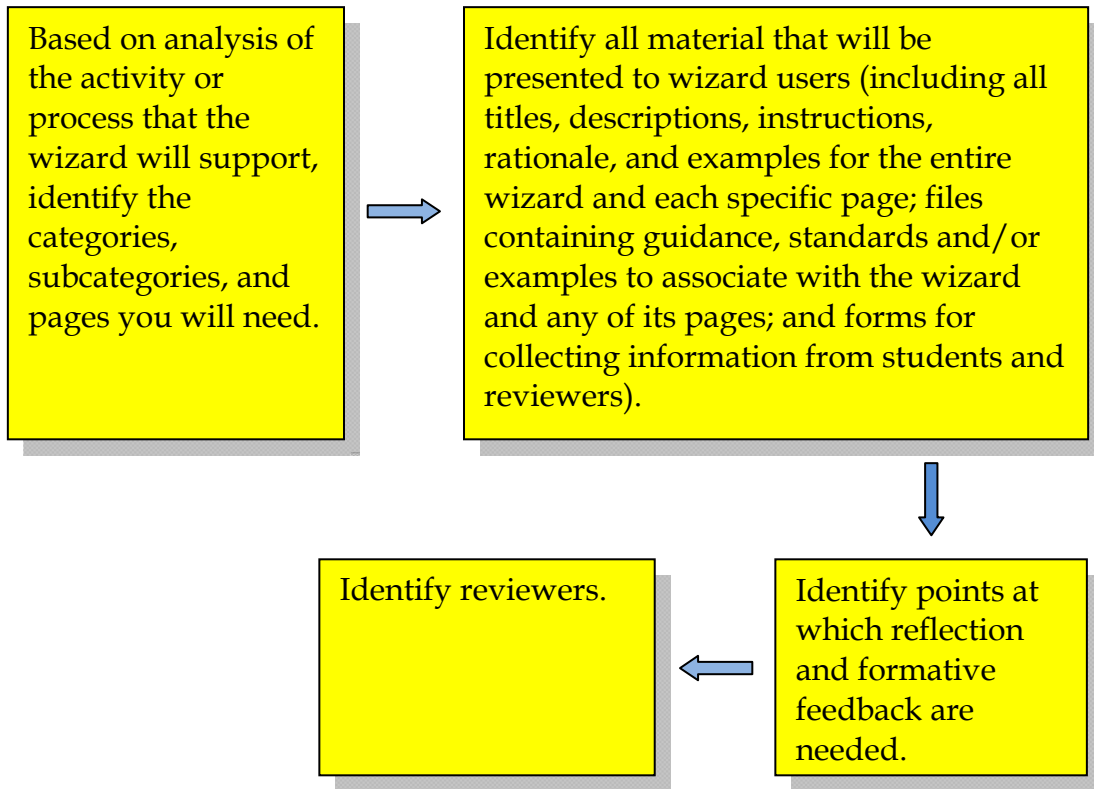
For each form:



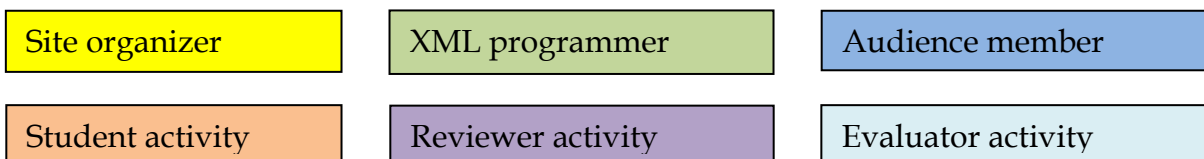
Key:



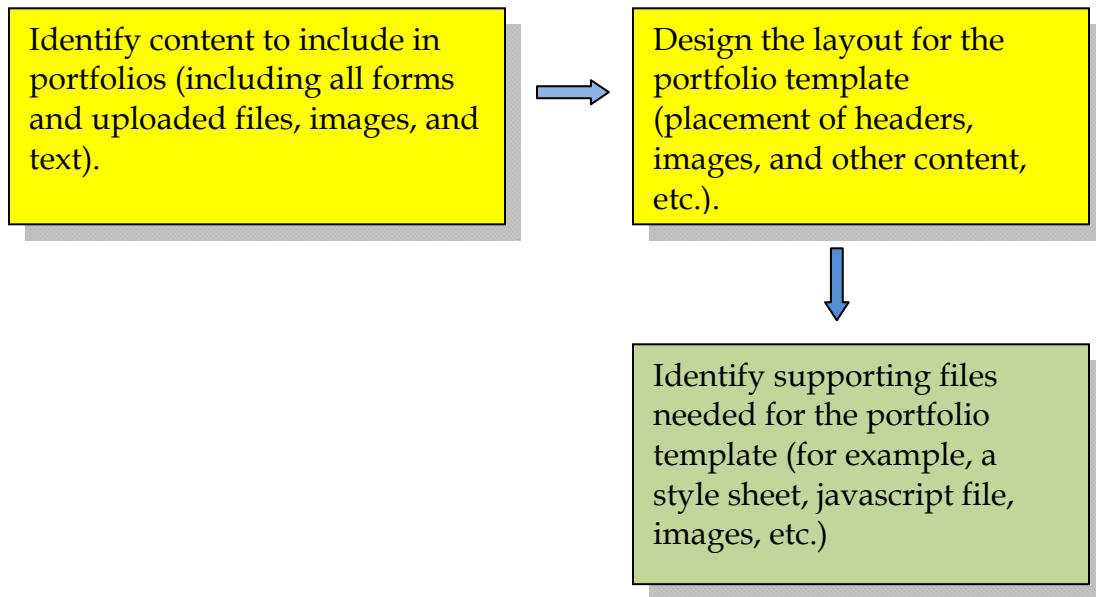
Design the Wizard



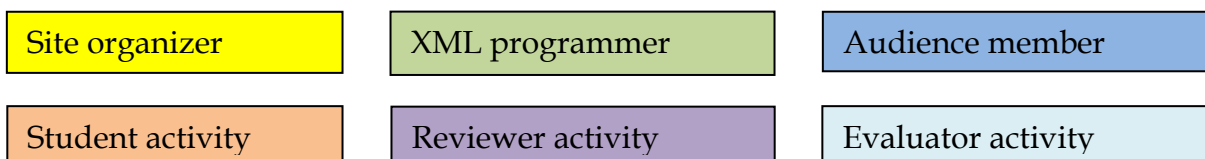
Key:



Design the Portfolio Template



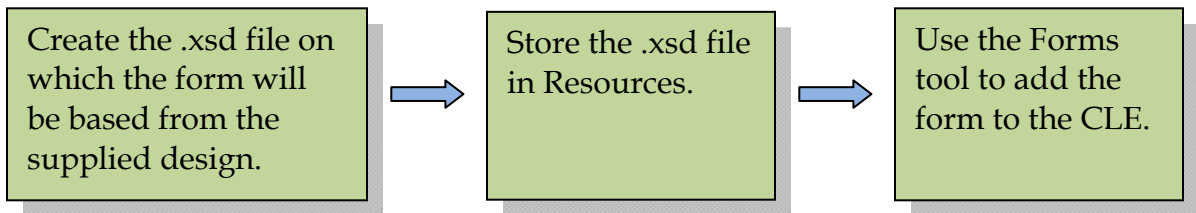
Key:



Create Data Structures

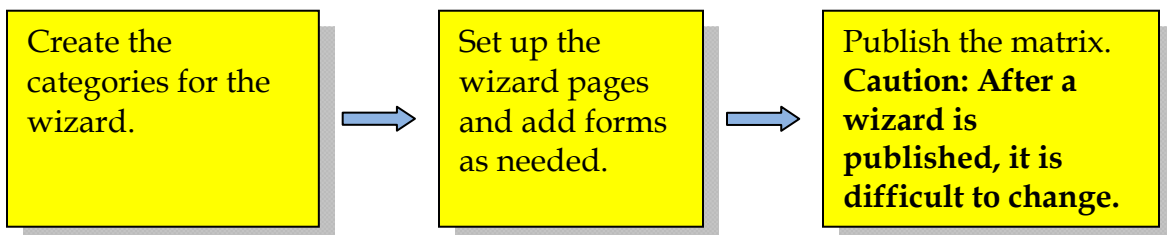
Create the Forms

For each form needed for the wizard and/or the portfolio template:

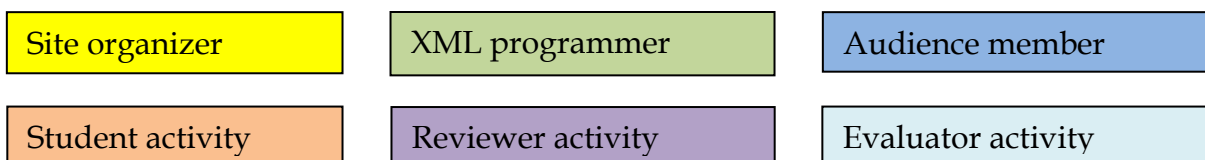


Create the Wizard

Using the Wizards tool:

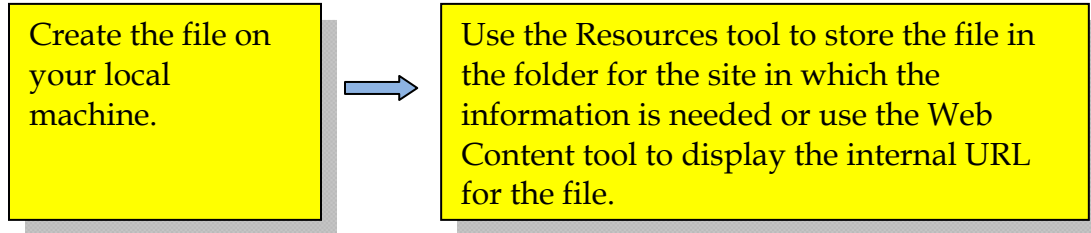


Key:



Create Other Basic Components

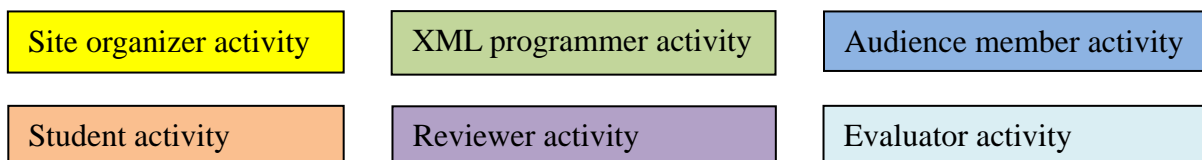
For each file that will display to users to supply additional information, instructions, examples, etc.:



Additionally:

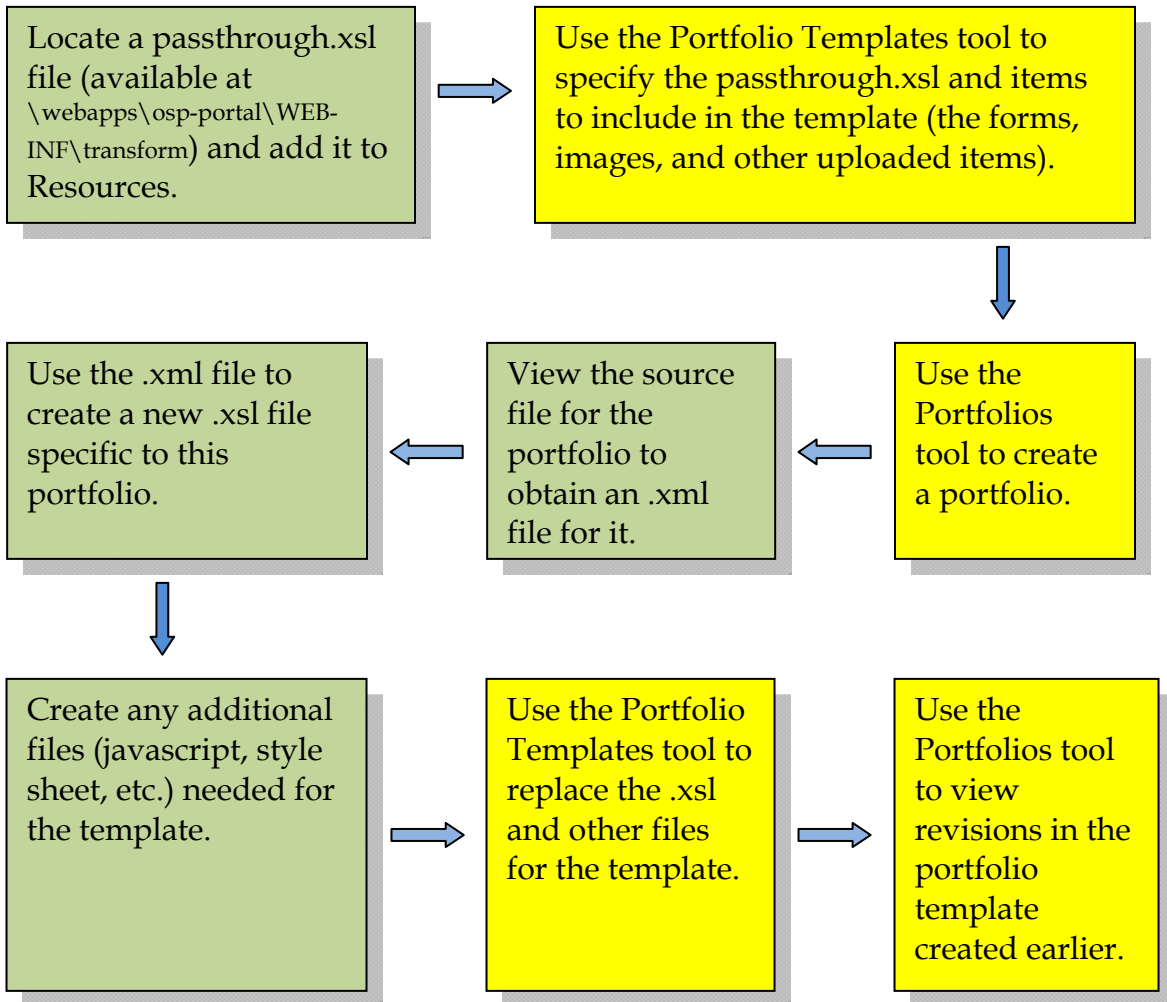
Create a .css file(s) for any new style sheet(s) needed to apply to wizard pages or to the wizard as a whole.

Key:

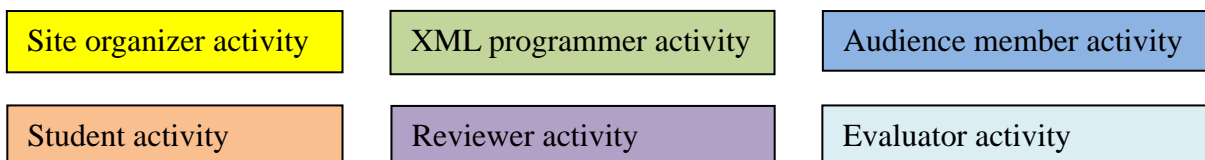


Create the Portfolio Template

For the portfolio template to be used to create student portfolios:



Key:



Rhode Island Electronic Portfolio System (RIEPS): Portfolios for Assessment and Accreditation

The Rhode Island Network for Educational Technology (RINET) is a non-profit corporation that supports the collective technology needs of the K-12 educational community in Rhode Island. RINET provides services to over 95 percent of all public school districts and private and independent schools in the state. RINET's mission is to provide advanced internet access and high quality technology programs and services in support of K-12 teaching and learning. One of these programs—the Rhode Island Electronic Portfolio System (RIEPS)—is described here.

Please note:

The RIEPS portfolio implementation uses a customized version of the Sakai CLE. This implementation includes the Goal Management tool. For information on using this tool, see the excellent video at <http://public.lsb.syr.edu/~smkeesle/osp24nightlyMar15.mov>.

In 2006, the Rhode Island Network for Educational Technology (RINET) worked with eighteen Rhode Island high school districts to implement the Rhode Island Electronic Portfolio System (RIEPS). The goals of this program are to use ePortfolios to assess student learning according to state standards and district expectations and provide reports of that learning to the state and to accrediting organizations.

Within each participating school, all teachers and students participate in the project. For each course, teachers create assignments that map to goals (that is, specific state standards and district expectations for graduation).

Assignment Details

Title Kelly's Cakes
Due May 15, 2007 5:00 pm
Status Not Started
Grade Scale Letter Grade
Modified by instructor Apr 3, 2007 6:37 p

The assignment Kelly's Cakes is linked to four state goals for math.

Assignment Goals

Viewing 1 - 4 of 4 items

Navigation: |< < Show 50 items... > >|

Worksite	GoalSet	Goal	Rubric	Rationale	Visible	Exportable
State Goals - Production Copy	Grade Span Expectations	M(F&A)-10-3 Demonstrates conceptual understanding of algebraic expressions by solving problems involving algebraic expressions, by simplifying expressions			true	true
State Goals - Production Copy	Grade Span Expectations	M(F&A)-10-2 Demonstrates conceptual understanding of linear and nonlinear functions and relations.			true	true
State Goals - Production Copy	Grade Span Expectations	M(F&A)-10-4 Demonstrates conceptual understanding of equality by solving problems involving algebraic reasoning about equality.			true	true
State Goals - Production Copy	Grade Span Expectations	M(F&A)-10-1 Identifies, extends, and generalizes a variety of patterns (linear and nonlinear) represented by models, tables, sequences, or graphs to solve problems.			true	true

Assignment Instructions

Figure 7 Sample RIEPS assignment linked to goals

The linkage between assignments and goals allows students to create portfolio-worthy artifacts for eventual inclusion in a graduation portfolio.

Each assignment contains instructions to students along with the rationale for mapping the assignment to specific goals and an explanation of the rating scale to be applied.

Kelly's Cakes

Instructions

- Read through the problem and questions carefully, and reread as needed.
- Write your thinking in words or numbers in the text field below.
- Attach an image file to illustrate your thinking when you are unable to capture it in the text field below.
- Be sure to answer both parts of question one, and show all of your thinking for **each** of the ingredients.
- Be sure to answer all five parts of question two, and remember to try out your ideas on the practice cake pans before you transfer your final answer to the task.
- Attach any additional pages that include work, including your images of your practice cake pans.
- Refer to the criteria worksheet and use the worksheet as a checklist when you have completed this task.

The Problem: Kelly's Cakes

Kelly, a baker, was hired to make Chocolate Peanut Butter Cakes for a fifth grade class. The ingredient list below makes one cake that serves 8 people.

Chocolate Peanut Butter Cake

Ingredient List

- 1 $\frac{1}{2}$ cups flour
- 2 eggs
- $\frac{3}{4}$ cups sugar
- 1 bar of baking chocolate
- $\frac{1}{2}$ cup vegetable oil
- $\frac{1}{4}$ teaspoons of vanilla
- 8 ounces of peanut butter chips

Serves 8 people

1. Kelly needs enough cake to serve 24 people.
 - a. How many cakes will Kelly need to make? How do you know?
 - b. How much of each ingredient will Kelly need to serve 24 people? Explain your thinking in pictures, numbers, and/or words.
 - ___ cups flour
 - ___ cups sugar
 - ___ teaspoons of vanilla
 - ___ eggs
 - ___ bars of baking chocolate
 - ___ ounces of peanut butter chips
2. Kelly made four sheet cakes for a parent meeting the following week. There were a total of 45 people who attended the event.
 - a. Show how Kelly can cut the four cakes so that everyone gets an equal-sized slice. (Each cake must have the same number of slices).
 - b. How many slices will there be in one whole cake?
 - c. What would the fraction name be for one slice of cake?
 - d. Will there be any left over slices of cake?
 - e. If so, what fraction of a whole cake will be left over?

Figure 8 Sample RIEPS assignment instructions

All of this information is available to the students.

At appropriate times throughout the school year, students work on the assignments and submit work to their teachers for rating. Over time, each student collects many assignments that map to goals.

At the end of the school year, each student chooses some of these completed, rated assignments to include in a graduation portfolio. A sample graduation portfolio is shown here.

RIEPS:
 Rhode Island Electronic
 Portfolio System

Johnston High School
 Graduation Portfolio

Bart Simpson
 2010
 April 2007

Johnston School District
 Requirements for
 Graduation Portfolio

School Expectations	ELA	ELA	Math	Math	Science	Science	Social Studies	Social Studies	Fine Arts	Technology	Special Interest	Special Interest	Special Interest
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="font-size: 8px;"> <input type="checkbox"/> = NOT submitted </div> <div style="font-size: 8px;"> <input checked="" type="checkbox"/> = completed </div> <div style="font-size: 8px;"> <input type="checkbox"/> = validated task </div> </div>													
The Johnston High School Student :													
1. Takes responsibility for his/her learning.													
2. Demonstrates the ability to be an autonomous learner.													
3. Understands and demonstrates a sense of community and good citizenship.													
4. Reads actively and critically for a variety of purposes.													
5. Writes and speaks effectively.													
6. Listens and views materials actively and critically.													
7. Reasons effectively and solves problems.													
8. Understands the concepts of personal physical fitness and good health.													
9. Understands and applies technological concepts.													
10. Performs and applies numeracy skills for a variety of purposes.													
Summative Reflection													

Comments on this Portfolio:

Currently there are no comments about this portfolio.

Add new comment about this portfolio:

Add Comment (required fields are noted with an *)

* Title:

* Comment:

Make this comment visible to:

Only Me
 Everyone

Figure 9 Sample RIEPS graduation portfolio

Each graduation portfolio is based on a table in which:

- ◆ Row headings represent district expectations.
- ◆ Column headings represent categories for individual assignments (which can be as simple as Entry 1, Entry 2, etc. or can provide more complex requirements for the entry of specific types of assignments).
- ◆ Cells in the table can be opened to display specific assignments that the student has chosen to meet the requirements of a district expectation. Clicking on the assignment allows the user to view the assignment instructions, student work on the assignment, linked goals, and teacher rating of the work according to the defined rating scale.

Viewers of the portfolio can click on each cell to view the assignment the student has chosen to submit as evidence of having met a standard. A sample assignment display is shown, in part, on the next page.

RIEPS: Rhode Island Electronic Portfolio System

Johnston High School
Graduation Portfolio

1. Takes responsibility for his/her learning.

Bart Simpson
2010
April 2007

Assignment Title:
Kelly's Cakes

Date Submitted:
04 / 04 / 2007

Date Returned:
04 / 04 / 2007

Assignment Instructions:

Kelly's Cakes

Instructions:

- Read through the problem and questions carefully, and reread as needed.
- Write your thinking in words or numbers in the text field below.
- Attach an image file to illustrate your thinking when you are unable to capture it in the text field below.
- Be sure to answer both parts of question one, and show all of your thinking for each of the ingredients.
- Be sure to answer all five parts of question two, and remember to try out your ideas on the practice cake pans before you transfer your final answer to the task.
- Attach any additional pages that include work, including your images of your practice cake pans.
- Refer to the online worksheet and use the worksheet as a checklist when you have completed that task.

The Problem:
Kelly's Cakes

Kelly, a baker, was hired to make Chocolate Peanut Butter Cakes for a fifth grade class. The ingredient list below makes one cake that serves 8 people.

Chocolate Peanut Butter Cake
Ingredient List

1 $\frac{1}{2}$ cups flour
2 eggs
 $\frac{3}{4}$ cups sugar
1 bar of baking chocolate
 $\frac{1}{2}$ cup vegetable oil
 $\frac{1}{2}$ teaspoons of vanilla
8 ounces of peanut butter chips
Serves 8 people

1. Kelly needs enough cake to serve 24 people.

a. How many cakes will Kelly need to make? How do you know?

b. How much of each ingredient will Kelly need to serve 24 people? Explain your thinking in pictures, numbers, and/or words.

_____ cups flour
_____ cups sugar
_____ teaspoons of vanilla
_____ eggs
_____ bars of baking chocolate
_____ ounces of peanut butter chips

2. Kelly made four sheet cakes for a parent meeting the following week. There were a total of 40 people who attended the event.

a. Show how Kelly can cut the four cakes so that everyone gets an equal-sized slice. (Each cake must have the same number of slices)

b. How many slices will there be in one whole cake?

c. What would the fraction name be for one slice of cake?

d. Will there be any left over slices of cake?

e. If so, what fraction of a whole cake will be left over?

Reflections

Write your answers to these reflective questions in the text box for the assignment or attach a word file containing your responses.

- How did you solve this problem? Describe your process and attach an uploaded image of your calculations.
- How would you change your process for solving a similar problem if you had to do it again?
- What advice would you have for others for solving this problem?

Assignment Attachments:
cake.r1.12.p0001.jpg

Response to Assignment:

1a. How many cakes will Kelly need to make? 3 How do you know? $24/8 = 3$

b. How much of each ingredient will Kelly need to serve 24 people? Explain your thinking in pictures, numbers, and/or words.

4 $\frac{1}{2}$ cups flour ($1 \frac{1}{2} * 3 = 4 \frac{1}{2}$)
2 $\frac{1}{4}$ cups sugar ($\frac{3}{4} * 3 = 2 \frac{1}{4}$)
 $\frac{3}{4}$ teaspoons of vanilla ($\frac{1}{2} * 3 = \frac{3}{4}$)
6 eggs ($2 * 3 = 6$)
3 bars of baking chocolate ($1 * 3 = 3$)
24 ounces of peanut butter chips ($8 * 3 = 24$)

2a. Show how Kelly can cut the four cakes so that everyone

Figure 10 Sample RIEPS assignment display in graduation portfolio

Another key aspect of the RIEPS portfolio is its reports. All students, teachers, and administrators associated with the project may create reports on the portfolio data to which they have access. These reports allow students to evaluate their progress towards graduation and allow faculty and administrators to evaluate the progress of individuals, classes, schools, and districts with regard to compliance with state and local standards.

Statewide Implementation

The RIEPS implementation of portfolios is based on three types of sites within the CLE.

- ◆ In each participating school, an SIS feed automatically sets up a course site for every section of every course. Teachers access the course site for each of their classes to add portfolio-worthy assignments for the class and associate these assignments with the appropriate state standards and district expectations for graduation. (See the sample shown in Figure 7 and Figure 8.) All course sites are associated with the State Goals site – a course site that contains global goals that apply to all school districts in the state.

Modify Goal Sets

Select a goal set to modify from the tree(s) below, or add a new goal set.

Add Goal Set

Unpublished Goal Sets (+)

- English Language Proficiency Standards 6-8
- English Language Proficiency Standards 9-12
- ★ Test Goal Set 2 (user1)

Published Goal Sets (+)

- Applied Learning Standards
- Career & Technical Education
- District Expectations
- Grade Level Expectations
- Grade Span Expectations
 - Alternate Assessment GSE's
 - Civics
 - Earth and Space Science GSE's
 - Life Science GSE's
 - Mathematics GSE's
 - Data, Statistics, and Probability
 - Functions and Algebra
 - M(F&A)-10-1 Identifies, extends, and generalizes a variety of patterns (linear and nonlinear) represented by models, tables, sequences, or graphs to solve problems.
 - M(F&A)-10-2 Demonstrates conceptual understanding of linear and nonlinear functions and relations,
 - M(F&A)-10-3 Demonstrates conceptual understanding of algebraic expressions by solving problems involving algebraic expressions, by simplifying expressions,
 - M(F&A)-10-4 Demonstrates conceptual understanding of equality by solving problems involving algebraic reasoning about equality;
 - Geometry and Measurement
 - Number and Operations
 - Physical Science GSE's
 - Reading GSE's
 - Written & Oral Communication GSE's
- RI Arts Standards
- Technology Standards

Figure 11 Display of RIEPS global goal sets

- ◆ Teachers can link assignments in their course sites to state and local standards in the State Goals site. Working in the individual course sites, students can then view the goals that teachers have linked to their assignments. (See Figure 7, above.)
- ◆ A number of project sites house libraries of assignments, many of which have been validated by peer review. For example, a math project site houses math assignments for many different math courses. Where appropriate, teachers import assignments from these project site libraries to use within their course sites.
- ◆ RINET has set up a portfolio site for the students and teachers of each high school. Students use this site to create and display their graduation portfolios. Their portfolios are based on a graduation portfolio template that has been customized to include their high school graduation requirements.

Portfolio Components

The RIEPS implementation of portfolios uses the following components:

- ◆ Numerous assignments for each section of each course in each school
- ◆ Goal sets containing state standards and district expectations
- ◆ One portfolio template per school or district. A portfolio based on one of these customized templates is shown in Figure 9 above. A portfolio based on a template that was customized for another school is shown on the next page.

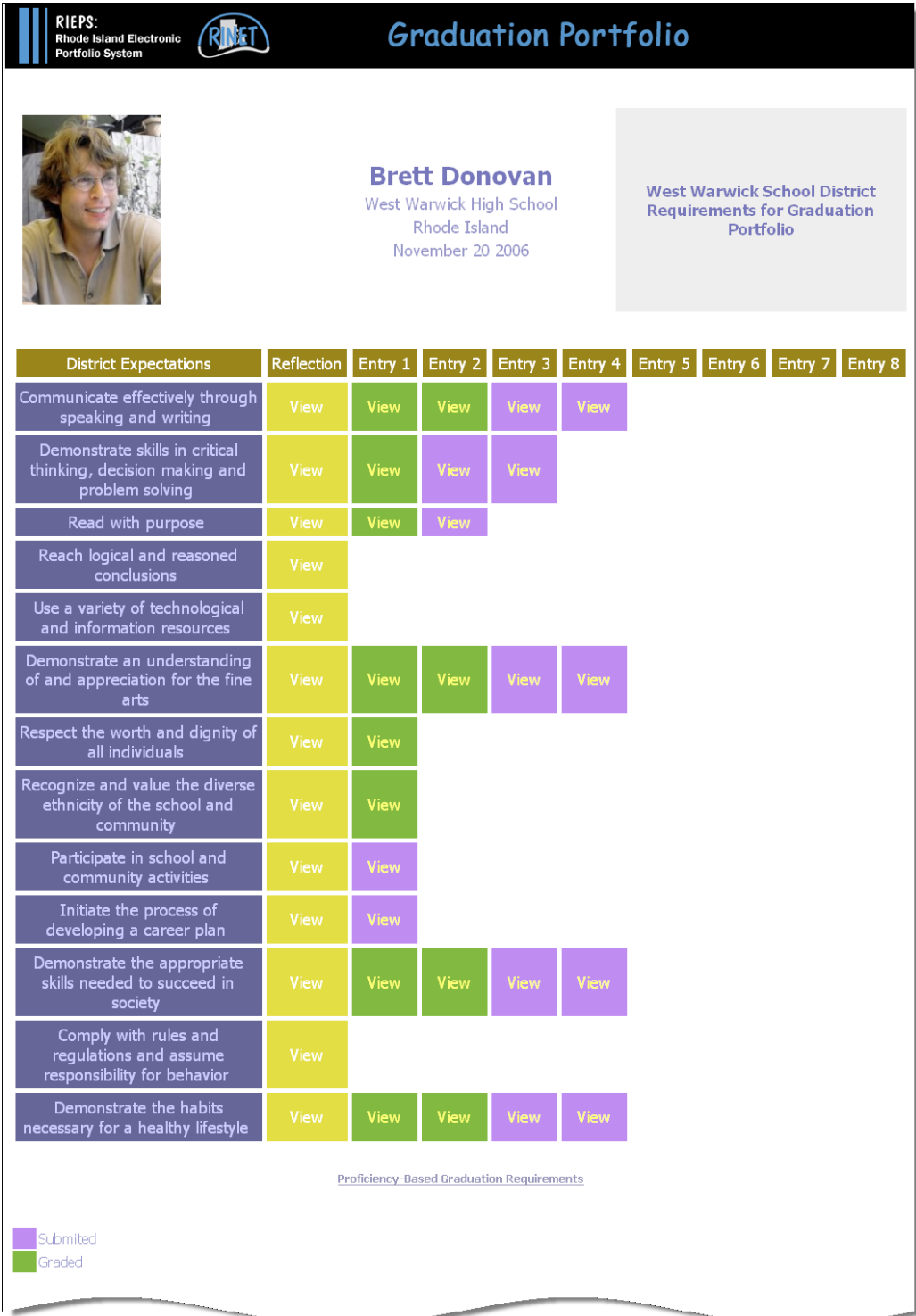


Figure 12 Sample RIEPS graduation portfolio

- ◆ Report templates allowing students, teachers, and administrators associated with the project to create reports on the portfolio data to which they have access.

Table 5 RIEPS portfolio components

<i>Component</i>	<i>Notes</i>
Assignments	Teachers in each course site create portfolio-worthy assignments and link them to one or more specific goals from the global goal sets on the State Goals project site.
Global goal sets	Each global goal set is a set of state standards or district expectations for the high school level. A goal set may include one or more goal subsets.
Local goal sets	Each course site may also contain any number of local goal sets, which may include one or more goal subsets.
Portfolio presentation template	Consists of: <ul style="list-style-type: none"> ◆ An .xsl file for determining pathways for inclusion of content from assignments, goals, and images ◆ An .xsd file to allow users to insert text ◆ A .css file that determines the look and feel of the portfolio ◆ A .gif file for the banner ◆ A .js file for additional script in the portfolio template
Report templates	Report templates allowing students, teachers, and administrators associated with the project to create reports on the portfolio data to which they have access.

Portfolio Users

RIEPS portfolio implementation makes use of course sites, project sites, and portfolio sites. Each type of site assigns different roles to its members.

The following table enumerates the roles, users, activities, and tools for RIEPS course sites.

Table 6 RIEPS roles, users, activities, and tools for course sites

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities in the course sites:</i>	<i>Using these CLE tools:</i>
Teacher	Instructors	<p>Add, change, and delete assignments; import assignments from project sites serving as libraries.</p> <p>View assignments from the student perspective.</p> <p>Associate assignments with global and local goals.</p> <p>Rate work on assignments submitted by students according to the standards linked to it and a standard rating scale (0-4) agreed upon by most districts.</p> <p>Add local goals for use in this site</p>	<p>Assignments, Resources</p> <p>Assignments</p> <p>Assignments</p> <p>Assignments</p> <p>Goal Management</p>
Teaching Assistant	Teaching assistants	Help with or take on part of the teacher's work.	Varies
Student	Students	<p>View and submit assignments.</p> <p>View associations between assignments and goals.</p>	<p>Assignments, Resources</p> <p>Goal Management</p>
		View teacher rating of their work on assignments according to the standards linked to them and the standard rating scale.	Assignments

This next table provides similar information for RIEPS project sites.

Table 7 RIEPS roles, users, activities, and tools for project sites

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities:</i>	<i>Using these CLE tools:</i>
Maintain	Site owners (teachers)	Add assignments to libraries	Resources

This last table indicates the roles, users, activities, and tools for RIEPS portfolio sites.

Table 8 RIEPS roles, users, activities, and tools for portfolio sites

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities:</i>	<i>Using these CLE tools:</i>
Maintain	District administrator	<p>Design the portfolio template and write instructions for using it.</p> <p>Add supporting files and set up the portfolio template in the CLE.</p> <p>Identify other site members (students and reviewers) and assign permissions.</p> <p>Introduce users to the tools they will use.</p> <p>Create reports on progress by students.</p>	<p>NA</p> <p>Resources, Portfolio Templates, Portfolios</p> <p>Site Setup, Portfolios</p> <p>Varies by user</p> <p>Reports</p>
Access	Students	Create and publish own portfolio; view and manage comments on portfolio; and revise portfolio as needed.	Portfolios, Resources
		Create reports on own progress.	Reports
Reviewer	Teachers	Review work in portfolios and provide formative feedback one or more times.	Portfolios

<i>Permissions for this role:</i>	<i>Allow these users:</i>	<i>To perform these activities:</i>	<i>Using these CLE tools:</i>
		Create reports on progress of students for which this user has responsibility.	Reports

Workflow: Using Portfolios for Accreditation

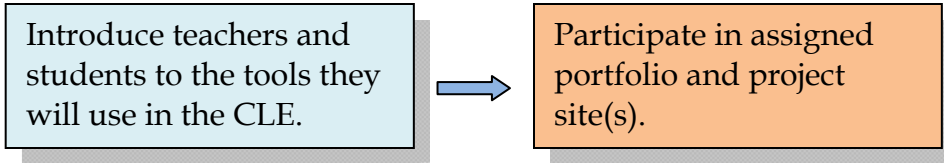
The process of using RIEPS portfolios for accreditation involves four major steps:

- 1 Involve teachers and students.
- 2 Complete assignments.
- 3 Create graduation portfolios.
- 4 Assess the program.

The following subsections show the workflow for each step. A key at the bottom of each page indicates which user is responsible for each activity.

