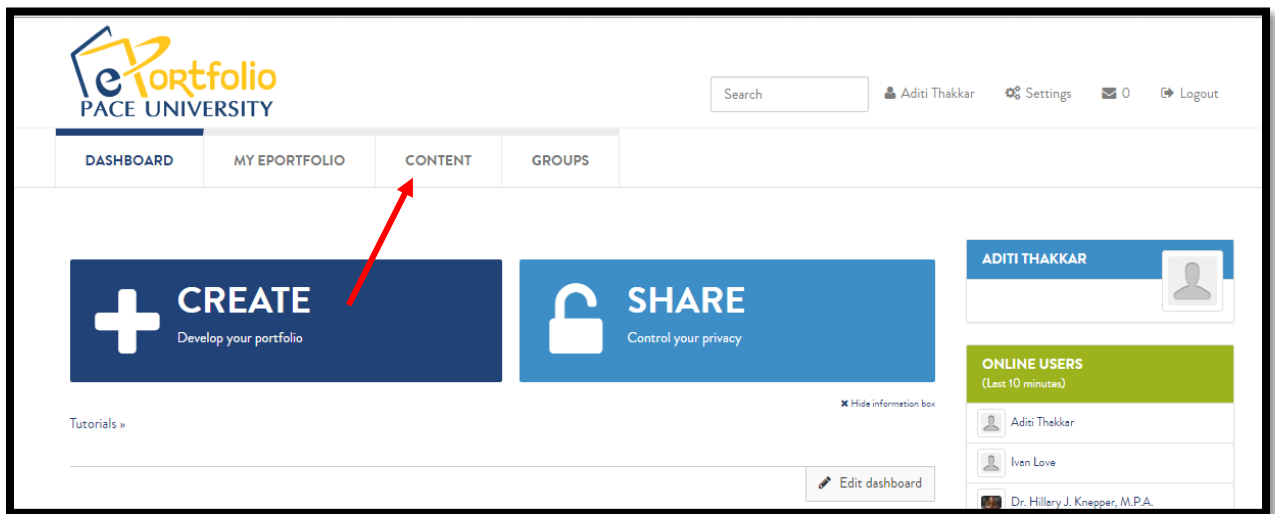


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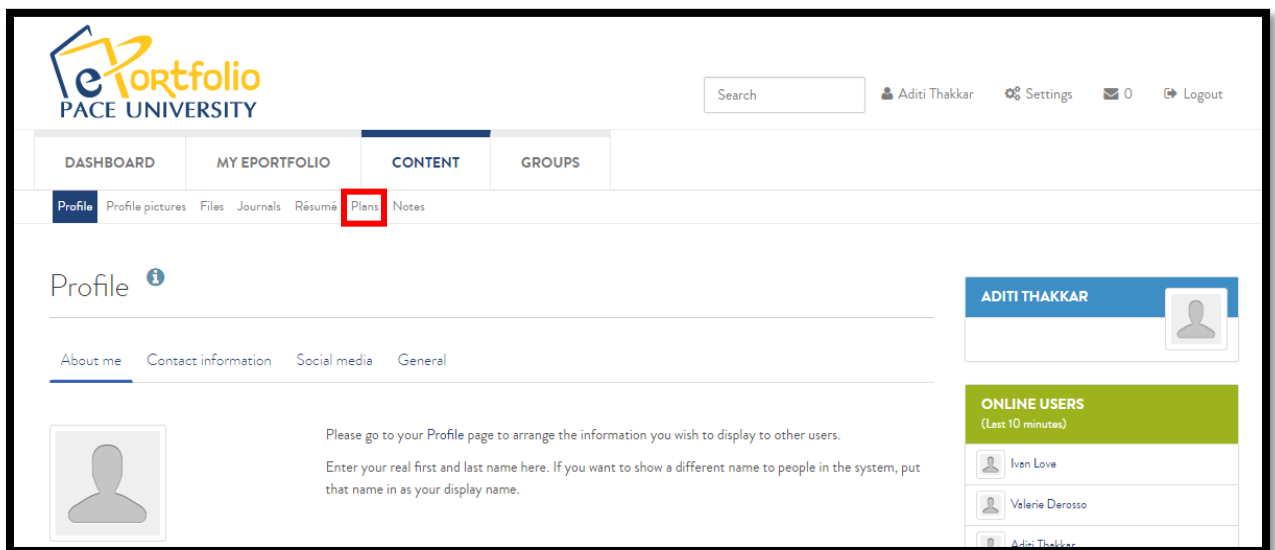
CREATING A PLAN