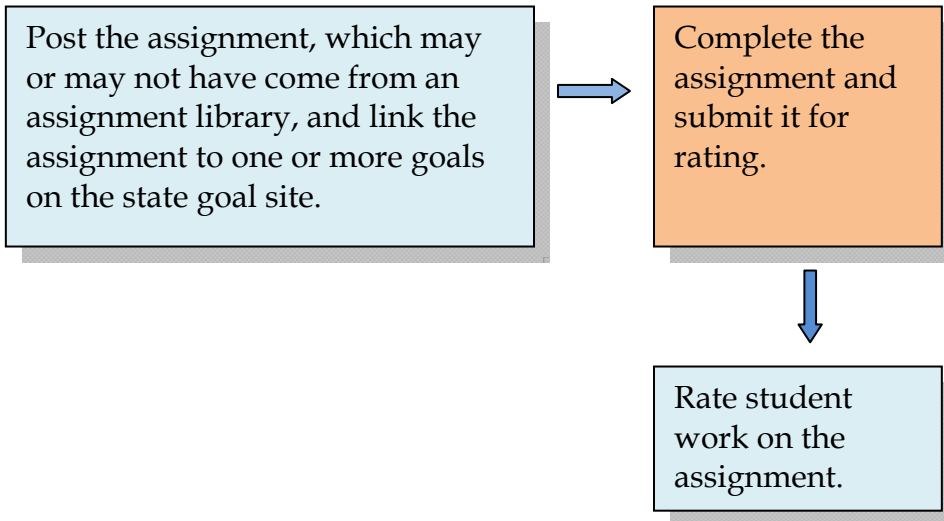
Involve Teachers and Students

For all teachers and students who will be involved:

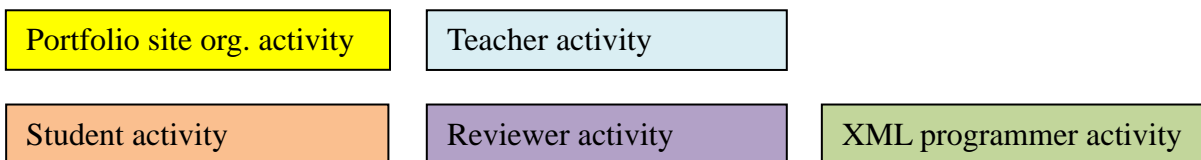


Complete Assignments

For each assignment:

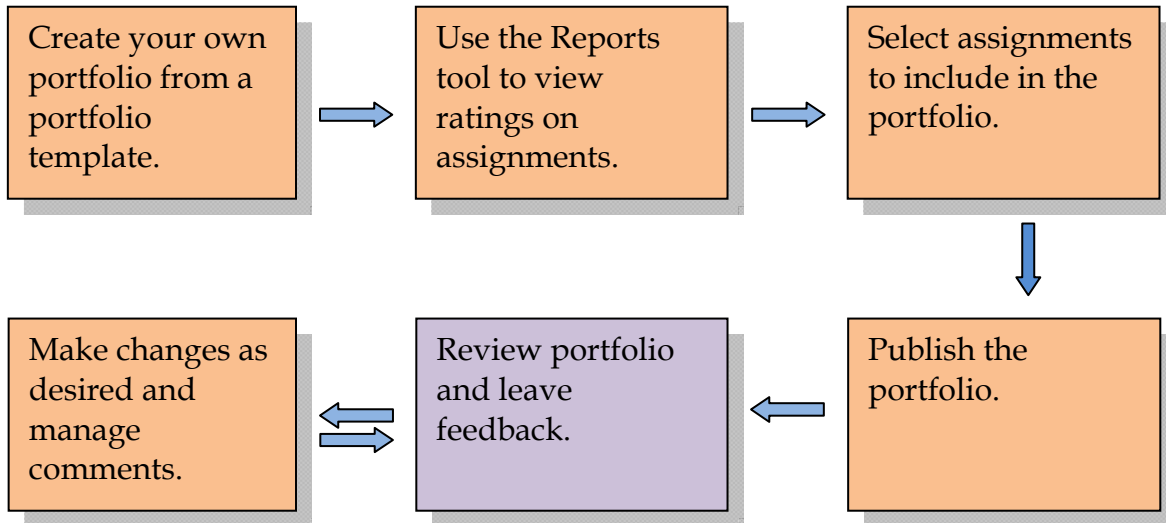


Key:



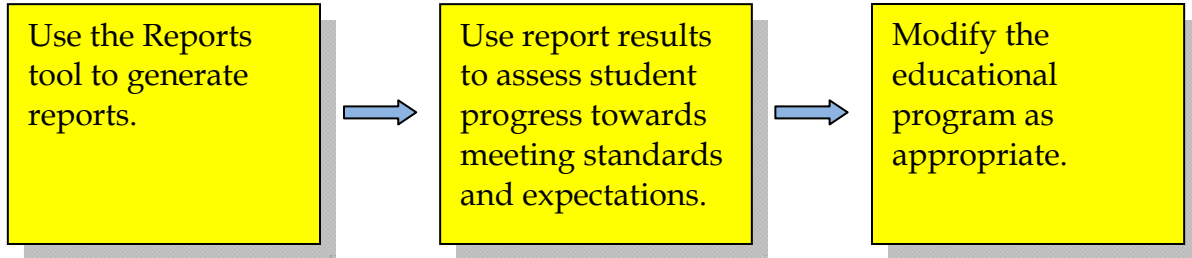
Create Graduation Portfolios

As assignments are completed:

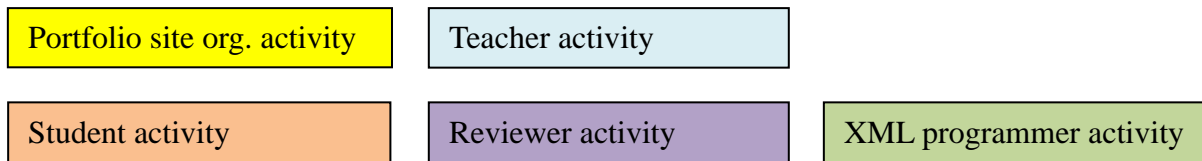


Assess the Program

At any time after students have begun working in the matrix:



Key:



Preliminary Setup

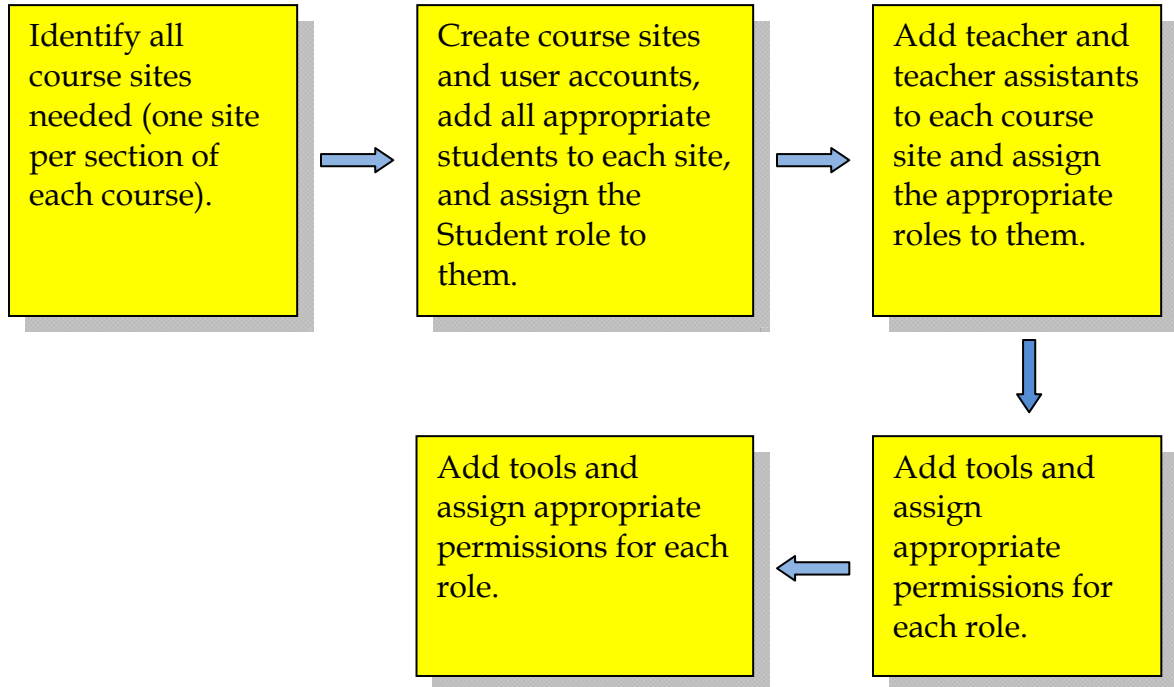
The workflow for developing data structures for the RIEPS accreditation portfolio involves three major steps:

- 1 Set up sites.
- 2 Enter goals.
- 3 Create assignments.
- 4 Design portfolio templates.
- 5 Create portfolio templates.

The following subsections show the workflow for each step. A key at the bottom of each page indicates which user is responsible for each activity.

Set up Sites

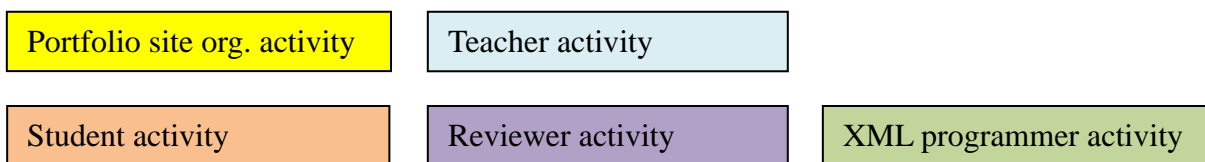
Within each district or school, set up course



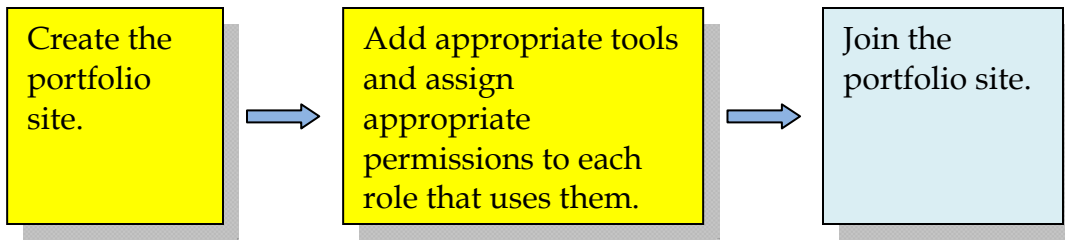
Within each district or school, set up project sites:



Key:

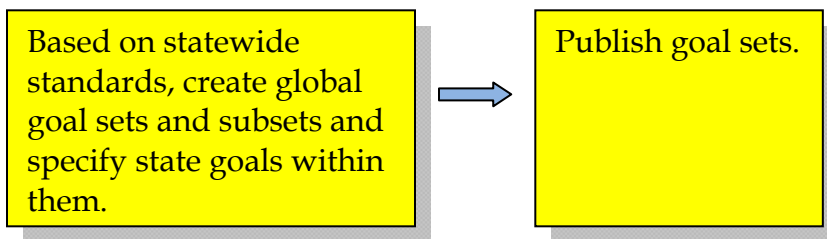


Within each district or school, set up one portfolio site:

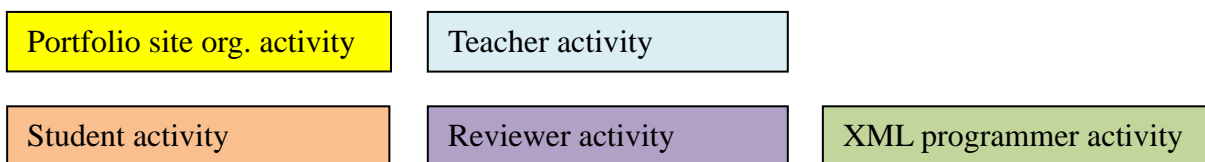


Enter State Goals

In each course site:

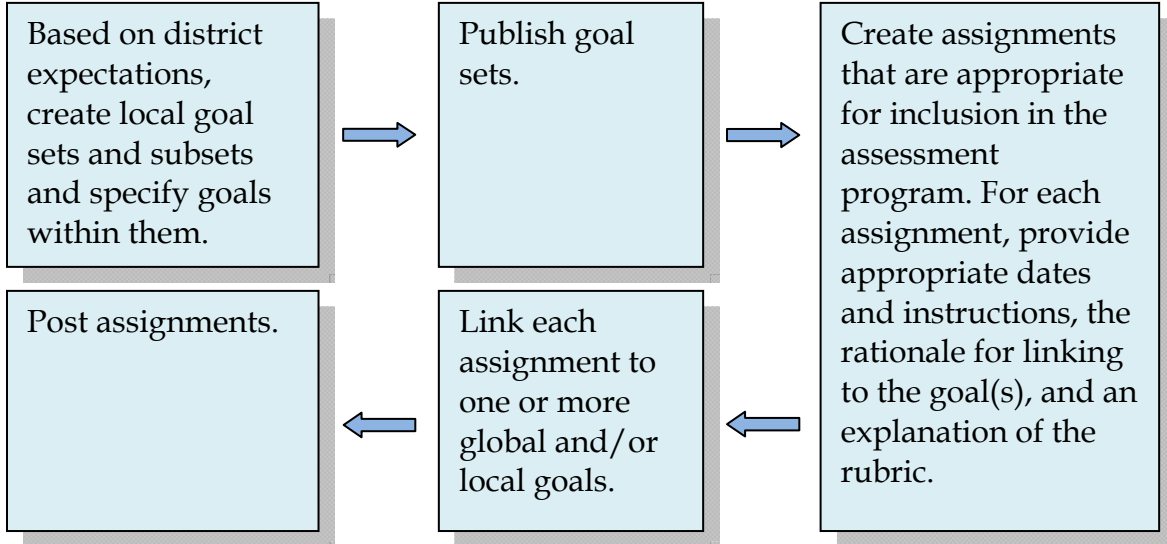


Key:



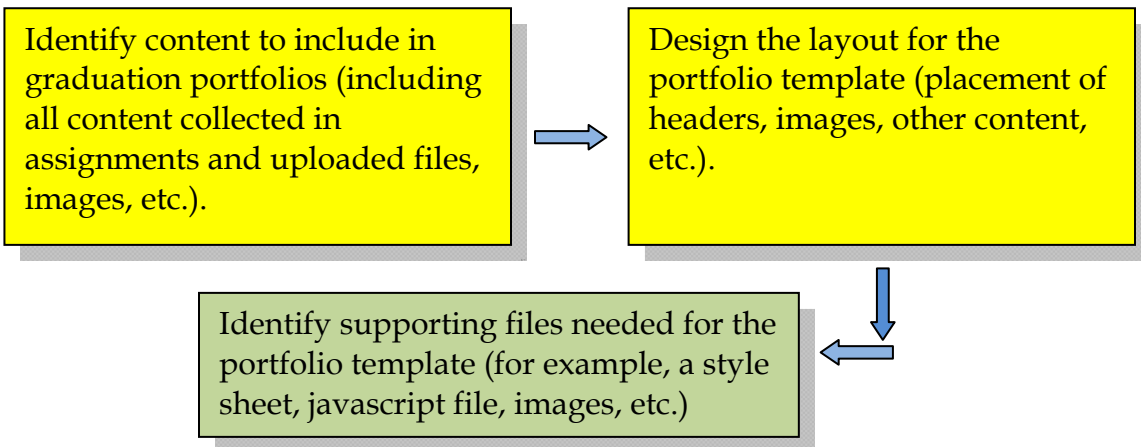
Create Assignments

Within each course site, use the Assignments tool to perform these

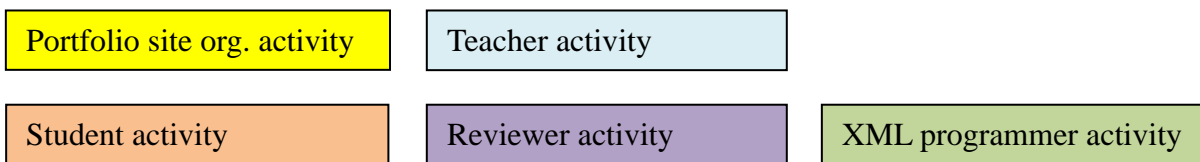


Design Graduation Portfolio Template

For the graduation portfolio template for your school or district:

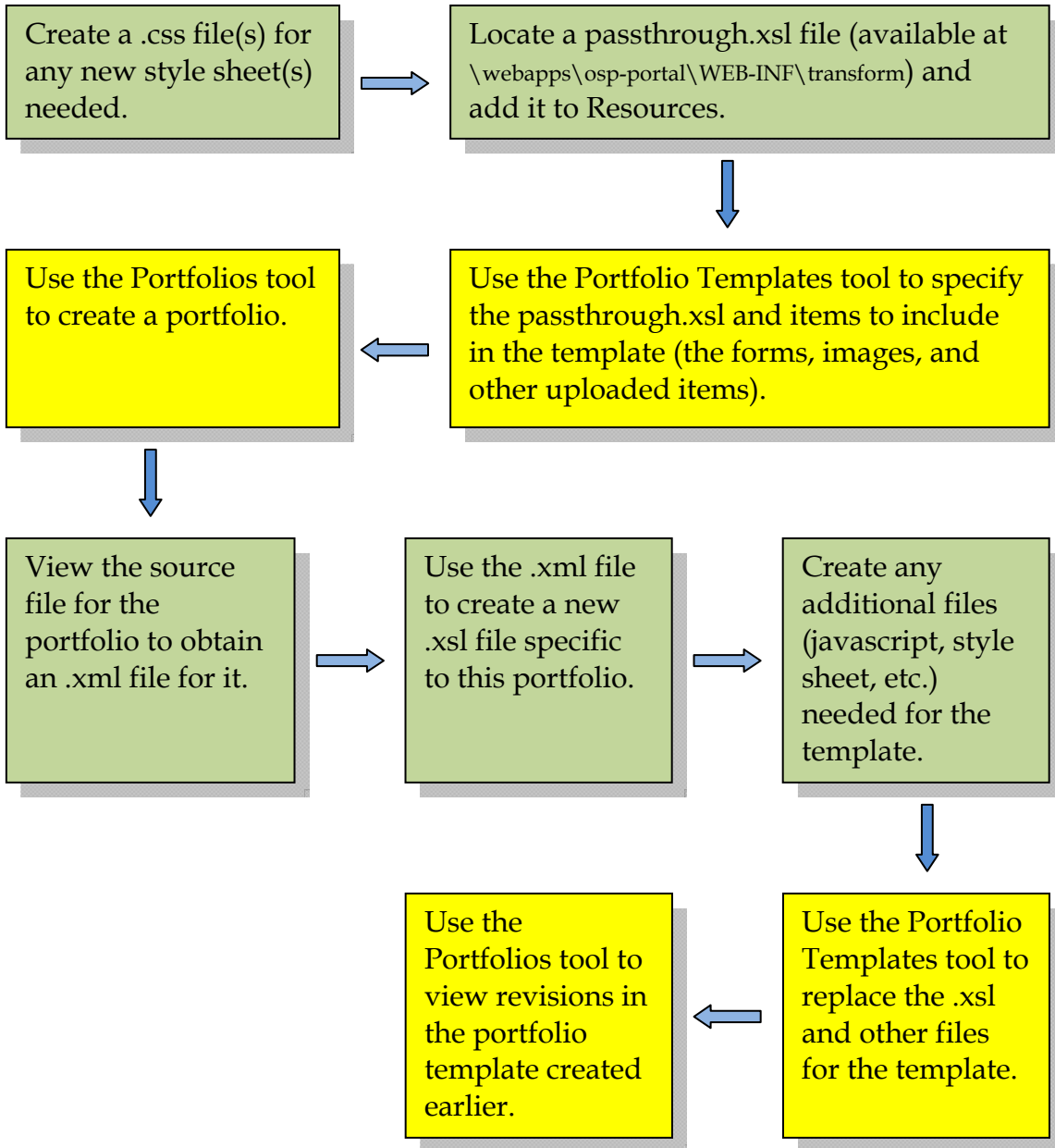


Key:

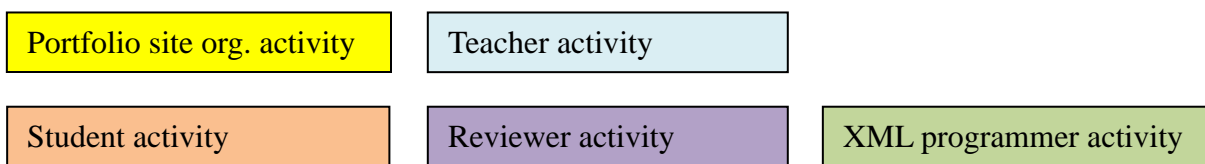


Create the Graduation Portfolio Template

For the portfolio template to be used to create graduation portfolios in this district or school:



Key:





Chapter 3 **CLE Portfolio Tools**

This chapter introduces a variety of CLE tools that are used for building wizards, matrices, and portfolios for learning assessment, program review, institutional accreditation, and individual self-expression.

Related Tools

The portfolio tools described in this chapter are closely related and are designed to be used together. Some of these tools have value, not as standalone tools, but as a means of creating important materials that are used by other portfolio tools. The following table shows the relationship between the tools.

Table 9 Relationships among portfolio tools

<i>Tool</i>	<i>Purpose</i>	<i>Relationship to Other Tools</i>
Glossary	Define terms in the context of a site.	<i>Matrices:</i> Rely on the Glossary to provide explanations of terms used in row and column headings. Can be used as a standalone to provide guidance to site participants.
Forms	Add online forms that provide structure for collecting and repurposing data from site members.	<i>Wizards, Matrices, Portfolios:</i> Rely on forms to collect, structure, and display information from users, reviewers, and evaluators.
Wizards	Create structured guidance for site participants.	<i>Forms:</i> Provide structure for collecting information in wizards. <i>Styles:</i> Provide options for fonts, type sizes and colors, background colors, and other display features in wizards.
Matrices	Create structured guidance for site participants.	<i>Forms:</i> Provide structure for collecting information in Matrices. <i>Styles:</i> Provide options for fonts, type sizes and colors, background colors, and other

<i>Tool</i>	<i>Purpose</i>	<i>Relationship to Other Tools</i>
		display features in matrices. <i>Portfolios:</i> May present artifacts and reflections created in a matrix.
Evaluations	Provide summative feedback.	<i>Wizards, Matrices:</i> Use evaluations to collect summative feedback on work performed by users in wizards and matrices.
Portfolios	Create online portfolios to design and share subsets of student (or other site participant) work with a selected audience.	<i>Forms:</i> Provide structure for collecting and repurposing information for display in portfolios. <i>Styles:</i> Provide sets of fonts, type sizes and colors, background colors, and other display features for users to choose from when they design their own portfolios. <i>Portfolio Layouts:</i> Provide layouts for users to choose from when they design their portfolios. <i>Portfolio Templates:</i> Provide templates that ensure consistency of appearance and content across all portfolios based on them. <i>Matrices:</i> Provide evidence of accomplishment that may be presented in portfolios.
Portfolio Layouts	Create layouts that determine the arrangement of items in portfolios designed by users.	<i>Portfolios:</i> Provide layouts for users to choose from when they design portfolios.

<i>Tool</i>	<i>Purpose</i>	<i>Relationship to Other Tools</i>
Portfolio Templates	Create templates that provide overall structure for the layout, style, and sources of data included in a portfolio.	<i>Portfolios:</i> Use templates to provide consistency across portfolios created by multiple users.
Styles	Provide sets of fonts, type sizes, colors, and other display features for use in building wizards, matrices and portfolios.	<i>Wizards, Matrices:</i> Use styles to control display features of wizards and matrices. <i>Portfolios:</i> Styles allow users to choose a set of fonts, type sizes and colors, background colors, and other display features when they design portfolios.

To coordinate the use of these tools in support of educational processes at your institution, you must plan carefully. In some cases, you must also involve staff skilled in XSD programming. General guidance on the necessary planning and programming support is provided in this chapter.

Glossary

The Glossary tool provides definitions for row and column names in matrices. By doing so, it compensates for the limited space allowed for row and column names.

When participants move the mouse over a row or column name in a matrix, the CLE displays a short definition or explanation that has been entered via the Glossary tool. When participants click on the name, it hyperlinks to more extensive information of the site organizer's choosing. Site organizers often use these hyperlinks to provide detailed information on objectives, outcomes, or standards represented by each criterion; a complete list of campus activities for each category; or an extensive grouping of resources to develop each skill.

If you are a system administrator or an instructor, the Glossary tool allows you to create the short and long definitions and explanations described above. If you are a system administrator, you may also make glossary terms global. In this case, the terms will be displayed in all sites that use the Glossary tool in this CLE instance.

This tool also allows you to manage glossary terms in other ways. You may:

- ✎ Change glossary terms.
- ✎ Delete glossary terms.
- ✎ Use a glossary created in one site in another site by exporting it from the first site and importing to the other site.
- ✎ Change Glossary tool permissions for all users in any given role.
- ✎ The Glossary tool is usually located in the Guide category on the portfolio web site.



To access the Glossary tool, click the **Launch** button for **Glossary**. The CLE displays the Glossary home page.

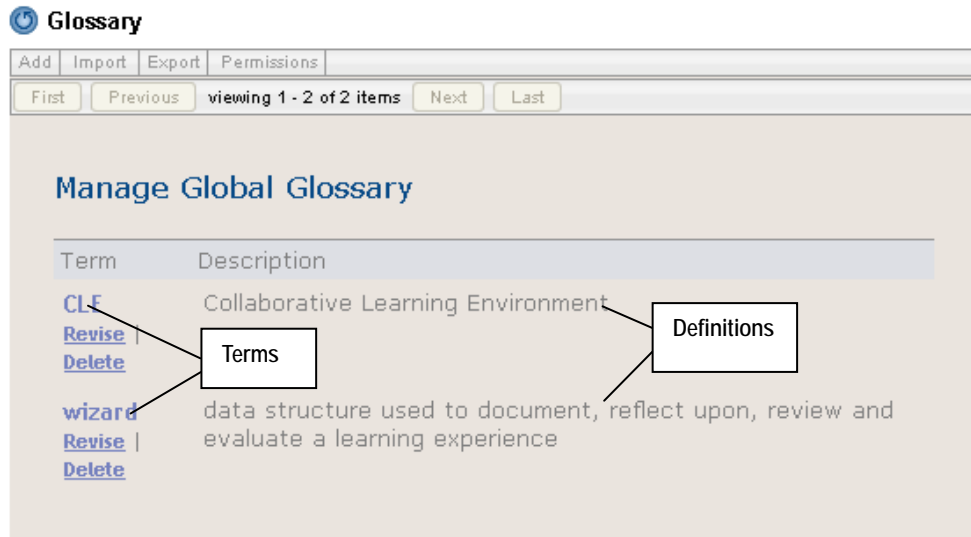


Figure 13 Glossary home page

The home page contains a list of glossary terms in alphabetical order, along with their short definitions. You have several options for viewing the glossary:

- ◆ To see the long definition or description of a term, click the term itself. The CLE displays the longer hyperlinked definition in a separate window. To close the window, click **Close**.

First

- ◆ To display the first page of terms, click **First**.

Previous

- ◆ To display the previous page of terms, click **Previous**.

Next

- ◆ To display the next page of terms, click **Next**.

Last

- ◆ To display the last page of terms, click **Last**.

Adding a Glossary Term

To add a term to the glossary, access the Glossary tool and follow these steps:

- 1 If you do not see the Glossary menu bar, click the **Reset** button.

Add

- 2 Click the **Add** link on the menu bar. The CLE displays the Add Glossary Term screen.

Glossary

Add Glossary Term

Glossary Term (required fields are noted with an *)

* **Term**

* **Short Description**

* **Long Description**

Source | Search | Copy | Paste | Undo | Redo | Bold | Italic | Underline | ABC | x₂ | x² | List | Indent | Outdent | Style | Format | Font | Size

Add Term Cancel

Figure 14 Add Glossary Term screen

- 3 In the **Term** box, enter the term you need to define.
- 4 In the **Short Description** box, enter a brief definition of the term.
- 5 In the **Long Description** box, enter a longer definition or description, or add more extensive information to help participants fully understand the term. Use the icons and pulldown lists to format the text as appropriate.

Add Term

- 6 Click the **Add Term** button. The CLE adds the term to the glossary and displays it in the list on the home page. The new term and the short definition you entered for it are displayed in the list.


Or, to return to the home page without adding the term, click **Cancel**.

Changing a Glossary Term

To change a glossary term or either of its definitions, access the Glossary tool and follow these steps:

 1 If you do not see the Glossary menu bar, click the **Reset** button.

 2 Click the **Revise** link below the term you want to change. The CLE displays the Revise Glossary Term screen.

 **Glossary**

Revise Glossary Term

Glossary Term (required fields are noted with an *)

* **Term**

* **Short Description**

* **Long Description**

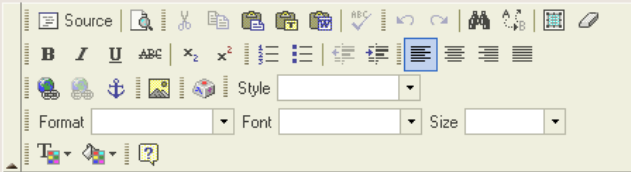


Figure 15 Revise Glossary Term screen

3 Change entries in the **Term**, **Short Description**, and **Long Description** boxes, as needed. Use the icons and pulldown lists to format text for the long description, as appropriate.





4 Click the **Save Changes** button. The CLE makes the changes and displays the list on the home page. The revised term and its short

definition are displayed there.

Or, to return to the home page without changing the glossary entry, click Cancel.

Deleting a Glossary Term

To delete a term from the glossary, access the Glossary tool and follow these steps:

-  1 If you do not see the Glossary home page, click the **Reset** button.
-  2 Click the **Delete** link below the term you want to remove. The CLE deletes the term from the list.



The CLE does not display a warning message before deleting the term. Instead, the CLE immediately removes the term from the list.

Publishing a Glossary Term Globally

If you are a system administrator, you may publish a glossary term globally (that is, for all sites in a CLE instance). To do so, log in and follow these steps:

- 1 Click the **Administration** folder at the top of the screen.
- 2 Select the PortfolioAdmin site.
- 3 Access the Glossary tool. The CLE displays the Glossary home page.
- 4 Add the term as instructed above. Because you are working in the PortfolioAdmin site, the CLE makes this term available to all sites.


Exporting and Importing a Glossary


If you own more than one site, you may want to use the same glossary in two or more of them. To do so, first export the glossary to

your desktop as a compressed file first and then import it to the other site(s) where you plan to use it.

Exporting a Glossary

To export a glossary as a compressed file, access the Glossary tool on the appropriate site and follow these steps:


 1 If you do not see the Glossary menu bar, click the **Reset** button.


-  2 Click the **Export** link on the menu bar. The CLE displays the Opening File window shown on page 237.
- 3 Follow the instructions given in "Exporting a File" beginning on page 236.

Importing a Glossary

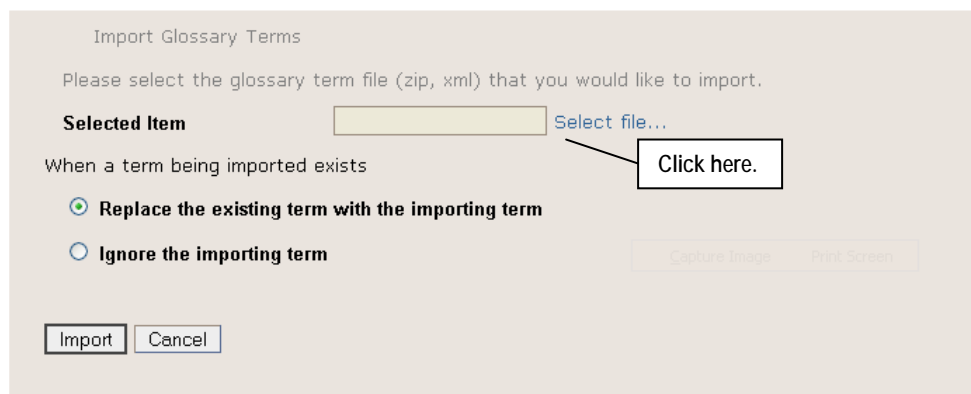
To import a compressed glossary file, access the site to which you want to import it and follow these steps:

1 Add the file to Resources. *For instructions, see Chapter 8 of the rSmart Sakai CLE User Guide.*

 2 Access the Glossary tool. If you do not see the Glossary menu bar, click the **Reset** button.

 3 Click the **Import** link on the menu bar. The CLE displays the Import Glossary Terms screen.

 Glossary



Import Glossary Terms

Please select the glossary term file (zip, xml) that you would like to import.

Selected Item [Select file...](#)

When a term being imported exists

Replace the existing term with the importing term

Ignore the importing term

[Import](#) [Cancel](#)

[Capture Image](#) [Print Screen](#)

Figure 16 Import Glossary Terms screen

- [Select File...](#) 4 Click the **Select file...** link. The CLE displays the Select Item screen shown on page 235.
- [Select](#) 5 Select the compressed file for the glossary by following the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Import Glossary Terms screen again.

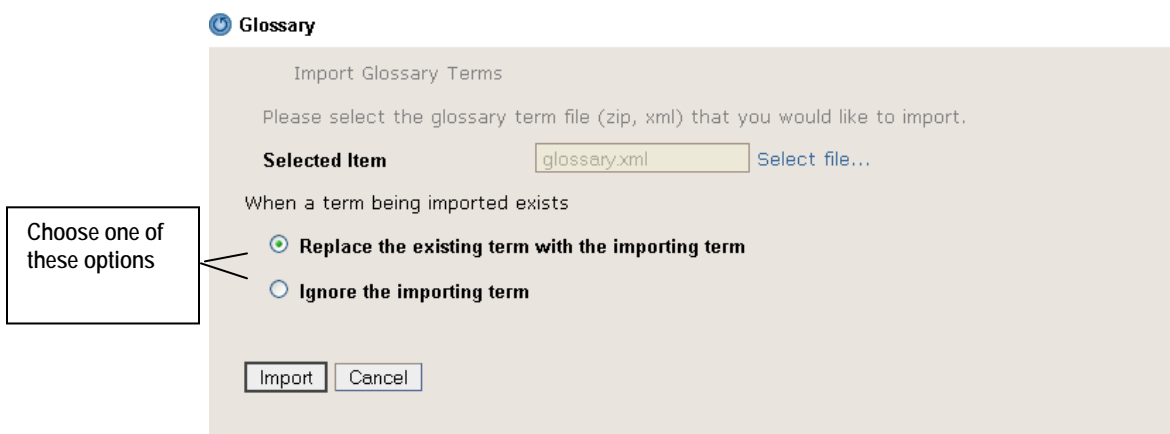


Figure 17 Import Glossary Terms screen with file shown

The name of the file you chose is shown in the **Selected Item** box.

- 6 Under “When a term being imported exists,” click to indicate whether you want the system to use the term being imported or ignore that term and use the existing term instead.
- [Import](#) 7 To import the file, click **Import**. The CLE imports the file, adds the terms to the glossary, and displays the Glossary home page. Or, to return to the home page without importing the file, click **Cancel**.

Changing Permissions for the Glossary Tool

All participants who work with a matrix are permitted to display glossary definitions for row and column names. However, permissions to add, delete, change, and export glossary terms can be restricted by role, just as they can in other tools in the CLE.

To assign permissions, access the Glossary tool and follow these steps:

- 1 If you do not see the Glossary menu bar, click the **Reset** button.

Permissions

- 2 Click the **Permissions** link on the menu bar. The CLE displays this screen:

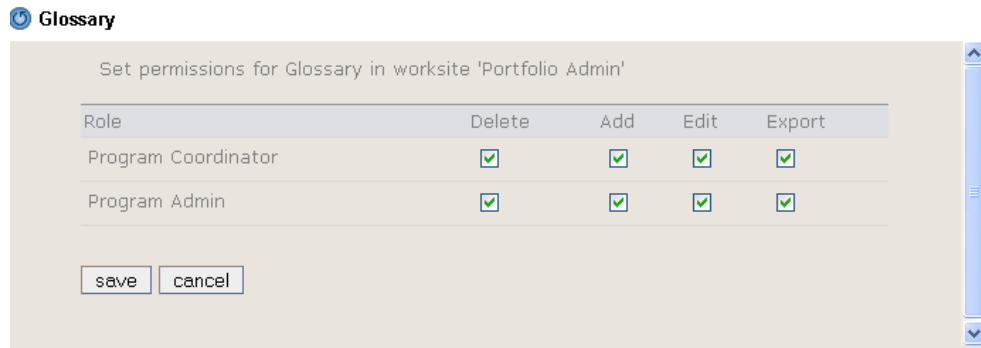


Figure 18 Glossary Permissions screen

- 3 Referring to the table below, click boxes to select the appropriate permissions for users in each role.

Table 10 Permissions for using the Glossary tool

<i>Permission</i>	<i>Description</i>
Delete	Users in this role may delete glossary terms.
Add	Users in this role may add and import glossary terms.
Edit	Users in this role may change glossary terms and their definitions.
Export	Users in this role may export a zip file of glossary terms.

save

- 4 To save the permissions settings, click **save**. The CLE saves the settings and displays the Glossary home page. Or, to return to that screen without saving your changes, click **cancel**.

Forms

An Introduction to Forms

In the CLE, forms are online structures that allow you to collect and store data. They are the electronic counterparts of paper forms, such as those you fill out to submit applications, complete surveys, and so forth. A screen on page 92 shows an example of a form in the CLE.

Each form consists of a name, instructions to the user, a set of text fields or boxes, and field names. Both the instructions and the field names guide participants in completing the form appropriately.

In the CLE, forms allow you to collect and store information for use in wizards, matrices, and portfolios. These forms can serve a variety of purposes. For example, you may use forms to collect routine information, such as contact information and educational or work history. You may also use forms to prompt users to document their learning or document work they have completed. Other forms may be designed to guide users in documenting the details of a teaching experience, restating a particular learning outcome in their own words, and reflecting upon an internship experience. Still other forms can be used to collect feedback on the user's work.

In wizards and matrices, you can present different forms to each different user who needs to provide input to the wizard or matrix.

- ◆ To site participants, you might present forms that prompt them to provide background information, document work on projects, describe courses, reflect on co-curricular experiences, and organize thoughts about learning outcomes. These users complete one or more appropriate forms as they work in each wizard page and matrix cell.
- ◆ To reviewers and evaluators, you present forms that collect and structure feedback on a site participant's work. These forms collect formative feedback (from reviewers) and summative feedback (from evaluators) on the work demonstrated in individual wizard pages and matrix cells and on the work as a whole. Forms for summative feedback can include an evaluation scale or elementary rubric.

Within a particular wizard, matrix, or portfolio, you may specify that

some forms can be used only once. You may also specify that a form need not be completed at all if it is not appropriate.

Other forms can and should be used repeatedly to collect multiple versions of the same type of data. So, a student may complete and save a contact information form many times to capture information about his or her home, work, school, summer residence, parents, study abroad and/or research locations. When working with portfolios, the student can include any or all of these versions of the completed form in one or more portfolios and/or one or more versions of a specific portfolio.

The instructions, fields, and field names in forms vary, depending on the information the form is designed to collect. Fields may also be as small or large (up to 4,000 characters) as the creator of the form deems necessary.

Forms can contain many types of fields. The different field types are shown in this table.

Table 11 Types of Fields

<i>Field Type</i>	<i>Examples</i>
Text	First Name, Street Address, Insights Gained, Feedback
Date	Birth Date, Date of Certification, Creation Date
Integer	Current Age, Social Security Number, Years at Current Address
Decimal	GPA, mathematical results
Complex (multiple entries allowed)	Phone Number(s), Email Address(es), Skill(s), Accomplishment(s), Hypothesis(es)

Forms may be published globally (that is, for use in all sites in this CLE instance) or locally (that is, for use in one site only). Most forms are created for one or more specific sites. However, if you create a form that has general applicability, you may recommend that it be published globally. Only a system administrator can publish a form

globally (in response to your recommendation).

Any form included in a portfolio template may display all fields from the form or only some fields from the form. The same form (and some or all of its fields) may be used in multiple portfolio templates, wizards, and matrices.

The Forms Tool and the Resources Tool

If you are the site organizer for a portfolio site, the Forms tool allows you to create and publish forms for use in this site. Each form that you create for the site is based on an .xml schema definition (.xsd file). This file is stored in Resources.



Important

We strongly recommend that you store all .xsd files in My Workspace Resources rather than in the portfolio site's Resources area. Site participants do not need to work with or see these files. By storing .xsd files in your personal Resources area (preferably in a folder named Form .xsds or something similar), you prevent site participants from possibly being confused by them. This practice leaves the site Resources area free to be used as the place for files that are appropriate for all site participants. It also allows you to use a single copy of an .xsd file in your My Workspace Resources to create forms in all of your sites.

All forms are also stored in Resources, so users access them via the Resources tool. In Resources, the name of each local form is displayed along with the name of the site to which it belongs in parentheses. So, a form entitled "Education" that is used only in the Career Services site is listed in Resources as Education (Career Services).

Using the Forms tool, you import .xsd files from Resources, give them meaningful names, provide instructions for using them, create the forms, and publish them for use by site participants. You may also use this tool to export forms from one site and import them into another.



The Forms tool does not provide direct access to the forms you create. Instead, site participants access forms that they need to complete via the Resources tool. They may view completed forms in Resources and in the wizards, matrices, and portfolios that make use of these forms. When users access the part of the wizard, matrix, or

portfolio that contains a form, the form will display automatically.

Accessing a List of Forms



The Forms tool is usually located in the Guide category on a portfolio site. To access the tool, click the **Launch** button for **Forms**. The CLE displays the Forms home page.

The screenshot shows the 'Forms' management interface. At the top, there are tabs for 'Add', 'Import', and 'Permissions'. Below these are navigation buttons: 'First', 'Previous', 'viewing 1 - 10 of 18 items', 'Next', and 'Last'. The main section is titled 'Manage Forms' and contains a table with the following data:

Name	Owner	Site Id	Last Modified	Site State	Global State
Accomplishment (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:32 PM	published	unpublished
Additional Information (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:32 PM	published	unpublished
Certification (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:33 PM	published	unpublished
Civic Action (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:33 PM	published	unpublished
Contact Information Revise Export	Sakai Administrator	global	11/16/2006 10:42 AM	published	published
Education (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:33 PM	published	unpublished
Experience (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 03:52 PM	published	unpublished
Honor (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:33 PM	published	unpublished
Interest (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:34 PM	published	unpublished
Internship (Career Services) Revise Export Publish Global	Sakai Administrator	Career Services	11/15/2006 04:34 PM	published	unpublished

Below the table, there are explanatory notes: 'Site State' refers to the state of this Form within the worksite (eg. unpublished/published). 'Global State' refers to the state of the Form within the system (eg. unpublished/waiting for approval/published). Only System Administrators can approve a Form for global access.

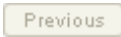


Figure 19 Forms home page

The home page contains a list of forms that have been created locally for your site. The forms are ordered alphabetically. For each form, you can see the site on which the form is published, when it was last changed, and its state (published, unpublished, or waiting for approval).

If the list of forms is longer than one page, use the buttons under the Forms menu bar to display other pages in the list.



- ◆ To display the first page in the list of forms, click **First**.

-  ♦ To display the previous page in list of forms, click **Previous**.
-  ♦ To display the next page in the list of forms, click **Next**.
-  ♦ To display the last page in the list of forms, click **Last**.

Creating a Form



Preliminary Steps

Before creating a form, follow these steps:

- 1 Review existing global forms on your CLE instance. You may find a form that suits your purposes, in which case you do not need to create a new one.
- 2 Plan the content carefully. Keep the following points mind:
 - ♦ Field names are displayed to the left of the text fields to which they apply.
 - ♦ Field names wrap somewhat unpredictably.
 - ♦ Long field names are difficult for participants to read.
- 3 Consider creating the new form in a test CLE instance in order to view and change it as needed before including it in your production CLE instance.

Creating the Form

To create a form, access the Forms tool and follow these steps:

-  1 If you do not see the Forms menu bar, click the **Reset** button.
-  2 Click **Add** on the menu bar. The CLE displays the Add Form screen.

Forms

Add Form

Please select an XSD file that defines your new form.

Required items marked with *

* **Name**

* **Schema File (.xsd)** [Select Schema File](#)

Document Root Node

Instruction

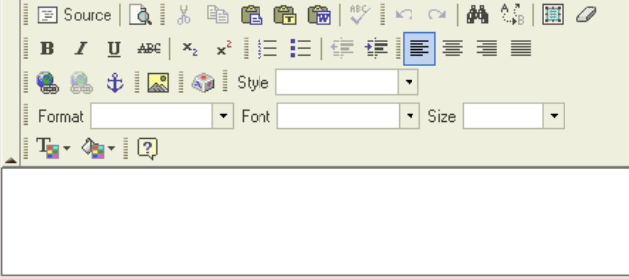


Figure 20 Add Form screen

- 3 In the **Name** box, enter a meaningful name for the form.



Choose the name carefully.

Be sure to choose a name that indicates the specific use of this form. After the form has been added to the site or published globally, its name will be visible in Resources to all site participants (or if published globally, to all participants of all sites in this CLE instance). Therefore, if the form is tailored to a particular matrix cell or wizard page, a generic name such as **Reflection** is misleading and makes the form seem appropriate for general use when, in fact, it is not. Use a generic name for a form only if the fields, field names, and instructions in it make the form suitable for use in a wide variety of situations.

[Select Schema File](#)

- 4 Click **Select Schema File**. The CLE displays the Select Item screen shown on page 235.
- 5 Follow the instructions for selecting an item, starting on page 236. After you click **Finish**, the CLE displays the Add Form screen again. The name of the file you selected is shown in the **Schema File (.xsd)** box.

- 6 In the **Instruction** box, enter appropriate instructions for filling out the form. Use the icons and pulldown menus to format the text as appropriate.

Add Form

- 7 To add the form to this site, click **Add Form**. The CLE creates the form and redisplay the Forms home page. The new form has been added to the list in an unpublished state. Or, to return to the home page without adding this form, click **Cancel**.

Viewing a Form



For more information on using the Resources tool, see Chapter 8 of the *rSmart Sakai CLE User Guide*.

To see a form as it is displayed to site participants, access the Resources tool and follow these steps:



- 1 If the Resources home page is not displayed, click the **Reset** button.

Add

- 2 Click the **Add** link for any folder in Resources on this site.

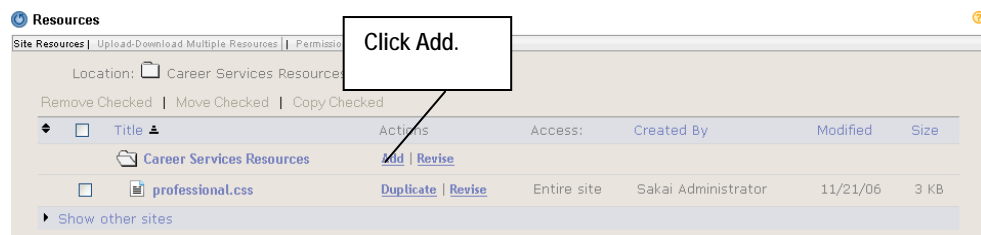


Figure 21 Click Add.

The CLE displays the Add Items screen.

- 3 Select **Form Item** from the **Add Item Type** pulldown list.

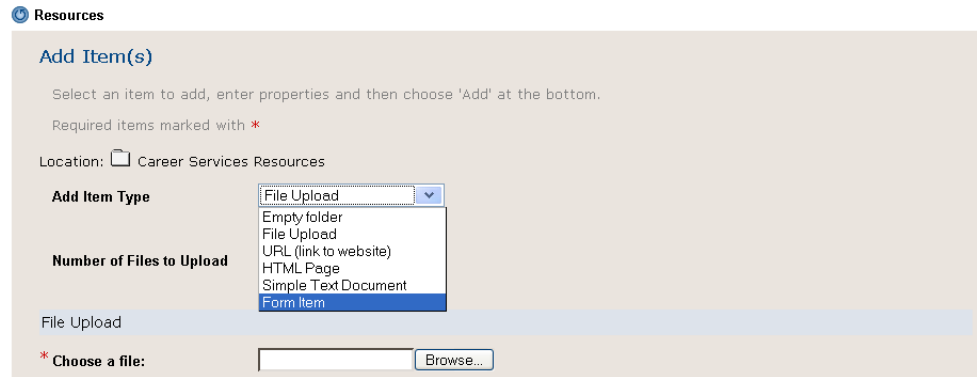


Figure 22 Upper portion of Add Item screen

The CLE displays the **Select Form Type** box.

4 Using the pulldown list for **Select Form Type**, select the form.

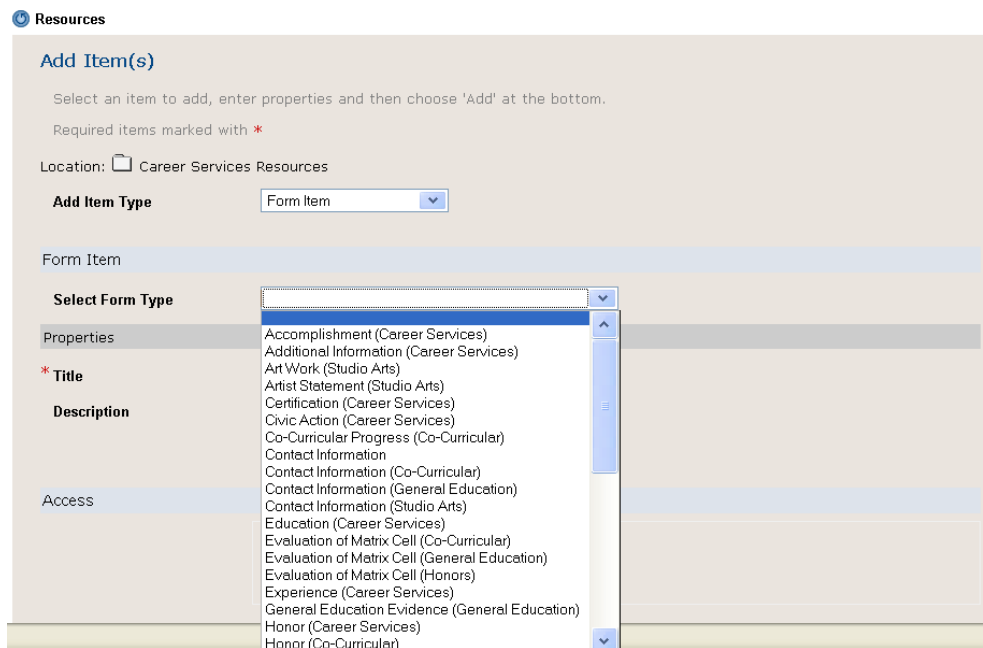


Figure 23 Select the form you want to see.

The CLE displays the form you chose in the Add Item screen.

Resources

Add Item(s)

Select an item to add, enter properties and then choose 'Add' at the bottom.

Required items marked with *

Location: Authoring Resources

Add Item Type

Form Item

Select Form Type

First Name

Middle Name

Last Name

Address 1

Address 2

City

State/Province

Zip/Postal Code

Country

Email Address(es) [+]

Type

Email

Phone Number(s) [+]

Type

Number

Properties

* **Title**

Description

Access

Display to non-members (publicly viewable)

Display to site

Email Notification

▸ Optional properties

Figure 24 The form is displayed on the Add Item screen.



The form that is displayed to site participants contains only two of the sections shown on this screen. The two sections that are displayed to site participants are Form Item and Properties. The Add Item section (at the top of the screen) and the Access section (at the bottom of the screen) are not displayed to participants who use the form.

5 To see another form, repeat step 4.

Cancel

6 To exit, click **Cancel**. The CLE displays the Resources home page.

Changing a Form

Using this tool, you may change the name of a form and the instructions for using it. However, you cannot use this tool to change the schema file for the form itself.

To change the name or instructions for a form, access the Forms tool and follow these steps:



1 If you do not see the Forms home page, click the **Reset** button.

Revise

2 Find the form you want to change, and click the **Revise** link below its name. The CLE displays the Revise Form screen.

Revise Form

Please edit your form properties

Required items marked with *

* **Name**

Instruction

Fill out all fields. Please be specific about your accomplishments!

Save Changes Cancel

Figure 25 Revise Form screen

- 3 Change the entries in the **Name** and **Instruction** boxes as needed. Use the icons and pulldown menus to format the instructions text as desired.

Save Changes

- 4 To proceed, click **Save Changes**. The CLE changes the form and redisplay the Forms home page. Or, to return to the home page without changing this form, click **Cancel**.

Publishing a Form

In order to make a form available to site participants, you must publish it.



Caution

Make certain that all aspects of a form are correct before you publish it. After publication, you can change only the form name and the instructions for completing the form. You cannot change the fields and field names in the form, and you cannot delete the form. Therefore, you must make sure that all aspects of the form itself are exactly as you want them before publishing the form.



If you have published a form that you no longer want site participants to use, rename it in a way that alerts users to the fact that it is not to be used. For example, you might rename the form **Certifications** to **Certifications OLD** or **Certifications Do Not Use**.

To publish a form, access the Forms tool and follow these steps:



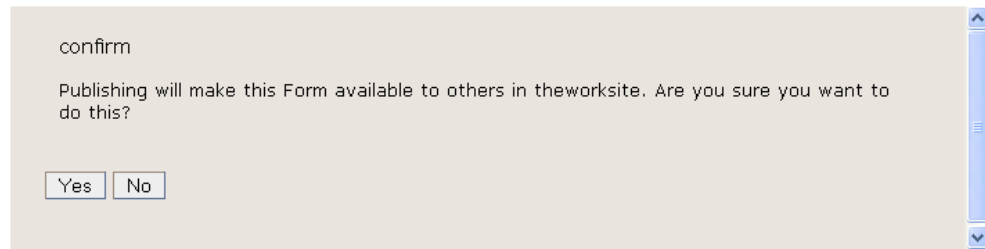
- 1 If the Forms home page is not displayed, click the **Reset** button.
- 2 Find the form you want to publish.
- 3 Display the form according to the instructions in "Viewing a Form" beginning on page 90. Check to be sure that all fields, field names, and instructions, including spelling, are correct.

Revise

- 4 Optional: To ensure that the information for the form is complete and correct, click the **Revise** link. Check the details, make changes as needed, and save the changes before proceeding.

Publish

- 5 Click the **Publish** link for the form you want to publish. The CLE displays this confirmation screen:



confirm

Publishing will make this Form available to others in the worksite. Are you sure you want to do this?

Figure 26 Publish confirmation message

Yes

- 6 To proceed with publishing the form, click **Yes**. The CLE displays the Forms home page. The Site State for this form has been changed to “published.” Or, to return to the home page without publishing the form, click **No**.

Requesting that a Form Be Published Globally

If you have created a form that has general applicability, you may want to make it available for use in all sites in your CLE. However, only the CLE system administrator(s) can publish a form globally (that is, across all sites in the CLE).

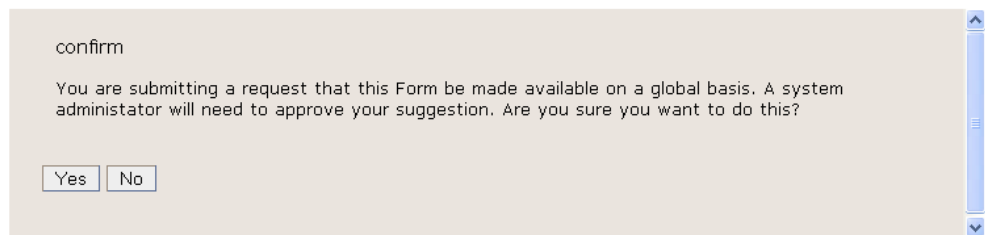
To request that a form be published globally, access the Forms tool and follow these steps:



- 1 If the Forms home page is not displayed, click the **Reset** button.
- 2 Find the form you want to submit to the system administrator for global publication.

Publish Global

- 3 Click the **Publish Global** link for the form. The CLE displays this confirmation screen:



confirm

You are submitting a request that this Form be made available on a global basis. A system administrator will need to approve your suggestion. Are you sure you want to do this?

Figure 27 Global publication request confirmation message

-
- To proceed with the request, click **Yes**. The CLE displays the Forms home page. The Global State for this form has been changed to “waiting for approval.” Or, to return to the home page without submitting the request, click **No**.

Publishing a Form Globally

If you are a system administrator, you may publish a form globally (that is, for all sites in a CLE instance). To do so, log in and follow these steps:

[approve global publish](#)

- Click the **Administration** folder at the top of the screen.
- Select the PortfolioAdmin site.
- Access the Forms tool. The CLE displays the Forms home page.
- Find the form you want to publish and click the **approve global publish** link beneath its name. The CLE displays this confirmation screen:

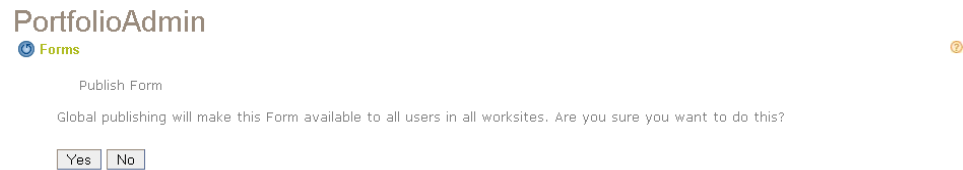


Figure 28 Global publish verification screen

-
- Click **Yes**. The CLE makes the form available to all sites.

Exporting and Importing a Form

If you own more than one site, you may want to use a particular form in two or more sites. To do so, you may either recreate the form from the .xsd file in Resources or export the form to your desktop as a compressed file and then import it to the other site(s) where you plan to use it. You may also wish to acquire exported zip files for forms from other users for import to your site(s).

Exporting a Form

To export a zipped file for a form, access the Forms tool and follow these steps:

- 1 If the Forms home page is not displayed, click the **Reset** button.
- 2 Find the form you want to export.
- 3 Click the **Export** link below the name of the form. The CLE displays the Opening File window shown on page 237.
- 4 Follow the instructions given in "Exporting a File" beginning on page 236.

Importing a Form

To import a form, access the site to which you want to import it and follow these steps:

- 1 Add the file to Resources. *For instructions, see Chapter 8 of the rSmart Sakai CLE User Guide.*
- 2 Access the Forms tool. If the Forms menu bar is not displayed, click the **Reset** button.
- 3 Click the **Import** button on the menu bar. The CLE displays the Import Form screen.

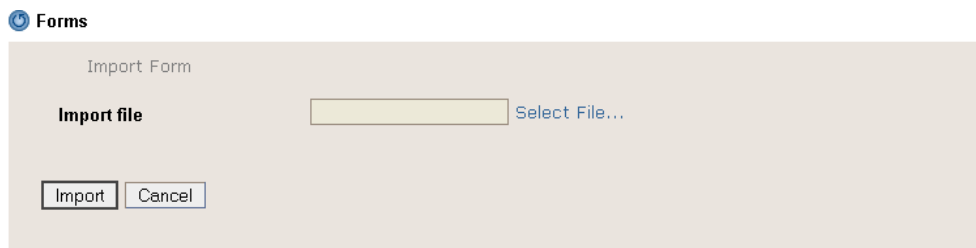


Figure 29 Import Form screen

- 4 Click **Select File...** The CLE displays the Select Item screen shown on page 235.

- 5 Follow the instructions given for selecting an item, starting on page 236. After you click **Finish**, the CLE displays the Import Form screen again.

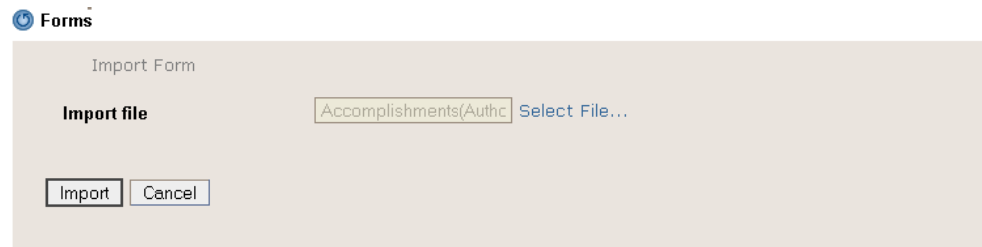


Figure 30 Import Form screen with file name listed

The name of the file you chose is displayed in the **Import File** box.



- 6 Click the **Import** button. The CLE imports the file from the Resources area and redisplay the Forms home page. The imported form is listed there. It has the same name and instructions as it had on its original site.

Or, to return to the home page without importing the file into the Forms tool, click **Cancel**.



Regardless of its state (published or unpublished) on the original site, the form you have imported is in an unpublished state on its new site. *For instructions on publishing a form, see page 94.*

Changing Permissions for the Forms Tool

All site participants can complete forms in Resources for use in portfolios, matrices, and wizards. However, permissions to create, change, delete, export, and publish forms by using the Forms tool can be restricted by role. To assign permissions, access the Forms tool and follow these steps:



- 1 If the Forms menu bar is not displayed, click the **Reset** button.



- 2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.

Forms

Permissions

Set permissions for Forms in worksite 'Authoring'

Role	create	edit	export	delete	publish	suggest.global.publish
Evaluator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Participant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tech Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 31 Forms Permissions screen

- Referring to the table below, check boxes to select the appropriate permissions for users in each role.

Table 12 Permission for using the Forms tool

<i>Permission</i>	<i>Description</i>
create	Users in this role may create and import forms for use by themselves and/or site participants.
edit	Users in this role may change the name and instructions for forms.
export	Users in this role may export a form to their desktops as a compressed file.
delete	Users in this role may delete forms.
publish	Users in this role may publish forms for use by site participants.
suggest.global.publish	Users in this role may suggest a form for global publication (that is, publication across all sites within a CLE).

- To save the permissions settings, click **Save**. The CLE saves the settings and displays the Forms home page. Or, to return to that screen without saving your changes, click **Cancel**.

Wizards

An Introduction to Wizards

Wizards are customized collections of informational screens and forms that provide structure and guidance for a wide variety of activities and processes.

If you are a system administrator or a site organizer, you can use this tool to perform these activities.

- Create, change, and delete wizards.
- Publish a wizard so site participants can use it.
- Use a wizard created in one site in another site by exporting it from the first site and importing it into the other site.
- Change Wizards tool permissions for all users in any given role.

If you are a site participant, you use the tool to complete wizards.

Types of Wizards

In the CLE, you can create three types of wizards. The simplest type is a sequential wizard. This kind of wizard is well suited to activities in which a series of steps are performed in a linear fashion. For example, you might create a sequential wizard to guide students through the steps of creating a term paper or to guide students through an experiment that extends over a significant period of time. A wizard for an experiment might track the timing of each step, collect data and interpretations from students at critical points, and provide an opportunity for you or others to provide feedback along the way.

The second type of wizard is hierarchical. A hierarchical wizard presents forms and information as a set of categories and subcategories, much as an outline presents nested information. Hierarchical wizards are helpful when organizing and tracking activities in multiple arenas, each of which has unique milestones. You might create a hierarchical wizard to track personal, academic,

occupational, and extracurricular activities for use by academic or career advisors or for use in developing resumes.

The third type of wizard is a matrix wizard. Also called a matrix, this wizard presents forms and information in a set of rows and columns. You might create a matrix to track progress across different disciplines (the rows) that have similar milestones (the columns). Each cell in the matrix is a point at which you can track achievements, encourage reflection on how the disciplines mesh, and provide feedback. *For more information on matrices, see "Matrices" beginning on page 138.*

Who Uses Wizards

In the out-of-the-box version of the CLE, any site participant can build a wizard in My Workspace. Most often, however, instructors and site organizers create and share wizards with site participants in portfolio, course, and project sites. After a wizard has been published, users in many roles may access it.

Let's say you are an academic advisor and you have created a wizard in a portfolio site for use in tracking student progress in a specific program. Each student in the program accesses your wizard to complete forms, attach files as evidence of work completed, reflect on learning, etc. Reviewers and evaluators (who you identify when you create the wizard) also access the wizard to review work and add comments at key points and/or after the entire wizard has been completed.

Components of Wizards

A wizard is made up of one or more units known as pages. Each page can contain many different components. These components can include instructions or general guidance to the user, an introduction to or rationale for the page, examples to help participants understand how to use the wizard, forms for people in various roles to complete (including, if desired, forms that solicit reflection or other feedback), and/or items from Resources.

To build an effective wizard, you use XSD programming and the Forms tool to create forms. The forms you create allow you to

structure and collect information, such as reflections on learning and feedback and evaluation of the work shown in the wizard. These forms may apply to the wizard as a whole and/or to each page of the wizard. *For more information on forms, see "Forms" beginning on page 84.* You may also use a .css file to create a display style for the wizard. *For more information on styles, see "Styles" beginning on page 229.*

Accessing the Wizards Tool



The Wizards tool allows you to create, change, publish, import, and export wizards. This tool is usually located in the Collect & Reflect category on a portfolio site, in the Guide & Instruct category on a course site, and in the Collaborate category on a project site.

To access the tool, click the **Launch** button for **Wizards**. The CLE displays the Wizards home page.

Wizards

Add | Import | Permissions

Wizard Manager

Administrator, Sakai

Go

Select another site participant's name to see a list of his or her wizards.

Viewing the Wizard of Sakai Administrator

Wizards	Description	Published?	Type	Submitted Pages	Total Pages	Last Visited
Build chronological resume		Unpublished	Sequential Wizard	0	0	
						Revise Delete Export
Build functional resume		Unpublished	Hierarchical Wizard	0	0	
						Revise Delete Export
Assess student achievements		Unpublished	Sequential Wizard	0	0	
						Revise Delete Export
Lab 4: Degradation of HG45 over time		Unpublished	Sequential Wizard	0	3	
						Publish Revise Delete Export

Figure 32 Wizards home page

The home page is also known as the Wizard Manager screen. It

contains a list of the wizards you have created. For each wizard, you can see its name, a short description of its purpose, its status (published or unpublished), its type (sequential or hierarchical), the number of pages that have been submitted by all participants for evaluation, the total number of pages in the wizard, and the date it was last accessed.

Designing a Wizard



Avoid unnecessary complexity.

You can add unlimited instructions, forms, feedback, evaluation, and other features to each page of a wizard. You can also create an unlimited number of pages, categories, and subcategories. As a result, it's possible to make a wizard overly complex and difficult or burdensome to use. Remember this: You do not have to use every element and feature at every opportunity. If something seems to have little or no value at any point, leave it out.

Wizards can be very simple or quite complex. For all but the most straightforward situations, we recommend that you design your wizard before creating it in the CLE. To design a wizard, follow these steps:

- 1 Analyze the activity or process that the wizard will support. Identify the type of wizard that will best support it.
- 2 If you plan to create a hierarchical wizard, identify the categories and subcategories you will need. You may want to consider creating a category for each distinct path or grouping of activities. You may find it helpful to draw a high-level diagram of the wizard's organization.
- 3 Identify the pages you will need. You may want to consider creating a page for each step that requires different guidance, produces a different work product, or takes place at a different time.
- 4 Identify the content needed (instructions, files, forms, etc.) for each page and – if the wizard contains more than one page – for the wizard as a whole. You may find it helpful to draw a diagram showing the organization of the wizard's components.
- 5 If you plan to attach files to provide information to users of the wizard, create those files and store them in Resources. *For*

information about storing files in Resources, see Chapter 8 of the *rSmart Sakai CLE User Guide*.

- 6 Identify the points at which formative and summative feedback are needed. You may allow for feedback on the wizard as a whole or on a page-by-page basis. Before making decisions in this regard, think carefully about the load placed on reviewers (those who provide formative feedback) and evaluators (those who provide summative feedback). Also, keep in mind that after a page or a wizard has been submitted for evaluation, participants can no longer change it.
- 7 Identify people to provide formative and summative feedback. Be sure they have appropriate permissions. *For more information on setting permissions for reviewers, see "Changing Permissions for the Wizards Tool" beginning on page 131. For more information on setting permissions for evaluators, see that same section and "Changing Permissions for the Evaluations Tool" beginning on page 176.*
- 8 If you plan to use forms for users to use in responding to instructions on a wizard page and/or for collecting comments from reviewers and evaluators, create those forms and store the .xsd files for them in Resources. *For more information on forms, see "Forms" beginning on page 84.*



Forms for collecting reflections and feedback comments may be added to the wizard as a whole or to individual pages. Forms for participants to use in following the instructions for completing a wizard can be added only to individual pages, not to the wizard as a whole.

- 9 Choose the style(s) you want to use in the wizard. In most cases, it is good practice to use a single style throughout a wizard. If you plan to use a style other than the default, store the .css file for it in Resources and use the Styles tool to create the style. *For more information on styles, see "Styles" beginning on page 229.*

Building a Wizard





To build a matrix wizard, use the Matrices tool. For more information on using that tool, see "Matrices" beginning on page 138.

To build a sequential or hierarchical wizard, access the Wizards tool

and follow these steps:

Step 1: Creating the Wizard

-  1 If the Wizards menu bar is not displayed, click the **Reset** button.
-  2 Click the **Add** button on the menu bar. The CLE displays the Add screen.

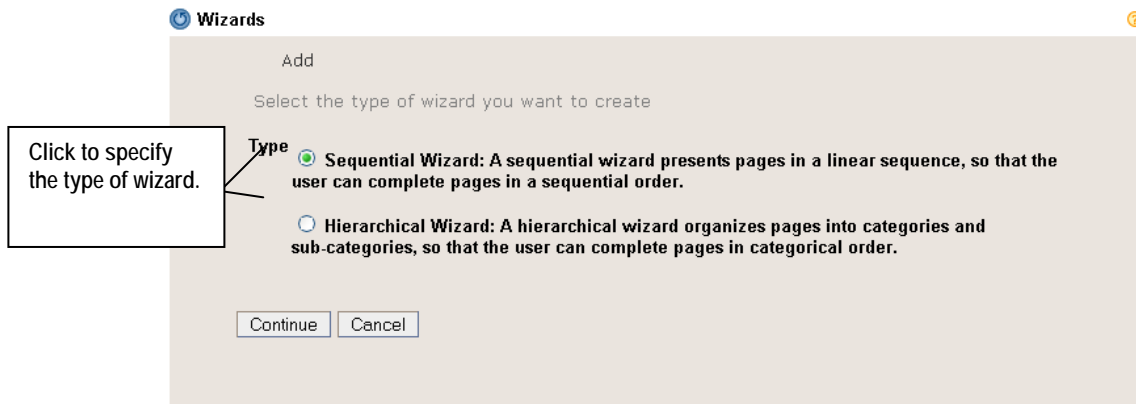
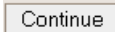


Figure 33 Wizards Add screen

- 3 Select the type of wizard you are creating by clicking the button for either sequential or hierarchical.
-  4 To proceed, click **Continue**. Or, to return to the Wizards home page without creating a wizard, click **Cancel**.
If you clicked **Continue**, the CLE displays the Add Wizard, Step 1, screen.

Wizards

Add Sequential Wizard

Step 1 of 3: Begin

Complete the information about your wizard

Required items marked with *

* **Name**

Description

Keywords

Apply a Style [Select Style](#)

Figure 34 Add Wizard, Step 1, screen

- 5 Using the boxes shown, enter a name, a description of the wizard's purpose, and keywords. Only the **Name** entry is required.
- 6 Choose one of the following options:

- ◆ To apply the CLE's default style to this wizard, skip this step and proceed directly to step 7.

[Select Style](#)

- ◆ To apply another style to this wizard, click **Select Style**. The CLE displays the Manage Styles screen.

Wizards

Add

First Previous viewing 1 - 1 of 1 items Next Last

Manage Styles

Name	Description	Owner	Published?
Professional Revise Delete Select	Professional style for use in resumes	Don Robinson	Unpublished

Click this link to select the style.

Figure 35 Selecting a style from the Manage Styles screen

This screen lists the styles available for use in your wizards. *For more information on creating and working with styles, see "Styles" beginning on page 229.*

Select

Click the **Select** link for the style you want to apply to this wizard. The CLE redisplay the Add Wizard, Step 1, screen. The name of the style you chose is displayed in the **Apply a Style** box. Or, to return to that screen without selecting a style, click **Go Back**.

Continue

7 To proceed, click **Continue**. Or, to return to the Wizards home page without creating a wizard, click **Cancel**.

If you clicked **Continue**, the CLE displays the Add Wizard, Step 2, screen. This screen is shown in the next subsection.

Step 2: Adding Wizard Support

The Add Wizard, Step 2, screen looks like this:

Wizards

Add Sequential Wizard

Step 2 of 3: Add wizard support

Guidance

Instructions

Add Instructions

Rationale

Add Rationale

Examples

Add Examples

Reflection and Feedback

Select a form for users to complete when reflecting and providing feedback on your wizard

Reflection Select an item

Feedback Select an item

Evaluation

Select a form for users to complete when evaluating your wizard

Evaluation Select an item

Evaluators

No evaluators yet

Select Evaluators...

Continue Finish Back Cancel

Figure 36 Add Wizard, Step 2, screen

At this point, you need to add information and forms that apply to the wizard as a whole. To do so, follow these steps:

Add Instructions

- 1 To add instructions and other helpful information for users, click **Add Instructions**. The CLE displays the Guidance screen.

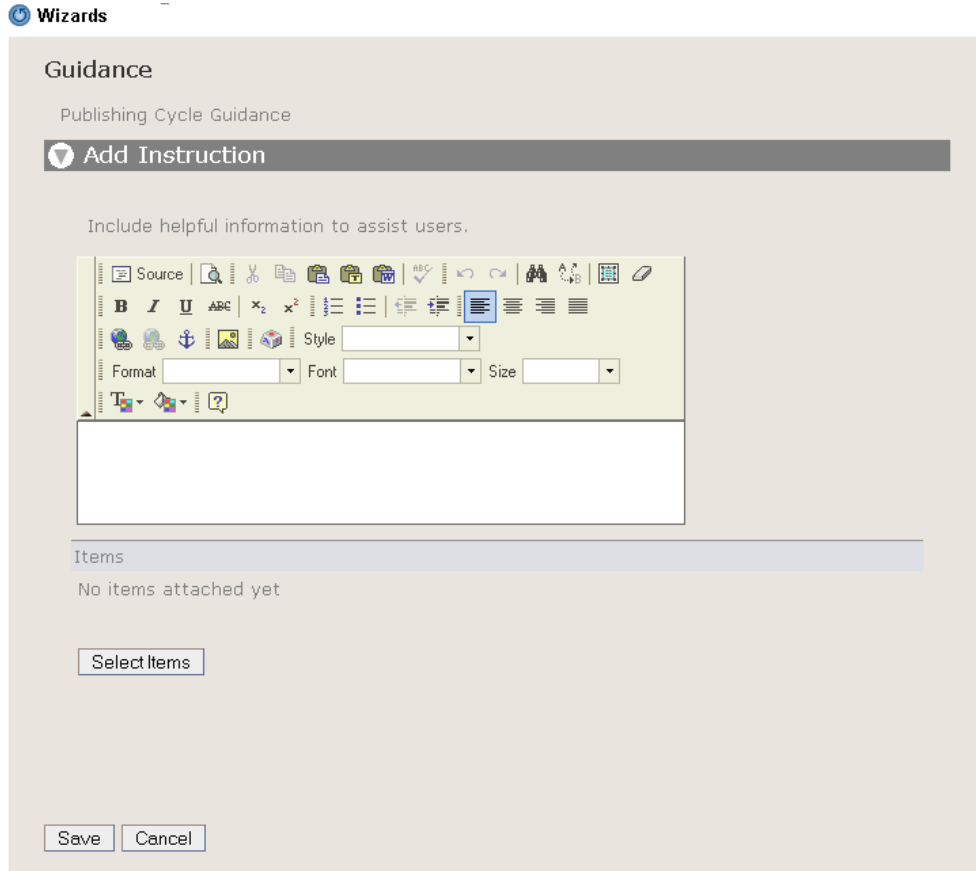


Figure 37 Guidance screen

2 Choose one or both of these options:

- ◆ Enter text directly into the text box on the screen. Use the icons and pulldown lists to format the text as appropriate.

Select Items

- ◆ Attach a file by clicking **Select Items**. To do so, follow the instructions given for selecting an item, starting on page 236. After you click **Finish**, the CLE displays the Guidance screen again.

Save

3 To save the information you have entered or attached, click **Save**. The CLE saves the information in the wizard and displays the Add Wizard, step 2, screen again. If you have entered text, that text is displayed in the appropriate part of the screen. If you have attached a file, its name is displayed.

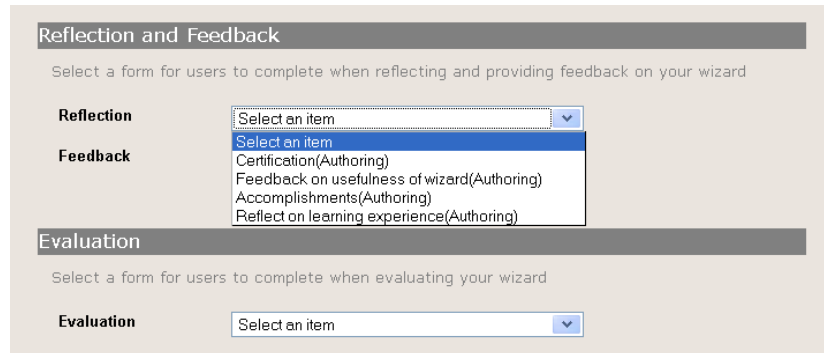
Add Rationale

4 To explain the purpose of the wizard to site participants, click **Add Rationale**. The CLE displays the Add Rationale screen. Except for its name, it is identical to the Guidance screen shown

above. Proceed as instructed in steps 2 and 3.

Add Examples

- 5 To add examples to show users how to use the wizard, click **Add Examples**. The CLE displays the Add Example screen. Except for its name, it is identical to the Guidance screen shown above. Proceed as instructed in steps 2 and 3.
- 6 To add a form with which to collect participant reflections upon their work in the wizard, select the appropriate form from the **Reflection** pulldown list.



The screenshot shows a web interface titled "Reflection and Feedback". It contains two main sections: "Reflection" and "Evaluation". The "Reflection" section has a label "Reflection" and a dropdown menu with a blue highlight on the first option "Select an item". The dropdown menu is open, showing five options: "Select an item", "Certification(Authoring)", "Feedback on usefulness of wizard(Authoring)", "Accomplishments(Authoring)", and "Reflect on learning experience(Authoring)". Below the "Reflection" section is the "Evaluation" section, which has a label "Evaluation" and a dropdown menu with "Select an item".

Figure 38 Select a reflection form from the pulldown list

- 7 To add a form in which reviewers will provide formative feedback to participants, select the appropriate form from the **Feedback** pulldown list.
- 8 To add a form in which reviewers will provide summative feedback to participants, select the appropriate form from the **Evaluation** pulldown list.



If you want participants to be able to modify their responses indefinitely, do not include an evaluation form and do not identify evaluators for the wizard. In the absence of evaluation form and an evaluator to provide summative feedback, the wizard has no end point, so participants can return to it and change it as desired.

Select Evaluators...

- 9 To select people to provide summative feedback, click **Select Evaluators**. The CLE displays the Select Evaluators screen.

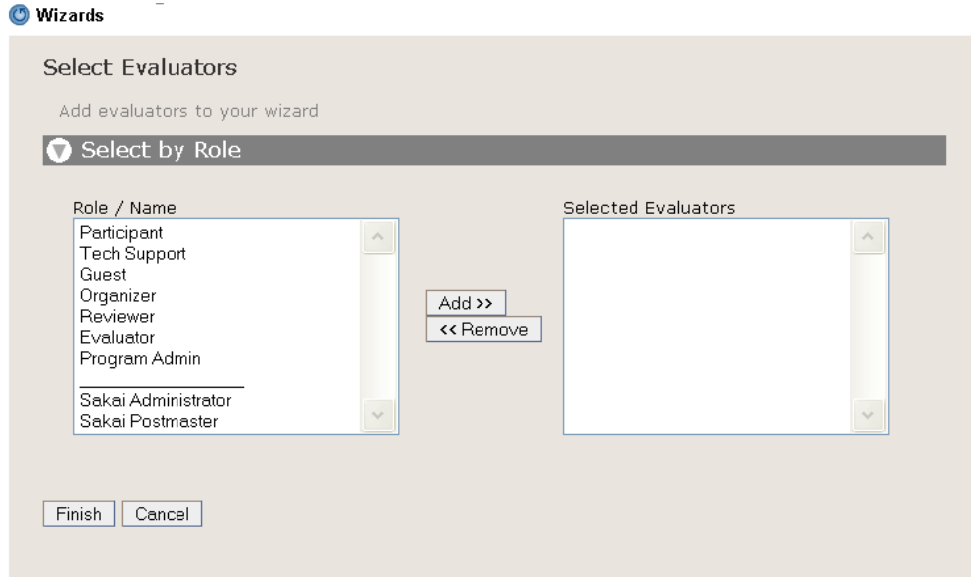


Figure 39 Select Evaluators screen

The window on the left side of the screen lists all roles defined for this site. Below the line, it also lists all site participants.



- To select evaluators, click the names of roles and/or individuals and then click the **Add** button.

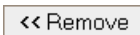


The roles you have selected for evaluators must have permission to evaluate wizards. Furthermore, the individuals selected for evaluation must be assigned a role selected for evaluation in the site. If these conditions are not met, the selected users will not be able to view and evaluate wizards. *For more information on setting permissions, "Changing Permissions for the Wizards Tool" beginning on page 131 and "Changing Permissions for the Evaluations Tool" beginning on page 176.*



To select more than one role or person at a time, hold the **CTRL** key down as you click.

The CLE displays the names of the roles and/or people in the box on the right.



- To remove any of these roles or people from the list of selected evaluators, click their names and click the **Remove** button.



- When you have identified all roles and/or individual participants who will act as evaluators, click **Finish**. The CLE displays the Add Wizard, step 2, screen again. The screen shows

the names of the roles and/or individuals you have selected as evaluators.

Continue

- 13 Choose one of the following options:
 - ♦ To create additional pages for this wizard, click **Continue**. The CLE displays the Add Wizard, step 3, screen. This screen varies, depending on whether you are creating a sequential or hierarchical wizard.
 - ♦ To complete this wizard without adding additional pages to it, click **Finish**. The CLE displays the Wizards home page. Your new wizard is listed on this screen.
 - ♦ To return to the Add Wizard, step 1, screen, click **Back**.
 - ♦ To exit without creating this wizard, click **Cancel**. The CLE displays the Wizards home page.
- 14 *To add pages to this wizard, follow the instructions for either “Step 3: Adding Pages to a Sequential Wizard” beginning on page 112, or “Step 4: Adding Categories, Subcategories, and Pages to a Hierarchical Wizard” beginning on page 114.*
- 15 *To publish this wizard, see “Publishing a Wizard beginning on page 126.*

Step 3: Adding Pages to a Sequential Wizard

If you are creating a sequential wizard and have completed “Step 2: Adding Wizard Support” by clicking **Finish**, the CLE displays this screen:

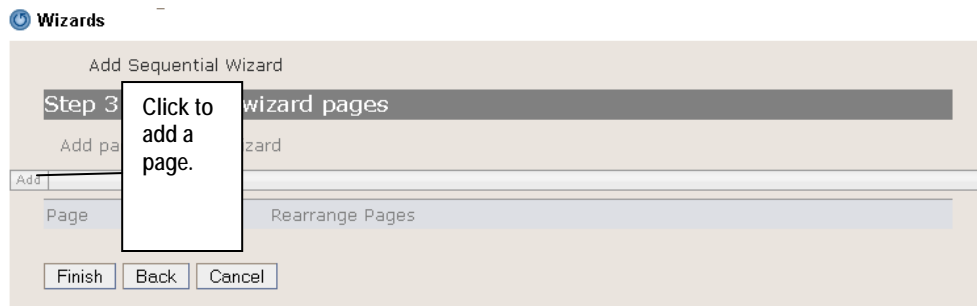


Figure 40 Add Sequential Wizard, Step 3, screen

Add

- 1 Click the **Add** button on the menu bar. The CLE displays the Revise Wizard Page Settings screen.