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

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

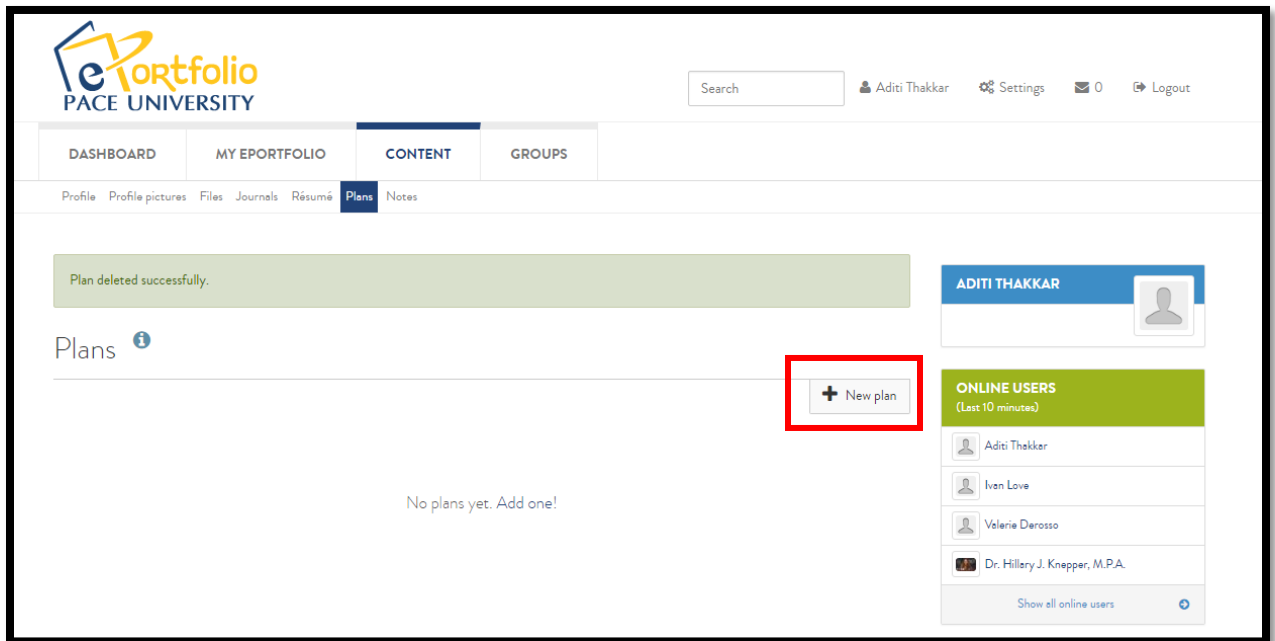


2. Click “**Plans**”.



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3. Click the “**New Plan**” button.



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

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ePortfolio
PACE UNIVERSITY

Search Aditi Thakkar Settings 0 Logout

DASHBOARD MY EPORTFOLIO **CONTENT** GROUPS

Profile Profile pictures Files Journals Résumé **Plans** Notes

New plan

Title * High GPA

Description Maintain a high GPA this semester.

Tags Type in a search term

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

Save plan Cancel

ADITI THAKKAR

ONLINE USERS
(Last 10 minutes)

- Ivan Love
- Valerie Derosso
- Aditi Thakkar
- Dr. Hillary J. Knepper, M.P.A.