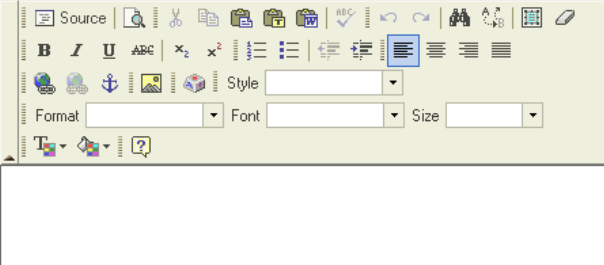
Wizards

Revise Wizard Page Settings

Wizard Page Settings (required fields are noted with an *)

*** Title**

Description



Style [Select Style](#)

Add Form(s)

Select the appropriate form(s) to display on this page. The form(s) selected will be displayed to the user for completion.

Form [Add](#)

Guidance

Instructions [Add Instructions](#)

Rationale [Add Rationale](#)

Examples [Add Examples](#)

Select a form for participant to complete and click Add. Repeat to select other forms, as needed.

Reflection and Feedback

Select a form for users to complete when reflecting and providing feedback on your page.

Reflection

Feedback

Evaluation

Select a form for users to complete when evaluating your page.

Evaluation

Evaluators

No evaluators are currently selected

[Select Evaluators](#)

[Save Changes](#) [Cancel](#)

Figure 41 Revise Wizard Page Settings screen

This screen looks like a combination of the Add Wizard, step 1, and the Add Wizard, step 2, screen. Just as those screens

provided all the boxes, pulldown lists, and access to files and forms that you needed for the wizard as a whole, this screen provides the boxes you need to define a single page in the wizard.

This screen contains one new box, which is a pulldown list for adding forms for site participants to use in completing this page of the wizard.

- 2 Referring to the instructions given in "Step 1: Creating the Wizard" beginning on page 105, and "Step 2: Adding Wizard Support" beginning on page 107, provide the information and materials that participants, reviewers, and wizard evaluators need for this page.

Add

- 3 To select forms for participants to complete, select a form from the **Forms** pulldown list and click **Add**. The CLE displays the name of the form you have added. Repeat this step to select the other forms you need.

Save Changes

- 4 After entering information, attaching forms and files, and identifying evaluators as needed, click **Save Changes**. The CLE displays the Add Wizard, step 3, screen. The page you have added is listed on this screen. Or, to return to this screen without adding the page to the wizard, click **Cancel**.

- 5 To add another page, repeat steps 1- 4.

Finish

- 6 After adding as the pages you need, click **Finish**. The CLE displays the Wizards home page. Or, to return to the Add Wizard, step 2, screen, click **Back**. To return to the Wizards home page without adding this wizard, click **Cancel**.

Step 4: Adding Categories, Subcategories, and Pages to a Hierarchical Wizard

If you are creating a hierarchical wizard and have completed "Step 2: Adding Wizard Support" by clicking **Finish**, the CLE displays the Add Hierarchical Wizard, Step 3, screen.

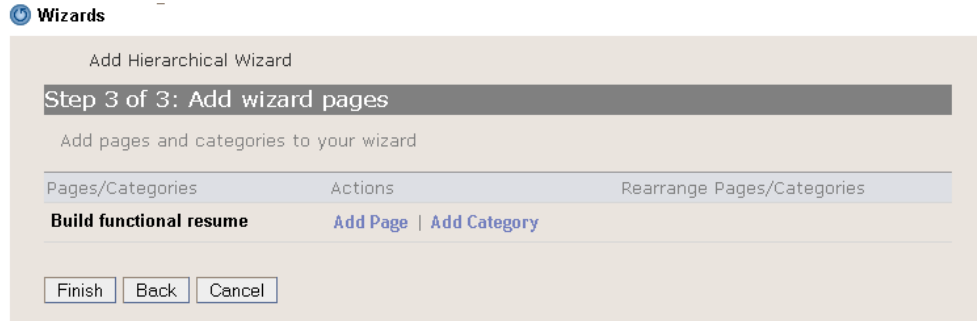


Figure 42 Add Hierarchical Wizard, Step 3, screen

This screen provides the starting point from which you add categories, subcategories, and pages to your hierarchical wizard.

Follow the directions in the subsections below. After finishing your work, choose one of these options:

Finish

- ♦ To save your work and return to the Wizards home page, click **Finish**.
- ♦ To save your work and return to the Add Wizard, Step 2, screen, click **Back**.
- ♦ To return to the home page without saving any of the categories, subcategories, and pages you have created, click **Cancel**.

Adding Categories

To add one or more categories, access the Add Hierarchical Wizard, Step 3, screen and follow these steps:

Add Category

- 1 Click the **Add Category** link for the wizard.

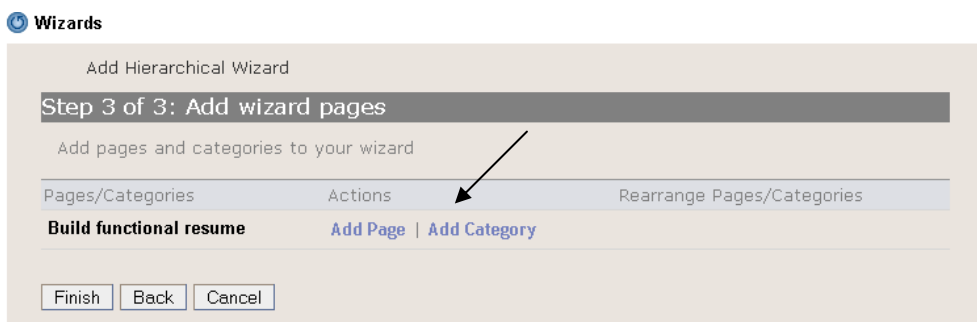


Figure 43 Click to add a category.

The CLE displays the Add Wizard Category screen.

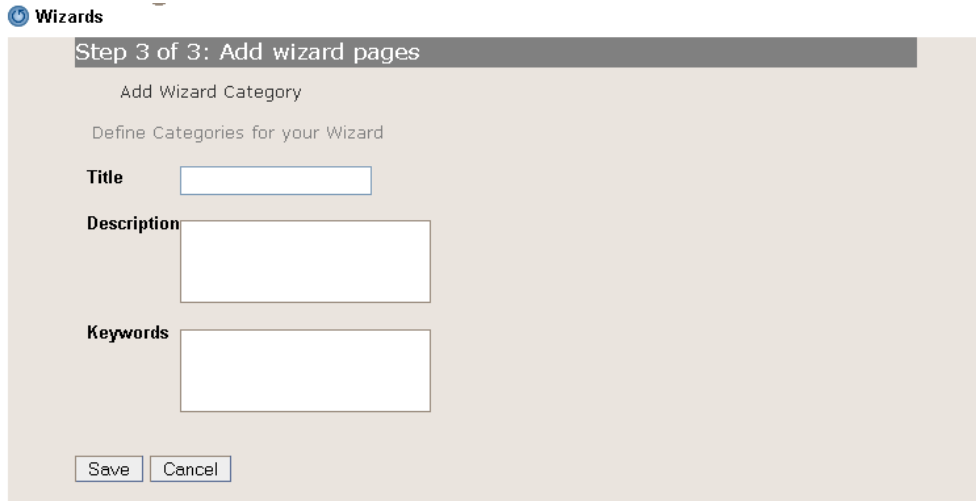


Figure 44 Add Wizard Category screen

- 2 Enter a title for the category in the **Title** box. This entry is required.
- 3 If desired, enter a description of the category in the **Description** box and enter keywords in the **Keywords** box.
- 4 To save this category, click **Save**. Or, to return to the Add Wizard, Step 3, screen without adding the category, click **Cancel**.
If you clicked **Save**, the CLE saves the category and displays the Add Wizard, Step 3, screen again. The category you have added is now listed.

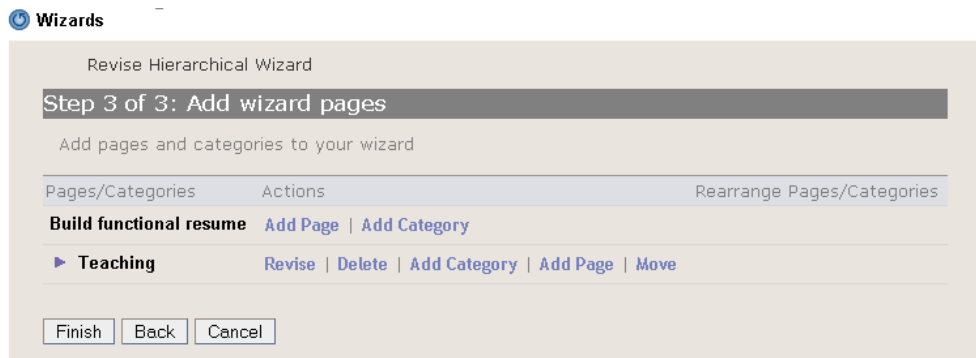


Figure 45 Add Wizard, Step 3, screen showing one category

- 5 To add another category, repeat steps 1 – 4.

Adding Subcategories

To add one or more subcategories, access the Add Hierarchical Wizard, Step 3, screen and follow these steps:

Add Category

- 1 Find the category to which you want to add a subcategory and click the **Add Category** link for it.

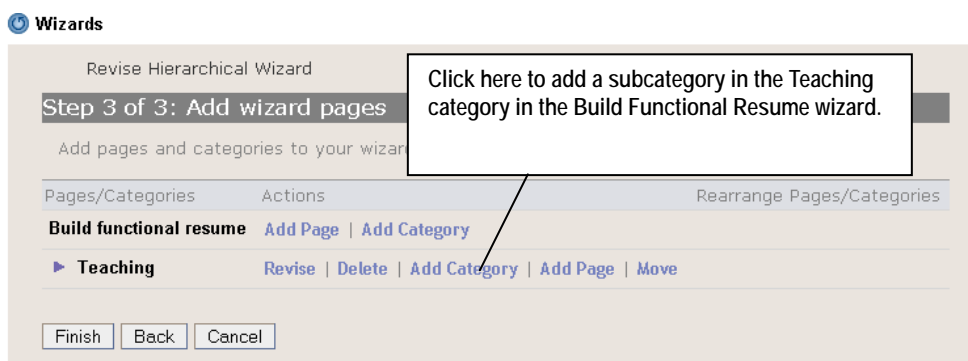


Figure 46 Click to add a subcategory

The CLE displays the Add Wizard Category screen shown on page 116.

- 2 Enter a title for the subcategory in the **Title** box. This entry is required.
- 3 If desired, enter a description of the subcategory in the **Description** box and enter keywords in the **Keywords** box.

Save

- 4 To save this subcategory, click **Save**. Or, to return to the Add Wizard, Step 3, screen without adding the subcategory, click **Cancel**.

If you clicked **Save**, the CLE saves the subcategory and displays the Add Wizard, Step 3, screen again. The subcategory you have added is now listed.

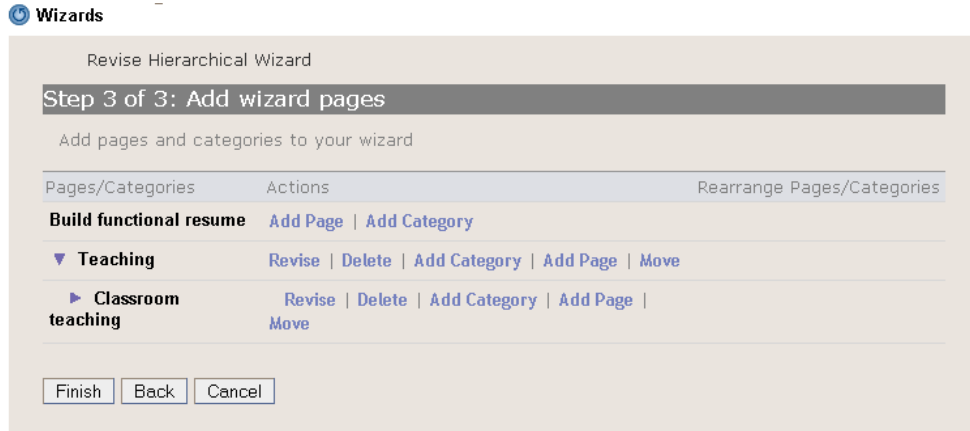


Figure 47 Add Wizard, Step 3, screen showing one category and one subcategory

- 5 To add another subcategory, repeat steps 1 – 4.

Adding Pages

To add a page to the wizard, access the Add Hierarchical Wizard, Step 3, screen and follow these steps:

- Add Page** 1 Depending on where you want to add a page, click the **Add Page** link for the wizard itself or any category or subcategory in the wizard.

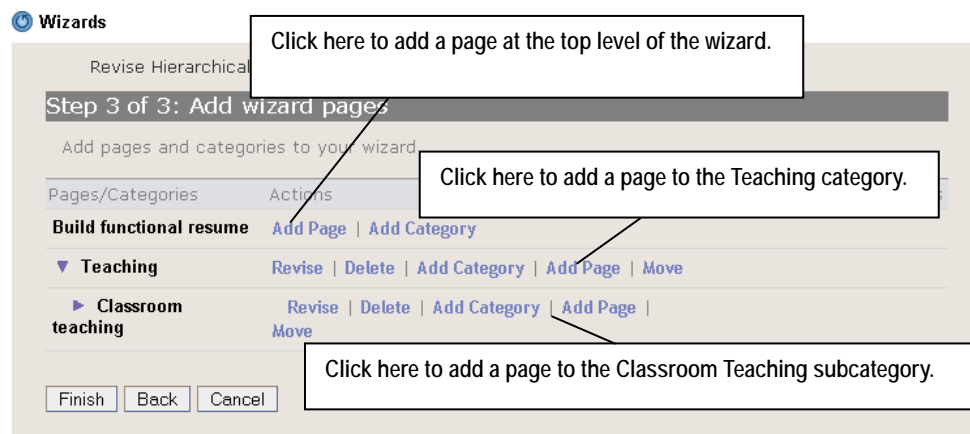


Figure 48 Add Wizard, Step 3, screen showing one category and one subcategory

The CLE displays the Revise Wizard Page Settings shown on page 113.

2 Referring to the instructions given in "Step 1: Creating the Wizard" beginning on page 105, and "Step 2: Adding Wizard Support" beginning on page 107, provide the information and materials that participants, reviewers, and wizard evaluators need for this page.

Add

3 To select forms for participants to complete, select a form from the **Forms** pulldown list and click **Add**. The CLE displays the name of the form you have added. Repeat this step to select the other forms you need.

Save Changes

4 After entering information, attaching forms and files, and identifying evaluators as needed, click **Save Changes**. The CLE displays the Add Wizard, step 3, screen. The page you have added is listed on this screen. Or, to return to this screen without adding the page to the wizard, click **Cancel**.

Finish

5 After adding as the pages you need, click **Finish**. The CLE displays the Wizards home page. Or, to return to the Add Wizard, step 2, screen, click **Back**. To return to the Wizards home page without adding this wizard, click **Cancel**.




Save Changes

6 After entering information, attaching forms and files, and identifying evaluators as needed, click **Save Changes**. The CLE displays the Add Wizard, step 3, screen. The page you have added is listed on this screen. Or, to return to this screen without adding the page to the wizard, click **Cancel**.

7 To add another page to the wizard, repeat steps 1 - 6.





Changing a Wizard

The Wizards tool allows you to change wizards in these ways:

-  Change the name and other attributes of the wizard.
-  Change content of wizard pages and categories
-  Change the order of pages in a category (hierarchical wizards only)

- ✍ Change the order of categories in the wizard
- ✍ Move pages to another category
- ✍ Delete individual pages and categories

To make any of these changes, access the Wizards tool and follow these steps:

-  1 If the Wizards home page is not displayed, click the **Reset** button.
-  2 Find the wizard you want to change and click the **Revise** link beneath its name. The CLE displays the Revise Wizard, Step 1 screen. Except for its name, this screen looks like the Add Wizard, Step 1 screen shown on page 106.
-  3 Referring to the instructions given in “Step 1: Creating the Wizard,” steps 5 - 7, beginning on page 106, change entries as appropriate.
- 4 If you press **Continue**, the CLE displays the Revise Wizard, Step 2, screen. Except for its name, this screen is identical to the Add Wizard, Step 2 screen shown on page 108.
-  5 Referring to the instructions in “Step 2: Adding Wizard Support” beginning on page 108, change entries, as appropriate.

If you press **Continue**, the CLE displays the Revise Wizard, Step 3, screen. This screen varies, depending on whether you are revising a sequential or hierarchical wizard.

Depending on how many pages have been created for this wizard, the Revise Sequential Wizard, Step 3, screen looks something like this:

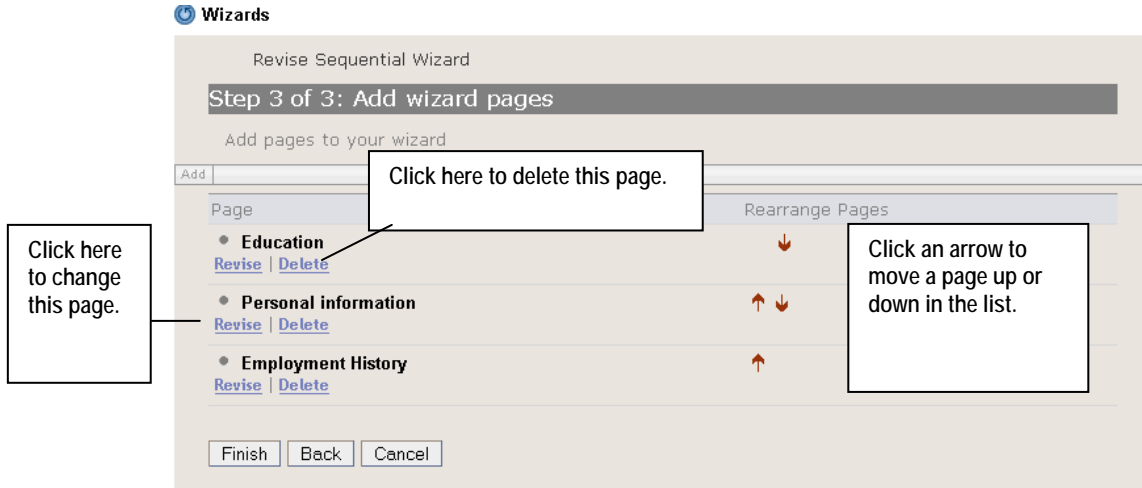


Figure 49 Revise Sequential Wizard, Step 3, screen

Depending on how many pages and categories have been created for this wizard, the Revise Hierarchical Wizard, Step 3, screen looks something like this:

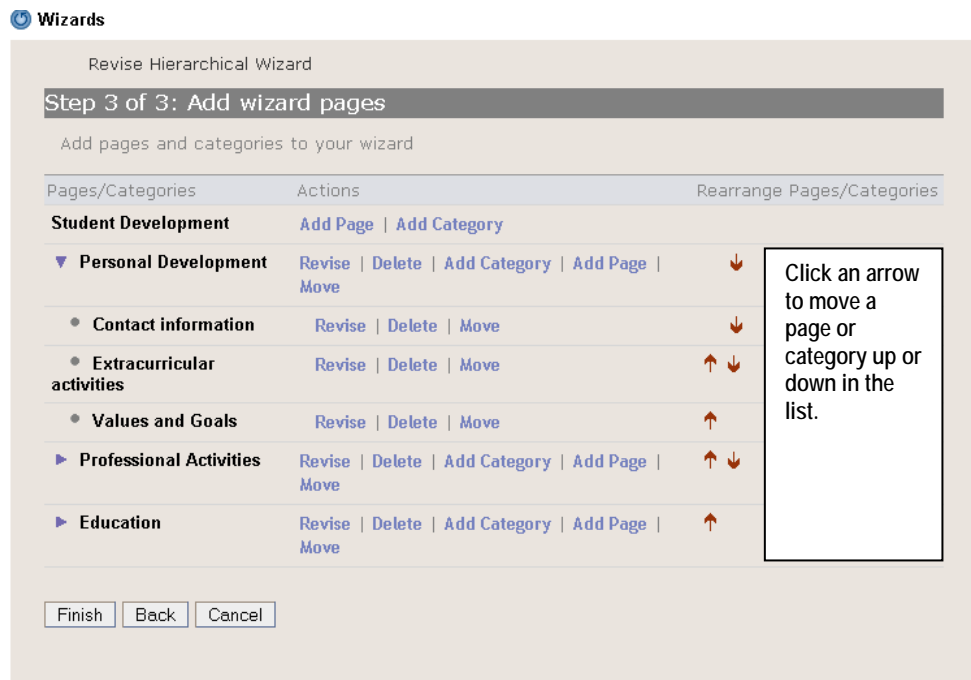


Figure 50 Revise Hierarchical Wizard, Step 3, screen

Note that categories and pages are identified by different icons:

- ▼ A down-facing triangle denotes a category that contains pages.

- ▶ A right-facing triangle denotes a category that contains no pages.
 - A circle denotes a page.
- 6 To make other types of changes, choose one or more of these options:
- ◆ To add pages to a sequential wizard, see “Step 3: Adding Pages to a Sequential Wizard” beginning on page 112.
 - ◆ To add categories and/or pages to a hierarchical wizard, see “Step 4: Adding Categories, Subcategories, and Pages to a Hierarchical Wizard” beginning on page 114.
 - ◆ To change, delete, or move a category or page, see the subsections that follow.
- 7 Exit from the screen in one of these ways:
- Finish
- ◆ To save your work and return to the Wizards home page, click **Finish**.
 - ◆ To save your work and return to the Add Wizard, Step 2, screen, click **Back**.
 - ◆ To return to the home page without saving any of the changes you have made, click **Cancel**.

Changing a Category

To change a category in a hierarchical wizard, follow these steps:

- Revise
- 1 On the Add Wizard, Step 3, screen, find the category you want to change and click the **Revise** link below its name. The CLE displays the Revise Wizard Category screen. Except for its name, it is identical to the Add Wizard Category screen shown on page 116.
 - 2 Referring to the instructions given in “Adding Categories,” steps 2 – 5 beginning on page 116, make changes as needed.

Changing a Page

To change a page in a wizard, follow these steps:

- Revise**

1 On the Add Wizard, Step 3, screen, find the page you want to change and click the **Revise** link below its name. The CLE displays the Revise Wizard Page Settings screen (see page 113).
- 2 Referring to the instructions given in "Step 1: Creating the Wizard" beginning with step 5 on page 106, and "Step 2: Adding Wizard Support" beginning on page 107, make changes as needed.
- Add**

3 To select forms for participants to complete, select a form from the **Forms** pulldown list and click **Add**. The CLE displays the name of the form you have added. Repeat this step to select the other forms you need.
- Save Changes**

4 After entering information, attaching forms and files, and identifying evaluators as needed, click **Save Changes**. The CLE displays the Add Wizard, step 3, screen. The page you have added is listed on this screen. Or, to return to this screen without adding the page to the wizard, click **Cancel**.

Deleting a Category or Page



Caution

After a wizard has been published, you cannot delete categories or pages from it.

You can delete categories or pages only from unpublished wizards. To delete a category or a page, follow these steps:

- 1 On the Add Wizard, Step 3, screen, find the category or page you want to delete.




Caution

Be sure you have chosen the correct category or page.

- Delete** 2 Click the **Delete** link below the name of this category or page. The CLE deletes your selection immediately, without asking you to confirm your selection.

Changing the Order of Categories or Pages

-  To change the order of pages in a category or a sequential wizard, or to change the order of categories, click the up and/or down arrows.

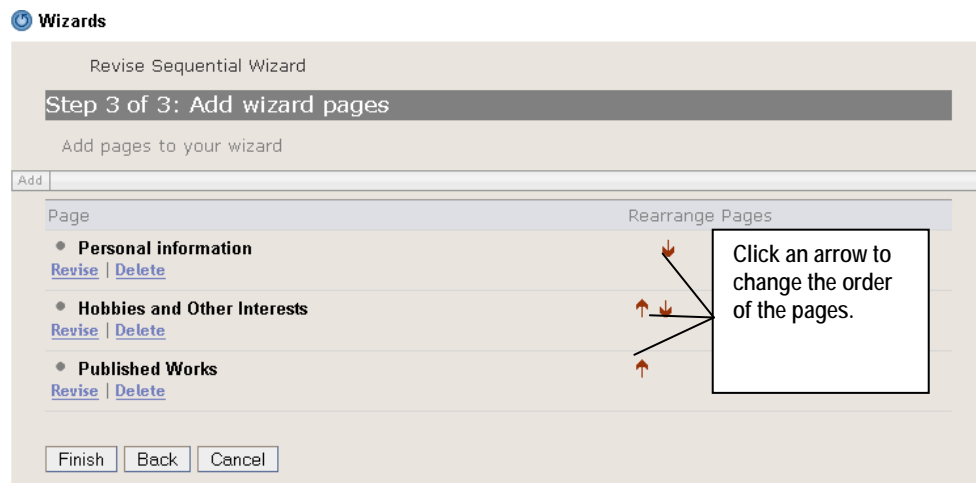


Figure 51 Click the up and down arrows as needed to change the order.

Each time you click an arrow, the CLE moves the associated category or page up or down in the list.

Moving a Page or Category to Another Level or Category

In a hierarchical wizard, you can move pages from one category to another. You can also move categories around, making them subcategories or moving subcategories up to become categories.

To move a page or category, follow these steps:

- Move** 1 On the Add Wizard, Step 3, screen, find the category or page you want to move and click the **Move** link for it.

Pages/Categories	Actions	Rearrange Pages/Categories
Student Development	Add Page Add Category	
▼ Personal Development	Revise Delete Add Category Add Page Move	↓
• Extracurricular activities	Revise Delete Move	↓
• Values and Goals	Revise Delete Move	↑
▶ Professional Activities	Revise Delete Add Category Add Page Move	↑ ↓
▶ Education	Revise Delete Add Category Add Page Move	↑ ↓
▶ Contact Information	Revise Delete Add Category Add Page Move	↑

Figure 52 Click to move this category.

The CLE redisplay the screen, showing the possible destinations for the category or page.

Pages/Categories	Actions	Rearrange Pages/Categories
Student Development	Add Page Add Category Cancel Move	
▼ Personal Development	Revise Delete Add Category Add Page Move Move Category Here	
• Extracurricular activities	Revise Delete Move	
• Values and Goals	Revise Delete Move	
▶ Professional Activities	Revise Delete Add Category Add Page Move Move Category Here	
▶ Education	Revise Delete Add Category Add Page Move Move Category Here	
▶ Contact Information	Revise Delete Add Category Add Page Move	

Figure 53 Select the new location for the category.

[Move Category Here](#)

- Find the category you want to move the category or page into and click the **Move Category Here** link for it. The CLE moves the category or page to the new location.

Pages/Categories	Actions	Rearrange Pages/Categories
Student Development	Add Page Add Category	
▼ Personal Development	Revise Delete Add Category Add Page Move	↓
▶ Contact Information	Revise Delete Add Category Add Page Move	
• Extracurricular activities	Revise Delete Move	↓
• Values and Goals	Revise Delete Move	↑
▶ Professional Activities	Revise Delete Add Category Add Page Move	↑ ↓
▶ Education	Revise Delete Add Category Add Page Move	↑

Figure 54 The category has been moved.

Deleting a Wizard

You can delete a wizard only if it has not yet been published. To delete a wizard, access the Wizards home page and find the wizard you want to delete. Then follow these steps:

- Delete**
- 1 Click the **Delete** link below the name of the wizard. The CLE displays this screen:

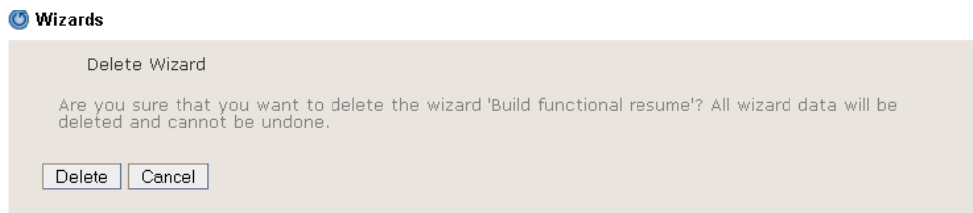


Figure 55 Delete Wizard screen

- Delete**
- 2 To delete this wizard, click **Delete**. The CLE deletes the wizard and displays the Wizards home page. Or, to return to the home page without deleting this wizard, click **Cancel**.

Publishing a Wizard

Publishing a wizard makes it available to site participants.



Caution

After a wizard has been published, you cannot add, move, reorder, or delete any of the categories or forms in it, nor can you delete the wizard itself. For this reason, we strongly recommend that you publish a wizard *only* when you are sure it contains the components you want in the order you want them.

To publish a wizard, access the Wizards tool and follow these steps:

- 1 If the CLE is not displaying the Wizards home page, click the **Reset** button.


- Publish** 2 Find the wizard you want to change, and click **Publish**. The CLE publishes the wizard and redisplay the home page.

Exporting and Importing a Wizard

If you own more than one site, you may want to use the same wizard in two or more of them. To do so, you first export the wizard to your desktop as a compressed file and then import it to the other site(s) where you plan to use it.

Exporting a Wizard

To export a wizard as a compressed file, access the Wizards tool and follow these steps:

-  1 If the Wizards home page is not displayed, click the **Reset** button.
- 2 Find the wizard you want to export.
- Export** 3 Click the **Export** link below the name of the wizard. The CLE displays the Opening File window shown on page 237.
- 4 Follow the instructions given in "Exporting a File" beginning on page 236.
- 5 Upload the compressed file to Resources. *For instructions on uploading the file, see Chapter 10 of the rSmart Sakai CLE User Guide.*

Importing a Wizard

To import a wizard from your desktop as a compressed file, access the site to which you want to import it and follow these steps:

1 Add the file to Resources. *For instructions, see Chapter 8 of the rSmart Sakai CLE User Guide.*



2 Access the Wizards tool. If the Wizards menu bar is not displayed, click the **Reset** button.



3 Click the **Import** button on the menu bar. The CLE displays the Import Wizard screen.

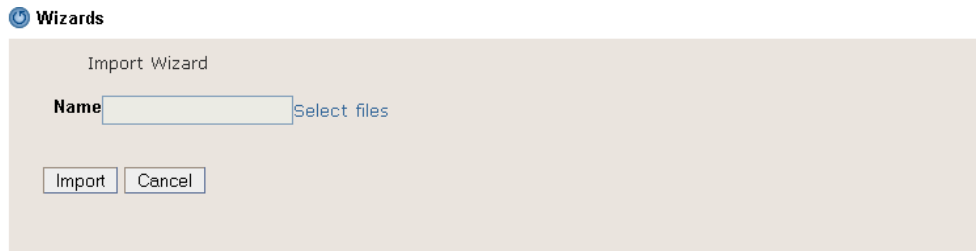


Figure 56 Import Wizard screen



4 Click **Select files**. The CLE displays the Select Item screen shown on page 235.

5 Select the compressed file for the wizard by following the instructions given for selecting an item, starting on page 236. After you click **Finish**, the CLE displays the Import Wizard screen again.

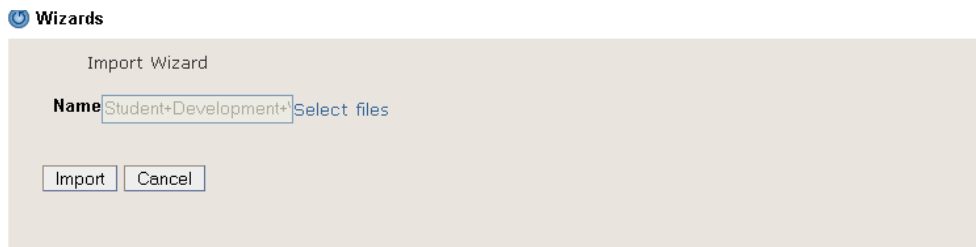


Figure 57 Import Wizard screen with file name listed

6 The name of the file you chose is displayed in the **Name** box.



7 Click the **Import** button. The CLE imports the file from the Resources area and redisplay the Wizards home page. The imported wizard is listed there. It has the same name and instructions as it had on its original site. Or, to return to the home page without importing the file into the Forms tool, click **Cancel**.



Regardless of the state (published or unpublished) of the wizard on the original site, it is always imported in the unpublished state. *For instructions on publishing a matrix, see page 150.*

Providing Formative Feedback on a Wizard

If you have appropriate permissions to act as a reviewer, you may review and provide formative feedback on the work of any site participant in any wizard in the site. Each participant's work is displayed in read-only mode.

To provide feedback, you fill out a form that is linked to the wizard as a whole or to a particular page and give your completed form a unique title. This completed form is then available to the site participant. Subsequently, you may fill out the same form any number of times (with a different title each time) to provide feedback on changes the participant may have made. You may review and provide feedback at any time up until the participant submits the wizard or the wizard page for summative evaluation.

To review and provide feedback on a wizard, access the Wizards tool and follow these steps:



- 1 If the Wizards home page is not displayed, click the **Reset** button.
- 2 Use the dropdown list to select the name of the person whose wizard you want to review.

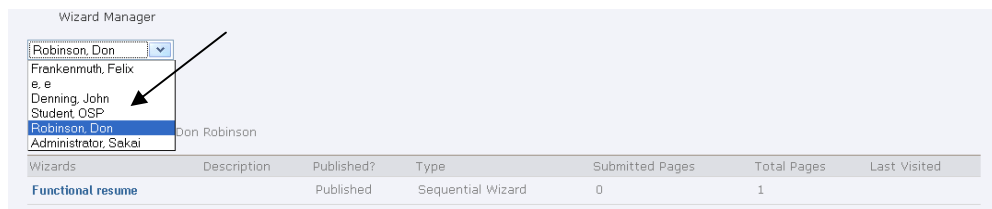


Figure 58 Select from the dropdown list.



- 3 Click **Go**. The CLE displays a list of wizards for the user you specified.



Figure 59 List of wizard(s) for a selected user

4 Find the wizard you want to review and click its name. The CLE displays the introductory page of that wizard.

Continue

5 Review the introductory page and then click **Continue**. The CLE displays the first page of the wizard. If this is not the page you want to work with, click **Continue** until you reach the appropriate page.

6 To review an attached item on any page, click its name.

Add Feedback

7 To enter feedback, click the **Add Feedback** link in the "Feedback" section at the bottom of the page.

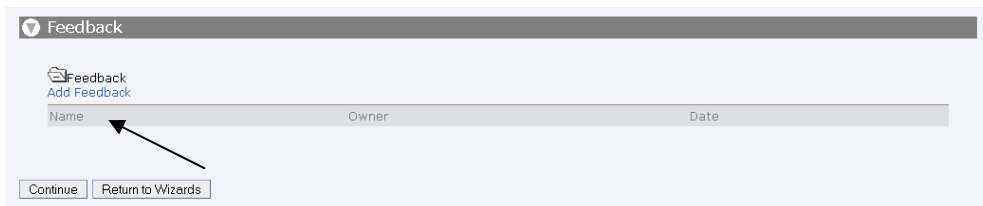


Figure 60 Click Add Feedback.

The CLE displays a screen containing a feedback form. It may look something like this:

Figure 61 Feedback form

8 Enter information in the fields, as appropriate.



Caution

The Access section of the screen allows you to make your feedback public to people other than the participant whose work you are reviewing. As a general rule, we advise against making feedback public in any way. To keep your feedback between you and the participant, do not click either radio button in this section.

Add

9 To add your feedback, click **Add**. The CLE displays the wizard page again. The title of your feedback is shown in the Feedback section of the screen.

10 Choose from among these options:

Continue

- ◆ To review other pages in this participant's wizard, click **Continue**.

Return to Wizards

- ◆ To return to the Wizards home page, click **Return to Wizards**.

Finish

- ◆ If you have reached the last page of the wizard, click **Finish** to return to the Wizards home page.

Changing Permissions for the Wizards Tool

To change the default permissions for the Wizards tool, access the

tool and follow these steps:

- 1 If the Wizards menu bar is not displayed, click the **Reset** button.
- 2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.

Permissions

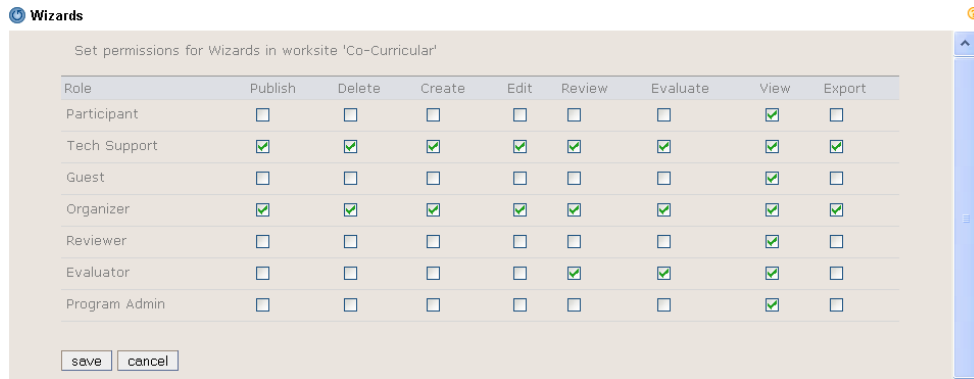


Figure 62 Wizards Permissions screen

- 3 Referring to the table below, check boxes to select the appropriate permissions for users in each role.

Table 13 Permissions for using the Wizards tool

<i>Permission</i>	<i>Description</i>
Publish	Users in this role may publish wizards for use by the site participants.
Delete	Users in this role may delete unpublished wizards.
Create	Users in this role may create and import wizards for use by themselves and/or site participants.
Edit	Users in this role may change any component of unpublished wizards and a limited number of components of published wizards.
Review	Users in this role may review participant work in progress in wizards and offer formative feedback on it.
Evaluate	Users in this role may review work that participants have submitted via wizard pages or wizards as a whole and offer summative

	feedback on it.
View	Users in this role may view and complete published wizards that have been created for their use.
Export	Users in this role may export a wizard to their desktops as a compressed file.



- 4 To save the permissions settings, click **save**. The CLE saves the settings and displays the Wizards home page. Or, to return to that screen without saving your changes, click **cancel**.

For Site Participants: Completing a Wizard

A wizard is a customized collection of instructions, forms, files, and other materials that guide you through an activity. You complete the wizard as you perform the various tasks or steps that make up the activity.

To complete a wizard, you access it online, follow its instructions, record information and attach requested materials, reflect on your activities, and receive feedback. Since wizards often guide you through activities that occur over a long period of time, you may need to access a wizard several times in order to complete it.

To access a wizard and complete it, access the Wizards tool and follow these steps:

- 1 If the Wizards home page is not displayed, click the **Reset** button.
- 2 Click the name of the wizard you want to work with.



Figure 63 Click the name to select this wizard.

The CLE displays the introductory screen for the wizard you chose.



Figure 64 Participant's view of introductory page of a wizard

The top section of the screen shows the name of the wizard. In this section, you may also see an explanation of the wizard's purpose, provides instructions for completing the wizard, and helpful examples of the wizard in its completed form.

The middle section contains the various items you will work with as you complete the wizard. All of the items you can access are shown in blue.

The bottom section provides an opportunity for you to reflect on this activity and your experience of it.

- 3 To access linked web pages or attached files shown on this screen and in other parts of the wizard, click the appropriate URLs or file names.
- 4 Following the instructions provided on this screen, access items in the wizard by clicking their names. Each time you click a name, the CLE presents a screen that contains the information and forms you need.

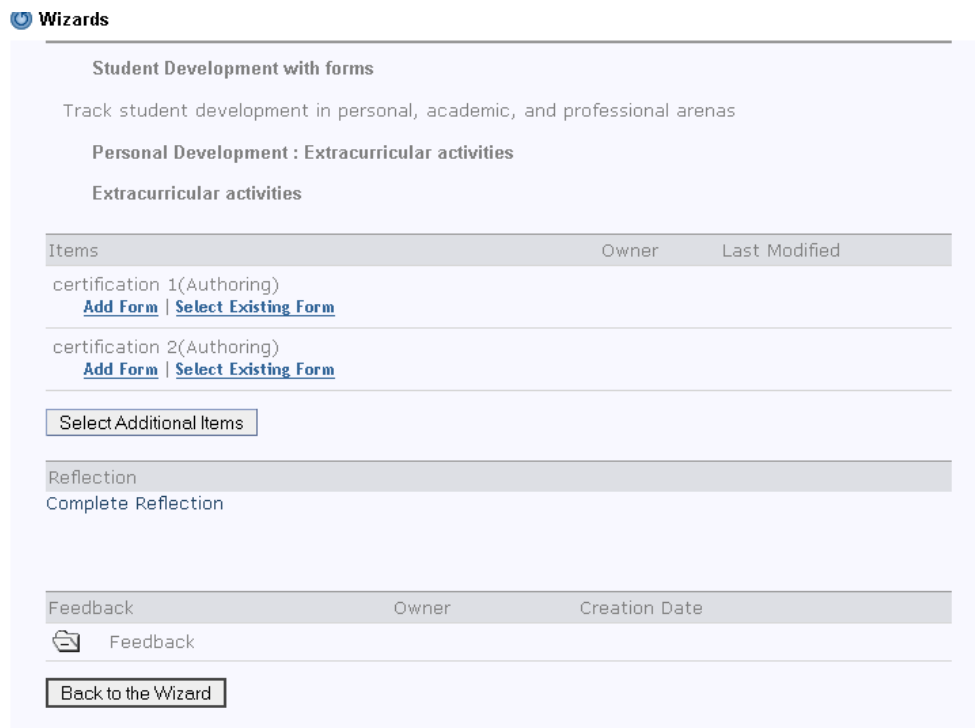


Figure 65 The CLE displays information for the item you selected.

In the example shown above, you have accessed the Extracurricular Activities portion of the wizard. This screen contains two items for your use – the certification 1 form and the certification 2 form.

- 5 To use a form, choose one of these options:

[Add Form](#)

- ♦ To fill out the form and attach it, click the **Add Form** link below the name of the form. The CLE displays the form you have selected.

Wizards

Form Item

Form Type certification

Name of Certification

Date(s) of Certification

Certifying Institution

Institutional Contact Information

Description

Reflection

Properties

*** Title**

Description

Access

Display to non-members (publicly viewable)

Display to site

Figure 66 The CLE displays the form you have selected.

Complete the form, including the **Title** field (required; your entry provides a display name for your work in this form), and click **Add**. The CLE saves the information and displays the wizard again. It also stores the completed form (by the title you gave it) in Resources in My Workspace.

[Select Existing Form](#)

- ◆ If you have already filled out this form and have stored it in Resources, click the **Select Existing Form** link. When the CLE displays the Resources home page, select the form. *For more*

information on selecting a form from Resources, see "Selecting an Item" beginning on page 235.

Submit for Evaluation confirmation

- 6 When you have completed a page that calls for submission or have completed the entire wizard, submit the page or wizard for evaluation. To do so, click the **Submit for Evaluation confirmation** button. The CLE a screen asking you to confirm that you want to submit the completed wizard for evaluation:

Wizards

Submit for Evaluation confirmation

! Are you sure you want to submit the following wizard for evaluation?

Title	Description
Student Development with forms	Track student development in personal, academic, and professional arenas

Submit Cancel

Figure 67 Submit confirmation screen



Caution

After you submit the wizard for evaluation, you cannot access it again to make changes. Therefore, you should make sure that all of your entries are in their final form and are ready for review and comment before you submit the wizard.

Submit

- 7 To submit the wizard now, click **Submit**. Or, to cancel the submission process, click **Cancel**.

Return to Wizards

- 8 To return to the Wizards home page at any point, click the **Return to Wizards** button.

Matrices

An Introduction to Matrices



A matrix is a type of wizard. For information on wizards in general, see "Wizards" beginning on page 100. The Glossary tool provides context and definitions for the criteria and levels in a matrix. For more information on using this tool, see "Glossary" beginning on page 76.

A matrix is a type of wizard that provides structure and guidance for any learning process that can be organized into two dimensions – rows and columns. Matrices track progress across criteria, milestones, or standards (the rows) in relation to different activities or levels (the columns).

Matrices allow site participants to provide evidence of learning or other achievements in criteria, standards, or skills according to different levels of ability or areas of activity. They can be used to document learning or achievements in many areas – general education, co-curricular development, program requirements, course activities, graduation standards, faculty promotion and tenure, and more.

Within a matrix, the intersection of each row and column forms a cell. The cell's content provides a means of tracking achievement, encouraging reflection on the learning experience, and providing feedback and evaluation.

Each cell presents participants with instructions, samples, and forms to be completed, along with informational files, URLs, and/or other materials. Participants complete the forms that are presented and provide evidence from Resources to document their learning or achievement in relation to the *criterion* and level for this cell. Participants also reflect upon that evidence according to prompts provided in the cell.

Site organizers guide participants through the activities for each cell. To provide this guidance, they supply instructions, rationale, and examples in the cell. They may also include forms that structure participant evidence of learning or achievement. Additionally, they provide forms that prompt participants to reflect upon their evidence,



forms in which designated reviewers provide feedback on participant progress, and forms in which designated evaluators offer their evaluation of the work after a participant submits the cell. Finally, site organizers may also determine the order in which participants complete the cells.



As a site organizer, you can create portfolio templates to display the content of a completed matrix or a matrix in process. Through these templates, you can allow site participants to transform their matrices into portfolios. *For more information on creating portfolio templates, see "Creating a Template" beginning on page 214.*

The Matrices Tool



If you are a system administrator or a site organizer, you can use the Matrices tool to perform the following activities.

-  Create, change, and delete matrices.
-  Publish a matrix so that site participants can use it.



Do NOT publish a matrix until it is exactly the way you want it.

After a matrix has been published, its name, the number of columns and rows, participant navigation across the cells, and the forms within each cell cannot be changed. Furthermore, once published, a matrix cannot be deleted.

-  Use a matrix created in one site in another site by exporting it from the first site and importing it into the other site.
-  Change Matrices tool permissions for all users in any given role.

If you are a site participant, you use the tool to complete matrices.

Designing a Matrix

Many of the guidelines that apply to designing any other type of wizard also apply to designing a matrix.



Avoid unnecessary complexity

You can add unlimited instructions, forms, feedback, evaluation, and other features to each cell of a matrix. As a result, it's possible to make a matrix overly complex and difficult or burdensome to use. Remember this: You do not have to use every element and feature at every opportunity. If something seems to have little or no value at any point, leave it out.

To design a matrix, follow these steps:

- 1 Analyze the activity or process that the matrix will support.
- 2 Identify the rows and columns you will need.
- 3 Identify the content needed (instructions, files, forms, etc.) for each cell of the matrix and for the matrix as a whole.
- 4 Draw a diagram showing the organization of the matrix's components.



Do NOT omit step 4.

Because matrices are fairly complex and many aspects of them cannot be changed after publication, we strongly recommend that you diagram the matrix and the contents of each cell before creating them in the Matrices tool.

- 5 If you plan to attach files to provide information to users of the matrix, create those files and store them in Resources. *For information about storing files in Resources, see Chapter 8 of the rSmart Sakai CLE User Guide.*
- 6 Identify the points at which formative and summative feedback are needed. You may allow for feedback on the matrix as a whole or cell by cell. Before making decisions in this regard, think carefully about the load placed on reviewers (those who provide formative feedback) and evaluators (those who provide summative feedback). Also, keep in mind that after a cell or a matrix has been submitted for evaluation, participants can no longer change it.
- 7 Identify people to provide formative and summative feedback. Be sure they have appropriate permissions. *For more information on setting permissions for reviewers, see "Changing Permissions for the Matrices Tool" beginning on page 159. For more information on setting permissions for evaluators, see that section and "Changing Permissions for the Evaluations Tool" beginning on page 176.*
- 8 If you plan to use forms in the matrix to provide structure for site

participant work, reflection prompts, and review and evaluation of work in the cells, store the .xsd files for those forms in Resources. *For more information on forms, see “Forms” beginning on page 84.*

- 9 In most cases, it is good practice to use a single style throughout a matrix. If you plan to use a style other than the default, store the .css file for it in Resources and use the Styles tool to create the style. *For more information on styles, see “Styles” beginning on page 229.*

Accessing the Matrices Tool



The Matrices tool is usually located in the Collect & Reflect category of a Portfolio site and in the same category of My Workspace. For portfolio site organizers, the tool is often in the Guide category of the site menu.

To access the tool, open the appropriate category and click the **Launch** button for **Matrices**. The CLE displays the Manage Matrices page. This is the Matrices home page.

Name	Description	Owner	Published?
Resume Development Matrix		Don Robinson	Unpublished
General Education Matrix		Don Robinson	Unpublished

Figure 68 Matrices home page

The screen contains a list of matrices for the site. For each matrix, the list contains its name, description, and owner and indicates whether it has been published.

If the list of matrices is longer than one page, use the buttons under the Matrices menu bar to display other pages in the list.

First

- ◆ To display the first page of the list, click **First**.

Previous

- ◆ To display the previous page of the list, click **Previous**.

Next

- ◆ To display the next page of the list, click **Next**.

Last

- ◆ To display the last page of the list, click **Last**.

Creating a Matrix

Creating a matrix involves multiple steps:

- 1 Creating a framework for the matrix.
- 2 Setting up the cells.
- 3 Publishing the matrix.

Step 1: Creating the Framework

To create the framework for a matrix, access the Matrices tool and follow these steps:



- 1 If the Matrices home page is not displayed, click the **Reset** button.



- 2 In the Matrices menu bar near the top of the screen, click the **Add** button. The CLE displays the Add Matrix screen.

Matrices

Add Column Add Row

Add Matrix

Scaffolding (required fields are noted with an *)

General Scaffolding Information

* Title

Description

Style Select Style

Columns Add Column

Column Label

Name

Rows Add Row

Row Label

Name

Matrix Progression

Set Matrix Progression to:

None

Horizontal Cells to the left begin as ready; cells to the right begin as locked. Cell to the right opens when cell to the left is submitted.

Vertical Cells to the top begin as ready; cells underneath begin as locked. Cell underneath opens when cell on top is submitted.

Open All cells begin as open and follow the "pending->completed" behavior.

Determined by Instructor Cells begin as configured (ready or locked) and are opened on-demand.

Matrix Status Colors

* Ready Color #86F283

* Pending Color #F7EF84

* Completed Color #A6C7EA

* Locked Color #AC326B

Figure 69 Add Matrix screen

- 3 In the appropriate boxes, enter a title for the matrix and a description of its purpose. Only the **Title** entry is required.



Caution

Choose the title carefully. After publishing a matrix, you cannot change its title.

4 Choose one of the following options:

[Continue](#)

- ◆ To apply the CLE's default style to this matrix, skip this step and proceed directly to step 6.

[Select Style](#)

- ◆ To apply another style to this matrix, click **Select Style**. The CLE displays the Manage Styles screen.

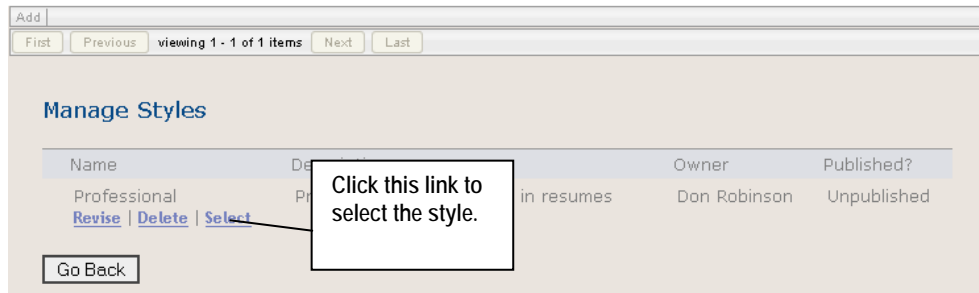


Figure 70 Selecting a style from the Manage Styles screen

This screen lists the styles available for use in your matrices. For more information on styles, see "Styles" beginning on page 229.

[Select](#)

5 Click the **Select** link for the style you want to apply to this matrix. The CLE redisplay the Add Matrix screen. The name of the style you chose is displayed in the **Style** box. Or, to return to that screen without selecting a style, click **Go Back**.

[Add Column](#)

6 To add a column, click **Add Column**. The CLE displays the Editing Scaffold Column screen.

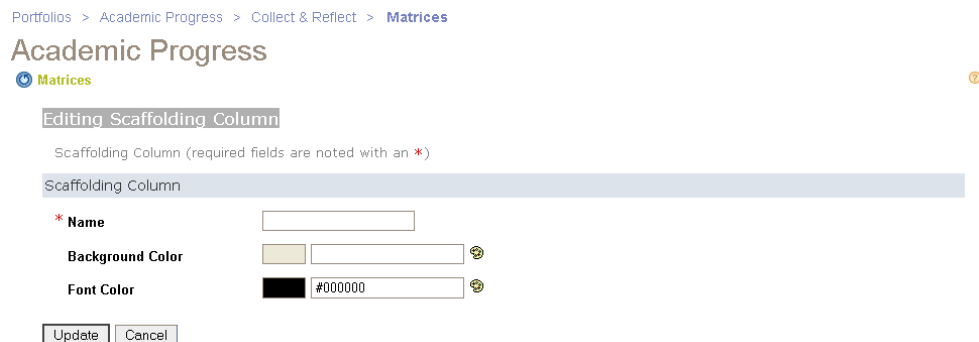


Figure 71 Editing Scaffold Column screen

7 In the **Name** box, enter a name for display in the column header. Keep in mind that shorter names for columns allow for better use of screen space.

- 8 To select a background color for this column other than the default (gray), click the color palette icon for the **Background Color** box. When the CLE displays color choices, click the background color you want.
- 9 To select a color for the text in this column other than the default (black), click the color palette icon for the **Font Color** box. When the CLE displays color choices, click the text color you want.
- 10 To save your work on this column, click **Update**. The CLE displays the Add Matrix screen, including information for the column you have just created.

Or to return to the Add Matrix screen without adding this column, click **Cancel**.
- 11 Repeat steps 6 - 10 as needed to create the remaining columns for your matrix.



Caution

Think carefully about the number of columns in the matrix. After publishing a matrix, you cannot change the number of columns it contains.

- 12 To change terminology to something other than the word "Column," enter the term you prefer in the **Column Label** box.

Add Row

- 13 To add a row, click **Add Row**. The CLE displays the Editing Scaffold Row screen.

Figure 72 Editing Scaffold Row screen

- 14 In the **Name** box, enter a name for display in the row header.
- 15 To select a background color for this row other than the default (gray), click the color palette icon for the **Background Color** box. When the CLE displays color choices, click the background color you want.

- 16 To select a color for the text in this row other than the default (black), click the color palette icon for the **Font Color** box. When the CLE displays color choices, click the text color you want.
- 17 To save your work on this row, click **Update**. The CLE displays the Add Matrix screen, including information for the row you have just created.
Or to return to the Add Matrix screen without adding this row, click **Cancel**.
- 18 Repeat steps 13 - 17 as needed to create the remaining rows for the matrix.



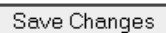
Caution

Think carefully about the number of rows in the matrix. After publishing a matrix, you cannot change the number of rows it contains.

- 19 To change terminology to something other than the word "Row," enter the term you prefer in the **Row Label** box.
- 20 Under Matrix Presentation, click the appropriate radio button to select the way you want participants to work through the cells in the matrix.
- 21 Under Matrix Status Colors, select colors to indicate the status of each cell in the matrix.

Table 3-14 Matrix Status Colors

<i>Status</i>	<i>Meaning</i>
Ready	This cell is available for site participant work.
Pending	The participant has submitted this cell for evaluation.
Completed	This cell has been evaluated.
Locked	This cell is not available for site participant work at this time.



- 22 To save your work, click **Save Changes**. Or, to exit without adding a new matrix, click **Cancel**.

If you clicked **Save Changes**, the CLE saves your changes and displays the new matrix on the Revise Matrix screen.

The screenshot shows the 'Revise Matrix' interface. At the top, there is a navigation bar with 'Matrices' and 'Return to List'. Below this, the title 'Revise Matrix' is followed by a description: 'Track progress towards fulfilling graduation requirements in various academic and non-academic areas. Click on a cell to revise.' The main table has a header row with three columns: 'Academic' (purple background), 'Co-Curricular' (blue background), and 'Internship' (cyan background). The first column is labeled 'General Education Matrix' and contains three rows: 'Communication' (pink background), 'Critical Thinking' (orange background), and 'Practical Application' (yellow background). All cells in the table are green. Below the table is a legend with four categories: 'Ready' (green), 'Completed' (light blue), 'Pending' (yellow), and 'Locked' (maroon).

General Education Matrix	Academic	Co-Curricular	Internship
Communication	Ready	Ready	Ready
Critical Thinking	Ready	Ready	Ready
Practical Application	Ready	Ready	Ready

Legend

- Ready (Green)
- Completed (Light Blue)
- Pending (Yellow)
- Locked (Maroon)

Figure 73 Newly created matrix displayed on the Revise Matrix screen

Note the following:

- ◆ The matrix title you specified in step 3 is displayed in the top left corner of the table. If you entered a description in that step, it is displayed above the table.
- ◆ The column names, background colors, and text colors you entered in steps 6 - 11 are displayed in the column headers.
- ◆ The row names and colors you entered in steps 13 - 18 are displayed in the row headers.
- ◆ The legend shows the colors you selected to indicate various states.
- ◆ In this example, all cells of the matrix are green, indicating (according to the legend) that they are ready for use.

Step 2: Setting up Cells

To set up cells for a matrix, access the Matrices tool and follow these steps:

- 1 If the Matrices home page is not displayed, click the **Reset** button.
- 2 Find the matrix you want to work on and click the **Revise** link beneath its name. The CLE displays the Revise Matrix screen.
- 3 Click the desired cell.

Revise

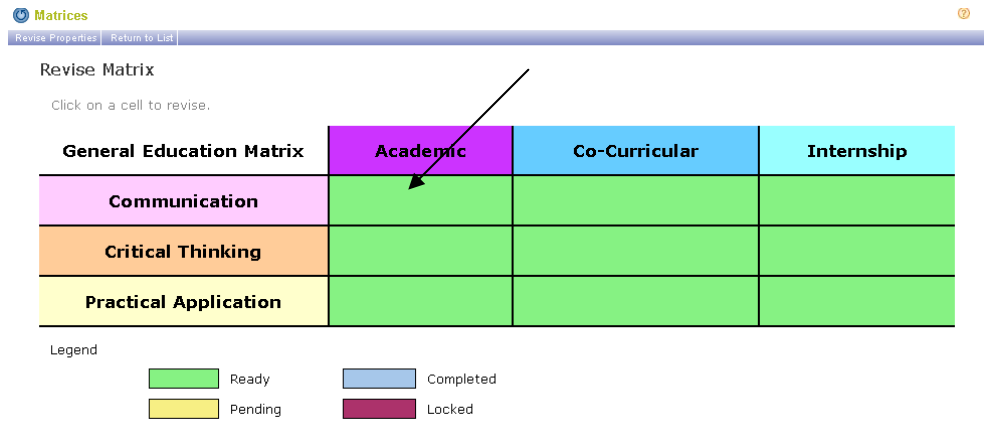


Figure 74 To work on a cell, click it.

The CLE displays the Revise Cell screen.

Matrices

Revise Cell

Cell Settings (required fields are noted with an *)

Column: Academic
Row: Communication

* **Title**

Description

* **Initial Status**

Style [Select Style](#)

Add Form(s)

Select the appropriate form(s) to display on this page. The form(s) selected will be displayed to the user for completion.

Form

Guidance

Instructions

Rationale

Examples

Reflection and Feedback

Select a form for users to complete when reflecting and providing feedback on your page.

Reflection

Feedback

Evaluation

Select a form for users to complete when evaluating your page.

Evaluation

Evaluators

No evaluators are currently selected

Figure 75 Revise Cell screen

The CLE has automatically entered a title for this cell. The default title includes the name of both the column and row that intersect at this cell.

- 4 Change the title of the cell, if needed. An entry in the **Title** box is required.
- 5 Enter a description (objectives, etc.) of the cell, if needed.

- 6 In the **Initial Status** box, select either **Ready** or **Locked** to indicate whether this cell is to be available to participants as soon as the matrix is published.
- 7 To apply a style to this cell, *see "Step 1: Creating the Framework," step 4, above.*
- 8 Add the following as needed:
 - ◆ Forms for structuring site participant work in this cell.
 - ◆ Instructions, rationale, and examples of work relevant to this cell, including uploaded files.
 - ◆ Forms for collecting participant reflections on their work in this cell.
 - ◆ Forms for structuring reviewer feedback on participant work in this cell.
 - ◆ Forms for evaluation of work after this cell has been submitted for evaluation.
 - ◆ Names of evaluators

For more information on adding forms and supporting information and material to a cell, *see "Step 2: Adding Wizard Support" beginning on page 107.*

Save Changes

- 9 To save your work, click **Save Changes**. The CLE displays the Revise Matrix screen. Or, to return to this screen without saving your entries, click **Cancel**.
- 10 To set up other cells in the matrix, repeat steps 3– 9.

Step 3: Publishing the Matrix

Publishing a matrix makes it available for use by site participants.



Caution

After publishing a matrix, you cannot add, move, reorder, or delete columns and rows in it, nor can you rename or delete the matrix itself. For this reason, we strongly recommend that you publish a matrix only when you are sure that all the components are exactly as you want them.

To publish a matrix, access the Matrices tool and follow these steps:




-  1 If the Matrices home page is not displayed, click the **Reset** button.
-  2 Find the matrix you want to work on and click the **Publish** link beneath its name. The CLE displays the Revise Matrix screen.



Figure 76 Publish Scaffolding screen



-  3 To publish the matrix, click **Continue**. The CLE publishes the matrix and displays the Matrices home page. Or, to return to the home page without publishing the matrix, click **Cancel**.

Exporting and Importing a Matrix

If you own more than one site, you may want to use the same matrix in two or more of them. To do so, you first export the wizard to your desktop as a compressed file and then import it to the other site(s) where you plan to use it. You may edit the imported matrix to tailor it to the needs of the new site before publishing it.

Exporting a Matrix

To export a matrix as a compressed file, access the Matrices tool and follow these steps:

-  1 If the Matrices home page is not displayed, click the **Reset** button.
- 2 Find the matrix you want to export.
-  3 Click the **Export** link below the name of the matrix. The CLE displays the Opening File window shown on page 237.
- 4 Follow the instructions given in "Exporting a File" beginning on

page 236. The CLE creates a compressed file and downloads it to your desktop.

- 5 Upload the compressed file to Resources. *For instructions on uploading the file, see Chapter 10 of the rSmart Sakai CLE User Guide.*

Importing a Matrix

To import a matrix from your desktop as a compressed file, access the site to which you want to import it and follow these steps:

- 1 Add the file to Resources. *For instructions, see Chapter 8 of the rSmart Sakai CLE User Guide.*



- 2 Access the Matrices tool. If the Matrices menu bar is not displayed, click the **Reset** button.

Import

- 3 Click the **Import** button on the menu bar. The CLE displays the Import Matrix screen.

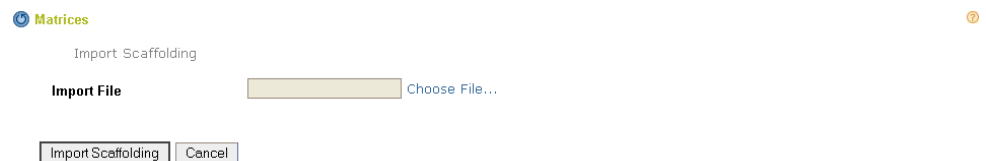


Figure 77 Import Matrix screen

Choose File...

- 4 Click **Choose File**. The CLE displays the Select Item screen shown on page 235.
- 5 Select the compressed file for the matrix by following the instructions given for selecting an item, starting on page 236. After you click **Finish**, the CLE displays the Import Matrix screen again.

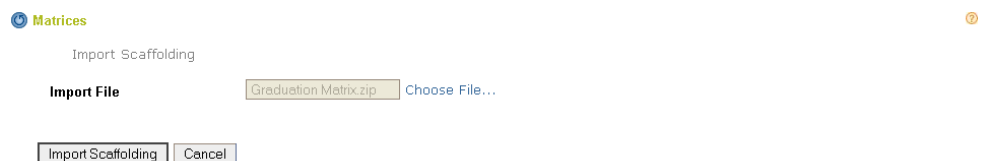


Figure 78 Import Matrix screen with file name listed

The name of the file you chose is displayed in the **Import File** box.

Import Scaffolding

- 6 Click the **Import Scaffolding** button. The CLE imports the file from Resources and redisplay the Matrices home page. The imported matrix is listed there. It has the same name and instructions as it

had on its original site. Or, to return to the home page without importing the file into the Matrices tool, click **Cancel**.



Regardless of the state (published or unpublished) of the matrix on the original site, it is always imported in the unpublished state. Before publishing the imported matrix, you may change it to suit the requirements of the new site. For instructions on changing a matrix, see below. For instructions on publishing a matrix, see page 150.

Changing a Matrix

If you have not yet published a matrix, you may change any part of it. After a matrix has been published, however, you may change only the following:

- ◆ Description of the matrix
- ◆ Style selected for the matrix
- ◆ Row and column labels
- ◆ Names and colors of rows and columns
- ◆ Colors for ready, pending, completed, and locked cells
- ◆ Titles and descriptions of individual cells
- ◆ Initial status of individual cells
- ◆ Styles selected for individual cells
- ◆ Instructions, rationale, and examples for individual cells
- ◆ Evaluators for individual cells

You may not revise the following in a published matrix:

- ◆ Title of the matrix
- ◆ Number of rows and columns in the matrix
- ◆ Any aspect of forms added to matrix cells

To revise a matrix, access the Matrices tool and follow these steps:



1 If the Matrices home page is not displayed, click the **Reset** button.

[Revise](#)

2 Find the matrix you want to change and click the **Revise** link beneath its name. The CLE displays the Revise Matrix screen (*see Figure 73* Newly created matrix displayed on the Revise Matrix

screen).

Revise Properties

- 3 In the Matrices menu near the top of the screen, click **Revise Properties**. The CLE displays the Revise Matrix Properties screen.

Matrices

Add Column | Add Row

Revise Matrix Properties

Scaffolding (required fields are noted with an *)

General Scaffolding Information

* Title

Description

Style Select Style

Columns Add Column

Column Label

Name

Academic [Revise](#) | [Remove](#) | [Up](#) | [Down](#)

Co-Curricular [Revise](#) | [Remove](#) | [Up](#) | [Down](#)

Internship [Revise](#) | [Remove](#) | [Up](#) | [Down](#)

Rows Add Row

Row Label

Name

Communication [Revise](#) | [Remove](#) | [Up](#) | [Down](#)

Critical Thinking [Revise](#) | [Remove](#) | [Up](#) | [Down](#)

Practical Application [Revise](#) | [Remove](#) | [Up](#) | [Down](#)

Matrix Progression

Set Matrix Progression to:

None

Horizontal Cells to the left begin as ready; cells to the right begin as locked. Cell to the right opens when cell to the left is submitted.

Vertical Cells to the top begin as ready; cells underneath begin as locked. Cell underneath opens when cell on top is submitted.

Open All cells begin as open and follow the "pending->completed" behavior.

Determined by Instructor Cells begin as configured (ready or locked) and are opened on-demand.

Matrix Status Colors

* Ready Color

* Pending Color

* Completed Color

* Locked Color

Figure 79 Revise Matrix screen

- 4 To revise a column or row, click the **Revise** link below its name and proceed as instructed in "Creating a Matrix," steps 456 - 10 (for columns) and steps 4513 - 17 (for rows).
- 5 To remove a column or row, click the **Remove** link below its name. The CLE displays the Remove Column (or Remove Row) window.

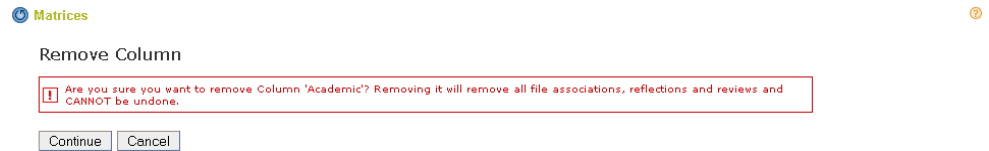


Figure 80 Remove Column window

Continue

To proceed, click **Continue**. The CLE deletes the column (or row) and redisplay the Revise Matrix screen.

[Up](#) | [Down](#)

- 6 To move a row or column up or down in the list, click the appropriate link below its name. The CLE reorders the columns.
- 7 To change other selections and entries on this screen, proceed as instructed in "Creating a Matrix," above.

Save Changes

- 8 To save your work, click **Save Changes**. Or, to exit without adding a new matrix, click **Cancel**.

If you clicked **Save Changes**, the CLE saves your changes and displays the revised matrix on the Revise Matrix screen.

Providing Formative Feedback on a Matrix

If you are a reviewer, you may review the cells of a site participant's matrix at any time and offer formative feedback on the work you find there. You may also return to a cell you have reviewed before, review any further work that has been done there, and provide additional feedback.

To review and provide feedback on a matrix, access the Matrices tool and follow these steps:

- 1 If the Matrices home page is not displayed, click the **Reset** button.
- 2 Find the matrix you want to review and click its name. The CLE

displays the Manage Matrix screen.

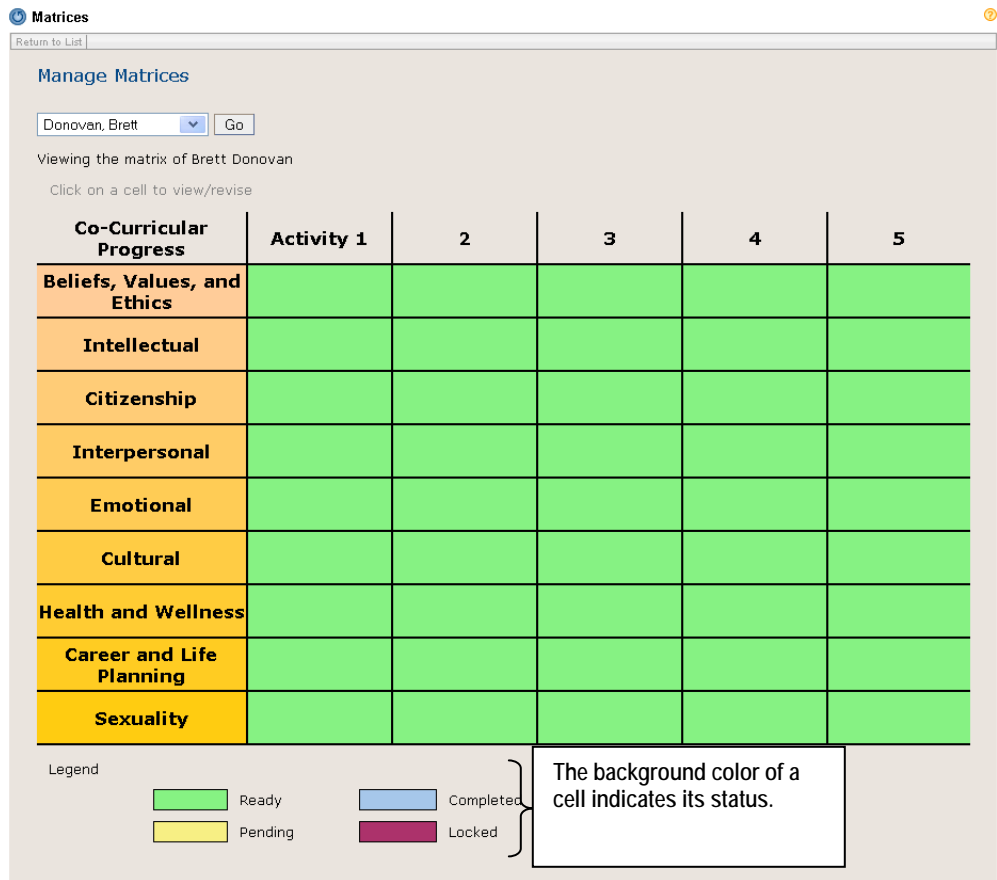


Figure 81 Manage Matrix screen

The screen displays the matrix. In the upper left corner of the screen, a dropdown list is displayed.

- Use the dropdown list to select the name of the person whose matrix you want.

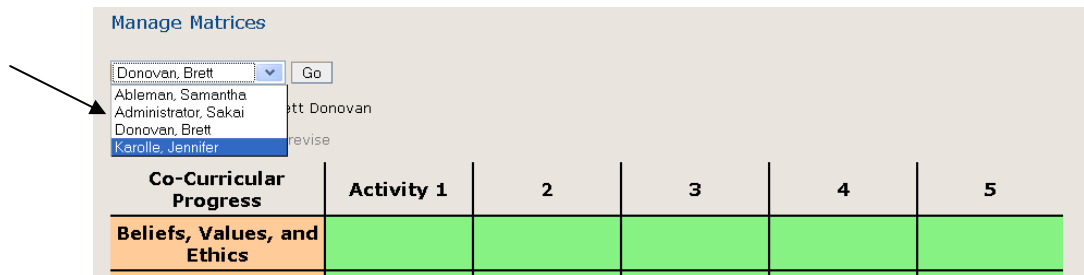


Figure 82 Select from the dropdown list.

- Click **Go**. The CLE displays a read-only copy of the matrix for the user you specified.

Matrices

Return to List

Manage Matrices

Karolle, Jennifer

Viewing the READ ONLY matrix of Jennifer Karolle

Click on a cell to view/revise

Co-Curricular Progress	Activity 1	2	3	4	5
Beliefs, Values, and Ethics					
Intellectual					
Citizenship					
Interpersonal					
Emotional					
Cultural					
Health and Wellness					
Career and Life Planning					
Sexuality					

Legend

	Ready		Completed
	Pending		Locked

The background color of a cell indicates its status.

Figure 83 This user has added a few items; two cells are pending.

Icons in a cell indicate that the user has attached material to it. The background color of a cell indicates its status.

- To review the contents of a cell, click on it. The CLE displays the cell. The display might look something like this:

Matrices

Manage Status

Row: Beliefs, Values, and Ethics; Column: 2

Beliefs, Values, & Ethics--Being grounded in one's religious and/or philosophical beliefs; having integrity; finding peace and joy in daily activities and a confident view of the future.

Items	Owner	Last Modified
Co-Curricular Progress (Co-Curricular)		
Civic Action 01	Jennifer Karolle	11-15-2006
Reflection		

Click here to review this item.

Feedback	Owner	Creation Date
Feedback Add Feedback		

Click here to add feedback.


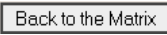
[Back to the Matrix](#)

Figure 84 Contents of a cell

- To review an attached item, click its name.


- To enter feedback on the work in this cell, click the **Add Feedback** link in the "Feedback" section. The CLE displays a screen that contains a feedback form. It may look something like this:

Figure 85 Feedback form

- Enter comments in the **Comments** box, and then add a title for your feedback (required) and, if desired, a description.
 - Under "Access," click a radio button to specify whether the feedback is for public display, for display only to site members, or neither.
-  10 To add your feedback, click **Add**. The CLE displays the contents of the cell again. The title of your feedback is shown in the Feedback section of the screen.
-  11 To return to the matrix display, click **Back to the Matrix**.

Changing Permissions for the Matrices Tool

To change the default permissions for the Matrices tool, access the tool and follow these steps:

-  1 If the Matrices menu bar is not displayed, click the **Reset** button.

-  2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.



Figure 86 Matrices Permissions screen

- Referring to the table below, check boxes to select the appropriate permissions for users in each role.

Table 15 Permissions for using the Matrices tool

<i>Permission</i>	<i>Description</i>
Use	Users in this role may access matrices and use them to collect information and material and reflect on their work.
Create	Users in this role may create new matrices and import existing matrices for use by themselves and/or site participants.
Publish	Users in this role may publish matrices for use by site participants.
Export	Users in this role may export a matrix to their desktops as a compressed file.
Review	Users in this role may review work in progress in matrices (by using the drop-down menu to go to the matrix of any site participant) and offer formative feedback on it.
Evaluate	Users in this role may review finished work in matrices and offer summative feedback on it.

save

- To save the permissions settings, click **save**. The CLE saves the settings and displays the Matrices home page. Or, to return to that screen without saving your changes, click **cancel**.

For Site Participants: Completing a Matrix

A matrix is a table of columns and rows that contains a customized collection of instructions, forms, files, and other materials. The purpose of these materials is to guide you through learning activities. These activities often take place over a long period of time. Therefore, you may need to access a matrix many times in order to complete it.

To complete part of a matrix (each part of the table is called a "cell"), you access it online, follow the instructions you find there, record information and attach requested materials, reflect on your activities, and receive feedback.



After collecting samples of your work in a matrix, the CLE allows you to create a portfolio to showcase them. *For information on creating portfolios, see "Portfolios" beginning on page 178.*

To access a matrix and work in one or more of its cells, access the Matrices tool and follow these steps:



- 1 If the Matrices home page is not displayed, click the **Reset** button.
- 2 Click the name of the matrix you want to work with.

Manage Matrices

Name	Description	Owner	Published?
General Education	This matrix provides a way for students to demonstrate their ability to meet General Education requirements for graduation.	Sakai Administrator	Published

Figure 87 Click the name to select a matrix.

The CLE displays the matrix you have chosen.

Manage Matrices

This matrix provides a way for students to demonstrate their ability to meet General Education requirements for graduation.

Click on a cell to view/revise

General Education	Level 1	Level 2	Level 3
Written Communication			
Critical Thinking			
Information Retrieval and Technology			
Quantitative Reasoning			
Oral Communication			
Understanding Self and Community			

Legend

 Ready	 Completed
 Pending	 Locked

Figure 88 Participant's view of a matrix

The name of the matrix is shown in the upper left corner of the table. In this example, each column of the matrix represents a level of proficiency and each row represents the ability to meet a different criterion or perform a different skill. The intersection of each column and row forms a cell. Within each cell are instructions for you to follow in order to demonstrate a specific level of competence in a particular area.

As shown in the legend beneath the table, each cell is color coded to indicate its status.

- ◆ Ready: This cell is available for you to work on.
- ◆ Pending: You have submitted your work in this cell for evaluation.
- ◆ Completed: You have received an evaluation of your work in this cell and are not required to perform any additional work.
- ◆ Locked: This cell is not yet available for you to work on.

- 3 To understand the purpose of a particular column or row, use your mouse to move the cursor over it. The CLE displays a short description.

General Education	Level 1
Written Communication	
Critical Thinking	
Information Retrieval and Technology	

Figure 89 Short description of a row name

To see a longer description, click the title of the column or row.