Show all online users

TAGS

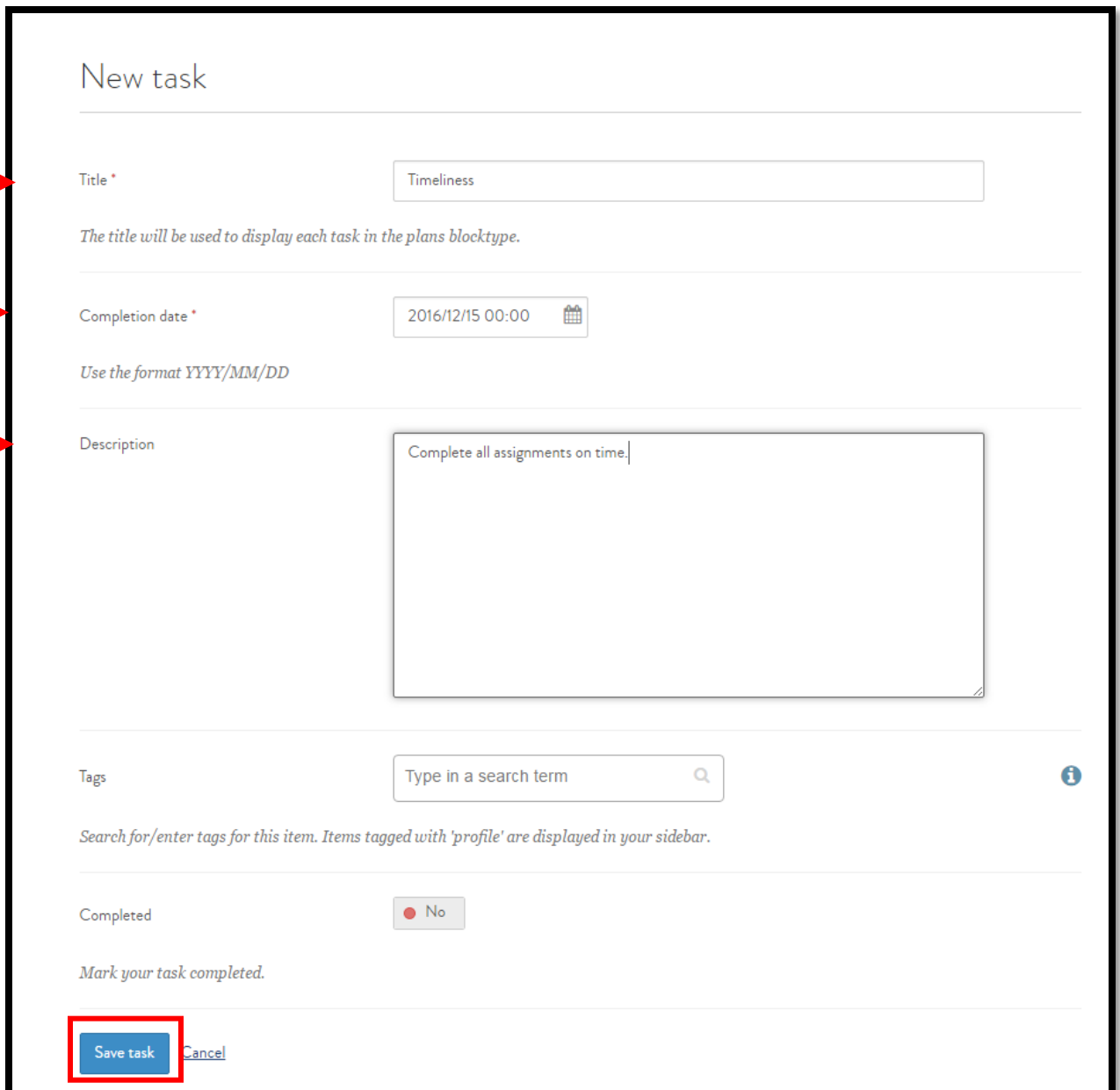
You have not tagged anything yet

5. Now you may **create a series of tasks**, which represent smaller steps necessary to complete your plan. Click the **“New Task”** button to add a task.

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The screenshot displays the ePortfolio interface for PACE UNIVERSITY. The top navigation bar includes a search box, the user's name 'Aditi Thakkar', 'Settings', '0' notifications, and a 'Logout' link. Below this is a main navigation menu with 'DASHBOARD', 'MY EPORTFOLIO', 'CONTENT', and 'GROUPS'. Under 'CONTENT', there are sub-links for 'Profile', 'Profile pictures', 'Files', 'Journals', 'Résumé', 'Plans', and 'Notes'. A green notification bar at the top left states 'Plan saved successfully.'. The main content area is titled 'Plan 'High GPA' tasks' and contains a red-bordered button labeled '+ New task'. Below this, a message reads: 'Add tasks below or use the "New task" button to begin building your plan. No tasks yet. Add one.' On the right side, there is a user profile for 'ADITI THAKKAR' and a section for 'ONLINE USERS (Last 10 minutes)' listing 'Ivan Love', 'Valerie Derosso', and 'Aditi Thakkar'.