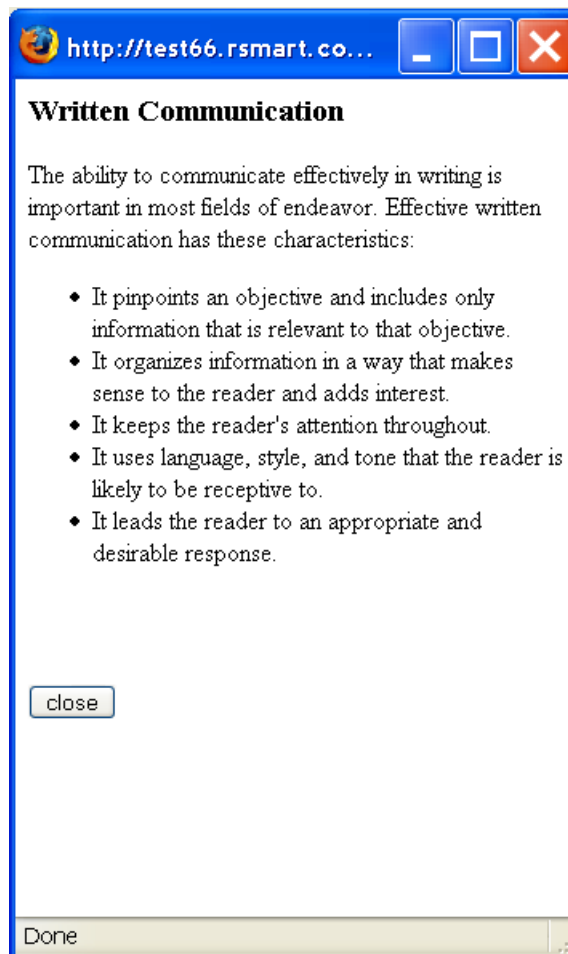


Figure 90 Longer description of a row

- To work on a cell, click it. The CLE displays a screen like this one:

Cell name

Purpose of this cell

Instructions

For further instruction and examples, click here.

To add a file containing your work, click here.

To enter reflections on your work, click here.

To read feedback on your work, click here.

Items

Items	Owner	Last Modified
General Education Evidence (General Education)		
Add Form Select Existing Form		
<input type="checkbox"/> General Education Form 01 Revise Delete	Jennifer Karolle	11-15-2006
Delete	Jennifer Karolle	11-15-2006
Select Additional Items		

Reflection

[Complete Reflection](#)

[Submit for Evaluation comment](#)

Feedback

Feedback	Owner	Creation Date
Feedback from Brett Deane	Sakai Administrator	11-29-2006

[Back to the Matrix](#)

Figure 91 Contents of a cell

- 5 Read the Guidance section carefully. For more detailed instructions and an example of the work that is expected of you, click **Click here to see the full guidance**. The CLE displays the Guidance screen.

Guidance

Instruction

Contribute at least two examples of coursework from a completed, required foundation course, and define and discuss the relevance of your works to at least one of the following standards.

Attachments

Use the General Education form to describe your evidence and the Reflection form to reflect upon your growth in relation to the evidence.

Standards:

Written communication is an integral part of every content area and discipline. Use writing to discover and articulate ideas.

1. Identify and analyze the audience and purpose for any intended communication.
2. Choose language, style, and organization appropriate to particular purposes and audiences.
3. Gather information and document sources appropriately.
4. Express a main idea as a thesis, hypothesis, or other appropriate statement.
5. Develop a main idea clearly and concisely with appropriate content.
6. Demonstrate mastery of the conventions of writing, including grammar, spelling, and mechanics.
7. Demonstrate proficiency in revision and editing.
8. Develop a personal voice in written communication.

Example

To see an example, click here.

Attachments

 Narrative Example - Toast.doc

Rationale

Attachments

Back

Figure 92 Guidance screen

This sample screen has no attachments for additional instructions and rationale, but it does have an attachment that provides an example of the kind of work you are expected to provide.

To display an attachment listed on the screen, click its name. The CLE displays the Opening File window.

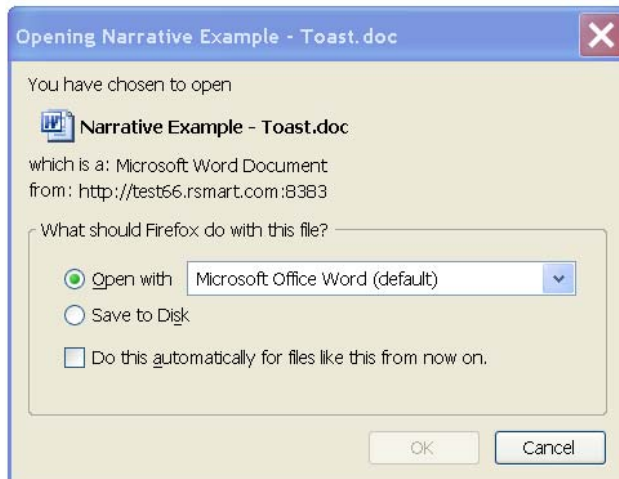


Figure 93 Opening File window

OK

Click the radio button for either **Open** or **Save to Disk** and then click **OK**. The CLE displays the file you have selected.

Back

To return to the main screen for this cell, click **Back**.

- 6 Depending on the makeup of the cell and the progress you have made on it to date, choose any or all of the following:
 - ◆ Complete the form(s) listed on the screen. *For instructions on completing these forms, see "Attaching Your Work," below.*
 - ◆ Identify any additional items you want to submit and attach them to the cell. *For instructions on attaching work to a cell, see "Attaching Your Work," below.*
 - ◆ Reflect on your work. *For instructions, see "Reflecting on Your Work," below.*
 - ◆ Review any formative feedback that has been offered in relation to your work. *For instructions, see "Viewing Feedback on Your Work," below.*
 - ◆ Revise your work. *For instructions, see "Revising Your Work," below.*
 - ◆ Delete forms or work you have attached. *For instructions, see "Deleting Forms and Attached Work," below.*
 - ◆ Submit your work for summative evaluation. *For instructions, see "Submitting Your Work for Evaluation," below.*

Back to the Matrix

- 7 To return to the matrix at any time, click the **Back to Matrix** button. The CLE displays the matrix.

Attaching Your Work

You may attach samples of your work in the form of files, URLs, HTML, and simple text. To do so, follow these steps:



- 1 If you have not done so already, upload the appropriate items to Resources. We recommend that you place these items in your My Workspace Resources folder.



For information about adding files, URLs, HTML, and other material to Resources, see Chapter 8.

Select Additional Items

- 2 In the Items section of the screen for this cell of the matrix, click the **Select Additional Items** button.
- 3 Follow the instructions given in "Selecting an Item" beginning on page 235. When you have finished, the CLE redisplay the screen for this cell. The item you have added is listed.

Items	Owner	Last Modified
General Education Evidence (General Education) Add Form Select Existing Form		
 French Poetry of the 13th Century.  Delete	John Denning	11-06-2006

Select Additional Items

Figure 94 The item you added is now listed on the screen.

[Add Form](#)

- 4 Enter basic information about this work by choosing one of these options:
- 5 To fill out a form provided to guide your work in the cell (in the example shown above, General Education Form 01), click the **Add Form** link below the name. The CLE displays the form. It may look something like this:

Matrices

Form Item

Form Type genEducation

Context of Work.

Dates of Work.

Description of Work.

Self-Evaluation of Work.

Properties

* Title

Description

Access

Display to non-members (publicly viewable)

Display to site

Add Cancel

Figure 95 Form for describing your work

Add

Complete the form and click **Add**. The CLE saves the information and displays the matrix again.

[Select Existing Form](#)

- 6 If you have already filled out a version of this form, it is stored in Resources. To add this version of the form to this cell, click the **Select Existing Form** link below the name of the completed form you need. When the CLE displays the Resources home page, select the form. *For more information on selecting a form from Resources, see "Selecting an Item" beginning on page 235.*
- 7 To add additional items, repeat all steps.

Reflecting on Your Work

To enter your reflections on your work, follow these steps:

[Complete Reflection](#)

- 1 In the Reflection section of the screen, click the **Complete Reflection** link. The CLE displays a form. It may look something like this:

The screenshot shows a web form titled "Matrices" with a "Form Item" header. The form is divided into several sections:

- Form Type:** reflection
- Form Questions:** Five text input fields with the following prompts:
 - Explain the origins of your work.
 - Describe why you chose the subject matter.
 - Explain how the work fulfills the standard.
 - How has the work challenged you to grow personally, academically, and professionally?
 - How might the work contribute to your life long learning?
- Properties:** A section containing two required fields:
 - * Title:** A short text input field.
 - Description:** A longer text input field.
- Access:** A section with two radio button options:
 - Display to non-members (publicly viewable)
 - Display to site
- Buttons:** "Add" and "Cancel" buttons at the bottom.

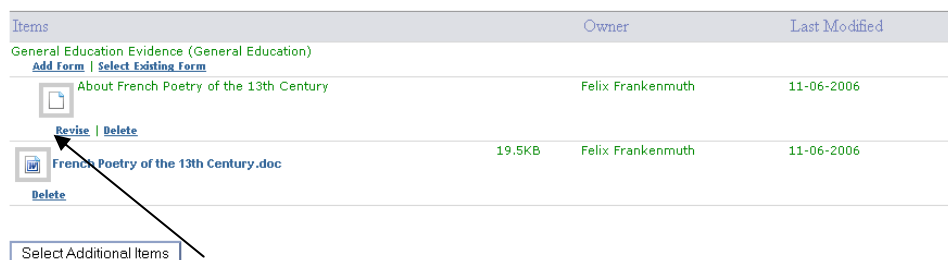
Figure 96 Reflection form

- 2 Complete the form. An entry in the Title box is required. At your institution, other fields may be required as well.
- 3 After completing all relevant fields in the form, click **Add**. The CLE saves the information and displays the cell screen again. The title you entered is now listed in the Items section.

Revising Your Work

Before submitting your work in a cell, you may revise any of the forms you have completed. To do so, follow these steps:

- Revise**
- 1 Click the **Revise** link under the name of the form you want to change.



Items	Owner	Last Modified
General Education Evidence (General Education) Add Form Select Existing Form		
About French Poetry of the 13th Century	Felix Frankenmuth	11-06-2006
French Poetry of the 13th Century.doc	19.5KB Felix Frankenmuth	11-06-2006

[Revise](#) | [Delete](#)

[Delete](#)

Select Additional Items

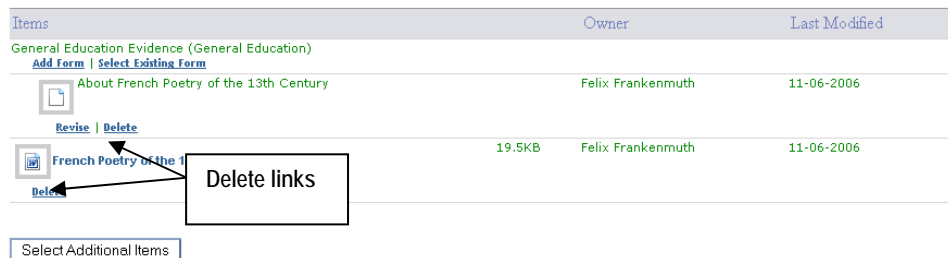
Figure 97 Click the Revise link.

The CLE displays the form.

- Update**
- 2 Make changes as needed and click **Update**. The CLE displays the screen for the cell again. Or, to return to this screen without making changes, click **Cancel**.

Deleting Forms and Attached Work

The CLE displays a **Delete** link beneath the name of each form and item you have attached to a cell.



Items	Owner	Last Modified
General Education Evidence (General Education) Add Form Select Existing Form		
About French Poetry of the 13th Century	Felix Frankenmuth	11-06-2006
French Poetry of the 13th Century.doc	19.5KB Felix Frankenmuth	11-06-2006

[Revise](#) | [Delete](#)

[Delete](#)

Select Additional Items

Figure 98 Location of Delete links.

- Delete**
- To delete any of these items, simply click the appropriate **Delete** link.

The CLE deletes the item immediately.



Caution

The CLE does not display a delete confirmation message before deleting the item you have selected for removal. Therefore, you should make your selection of an item to delete with care.

Submitting Your Work for Evaluation

When you have completed your work in a cell, submit it for evaluation.



Caution

After you submit your work for evaluation, you cannot access it again to make changes. Therefore, you should make sure that all of your entries are in their final form and are ready for review and comment before you submit your work in a cell.

To do so, follow these steps:

Submit for Evaluation confirmation

- 1 Click the **Submit for Evaluation confirmation** button in the Reflection section. The CLE displays a screen asking you to confirm that you want to submit the work for evaluation:

Matrices

Submit for Evaluation confirmation

Are you sure you want to submit the following page for evaluation?

Title	Description
Row: Written Communication; Column: Level 1	Demonstrate your ability to communicate in writing at the introductory level.

Submit Cancel

Figure 99 Submit confirmation screen

Submit

- 2 To submit the cell now, click **Submit**. Or, to cancel the submission process and return to the screen for this cell, click **Cancel**.

If you clicked **Submit**, the CLE submits your work for evaluation and displays the screen for the cell, along with this message:

Status is PENDING and cannot be altered

Figure 100 "Status is pending" message

- 3 Return to the matrix by clicking **Back to the Matrix**.

- 4 Notice that the color of this cell has changed. Consult the legend below the matrix to identify the cell's status.

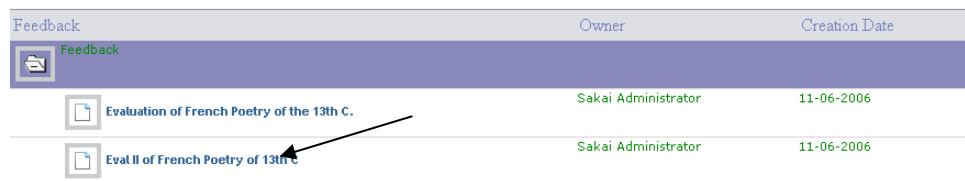
Cells that have been submitted for evaluation appear in the color for “pending.”

After a cell has been evaluated, it returns to the “ready” color or changes to the “completed” color. Cells that return to the “ready” color require you to perform additional work and resubmit. Cells that are “completed” are not available to you for additional work.

Viewing Feedback on Your Work

One or more members of the site may be assigned to review matrix cells and provide feedback on the work done in them by site participants. These reviewers may complete a feedback form for any cell that has not yet been submitted. If feedback has been offered for one of your matrix cells, you will notice a completed feedback form listed in the cell. To read the feedback you have received, follow these steps:

- 1 In the Feedback section, click the title of an item in the list.






Feedback	Owner	Creation Date
 Feedback		
 Evaluation of French Poetry of the 13th C.	Sakai Administrator	11-06-2006
 Eval II of French Poetry of 13th C.	Sakai Administrator	11-06-2006

Figure 101 Feedback listed on the screen for a cell

In a new window, the CLE displays feedback. It may look like this:

Eval II of French Poetry of 13th C

Comments Generally good analysis, John. However, you did not mention that the troubadors were usually members of the upper class. In some places, you give the impression that troubadors and their music were available to all. This was almost certainly not the case.

Created Mon Nov 06 13:30:36 MST 2006

Modified Mon Nov 06 13:30:37 MST 2006

Figure 102 Complete feedback display

- 2 After reading the feedback, close the window.

Evaluations

The Evaluations tool allows users with appropriate permission to evaluate work in a wizard page or matrix cell after it has been submitted for evaluation by a site participant. If you are an evaluator, you use this tool to access the appropriate part of a participant's wizard or matrix, review the work shown there, and provide an evaluation of it.

As an evaluator, you enter your ratings and comments in an evaluation form. This form is created by the site organizer. By carefully designing evaluation forms for wizard pages and matrix cells, the site organizer can incorporate your institution's existing evaluation practices and assessment rubrics, such as evaluation scales and prompts for subjective evaluation, into the process of evaluating wizards and matrices.



To ensure effective reporting and avoid confusion, we strongly recommend that your institution standardize evaluation scales across all wizard pages and matrix cells and across all wizards and matrices.

After you have evaluated a page or cell, your ratings and comments are available to the participant whose work you have evaluated. Your evaluation is also available to other site members who have permission to evaluate or review the page or cell.

The Evaluations tool is usually located in the Review & Evaluate category of a Portfolio site.


Accessing the Tool



To access the Evaluations tool, open the Review & Evaluate category and click the **Launch** button for **Evaluations**. The CLE displays the Manage Evaluations page. This is the Evaluations home page.

Title	Owner	Date Received	Type
Row: Written Communication; Column: Level 1	Denning, John	11-6-06	matrix_cell_type
Row: Written Communication; Column: Level 1	Administrator, Sakai	11-2-06	matrix_cell_type

Figure 103 Evaluations home page

-  If the Evaluations home page is not displayed, click the **Reset** button.

The home page contains a list of participant work that is ready to be evaluated. For each title, the list contains its owner (if you have permission to see the name of the owner), the date the work was submitted, and whether the work is contained in a matrix cell or wizard page.

If the list is longer than one page, use the buttons near the top of the screen to find the item you want.

First

- ◆ To display the first page of the list, click **First**.

Previous

- ◆ To display the previous page of the list, click **Previous**.

Next


- ◆ To display the next page of the list, click **Next**.

Last

- ◆ To display the last page of the list, click **Last**.

Evaluating Submitted Work

To review submitted work, access the Evaluations tool and follow these steps:

-  1 If the Evaluations home page is not displayed, click the **Reset** button.
- 2 Click the desired title in the list. The CLE displays the appropriate matrix cell or wizard page for the title you have selected.



For information on the content of screen displays for wizards and matrices, see "For Site Participants: Completing a Wizard" beginning on page 133, and "For Site Participants: Completing a Matrix" beginning on page 161.

- 3 Review the instructions and all forms and other attachments that have been submitted.



Note: To return to the Evaluations home page at any time, click the **Reset** button.

[Add Evaluation](#)

- 4 In the Evaluation section, click the **Add Evaluation** link.

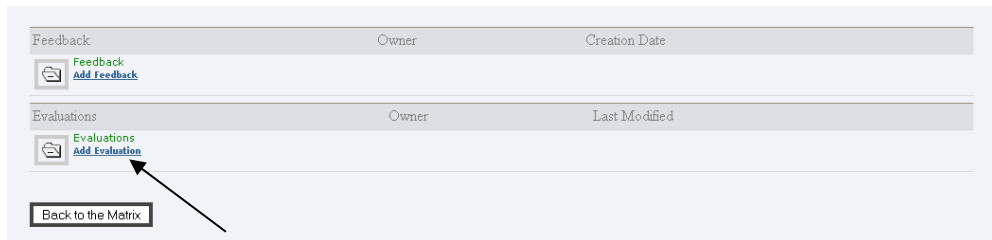


Figure 104 Location of Add Evaluation link

The CLE displays an evaluation form. Your form may look something like this:

Figure 105 Evaluation form

- 5 Complete the boxes in the form. Be sure to enter a title for your evaluation. This entry is required.



- 6 To add your comments, click the **Add** button. The CLE attaches your comments to the participant's wizard page or matrix cell and redisplay the Evaluations home page. Or, to return to that page

without attaching comments, click **Cancel**.

Changing Permissions for the Evaluations Tool

Permissions are more complex for evaluators than for most other site members. In order for you to act as an evaluator of work in a specific matrix cell or wizard page, the following conditions must be met:

- ◆ You must be assigned the role of evaluator on this site.
- ◆ On the specific matrix cell or wizard page, your role or your user name must be specified as an evaluator.
- ◆ Your role must have "evaluate" permission in both the Matrices or Wizards tool and the Evaluations tool. *For information on changing permissions in the Matrices and Wizards tools, see "Changing Permissions for the Matrices Tool" beginning on page 159 and "Changing Permissions for the Wizards Tool" beginning on page 131.*

To change the default permissions for the Evaluations tool, access the tool and follow these steps:



1 If the Evaluations menu bar is not displayed, click the **Reset** button.

Permissions

2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.

Figure 106 shows the Evaluations Permissions screen. The screen title is "Evaluations" and the subtitle is "Set permissions for Evaluations in worksite 'Co-Curricular'". The screen contains a table with the following data:

Role	Evaluate	View Owner
Participant	<input type="checkbox"/>	<input type="checkbox"/>
Tech Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Guest	<input type="checkbox"/>	<input type="checkbox"/>
Organizer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reviewer	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Program Admin	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the table are "save" and "cancel" buttons.

Figure 106 Evaluations Permissions screen

3 Referring to the table below, check boxes to select the appropriate permissions for users in each role.

Table 16 Permissions for using the Evaluations tool

<i>Permission</i>	<i>Description</i>
View Owner	Users in this role may see the name of the user whose work is being evaluated in a matrix cell or wizard page.
Evaluate	Users in this role may review site participants' finished work in matrices and wizards and offer summative feedback on it.

save

- 4 To save the permissions settings, click **save**. The CLE saves the settings and displays the Evaluations home page. Or, to return to that screen without saving your changes, click **cancel**.

Portfolios

An electronic portfolio is a collection of one or more web pages that presents information of your choosing and allows you to share it with others. Portfolios serve real-world purposes, such as career development and job search, documentation of and reflection on experience and learning, and collaboration. For example, you might create a portfolio for your resume or curriculum vita. You might also make a portfolio to showcase art, writing, or other talents and skills you have developed. Other uses of portfolios include collaboratively reporting on group projects and presenting learning you have demonstrated in matrices or wizards. These are just a few of the many ways people have used online portfolios.

To create and work with a portfolio in the CLE, you use both the Resources tool and the Portfolios tool. First, you collect the material you want to present in Resources. Then you use the Portfolios tool to present the information.

The Portfolios tool allows you to do all of the following:

- ✍ Choose material for your presentation by selecting forms, matrices, uploaded files, and URLs from your Resources.
- ✍ Design your own portfolio presentation by selecting from layouts and text/color/display styles made available to you by your institution. Alternatively, you may base your presentation on a template made available to you by your institution. Templates are especially helpful for more elaborate portfolios.



At your institution, some styles, layouts, and templates may be available only to a specific site, while others are available to all sites. Therefore, users working in different sites may have access to different styles, layouts, and templates.

- ✍ Publish portfolio presentations for audiences of your choosing. Your audience may include both site participants and people who are not members of the site.
- ✍ Notify others that a portfolio has been shared with them.
- ✍ Change, comment on, and delete your portfolios.
- ✍ Invite comments on your portfolios and view and manage

comments received.

- ✎ View and comment on other participants' portfolios. View comments you have made about these portfolios.
- ✎ View statistics on who has accessed your portfolios.
- ✎ Download a copy of a portfolio to your desktop.

Planning a Portfolio

Before creating a portfolio, we recommend that you carefully consider the following questions and take appropriate action.

- ✎ What is the objective of this portfolio?
- ✎ What content do I need to include in order to achieve this objective? What specific word-processing, spreadsheet, image, and other files do I need? After answering these questions, store the files you plan to use in Resources. *For information on adding items to Resources, see Chapter 8 of the rSmart Sakai CLE User Guide.*
- ✎ What additional information (context, explanation, and so forth) do I need to provide?
- ✎ In what order do I want to present the material?
- ✎ How much creative control do I want to have over the appearance of the portfolio? Would I rather use a template that controls the layout and text/color/display style of the entire portfolio or design my own approach by selecting from a set of predefined layouts and styles? In order to answer these questions, we recommend that you review all appropriate templates, layouts, and styles that your institution has made available for your use.
- ✎ If I plan to design my own approach, will the presentation be more effective if I use the same layout on each web page or if the layout changes from page to page? You may choose a different layout for each page or use the same layout for all pages in your presentation.

- Based on the layout(s) I have chosen, how many web pages will be required?
- If I plan to design my own approach, will the presentation be more effective if I use the same set of fonts, text colors and sizes, spacing, and background colors for all pages? Or should the text display and background change from page to page? Your institution has a default "style" that includes a standard set of fonts, colors, and so forth. If your institution has created other styles as well, you may choose between them for each page or you may choose to use a single style for the entire presentation.

Accessing the Portfolios Tool



The Portfolios tool is usually located in the Design & Publish category. To access the tool, open that category and click the **Launch** button for **Portfolios**. The CLE displays the Portfolios home page.

The screenshot shows the 'Portfolios' tool interface. At the top, there is a navigation bar with 'Add', 'My Comments', 'Comments from others', and 'Permissions'. Below this is a sub-navigation bar with 'First', 'Previous', 'viewing 1 - 4 of 4 items', 'Next', and 'Last'. The main content area is titled 'Manage Portfolios' and contains a table with the following data:

Name	Date Modified	Template	Owner	Expired
Anita Woo Resume Publish Revise Statistics Download Delete	06-11-08 10:09 AM	Professional resume template	Sakai Administrator	
Benjamin K. Brown resume Publish Revise Statistics Download Delete	06-11-08 10:08 AM	Basic Resume	Sakai Administrator	
Katherine L. Rodriguez Resume Publish Revise Statistics Download Delete	06-11-08 10:09 AM	Basic Resume	Sakai Administrator	
Yolanda L. Johnson Resume Publish Revise Statistics Download Delete	06-11-08 10:09 AM	Professional resume template	Sakai Administrator	

Figure 107 Portfolios home page

This page contains a list of all portfolios on the site that you have permission to view. If the list is longer than one page, use the buttons under the Portfolios menu bar to display other pages in the list.

First

- To display the first page of the list, click **First**.

Previous

- To display the previous page of the list, click **Previous**.

Next

- To display the next page of the list, click **Next**.

Last

- ◆ To display the last page of the list, click **Last**.

Creating a Portfolio

The process of creating a portfolio involves selecting items from Resources, giving the portfolio a name and an optional expiration date, deciding whether or not to allow comments, determining which site participants or users outside the site will have access to the portfolio, deciding whether or not to make the portfolio public, and optionally notifying others that a portfolio has been shared with them.

To create a portfolio, access the Portfolios tool and follow these steps:

- 1 If the Portfolios home page is not displayed, click the **Reset** button.
- 2 In the Portfolios menu bar near the top of the screen, click the **Add** button. The CLE displays the Add Portfolio screen.

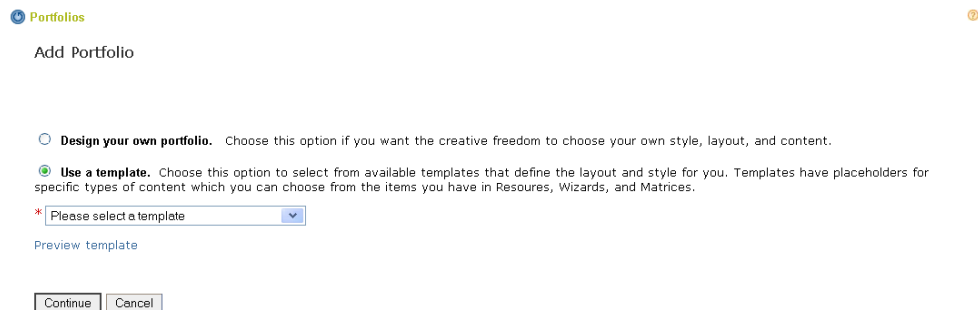


Figure 108 Add Portfolio screen

- 3 Decide whether you want to create a portfolio "from scratch" or base it on a template.
 - ◆ To create a portfolio in which you freely choose the layout, text styles, and content to include, click the **Develop your own portfolio** button.
 - ◆ To base your portfolio on an existing template, click the **Use a template** button.
- 4 If you chose to use a template, select the template you want to

use from the dropdown list.

Preview template

If desired, preview the template you have chosen. To do so, click **Preview template**.

Close preview

To close the preview display, click **Close Preview**.

Continue

- 5 To proceed, click **Continue**. Or to exit without creating a portfolio, click **Cancel**. If you chose to continue, the CLE displays the Step 1 of 3: Begin, screen.

Portfolios

Add Portfolio

Step 1 of 3: Begin

(required fields are noted with an *)

* Title

Description

Expires

allow comments

Continue Cancel

Figure 109 Add Portfolio, Step 1 of 3: Begin screen

- 6 Enter a title (required) and a description of this portfolio in the boxes provided.
- 7 To specify the last date on which this portfolio is available for viewing, use the pulldown lists in the **Expires** boxes to enter that date.
- 8 To allow others to view and comment on this portfolio, click **allow comments**.
- 9 After finishing your work, choose one of these options:

Continue

- ♦ To continue working on this portfolio, click **Continue**.

Finish

- ♦ To save your work and exit, click **Finish**. The CLE displays the Portfolios home page, and the name of this portfolio is displayed in the portfolio list. You may return at any time to continue working on this portfolio.

Cancel

- ♦ To exit without saving your work, click **Cancel**. The CLE displays the Portfolios home page.

- 10 If you elected to continue, follow the instructions given in "Creating a Portfolio Based on Your Own Design" beginning on page 183, or "Using a Template To Create a Portfolio" beginning on page 188. The appropriate choice to make at this point follows from the choice you made in step 3.

Creating a Portfolio Based on Your Own Design

After you have completed the steps in "Creating a Portfolio," above, the CLE displays the Step 2 of 3: Design screen.

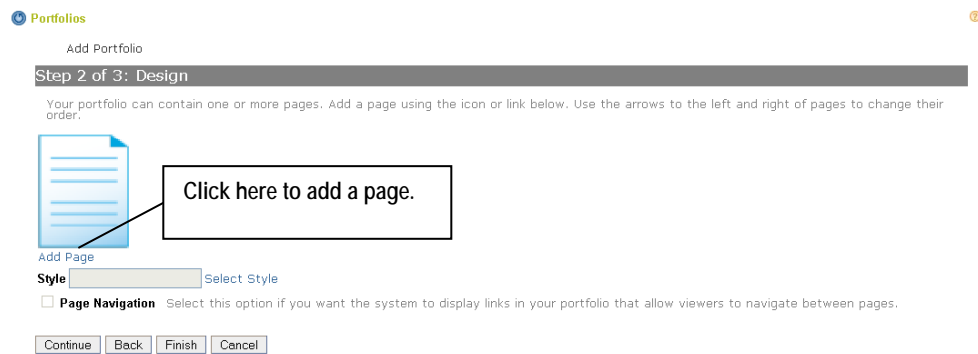


Figure 110 Add Portfolio, Step 2 of 3: Design screen

Back

You may return to the Step 1 screen from this screen at any time. To do so, click the **Back** button near the bottom of the screen.

To proceed, follow these steps:

- Add Page** 1 Begin to create a page in the portfolio by clicking the **Add Page** link. The CLE displays the Add Page screen.

Portfolios

Add Portfolio

Step 2 of 3: Design

Add Page

Page Information

* Title Last Modified

Description

Keywords

* Layout Select Layout

Style Select Style

Page Content

Click the Select Items button below to select items from your resources. The items you select will be available to insert into the page content using the drop-down menu in the editor that says "choose an item to insert."

Select Items

Add Page Cancel

Figure 111 Add Portfolio, Step 2 of 3: Design, Add Page screen

Using this screen, you specify the title, the look and feel, and the content of a page of the portfolio. The screen contains two sections: Page Information and Page Content.

- ▶ ♦ A right-facing arrow in the header for either section indicates that the section is closed. To open it so you can see the boxes in that section, click the arrow.
- ▼ ♦ A down-facing arrow in the header for either section indicates that the section is open (that is, its boxes are displayed). To close it, click the arrow.

- 2 In the Page Information section, enter a title for the portfolio page in the **Title** box. The **Title** entry is required.
- 3 If desired, enter a description of the page in the **Description** box and enter keywords in the **Keywords** box.
- 4 Click **Select Layout** link. The CLE displays a list of layouts.

[Select Layout](#)

Portfolios

First Previous Viewing 1 - 2 of 2 items Next Last

Manage Portfolio Layouts

Name	Description	Owner	Published?
Content Over Text Select	Content Over Text Layout File	Sakai Administrator	Published
Two Column Select	Two Column Layout File	Sakai Administrator	Published

Go Back

Figure 112 Select a layout from this screen.

- 5 Select a layout by following the instructions in "Selecting an Item" beginning on page 235. After you have selected a layout, the CLE displays the Add Page screen again. The name of the layout you have chosen is displayed in the **Layout** box, and a preview of this layout is displayed below the box.

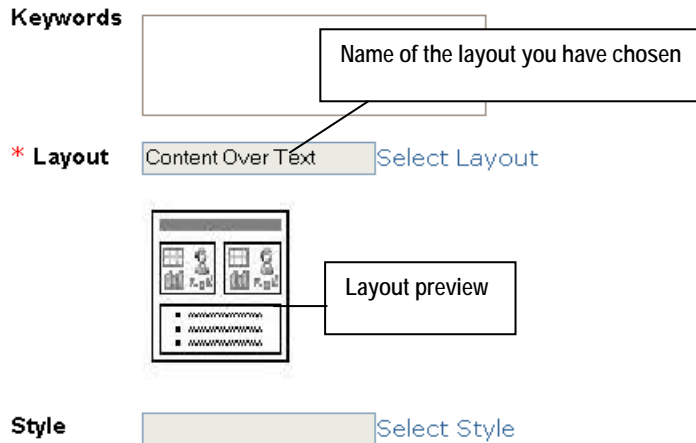


Figure 113 Preview of layout displayed

- 6 To use your institution's default style for fonts, colors, and graphics, leave the **Style** box blank. To select another style for this portfolio, click the **Select Style** link. The CLE displays a list of styles for you to choose from.



Figure 114 Select a style from this screen.

- 7 To select a style for this portfolio, follow the instructions given in "Styles" beginning on page 229. After you have made your selection, the CLE displays the Add Page screen again. The name of your chosen style is displayed in the **Style** box. This style applies to the entire portfolio, unless you select another style for one or more specific pages.

- ▶ 8 If the Page Content section is closed, click the arrow in the section header to open it. The CLE displays boxes for the layout you have chosen.

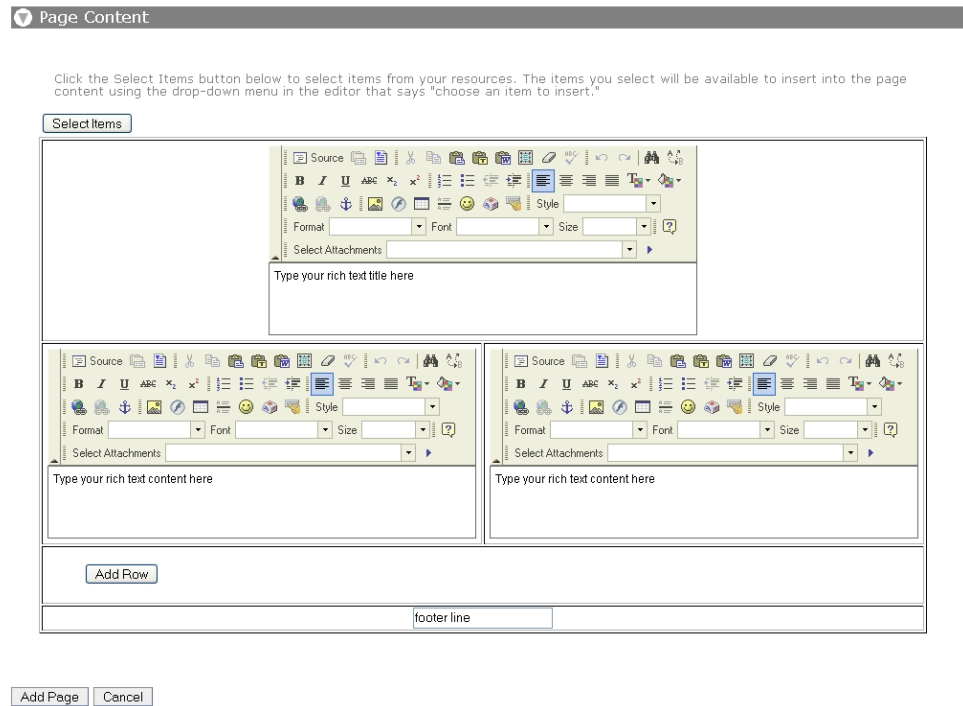


Figure 115 Page Content section

- ▶ 9 Enter text for each part of the layout via the rich text editor. Use the icons and pulldown lists to format the text as appropriate. To add blocks of text in sequence, click the **Add Row** button. The CLE displays a box.

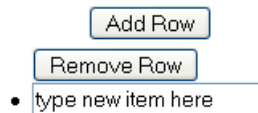


Figure 116 Type text for the bullet item in the box.

Choose among these options:

- ◆ To add a chunk of text, enter it in the box. You may copy and paste text from another source or key it directly into the box. Although each box is small, you may enter as much text as you need there.
- ◆ To remove a text box, click the **Remove Row** button.

Remove Row

Add Row

- ◆ To add the next chunk of text, click **Add Row** again.

Add Page

- 10 To add this page to your portfolio, click **Add Page**. The CLE displays the Step 2 of 3: Design screen again. The screen now shows an icon for the page you have added.

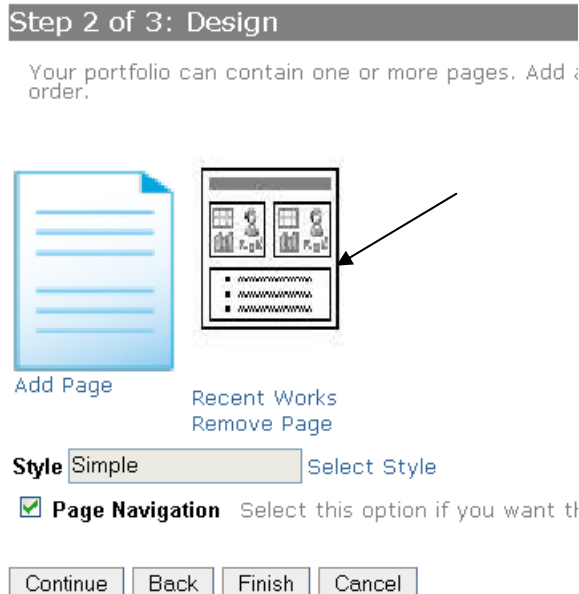


Figure 117 An icon is displayed for the page you have added.

- 11 To add another page, repeat steps 1 – 10.
- 12 To include links that allow users to move from page to page within the portfolio, check the **Page Navigation** box.
- 13 After finishing your work, choose one of these options:

Finish

- ◆ To save your work and exit, click **Finish**. The CLE displays the Portfolios home page, and the name of this portfolio is displayed in the portfolio list. You may return at any time to work on it.

Continue

- ◆ To publish this portfolio, click **Continue**. The CLE displays the Step 3 of 3: Publish screen. Its fields are identical to those of the Select Audience screen. Proceed as instructed in "Publishing a Portfolio" beginning with step 3 on page 192.

Cancel

- ◆ To exit without saving your work on this portfolio, click **Cancel**. The CLE displays the Portfolios home page.

Using a Template To Create a Portfolio

After you have completed steps 1–10 in "Creating a Portfolio" beginning on page 181, you must enter information in one or two more screens. Whether you see one or two screens depends on the template you have chosen.

If you are presented with two screens, the first screen may look something like this:

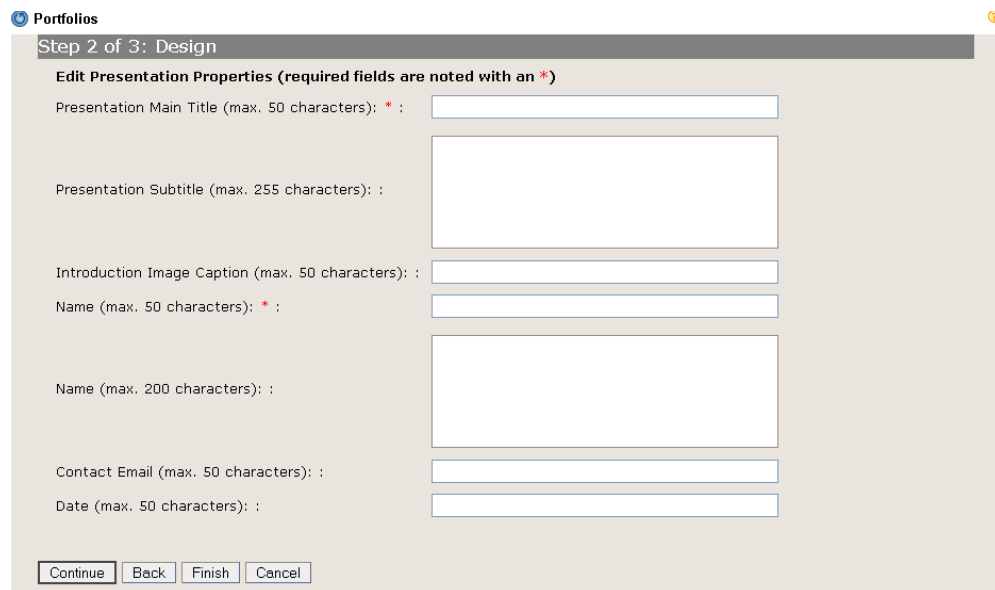


Figure 118 Sample portfolio-create screen #1 based on template

Typically, this screen will require you to do one or both of the following:

- ◆ Supply text for a portfolio title, a subtitle, and/or captions for images.
- ◆ Specify a particular level of a matrix to include in the portfolio.

The second screen contains dropdown lists from which you select items to include in your portfolio. The second screen may look something like this:

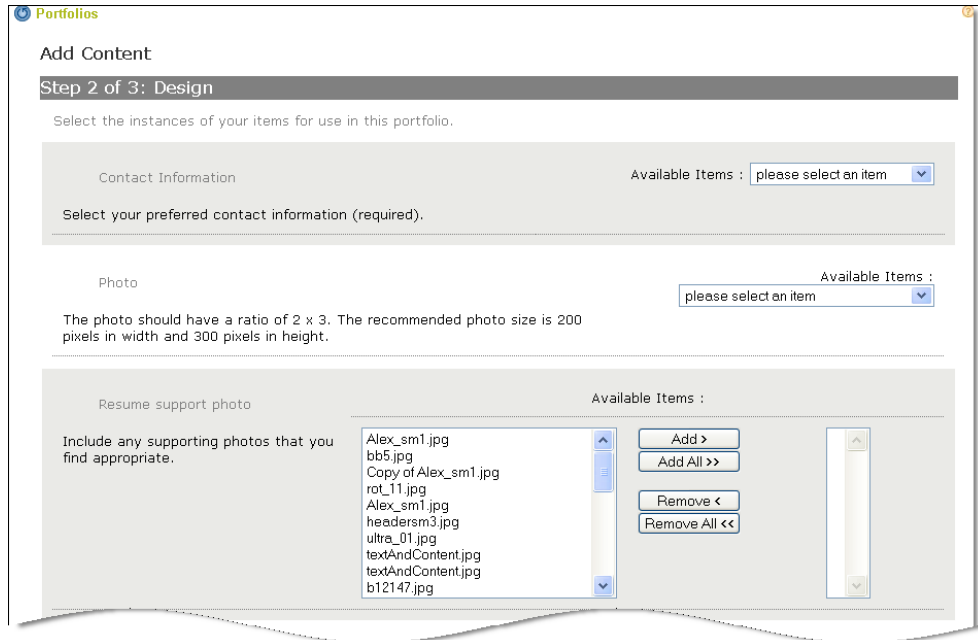


Figure 119 Sample portfolio-create screen #2 based on template (top portion)

If you are presented with only one screen, it will contain dropdown lists and may look similar to the sample shown above.

In either case, complete the screen(s) by following these steps:

- 1 Enter information and attach files and other materials as instructed on the screen. In general:
 - ◆ To enter text in a box, either key it in or copy and paste it.
 - ◆ To attach an item you have stored in Resources, follow the instructions in "Selecting an Item" beginning on page 235.
- 2 When you are ready to leave this screen, choose one of these options:

Finish

- ◆ To save your work and exit, click **Finish**. The CLE displays the Portfolios home page, and the name of this portfolio is displayed in the portfolio list. You may return at any time to continue working on this portfolio.

Continue

- ◆ To proceed, click **Continue**. The CLE displays either the second of two screens or displays a screen from which you can publish your portfolio. *For information on publishing a portfolio, see "Publishing a Portfolio" beginning on page 191.*

Cancel

- ◆ To exit without saving your work on this portfolio, click **Cancel**. The CLE displays the Portfolios home page.

Back

- ◆ To return to the previous screen, click the **Back** button near the bottom of the screen.

Changing a Portfolio

You may change any portfolio you have created. To change a portfolio, access the Portfolios tool and follow these steps:



- 1 If the Portfolios home page is not displayed, click the **Reset** button.

[Revise](#)

- 2 Find the portfolio you want to change and click the **Revise** link below its name.

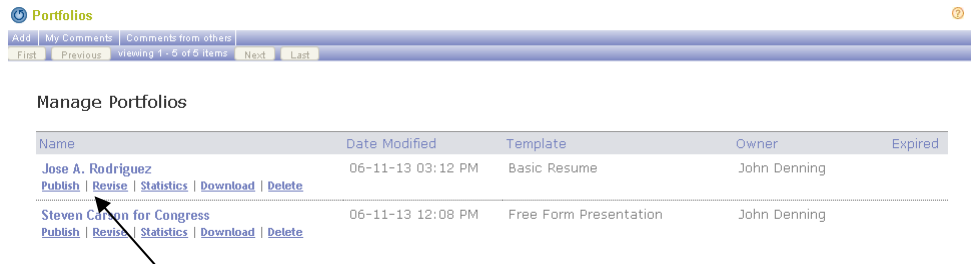


Figure 120 Click the Revise link.

The CLE displays the Revise Portfolio screens, beginning with Step 1 of 3: Begin.

Revise Portfolio

Step 1 of 3: Begin

(required fields are noted with an *)

* Title

Description

Expires

allow comments

Figure 121 Revise Portfolio, Step 1 of 3: Begin screen

- 3 Make changes to the boxes as needed. *For more information, see "Creating a Portfolio," steps 6 - 10, beginning on page 182.* Continue, as appropriate, as instructed in either "Creating a Portfolio Based on Your Own Design" beginning on page 183, or "Using a Template To Create a Portfolio" beginning on page 188.

Publishing a Portfolio

After you have created a portfolio, you may publish it for others to view. You have the option of publishing it to groups of people on your site, to individuals outside your site or outside the CLE environment, or to a URL that can be accessed by anyone via a Web browser.

To publish a portfolio, access the Portfolio tool and follow these steps:

- 1 If the Portfolios home page is not displayed, click the **Reset** button.
- 2 Find the portfolio tool you want to publish and click the **Publish** link below its name.

Manage Portfolios

Name	Date Modified	Template	Owner	Expired
Jose A. Rodriguez Publish Revise Statistics Download Delete	06-11-13 03:12 PM	Basic Resume	John Denning	
Steven Carson for Congress Publish Revise Statistics Download Delete	06-11-13 12:08 PM	Free Form Presentation	John Denning	

Figure 122 Click the Publish link.

The CLE displays the Select Audience screen.

Select Audience

Use this screen to publish your portfolio. You can publish to groups of people, individuals, or to a URL that anyone can access via Web browser.

▼ Publish to a Group or Individual

Role / Name

- Participant
- Tech Support
- Guest
- Organizer
- Reviewer
- Evaluator
- Program Admin

- OSP Student
- Sakai Administrator

Add >>

<< Remove

Selected Audience

Individual Email: Add >>

▼ Publish to the Web

Select the option below if you want anyone to be able to access your portfolio at the URL listed. Keep in mind, this URL is publicly accessible by anyone. It is not protected by a password.

Public URL:

Figure 123 Select Audience screen

This screen contains two sections: The Publish to a Group or Individual section and the Publish to the Web section.

- ▶ ♦ A right-facing arrow in the header for either section indicates that the section is closed. To open it so you can see the boxes in that section, click the arrow.
 - ▼ ♦ A down-facing arrow in the header for either section indicates that the section is open (that is, its boxes are displayed). To close it, click the arrow.
- 3 To make this portfolio available to all site members who are assigned to a particular role and/or to make it available to specific site members, follow these steps:
- a. In the Publish to a Group or Individual section, click the appropriate role or name in the **Role/Name** box. (Roles are listed first, followed by names. You may need to scroll down to see all of the names.) Or hold the **CTRL** key down as you click multiple roles and/or names.

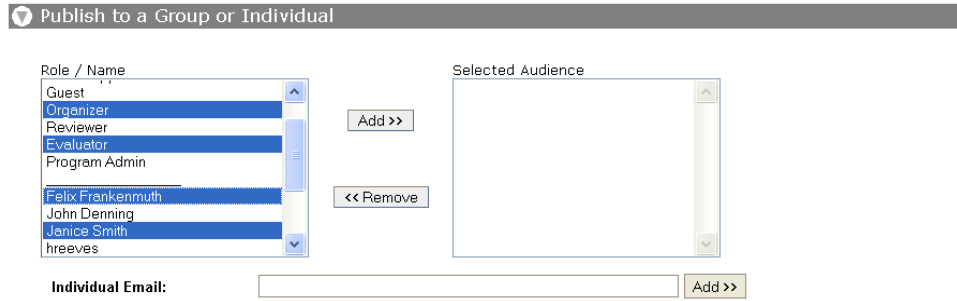


Figure 124 Select one or more roles and/or individuals.

- b. Click the **Add** button. The CLE displays the roles and names you have chosen in the **Selected Audience** box.

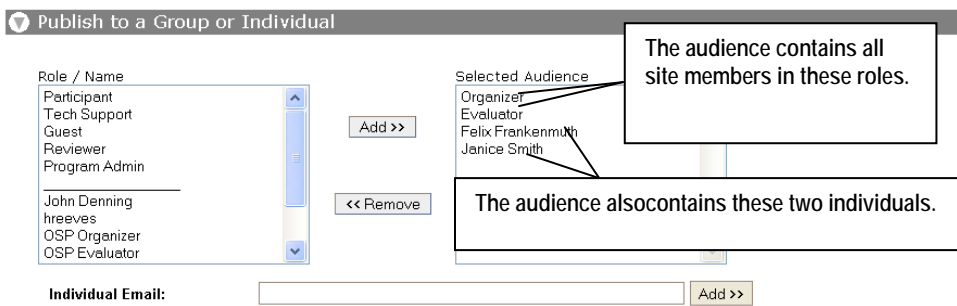
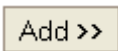


Figure 125 The CLE displays your selections.



- 4 To share your portfolio with someone who is not a site member, enter the person's email address in the **Individual Email** box and click **Add**. The CLE adds that address to the Selected Audience box. Repeat this step for each email address you want to add.
- 5 To post your portfolio on the Web, check the **Public URL** box in the Publish to Web section. The CLE then displays the default URL for this site's portfolios in the box to the right.

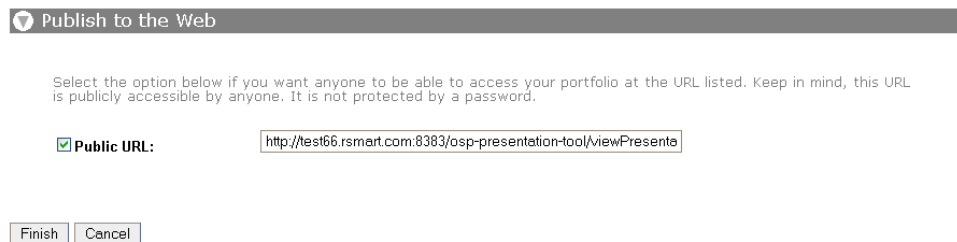


Figure 126 Publishing to a URL

To specify another URL, change the entry in the box.



Caution

Checking the **Public URL** box makes your portfolio publicly accessible by anyone with access to the Web.

6 After identifying the audience for this portfolio, choose one of these options:

Finish and Notify

- ◆ To publish the portfolio and notify your audience that it is ready for viewing, click **Finish and Notify**. The CLE displays this screen:

Portfolios

Notify Viewers

Notify Viewers of changes to *Free Form Portfolio*

Select the users from the list that you would like to notify of updates to this share. You may also include your own message to the viewers.

- Participant (Role)
- Organizer (Role)
- Reviewer (Role)
- Guest (Role)
- Evaluator (Role)
- jonny@warsev.com

Your Message

Send Cancel

Figure 127 Notify Viewers screen

- ◆ To publish the portfolio without notifying the audience, click **Finish**. The CLE publishes the work and displays the Portfolios home page.
 - ◆ To return to the Step 2 of 3: Design screen, click **Back**.
 - ◆ To return to the home page without publishing the portfolio, click **Cancel**.
- 7 If you clicked Finish and Notify, fill out the fields of the Notify Viewers screen as follows:
- ◆ Check the box for each role or individual user that you want to notify.
 - ◆ In **Your Message**, enter any message that should be included

in the email.

Send

- 8 To send this message to the selected users, click **Send**. The CLE sends the message and displays the Portfolios home page again. Or, to return to the home page without publishing the portfolio and sending the message, click **Cancel**.



Important

After you click **Send**, people who are not members of this site but who are in your selected audience receive two emails. The first email notifies them that an account has been set up for them on the site and provides the login ID and password needed to access it. The second email contains information needed to access your portfolio on that site. In order to view your portfolio, these users must enter information from both emails.

Site members who are in your audience receive only one email. This email notifies them that your portfolio is ready to view and provides information needed to access your portfolio. .

Downloading (Exporting) a Portfolio

You may download (that is, export) to your desktop any portfolio you have created. The portfolio will be exported as a compressed (zipped) file made up of numerous HTML files. To download a portfolio, access the Portfolios tool and follow these steps:



- 1 If the Portfolios home page is not displayed, click the **Reset** button.

Download

- 2 Find the portfolio you want to download and click the **Download** link below its name. The CLE displays the Opening file window shown on page 237.
- 3 Proceed as instructed in "Exporting a File," page 237.

Deleting a Portfolio

You may delete any portfolio you have created. To delete a portfolio, access the Portfolios tool and follow these steps:

- 1 If the Portfolios home page is not displayed, click the **Reset** button.
- 2 Find the portfolio you want to delete and click the **Delete** link below its name. The CLE displays the Delete Confirmation window.

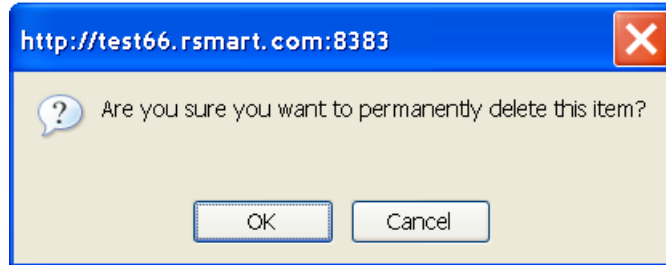
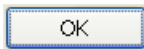


Figure 128 Delete Confirmation window



- 3 To delete this portfolio, click **OK**. The CLE deletes the portfolio and displays the Portfolios home page. Or, to return to that page without deleting the portfolio, click **Cancel**.

Viewing a Portfolio and Its Comments

To view a portfolio and comments on it that you are permitted to see, access the Portfolios tool and follow these steps:

- 1 If the Portfolios home page is not displayed, click the **Reset** button.
- 2 Find the portfolio you want to view, and click its name. The CLE opens a new window and displays the portfolio in it.



Figure 129 Portfolio display

This screen has three parts:

- ◆ The top portion of this screen contains the actual portfolio.
- ◆ Below the portfolio are comments (if any) that have been made by individuals who have already viewed the work.
- ◆ At the bottom of the screen is an area in which you may add comments of your own.

3 If the portfolio has multiple pages, use the links to view other pages.



4 To exit, close the window.

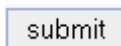
Leaving a Comment

To leave comments on a portfolio you are viewing, follow these steps:

1 Scroll to the "Add new comment" section near the bottom of the

screen.

- 2 Enter a title and a comment of any length in the **Title** and **Comment** boxes, respectively. Both of these entries are required.
- 3 Under the "Make this comment visible to" subheading, choose one of the following options:
 - ◆ Make the comment visible only to yourself by clicking the **Only Me** radio button.
 - ◆ Make the comment visible only to yourself and the person who created the portfolio by clicking the **The Owner and I** radio button.
 - ◆ Make the comment visible to the general public by clicking the **Everyone** button is the active button. This is the default option.



- 4 To submit your comment, click **submit**.



- 5 To exit, close the window.

Managing Comments on Your Portfolio

When you view a portfolio you have created, the middle section of the display contains comments that have been left for you to see. (You cannot see comments that were left by someone else and marked as private.) The Comments section looks something like this:

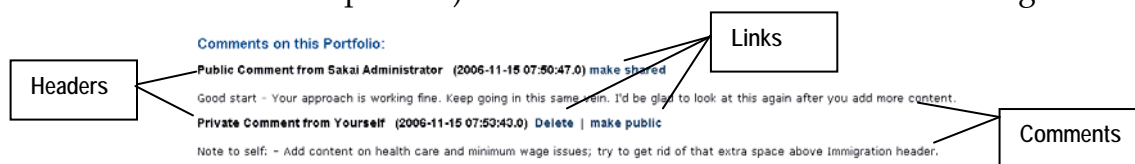


Figure 130 Comment section of a portfolio

Each comment has a header in boldface type. The header includes the following:

- ◆ The word "public," "shared," or "private," indicating whether everyone, you and the person who left the comment, or only you can view the comment.

- ◆ The name of the person who left this comment
- ◆ The date and time the comment was left
- ◆ One or more links with which you can manage this comment. Using these links you may delete the comment or change the audience that is permitted to view it.

The next line or lines contain the comment itself.

To manage a comment, take any of these steps:

Delete

- ◆ Delete it by clicking the **Delete** link in the header. The CLE deletes the comment immediately.



Caution

Be sure you want to delete a comment before clicking **Delete**. The CLE does not display a delete verification window before deleting the comment.

make shared

- ◆ Change the audience to include only yourself and the person who left the comment by clicking the **make shared** link. The CLE

make public

- ◆ Change the audience to include everyone by clicking the **make public** link.

make private

- ◆ For a comment you have left, change the audience to private by clicking the **make private** link.

Viewing Comments on All of Your Portfolios

To read comments about all of your portfolios, access the Portfolios tool and follow these steps:



- 1 If the Portfolios home page is not displayed, click the **Reset** button.

Comments from others

- 2 In the Portfolios menu at the top of the page, click the **Comments from others** button. The CLE displays the Comments Written About My Portfolios screen.

3 Comments Written About My Portfolios

Portfolio	Comment	Date	Comment Author	Visibility
Jose A. Rodriguez (Basic Resume)	Needs more work	2006-11-14 12:49:05.0	Sakai Administrator	Shared
Looks to me as though this was published prematurely. Don't hesitate to resubmit it after you've had a chance to add detail. If you need any assistance, schedule an appointment with me.				
Jose A. Rodriguez (Basic Resume)	Woefully incomplete	2006-11-14 12:47:45.0	Don Robinson	Shared
Need to add skills, accomplishments, internships, references, and civic activities. Even at this early stage of your life, you DO have information to provide here, and it's important that you provide it.				
Jose A. Rodriguez (Basic Resume)	private	2006-11-14 12:33:55.0	John Denning	Private

Figure 131 Comments Written About My Portfolio screen


Information on each comment fills two rows.

- ◆ The top row indicates the name of the portfolio and the template used to create it (if any), the title of the comment and the date and time it was submitted, and the name of the author who left the comment. The last column indicates whether the comment is displayed to everyone (Public), only to you and the author of the comment (Shared), or only to you (Private; you will see this comment and the Private notation only if you have left a comment on your own portfolio).
 - ◆ The second row contains the text of the comment.
- 3 If desired, sort the list by any of the headings. To do so, simply click the heading you want to sort by. The first time you click a heading, the CLE sorts the list in ascending order. If you click the heading again, the CLE sorts the list in descending order.
 - 4 To return to the Portfolios home page, click the **Reset** button.

Viewing Your Comments on Portfolios



To read comments you have made about portfolios on this site,

access the Portfolios tool and follow these steps:

 1 If the Portfolios home page is not displayed, click the **Reset** button.

My Comments

2 In the Portfolios menu at the top of the page, click the **My Comments** button. The CLE displays the Comments screen.

 Portfolios 

I've Written {0} Comments

Portfolio	Comment	Date	Portfolio Owner	Visibility
Katherine L. Rodriguez Resume(Basic Resume)	Good start	2006-11-14 12:11:44.0	Sakai Administrator	Shared
You're off to a good start here. Since you're rather light on co-curricular activities, you might consider what you'd like to do in that area in the upcoming semesters.				
Yolanda L. Johnson Resume(Professional resume template)	Excellent content!	2006-11-14 12:10:22.0	Sakai Administrator	Public
Very impressive! Your internships should command a lot of attention and respect. They show that you've been both focused and practical in pursuing your goal.				
Benjamin K. Brown resume(Basic Resume)	Need references	2006-11-14 12:08:08.0	Sakai Administrator	Public
Don't forget to add references.				

Figure 132 My Comments screen

Information on each comment fills two rows.

- ◆ The top row indicates the name of the portfolio and the template used to create it (if any), the title of your comment and the date and time you submitted it, and the name of the portfolio owner. The last column indicates whether the comment is displayed to everyone (Public), only to you and the portfolio owner (Shared), or only to you (Private).
- ◆ The second row contains the text of your comment.

3 If desired, sort the list by any of the headings. To do so, simply click the heading you want to sort by. The first time you click a heading, the CLE sorts the list in ascending order. If you click the heading again, the CLE sorts the list in descending order.

 4 To return to the Portfolios home page, click the **Reset** button.

Seeing Who Has Viewed Your Portfolio

To see a list of users who have looked at a portfolio you created, access the Portfolios tool and follow these steps:

- 1 If the Portfolios home page is not displayed, click the **Reset** button.
- 2 Find the portfolio you are interested in, and click the **Statistics** link beneath its name. The CLE displays the Portfolio Statistics screen.



The screenshot shows the 'Portfolio Statistics' screen for a portfolio named 'Jose A. Rodriguez'. It indicates that the portfolio has 10 views. Below this, there is a table with two columns: 'Viewer' and 'Date'. The table lists the following viewers and their access dates:

Viewer	Date
Sakai Administrator	06-11-14 12:49 PM
Sakai Administrator	06-11-14 12:48 PM
Sakai Administrator	06-11-14 12:48 PM
Don Robinson	06-11-14 12:47 PM
Don Robinson	06-11-14 12:47 PM
John Denning	06-11-14 12:33 PM
John Denning	06-11-14 12:33 PM
John Denning	06-11-13 05:32 PM
John Denning	06-11-13 05:29 PM
Sakai Administrator	06-11-13 05:27 PM

Figure 133 Portfolio Statistics screen

The screen contains a list that includes the name of each person who has looked at your portfolio and the date and time the user accessed it.

- 3 To return to the Portfolios home page, click the **Reset** button.

Changing Permissions for the Portfolios Tool

To change the default permissions for the Portfolios tool, access the tool and follow these steps:

- 1 If the Portfolios menu bar is not displayed, click the **Reset** button.

- 2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.

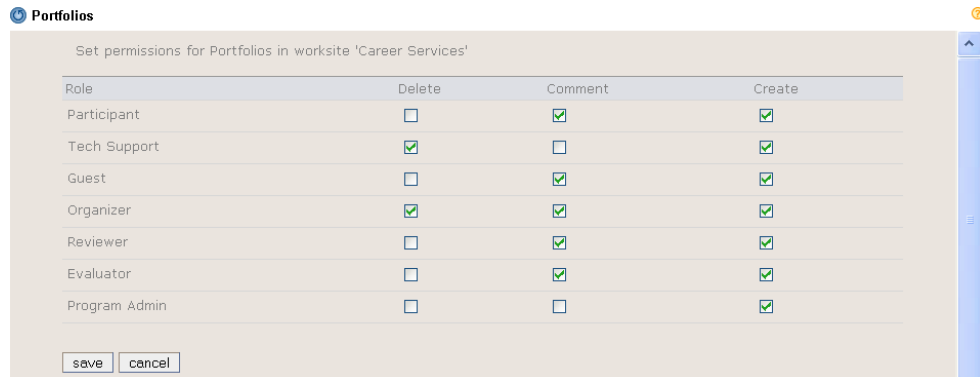


Figure 134 Portfolios Permissions screen

- 3 Referring to the table below, check boxes to select the appropriate permissions for users in each role.

Table 17 Permissions for using the Portfolios tool

<i>Permission</i>	<i>Description</i>
Delete	Users in this role may delete any portfolio that has been shared with them. (Delete permission does not apply to deleting one's own portfolio. Users may always delete their own portfolios, regardless of this permission setting.)
Comment	Users in this role may comment on portfolios.
Create	Users in this role may create their own portfolios.

- 4 To save the permissions settings, click **save**. The CLE saves the settings and displays the Portfolios home page. Or, to return to that screen without saving your changes, click **cancel**.

Portfolio Layouts

Portfolio layouts determine the arrangement of items on portfolio pages created by site participants. Each participant can design a portfolio by choosing a layout and using it to display selected items from Resources.

The CLE contains a default portfolio layout that is available to all site participants. If you are a site organizer or otherwise have appropriate permission, you may use the Portfolio Layouts tool to add more portfolio layouts to the site for use by all participants. After creating a layout, you can change and delete it, as needed. You may also use this tool to add preview images to help participants choose appropriate layouts for their portfolios and to change the usage permissions of all users in any given role.

All portfolio layouts are generated by XHTML files, and all layout previews are .jpg files. You must store these files in Resources before using the Portfolio Layouts tool to access them.



The Portfolio Layout tool does not allow you to change portfolio templates. *For information on changing portfolio templates, see “Portfolio Templates” beginning on page 211.*



The Portfolio Layouts tool is usually located in the Design & Publish category. To access the tool, click the **Launch** button for **Portfolio Layouts**. The CLE displays the Portfolio Layouts home page.

The screenshot shows the 'Portfolio Layouts' tool interface. At the top, there is a navigation bar with 'Add' and 'Permissions' buttons, and a status bar indicating 'viewing 1 - 2 of 2 items' with 'First', 'Previous', 'Next', and 'Last' buttons. Below this is a section titled 'Manage Portfolio Layouts' containing a table with the following data:

Name	Description	Owner	Published?
Content over text Revise Delete		Sakai Administrator	Unpublished
Two column layout Revise Delete		Sakai Administrator	Unpublished

Figure 135 Portfolio Layouts home page

This page contains a list of all portfolio layouts on the site. If the list is longer than one page, use the buttons under the Portfolio Layouts menu bar to display other pages in the list.

First

- ◆ To display the first page of the list, click **First**.

Previous

- ◆ To display the previous page of the list, click **Previous**.

Next

- ◆ To display the next page of the list, click **Next**.

Last

- ◆ To display the last page of the list, click **Last**.

Adding a Layout



If you are a system administrator, be advised that any layout that you add to the PortfolioAdmin site automatically becomes available to all sites on your CLE instance.

To add a portfolio layout to the site, follow these steps:

- 1 Add the files for this layout to Resources. *For information on adding resources, see Chapter 8 of the rSmart Sakai CLE User Guide.*

- 2 Access the Portfolio Layouts tool.



- 3 If the Portfolio Layouts home page is not displayed, click the **Reset** button.

Add

- 4 In the Portfolio Layouts menu bar near the top of the screen, click the **Add** button. The CLE displays the Add Layout screen.

Portfolio Layouts

Add Layout

Select the files that define the structure of the layout (required fields are noted with an *)

* Display Name

Description

* XHTML Layout File Select File

Preview Image Select File


Add Layout Cancel

Figure 136 Add Layout screen

- 5 In the **Display Name** box, enter a meaningful name for the layout. This is the name that will display to site participants when they create portfolios. This entry is required. If desired, enter a description of this layout in the **Description** box.
- [Select File](#) 6 Click the **Select File** link for the **XHTML Layout File** box. The CLE displays the Select Item screen shown on page 235.
- 7 Select the XHTML file you need by following the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Add Layout screen again. The name of the file you selected is shown in the box.
- [Select File](#) 8 To make a preview of the layout available, click the **Select File** link for the **Preview Image** box. The CLE displays the Select Item screen shown on page 235. Proceed as in step 7, above.
- [Add Layout](#) 9 To add this layout to the site, click the **Add Layout** button. The CLE displays the Portfolio Layouts home page. The new layout is shown in the list. Or, to return to this page without adding the new layout, click **Cancel**.

Changing a Layout

You may change the title and description for a layout. You may also attach different files. To change a layout, access the Portfolio Layouts tool and follow these steps:

-  1 If the Portfolio Layouts home page is not displayed, click the **Reset** button.
- [Revise](#) 2 Click the **Revise** link below the name of the layout you want to change. The CLE displays the Revise Layout screen.

Portfolio Layouts

Revise Layout

Select the files that define the structure of the layout (required fields are noted with an *)

* **Display Name**

Description

* **XHTML Layout File** [Select File](#)

Preview Image [Select File](#)

Figure 137 Revise Layout screen

- 3 Change entries in the **Display Name** and **Description** boxes, as needed.
- 4 To change the layout or preview file, click the **Select File** link for the appropriate box. When the CLE displays the Select Item screen shown on page 235, select the file you need by following the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Add Layout screen again. The name of the file you selected is shown in the box.
- 5 Select the XHTML file you need by following the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Add Layout screen again. The name of the file you selected is shown in the box.
- 6 Click the **Save Changes** button. The CLE makes the changes and displays the list on the Portfolio Layouts home page. Or, to return to the home page without changing the layout, click **Cancel**.

Deleting a Layout

You may delete a portfolio layout only if it is not being used in any portfolios on the site. If a layout is in use, you must delete all portfolios that use it before deleting the layout, itself.

To delete a portfolio layout, access the Portfolio Layouts tool and follow these steps:

- 1 If the Portfolio Layouts home page is not displayed, click the **Reset** button.
- 2 Find the layout you want to remove and click the **Delete** link below its name. The CLE displays a delete confirmation window.

[Delete](#)

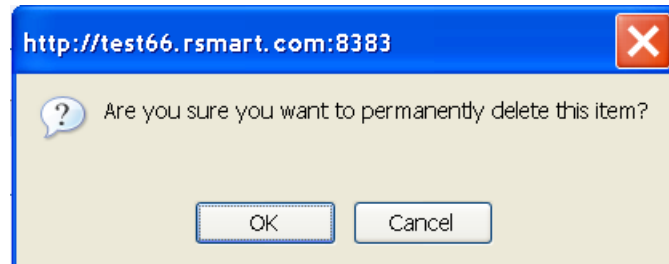
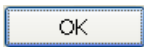


Figure 138 Layout delete confirmation window



- 3 To delete the layout, click **OK**. The CLE deletes the layout and displays the Portfolio Layouts home page. Or, to return to the home page without deleting this layout, click **Cancel**.

Requesting that a Layout Be Published Globally

If you have created a layout that has general applicability, you may want to make it available for use in all sites in your CLE. However, only the CLE system administrator(s) can publish a layout globally (that is, across all sites in the CLE).

To request that a layout be published globally, access the Portfolio Layouts tool and follow these steps:

- 1 If the Portfolio Layouts home page is not displayed, click the **Reset** button.
- 2 Find the layout you want to suggest for global publication.
- 3 Click the **Suggest for Global Publish** link below the name of the layout. The CLE submits the layout for consideration for global publication and displays the Portfolio Layouts home page again.

[Suggest for Global Publish](#)

Publishing a Layout Globally



If you are a system administrator, you may publish a layout globally (that is, for all sites in a CLE instance). To do so, log in and follow

these steps:

- 1 Click the **Administration** folder at the top of the screen.
- 2 Select the PortfolioAdmin site.
- 3 Access the Portfolio Layouts tool. The CLE displays the Portfolio Layouts home page.
- Publish** 4 Find the layout you want to publish and click the **Publish** link beneath its name. The CLE makes the layout available to all sites.

Changing Permissions for the Portfolio Layouts Tool

To change permissions for users in one or more roles, access the Portfolio Layouts tool and follow these steps:

-  1 If the Portfolio Layouts menu bar is not displayed, click the **Reset** button.
-  2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.

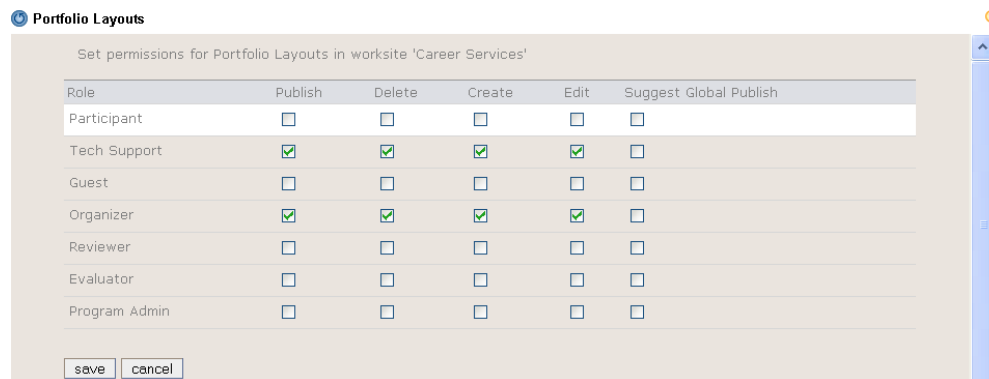


Figure 139 Portfolio Layouts Permissions screen

- 3 Referring to the table below, check boxes to select the appropriate permissions for all users in each role.

Table 18 Permissions for using the Portfolio Layouts tool

<i>Permission</i>	<i>Description</i>
Publish	Users in this role may publish portfolio layouts for use by site participants.

Delete	Users in this role may delete portfolio layouts.
Create	Users in this role may add new portfolio layouts.
Edit	Users in this role may change portfolio layouts.
Suggest Global Publish	Users in this role may suggest a portfolio layout for global publication (that is, throughout all sites on the CLE). Only the system administrator can globally publish layouts.



- 4 To save the permissions settings, click the **save** button. The CLE saves the settings and displays the Portfolio Layouts home page. Or, to return to the home page without saving your changes, click **cancel**.

Portfolio Templates

An Introduction to Portfolio Templates

A portfolio template defines the layout, style, and content of all portfolios that are based on it. If you are a site organizer, you can create templates that support the intended purpose(s) of portfolios on your site. You might create one template to support resumes or other forms of self-presentation. You might create another for displaying the results of teaching and learning as demonstrated in the contents of general education or co-curricular progress matrices. Or you might create a template that is tailored for assessment and accreditation portfolios, such as those that integrate learning across many data structures and sites to show learning in relation to institutional values or desired outcomes.



Site participants are not required to use templates for their portfolios. Within certain limits, they may also design their own portfolios. *For information on designing one's own portfolio, see "Creating a Portfolio Based on Your Own Design", beginning on page 183.*

Portfolio templates are best used when you, the site organizer, want to guide site participants in specific ways rather than allowing them to create portfolios according to their own ideas and specifications. The most effective way to work with portfolios and portfolio templates is use templates to guide and instruct participants in creating effective portfolios; then provide a variety of portfolio layouts and styles that allow participants more freedom in putting their own creativity into portfolios for similar or different purposes.

Each template is based on an .xsl file. This file specifies the layout for the portfolio, the pathways to the content for the portfolio, and, optionally, the pathway to a .css file that defines the portfolio style.

Optionally, a template can also include "outline options." These options allow participants to add content to their portfolios by keying or copying and pasting text directly into it. Outline options are often used when it is easier or more intuitive for participants to add content directly rather than creating each distinct item as a form in Resources. Outline options can be used to prompt for and collect information such as a site participant's name, a date, a title and subtitle for the

portfolio, captions for images, and/or one or more reflections. They are also used when the participant needs to specify a particular level of a matrix to include in a portfolio.

Outline options are presented to the participant in a CLE screen. You, the site organizer, define the fields on the screen (which is, essentially, a form) by adding an .xsd file for it to the template.

The Portfolio Templates Tool and the Resources Tool

If you are a site organizer, the Portfolio Templates tool allows you to add templates that define the content, style, and layout of portfolios created by your site participants. Each template is based on an .xsl file and may include other files, such as .css, .xsd, and javascript files. You must upload these files to Resources to make them available to the Portfolio Templates tool.

After adding a template, you may use this tool to perform any of the following activities.

- ✍ Change, and delete it.
- ✍ Publish it so site participants can use it.
- ✍ Create a new template by copying the template you added and changing the copy.
- ✍ Use a template created in one site in another site by exporting it from the first site and importing it into the other.
- ✍ Change Portfolio Templates tool permissions for all users in any given role.

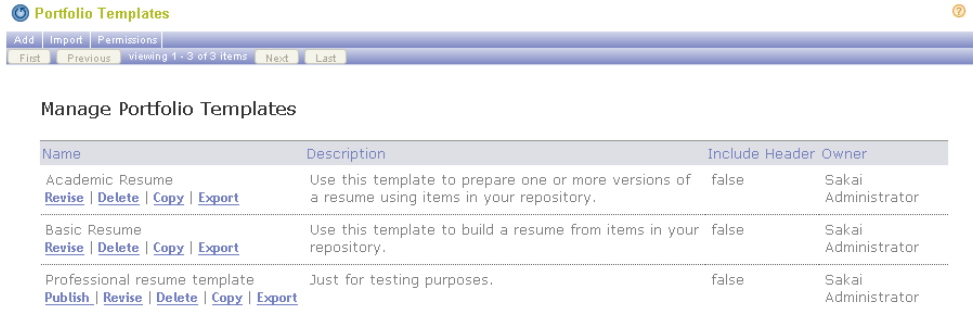
Accessing the Portfolio Templates Tool



The Portfolio Layouts tool is usually located in the Design & Publish category of a portfolio site.

To access the tool, click the **Launch** button for **Portfolio Templates**. The

CLE displays the Portfolio Templates home page.



Name	Description	Include Header	Owner
Academic Resume Revise Delete Copy Export	Use this template to prepare one or more versions of a resume using items in your repository.	false	Sakai Administrator
Basic Resume Revise Delete Copy Export	Use this template to build a resume from items in your repository.	false	Sakai Administrator
Professional resume template Publish Revise Delete Copy Export	Just for testing purposes.	false	Sakai Administrator

Figure 140 Portfolio Templates home page

The screen contains a list of the portfolio templates on your site. If the list is longer than one page, use the buttons under the Portfolio Templates menu bar to display other pages in the list.

First

- ◆ To display the first page of the list, click **First**.

Previous

- ◆ To display the previous page of the list, click **Previous**.

Next

- ◆ To display the next page of the list, click **Next**.

Last

- ◆ To display the last page of the list, click **Last**.

Preparing to Create a Template

Before creating a template, we recommend that you familiarize yourself with the forms, layouts, and styles that your institution has created. Then carefully consider the following questions and take appropriate action.

- ✍ What are the objectives of the type(s) of portfolios that will be based on this template?
- ✍ What content must be included to achieve these objectives?
- ✍ In what order should content be presented?
- ✍ If your institution has existing portfolio layouts, which of those

layouts is best suited to portfolios built on this template? Upload the appropriate .xsl file to Resources. If you do not have an appropriate layout file at your disposal, upload passthrough.xsl to Resources. This file is available at \webapps\osp-portal\WEB-INF\transform and in the Downloads/OSP section of rSmart's RSN.

- ☞ Do users need to enter additional information such as a portfolio title and subtitle and/or captions for images? Do they need to select a single level of a matrix to include in the portfolio? If the answer to any of these questions is yes, in what file are these options available? Upload the appropriate .xsd file to Resources and make note of its root node.
- ☞ Your institution has a default "style" that includes a standard set of fonts, colors, and so forth. If your institution has created other styles as well, which style is best suited for portfolios built on this template? Upload the appropriate .css file to Resources. Make note of the name for this file that is used in the layout (.xsl) file you have chosen.
- ☞ What other files do you need to use in this template? You may include image, sound, video, javascript, and other types of files. Upload the appropriate files to Resources and make note of the name for each file as given in the layout (.xsl) file you have chosen.



For information on adding resources, see Chapter 8 of the rSmart Sakai CLE User Guide.

Creating a Template

Creating a template involves multiple steps:

- 1 Add the name for the template to the CLE.
- 2 Specify the layout for it.
- 3 Add the required forms.
- 4 Select supporting files.
- 5 If you have based the template on passthrough.xsl, create an .xsl

transformation file and add it to the template.

Step 1: Adding the Template Name

To give the template a name, access the Portfolios Templates tool and follow these steps:

- 1 If the Portfolio Templates home page is not displayed, click the **Reset** button.
- 2 In the Portfolio Templates menu bar near the top of the screen, click the **Add** button. The CLE displays the Add Portfolio Template, Step 1 of 4, screen.

Portfolio Templates

Add Portfolio Template

Step 1 of 4

* Name

Description

Show within Portfolio Navigation?

Yes

No

Figure 141 Add Portfolio Layout screen

- 3 Enter a name for this layout in the **Name** box. If desired, enter a helpful description in the **Description** box.
 - - Under Show within Portfolio Navigation, specify whether portfolios based on this template will display in the window from which they are accessed or in a new window.

Table 19 Options for Show within Portfolio Navigation

• Option	• Result
• Yes	• Portfolios based on this template will display in the window from which they are

	accessed.
<ul style="list-style-type: none"> No 	<ul style="list-style-type: none"> Portfolios based on this template will display in a new browser window.

-
- To proceed, click **Continue**. The CLE displays the Build Template, Step 2 of 4, screen (see below). Or, to return to the Portfolio Templates home page without adding any of this information, click **Cancel**.

Step 2: Specifying the Layout

If you clicked **Continue** in step 4, above, the CLE displays the Build Template, Step 2 of 4, screen.

Figure 142 Build Template, Step 2 of 4, screen

To specify the layout for this template, follow these steps:

-
- To the right of the **Basic Template Outline** box, click the **Select File** link. The CLE displays the Select Item screen shown on page 235.
 - Select the .xsl file you need. (If you do not have a specific .xsl file for the portfolio template, select passthrough.xsl. To select the file, follow the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Build Template, Step 2 of 4, screen again. The name of the file you selected is shown in the **Basic Template Outline** box.
 - Optionally, provide outline options (described in "An Introduction to Portfolio Templates" beginning on page 211) by following these steps:

- Select File
- 4 Click the **Select File** link to the right of the **Outline Options** box.
 - 5 Select the appropriate .xsd file by following the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Build Template, Step 2 of 4, screen again. The name of the file you selected is shown in the **Outline Options** box.
 - 6 Use the pulldown list in the **Outline Options File Element** box to choose the desired root node from the file you have specified.
- Continue
- 7 Choose one of the following options:
 - ◆ To continue to build the template, click **Continue**. The CLE displays the List Content, Step 3 of 4, screen.
 - ◆ To stop working on this template and save the work you have done so far, click **Finish**. The CLE displays the Portfolio Templates home page. Your new template is listed on this screen. You may work on the template further at any time.
 - ◆ To return to the Add Portfolio Template, step 1 of 4, screen, click **Back**.
 - ◆ To exit without saving any of the information you have entered in this template creation session, click **Cancel**. The CLE displays the Portfolio Templates home page.

Step 3: Adding the Required Forms and Other Items

If you chose to continue in step 7, above, the CLE displays the List Content, Step 3 of 4, screen:

Portfolio Templates

List Content

Step 3 of 4

Please specify items that will appear in the portfolio. Users of the template will fill in content from their resources or by uploading files.

* **Type**

* **Name**

* **Title**

Description

Allow Multiple Selection

Yes

No

Sequence	Title
There is no content yet	

Figure 143 List Content, Step 3 of 4, screen

This screen allows you to identify the forms, matrices, uploaded files, URLs, and other content for portfolios that use this template. To select this material, follow these steps:

- 1 In the **Type** box, use the pulldown list to select the type of item the site participant must add. A selection here is required. The list contains the names of all forms on the site, along with two other choices: Matrix and Uploaded File. If site participants must:
 - ◆ complete and attach a specific form, select the name of that form here.
 - ◆ attach a matrix, select **Matrix**.
 - ◆ attach any other type of resource (simple text, URL, file, etc.) select **Uploaded file**.
- 2 Referring to the table below, enter an appropriate name in the **Name** box. This entry is required.

Table 20 Appropriate Name entries

<i>Item</i>	<i>Name Entry</i>
Form	The root node in this file
Upload file	The name by which the .xsl file identifies this file; if the template is based on passthrough.xsl, any one-word name by which you want the final .xsl file to identify this file
Matrix	The name by which the .xsl file identifies this matrix; if the template is based on passthrough.xsl, any one-word name by which you want the final .xsl file to identify this file

- 3 Enter a descriptive name for the item in the **Title** box. This entry is required as well.
- 4 In the **Description** box, enter instructions to site participants on how to select an item, if desired. These instructions display to site participants when they use the template to create a portfolio.
- 5 Under "Allow Multiple Selection," choose one of these options:
 - ◆ If the creators of these portfolios may include more than one instance of this information (as is the case for accomplishments, job experience, and other things that occur more than once), click **Yes**.
 - ◆ Otherwise, click **No**.

Add To List

- 6 Click **Add to List**. The CLE displays information about this item in the bottom part of the screen.

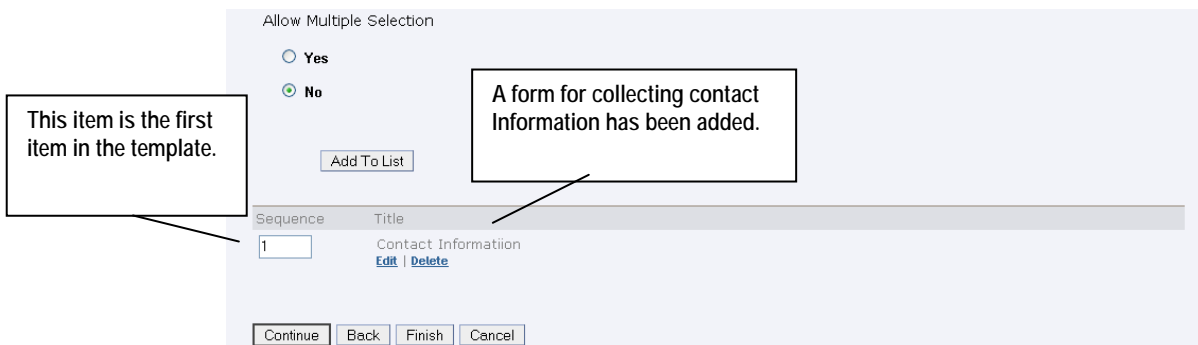


Figure 144 One item has been added to the new template.

- 7 To add another item to the template, repeat steps 1–6.
- 8 To reorder items so they are displayed to the portfolio creator in a different order, change the numbers in the **Sequence** boxes. (This change will not affect the sequence of the items in the final portfolio. The order of items in the portfolio is determined by the .xsl file you selected.)

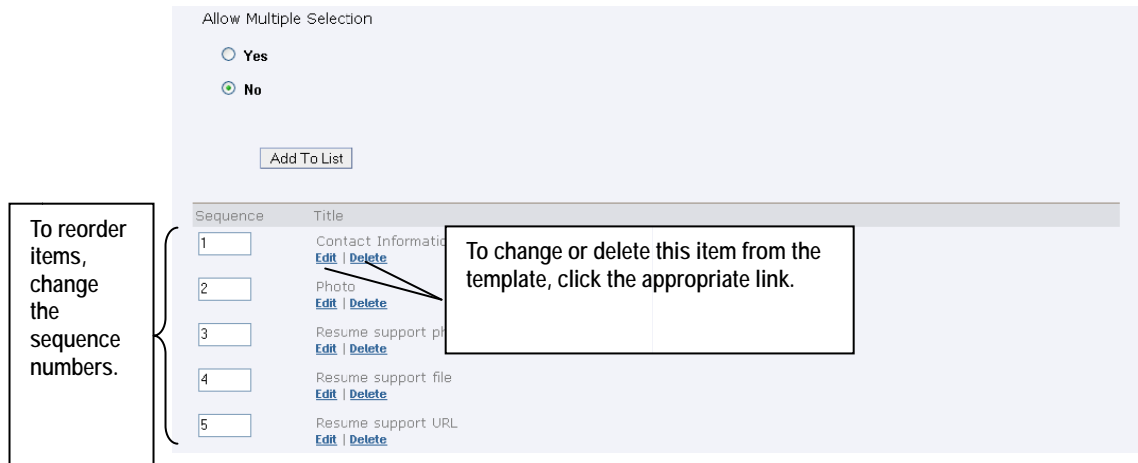


Figure 145 Reordering items in a template

- Edit** 9 To edit an item you have added, click the **Edit** link below its name and make changes as needed. For more information, see instructions in steps 1–6.

- Delete** 10 To delete an item you have added, click the **Delete** link below its name. The CLE deletes the item immediately.



Caution

Be sure you want to delete an item before clicking **Delete**. The CLE does not display a delete verification window before deleting the item.

- 11 After adding as many items as you wish, choose one of the following options:

Continue

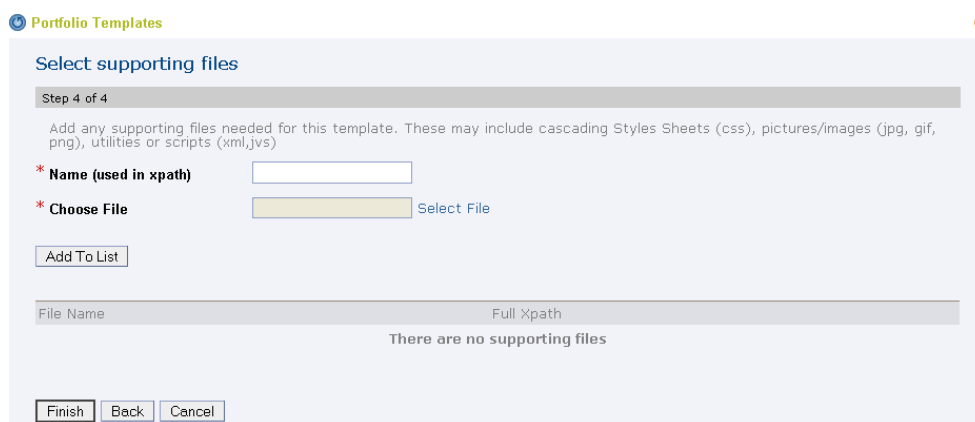
- ◆ To continue to create the template, click **Continue**. The CLE displays the Select Supporting Files, Step 4 of 4, screen.
- ◆ To stop working on this template and save the work you have done so far, click **Finish**. The CLE displays the Portfolio Templates home page. This template is listed on the screen. You may work on this template further at any time.
- ◆ To return to the Build Template, Step 2 of 4, screen, click

Back.

- ◆ To exit without saving any of the information you have entered in this template creation session, click **Cancel**. The CLE displays the Portfolio Templates home page.

Step 4: Selecting Supporting Files

If you chose to continue in step 11, above, the CLE displays the Select Supporting Files, Step 4 of 4, screen:



The screenshot shows a web interface for selecting supporting files. At the top, it says "Portfolio Templates" and "Select supporting files". Below that, it indicates "Step 4 of 4". The main instruction is: "Add any supporting files needed for this template. These may include cascading Styles Sheets (css), pictures/images (jpg, gif, png), utilities or scripts (xml,js)". There are two required fields: "* Name (used in xpath)" with an empty text box, and "* Choose File" with a yellow button and a "Select File" link. Below these is an "Add To List" button. At the bottom, there are "Finish", "Back", and "Cancel" buttons. A table with two columns, "File Name" and "Full Xpath", is shown with the text "There are no supporting files" in the center.

Figure 146 Select Supporting Files, Step 4 of 4, screen

This screen allows you to identify any additional files that are to be used in this template. These files may include .css files (style sheets) and image, sound, video, javascript, and other files that define the look and feel, navigation, graphics, and other features of the portfolio template.

To select this material, follow these steps:

- 1 In the **Name (used in xpath)** box, enter the name for this file that is used in the .xsl file you chose in "Step 2: Specifying the Layout" beginning on page 216. If the template is based on passthrough.xsl, enter any one-word name by which you want the final .xsl file to identify this file. An entry in this box is required.
- 2 To the right of the **Choose File** box, click the **Select File** link. (An entry in this box is required.) The CLE displays the Select Item screen shown on page 235.
- 3 Select the file you need. To do so, follow the instructions for

selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Select Supporting Files, Step 4 of 4, screen again.

Add To List

- 4 Click **Add to List**. The CLE displays the file name in the bottom part of the screen.

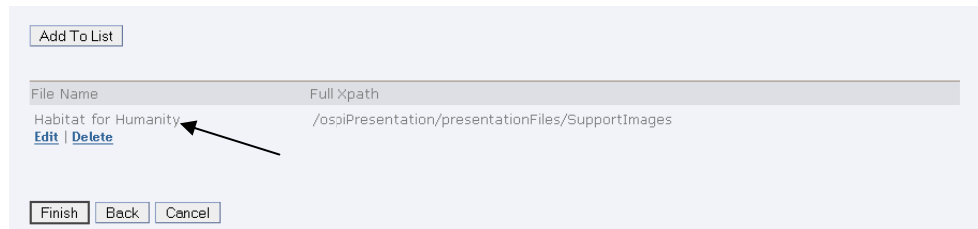


Figure 147 One supporting file has been added to the template.

- 5 To add another supporting file to the template, repeat steps 1–4.

Edit

- 6 To edit a file you have added, click the **Edit** link below its name and make changes as needed. For more information, see instructions in steps 1–4.

Delete

- 7 To delete a file you have added, click the **Delete** link below its name. The CLE deletes the item immediately.



Caution

Be sure you want to delete a file before clicking **Delete**. The CLE does not display a delete verification window before deleting the file.

- 8 Choose one of the following options:

Finish

- ♦ To save your work, click **Finish**. The CLE displays the Portfolio Templates home page. This template is listed on the screen. You may work on this template further at any time.
- ♦ To return to the List Content, Step 3 of 4, screen, click **Back**.
- ♦ To exit without saving any of the information you have entered in this template creation session, click **Cancel**. The CLE displays the Portfolio Templates home page.

Step 5: Finishing up When Using passthrough.xsl

If you have based your template on passthrough.xsl, follow these final steps:

- 1 Use the Portfolios tool to create a portfolio based on this template. *For instructions, see "Creating a Portfolio" beginning on page 181.*
- 2 Display the portfolio. *For instructions, see "Viewing a Portfolio and Its Comments" beginning on page 196.*
- 3 Display the XML file that the system will use to generate the final HTML file by right-clicking anywhere on the portfolio display and selecting **View Page Source**.
- 4 Use any XSLT creator program to create an .xsl transformation file.
- 5 Using the Portfolio Templates tool, replace passthrough.xsl with the .xsl file you have created. *For instructions, see "Step 2: Specifying the Layout," step 2, on page 216.*

Publishing a Template



If you are a system administrator, be advised that any template that you create and publish in the PortfolioAdmin site automatically becomes available to all sites on your CLE instance.

After you have created a template, you may use it to create your own portfolio. However, the template is not yet available for use by others. To make the template available for other site participants to use, you must publish it.

To do so, access the Portfolio Templates tool and follow these steps:



- 1 If the Portfolio Templates home page is not displayed, click the **Reset** button.

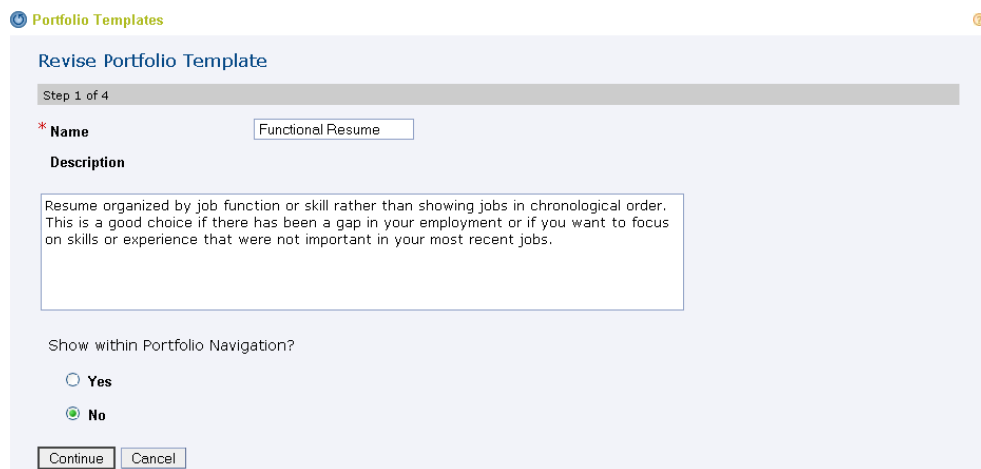


- 2 Find the template you want to publish and click the **Publish** link below its name. The CLE publishes the template.

Changing a Template

You may revise the title and description for a layout. You may also attach different files. To revise a layout, access the Portfolio Templates tool and follow these steps:

- 1 If the Portfolio Templates home page is not displayed, click the **Reset** button.
- 2 Click the **Revise** link below the name of the template you want to change. The CLE displays the Revise Portfolio Template, Step 1 of 4, screen.



Portfolio Templates

Revise Portfolio Template

Step 1 of 4

* **Name**

Description

Resume organized by job function or skill rather than showing jobs in chronological order. This is a good choice if there has been a gap in your employment or if you want to focus on skills or experience that were not important in your most recent jobs.

Show within Portfolio Navigation?

Yes

No

Figure 148 Revise Portfolio Template, Step 1 of 4, screen

- 3 Proceed from screen to screen, changing entries as needed. *For more information and instructions, see "Creating a Template" beginning on page 214.*

Copying a Template

To create a template that is similar to an existing template, you may want to copy the existing template and make changes to the copy. To copy a template, access the Portfolio Templates tool and follow these steps:

- 1 If the Portfolio Templates home page is not displayed, click the **Reset** button.

- [Copy](#) 2 Find the template you want to use and click the **Copy** link below its name. The CLE copies the template and displays its name in the list.

Manage Portfolio Templates

Name	Description	Include Header	Owner
Academic Resume Revise Delete Copy Export	Use this template to prepare one or more versions of a resume using items in your repository.	false	Sakai Administrator
Basic Resume Revise Delete Copy Export	Use this template to build a resume from items in your repository.	false	Sakai Administrator
Functional Resume Revise Delete Copy Export	job function or skill rather than showing order. This is a good choice if there has been a change in employment or if you want to focus on recent jobs.	false	Sakai Administrator
Functional Resume Copy Publish Revise Delete Copy Export	job function or skill rather than showing order. This is a good choice if there has been a change in employment or if you want to focus on recent jobs.	false	Sakai Administrator

Original template

Copied template

Figure 149 Result of copying a template

The name of the new template is the same as that of the original, with the word "copy" added at the end.

Exporting and Importing a Template

If you own more than one site, you may want to use the same template in two or more of them. To do so, first export the template to your desktop as a compressed file first and then import it to the other site(s) where you plan to use it.

Exporting a Template

To export a template as a compressed file, access the Portfolio Templates tool on the appropriate site and follow these steps:

- 1 If the Portfolio Templates home page is not displayed, click the **Reset** button.
- 2 Find the template you want to work with and click the **Export** link below its name. The CLE displays the Opening File window shown on page 237.
- 3 Follow the instructions given in "Exporting a File" beginning on page 236.

Importing a Template

To import a compressed template file from your desktop to a CLE site, access the site to which you want to import it and follow these steps:

1 Add the file to Resources. *For instructions, see Chapter 8 of the rSmart Sakai CLE User Guide.*



2 Access the Portfolio Templates tool. If the home page is not displayed, click the **Reset** button.

Import

3 Click the **Import** link on the Portfolio Templates menu bar near the top of the screen. The CLE displays the Import Template screen.

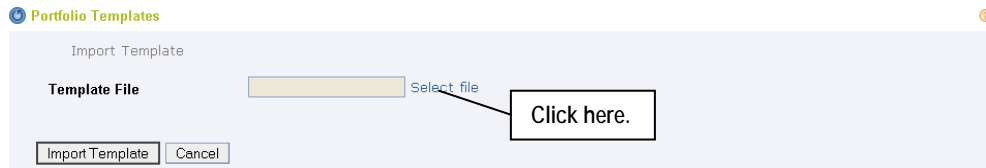


Figure 150 Import Template screen

Select file

4 Click the **Select file** link. The CLE displays the Select Item screen shown in on page 235.

Select

5 Select the compressed file for the template by following the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Import Template screen again.

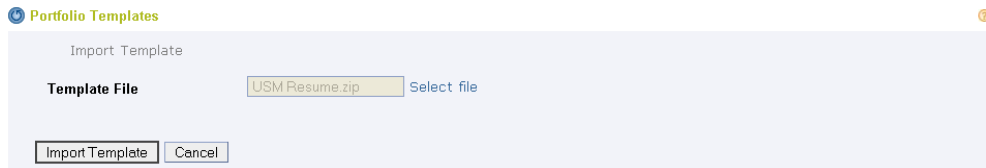


Figure 151 Import Template screen with file shown

The name of the file you chose is shown in the **Template File** box.



Import Template

6 To import the file, click **Import Template**. The CLE imports the file and displays the Portfolio Templates home page. The imported template is listed there. Or, to return to the home page without importing the file, click **Cancel**.

Deleting a Template

You may delete a template only if it is not being used in any portfolios (published or unpublished). If the template is in use, you must delete the portfolios based on it before you can delete the template, itself. *For information on deleting portfolios, see "Deleting a Portfolio" beginning on page 195.*

To delete a template, access the Portfolio Templates tool and follow these steps:

-  1 If the Portfolio Templates home page is not displayed, click the **Reset** button.
-  2 Find the template you want to remove and click the **Delete** link below its name. The CLE displays a delete confirmation window.

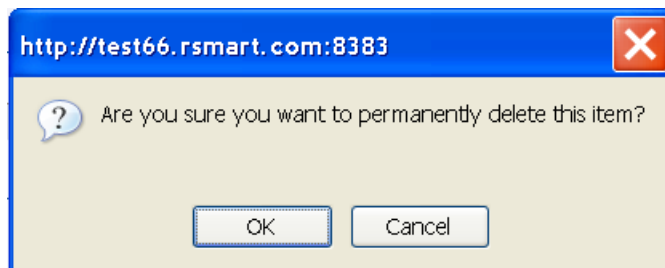
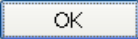




Figure 152 Template delete confirmation window

-  3 To delete the template, click **OK**. The CLE deletes the template and displays the Portfolio Templates home page. Or, to return to the home page without deleting this template, click **Cancel**.

Changing Permissions for the Portfolio Templates Tool

To change permissions for users in one or more roles, access the Portfolio Templates tool and follow these steps:

-  1 If the Portfolio Templates menu bar is not displayed, click the **Reset** button.
-  2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.

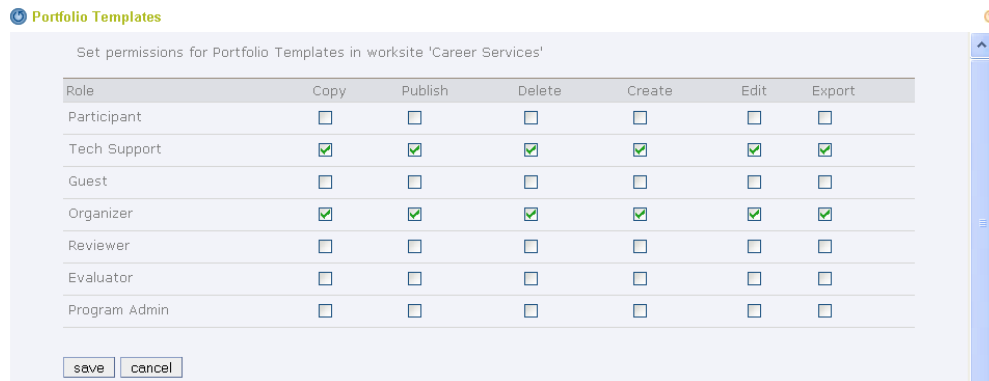


Figure 153 Portfolio Templates Permissions screen

- Referring to the table below, check boxes to select the appropriate permissions for all users in each role.

Table 21 Permissions for using the Portfolio Templates tool

<i>Permission</i>	<i>Description</i>
copy	Users in this role may create new templates by copying existing templates.
publish	Users in this role may publish templates for use by site participants.
delete	Users in this role may delete templates.
create	Users in this role may use the Portfolio Templates tool to create and import templates.
edit	Users in this role may change templates.
export	Users in this role may export a template to their desktops as a compressed file.



- To save the permissions settings, click the **save** button. The CLE saves the settings and displays the Portfolio Templates home page. Or, to return to the home page without saving your changes, click **cancel**.

Styles

Styles are sets of fonts, colors, and graphics. Site organizers use styles to control the look of matrix cells, wizards, and wizard pages. Site participants use them to control the look of templates they design themselves.



Guidelines for Using Styles

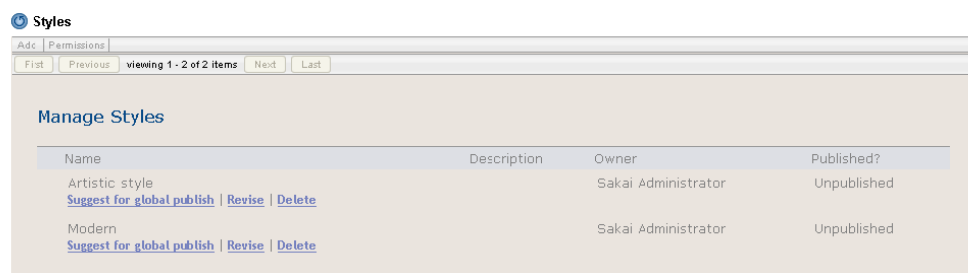
In order to maintain consistency within a matrix or wizard, we recommend that you, the site organizer, apply the same style to all cells in the matrix or all pages of the wizard. Portfolios do not necessarily require this consistency. Site participants who design their own portfolios may want to use more than one style. These users find it most helpful to have a variety of styles available for their work.

If you are a site organizer, you use the Styles tool to "create" a style by uploading a cascading style sheet (that is, a .css file) from Resources, giving it a meaningful name, and (if desired) providing a description of it. This tool also allows you to change the name and description of an existing style, delete a style you no longer need, and change usage permissions of all users in any role.

Once a style has been created in a site or globally using the Portfolio Admin site, the style is available for all members of the site to use.



The Styles tool is usually located in the Design & Publish category of a Portfolio site. To access the tool, click the **Launch** button for **Styles**. The CLE displays the Styles home page.



The screenshot shows the 'Styles' management interface. At the top, there are navigation links: 'Adc', 'Permissions', 'First', 'Previous', 'viewing 1 - 2 of 2 items', 'Next', and 'Last'. Below this is a section titled 'Manage Styles' containing a table with the following data:

Name	Description	Owner	Published?
Artistic style Suggest for global publish Revise Delete		Sakai Administrator	Unpublished
Modern Suggest for global publish Revise Delete		Sakai Administrator	Unpublished

Figure 154 Styles home page

This page contains a list of all styles on the site that you have created and that have been published for others to use. For each style in the list, you can see a description, the name of the person who created the style, and whether it has been suggested for publication.

If the list is longer than one page, use the buttons under the Styles

menu bar to display other pages.

First

- ◆ To display the first page of the list, click **First**.

Previous

- ◆ To display the previous page of the list, click **Previous**.

Next

- ◆ To display the next page of the list, click **Next**.

Last

- ◆ To display the last page of the list, click **Last**.

Adding a Style



If you are a system administrator, be advised that any style that you add to the PortfolioAdmin site automatically becomes available to all sites on your CLE instance.

To add a new style to your site, follow these steps:

- 1 Add the .css file for this style to Resources. *For information on adding resources, see Chapter 8 of the rSmart Sakai CLE User Guide.*

- 2 Access the Styles tool.



- 3 If the Styles home page is not displayed, click the **Reset** button.

Add

- 4 In the menu bar at the top of the screen, click the **Add** button. The CLE displays the Add Style screen.

Styles

Add Style

Add Style (required fields are noted with an *)

* Name

Description

* CSS File [Select File](#)

Figure 155 Add Style screen

- 5 In the **Name** box, enter a descriptive name for this style.
- 6 If desired, enter a longer description of it in the **Description** box.

Select File

- 7 To the right of the CSS File box, click the **Select File** link.
- 8 Select the .css file you need by following the instructions for selecting an item that begin on page 236. After you click **Finish**, the CLE displays the Add Style screen again. The name of the file you selected is shown in the box.

Add Style

- 9 To complete your work, click **Add Style**. The CLE displays the Styles home page again. The new style has been added to the list and is available for your site participants to use. Or, to return to the home page without adding the new style, click **Cancel**.

Changing a Style

If you are a site organizer, you may change the name and description of any style you have created that has not been published. You may also choose a different .css file for any unpublished style. After a style has been published, only the system administrator can change it.

To change a style, access the Styles tool and follow these steps:



- 1 If the Styles home page is not displayed, click the **Reset** button.

Revise

- 2 Find the style you want to change and click the **Revise** link below its name. The CLE displays the Revise Style screen.

Styles

Revise Style

Revise Style (required fields are noted with an *)

* Name

Description

* CSS File [Select File](#)

Figure 156 Revise Style screen

The boxes on this screen show your current entries for this style.

- 3 Change entries as needed. *For information on specific fields, see "Adding a Style," steps 5–8, beginning on page 231.*

Save Changes

- 4 To save your changes, click **Save Changes**. The CLE saves the changes you have entered and displays the Styles home page. Or, to return to that page without saving your changes, click **Cancel**.

Deleting a Style

If you are a site organizer, you may delete a style if it meets these conditions:

- ♦ It has not yet been published. After a style has been published, only the system administrator can delete it.
- ♦ It is not being used in any portfolio or portfolio template on the site. If a style is in use, you must delete all portfolios and templates that use it before deleting the style.

To delete a style, access the Styles tool and follow these steps:



- 1 If the Styles home page is not displayed, click the **Reset** button.

Delete

- 2 Find the style you want to remove and click the **Delete** link below its name. The CLE displays a delete confirmation window.

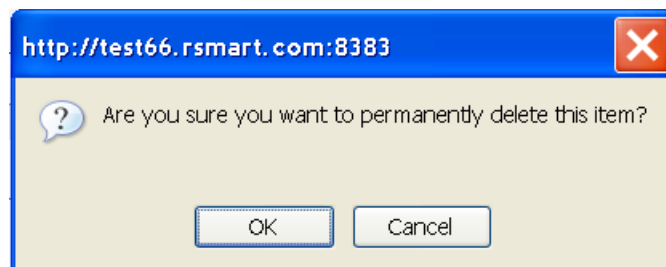


Figure 157 Styles delete confirmation window

OK

- 3 To delete the style, click **OK**. The CLE deletes the style and displays the Styles home page. Or, to return to the home page without deleting this style, click **Cancel**.

Requesting that a Style Be Published Globally

If you have created a style that has general applicability, you may want to make it available for use in all sites in your CLE. However, only the CLE system administrator(s) can publish a style globally (that is, across all sites in the CLE).

To request that a style be published globally, access the Styles tool and follow these steps:



1 If the Styles home page is not displayed, click the **Reset** button.

[Suggest for global publish](#)

2 Find the style you want to suggest for global publication.

3 Click the **Suggest for global publish** link below the name of the style. The CLE submits the style for consideration for global publication and displays the Styles home page again.

Publishing a Style Globally

If you are a system administrator, you may publish a style globally (that is, for all sites in a CLE instance). To do so, log in and follow these steps:

1 Click the **Administration** folder at the top of the screen.

2 Select the PortfolioAdmin site.

3 Access the Styles tool. The CLE displays the Styles home page.

[Publish](#)

4 Find the style you want to publish and click the **Publish** link beneath its name. The CLE makes the style available to all sites.

Changing Permissions for Using the Styles Tool

To change permissions for users in one or more roles, access the Styles tool and follow these steps:



1 If the Styles menu bar is not displayed, click the **Reset** button.

Permissions

2 Click the **Permissions** button on the menu bar. The CLE displays the Permissions screen.



Figure 158 Styles Permissions screen

3 Referring to the table below, check boxes to select the appropriate permissions for all users in each role.

Table 22 Permissions for using the Styles tool

<i>Permission</i>	<i>Description</i>
Global Publish	Users in this role may suggest that a style be published globally (that is, for all sites). Only the system administrator can globally publish a style.
Publish	Users in this role may publish styles for use by site participants.
Delete	Users in this role may delete styles.
Create	Users in this role may add new styles.
Edit	Users in this role may change styles.
Suggest Global Publish	Users in this role may suggest a style for global publication.

save

4 To save the permissions settings, click the **save** button. The CLE saves the settings and displays the Styles home page. Or, to return to the home page without saving your changes, click **cancel**.

Common Operations

This section covers operations that are common to two or more tools described in this chapter. After you learn one of these operations within one tool, you can apply the same techniques for any other tool using the common operation.

Selecting an Item

In order to create forms, wizards, and other structures, you need to select files and other items from the Resources area in My Workspace or the Resources area in one of your course, project, or portfolio sites.

If you have not yet added the file(s) you need to Resources, add them by following the instructions in Chapter 8, under "Resources, Adding a New Resource."

Select File

When you click **Select File** on a CLE screen, the system automatically displays the Select Item screen.

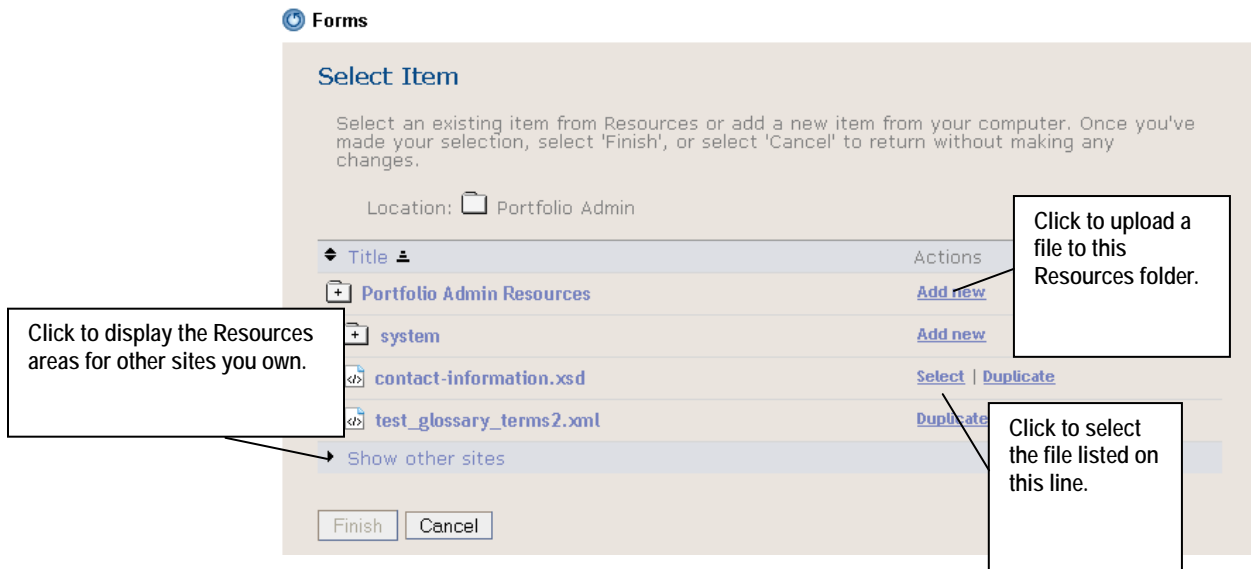


Figure 159 Select Item screen

This screen displays the contents of the Resources area for the site you are currently working in.

- 1 If the item you need is stored in the Resources area on another site in which you are a member, click the arrow for **Show other sites**.
- 2 Find the appropriate item and click the **Select** link for it. The CLE displays your selection near the top of the screen, under “Items to attach:”

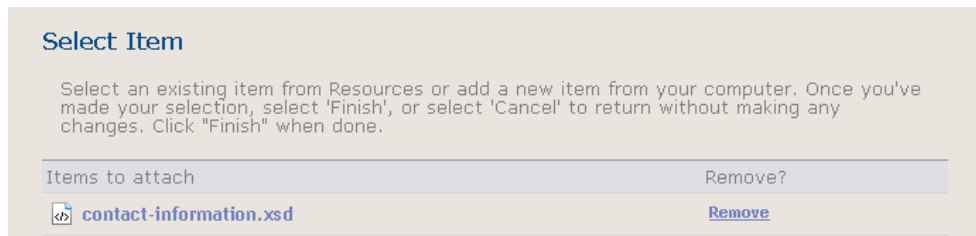


Figure 160 The selected item is displayed.

- 3 Choose one of the following options:

Finish

- ◆ If this is the file you want, click **Finish**. The CLE displays the screen you were last working in.

Remove

- ◆ If this is the wrong file, click the **Remove** link for it and select another file as instructed above.
- ◆ To exit without selecting a file, click **Cancel**. The CLE displays the screen you were last working in.

Exporting a File

The CLE allows you to export a compressed file containing a glossary, form, wizard, or other material from a CLE site to your desktop. After exporting the file, you can upload the compressed file from Resources to import it to another site.



Instructions for importing a file vary slightly from tool to tool. For information on importing, see the relevant section of this chapter for the tool you are using.

After you click the **Export** link or button, the CLE displays a window like this one:

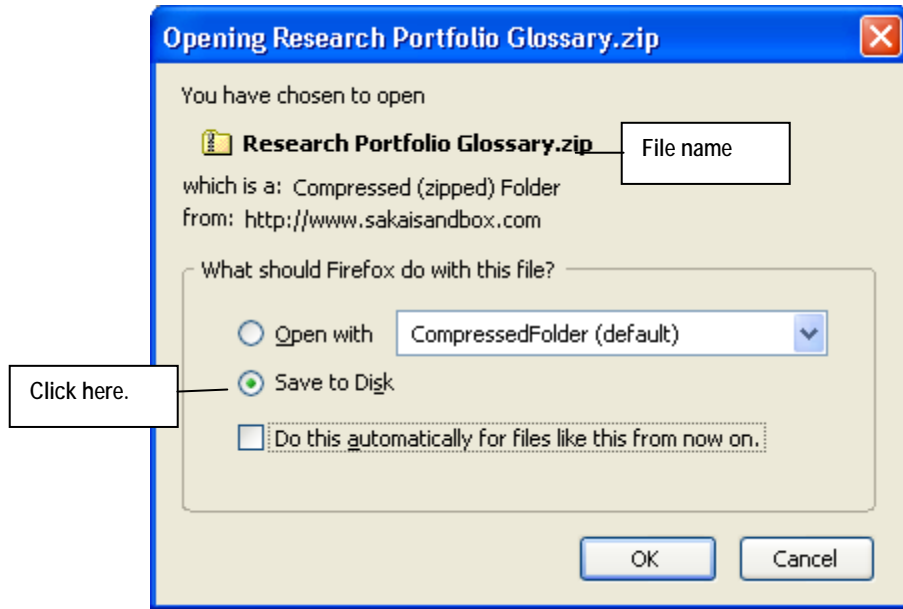
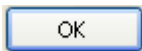


Figure 161 Opening file window

- 1 Click **Save to Disk**.



- 2 To export the compressed file named in this window, click **OK**. The CLE downloads the file to your standard download location and displays the home page for the tool you are working in. Or, to return to that screen without exporting the file, click **Cancel**.



Chapter 4

Future ePortfolio Documentation

This document is being contributed to the Sakai community to help establish a library of ePortfolio documentation. As your institution develops its own portfolios, we urge you to contribute samples to the community so everyone can profit from your experience.

Those of us currently working on this effort suggest that you consider using the template presented in this chapter to structure your own contributions to this important documentation set.

ePortfolio Documentation Template

Part I: Overview of Implementation

We suggest that the first section of your document provide the educational context for this portfolio implementation. You might cover information such as the following:

- ◆ Purpose of portfolio implementation
- ◆ Illustration of finished portfolio
- ◆ Value to stakeholders

Part II: Data Structures, Educational Process, and User Workflow

In this section, we suggest that you provide the following helpful material:

- ◆ A descriptive list of the sites, tools, and/or data structures involved.
- ◆ A high-level summary of educational processes represented
- ◆ Student, instructor, and administrator workflow for use of data structures

Part III: Customization and Authoring Workflow and Examples

In this part of the document, we suggest that you explain how to use the Sakai Interface to perform the following activities:

- ◆ Set up and configure sites and tools
- ◆ Create matrices, wizards, and goal management tools

We further suggest that you provide information on using XML coding to author forms, portfolios, styles, portfolio layouts, and reports.

Please note that a screencast (that is, a Flash or other video file that takes viewers on a "tour" of the activities or showcases particular features of the implementation could be substituted for any or all of this

documentation.

Part IV: Example of Final Production

This section of the documentation may include the following:

- ◆ A link to an account in a live demonstration instance
- ◆ A link to a library of sample data structures (may be housed on Sakai Confluence)

Please note that a screencast (that is, a Flash or other video file that takes viewers on a "tour" of the tools or showcases particular features of the implementation could be substituted for any or all of this documentation.