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

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The screenshot shows a 'New task' form with the following fields and controls:

- Title ***: A text input field containing 'Timeliness'. A red arrow points to this field.
- Completion date ***: A date picker showing '2016/12/15 00:00'. A red arrow points to this field.
- Description**: A text area containing 'Complete all assignments on time.'. A red arrow points to this field.
- Tags**: A search input field with the placeholder 'Type in a search term' and a magnifying glass icon.
- Completed**: A radio button control with 'No' selected.
- Buttons**: 'Save task' (highlighted with a red box) and 'Cancel'.

Below the form, a red box highlights the 'Save task' button.



7. **Repeat steps 5 and 6** whenever you wish to add a new task. To mark a task as completed, **click the pencil icon** across from the task.

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Plan saved successfully.

Plan 'High GPA' tasks

[+ New task](#)

COMPLETED	TITLE	COMPLETION DATE	DESCRIPTION	
	Timeliness	15 December 2016	Complete all assignments on time.	 

1 task




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

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Editing task



Title *

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


Completion date * 

Use the format YYYY/MM/DD

Description

Tags  

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

Completed Yes 


Mark your task completed.

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

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Plan 'High GPA' tasks

+ New task


COMPLETED	TITLE	COMPLETION DATE	DESCRIPTION
	Timeliness	15 December 2016	Complete all assignments on time.

1 task

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

Plan 'High GPA' tasks

+ New task

COMPLETED	TITLE	COMPLETION DATE	DESCRIPTION
	Timeliness	8 September 2016	Complete all assignments on time.

1 task

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

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

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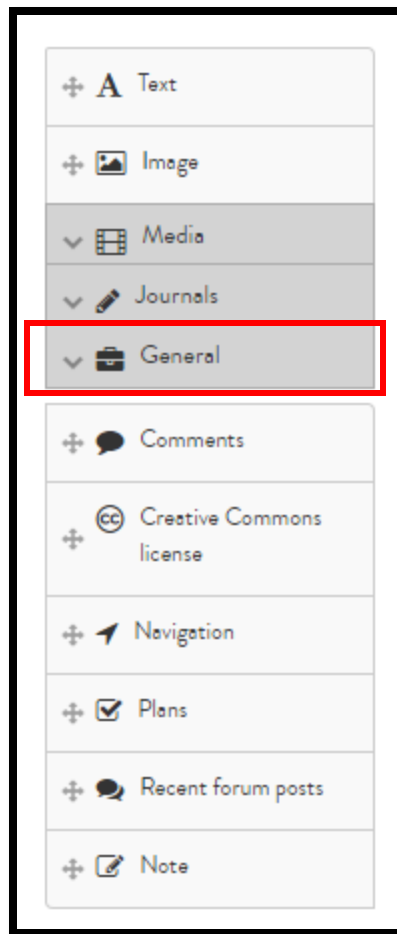
The screenshot displays the Pace University ePortfolio interface. At the top, the 'ePortfolio' logo and 'PACE UNIVERSITY' are visible. A search bar and user information (Aditi Thakkar, Settings, 0 messages, Logout) are in the top right. The main navigation bar includes 'DASHBOARD', 'MY EPORTFOLIO' (highlighted with a red box), 'CONTENT', and 'GROUPS'. Below this, a sub-menu shows 'Pages' (highlighted with a red box), 'Collections', 'Shared by me', 'Shared with me', 'Export', and 'Import'. The 'Pages' section is active, showing a search bar with the placeholder 'Search: (Title, description, tags)' and a 'Search' button. Below the search bar is a 'RESULTS' table with the following entries:

RESULTS	
Dashboard page Your dashboard page is what you see on the homepage when you first log in. Only you have access to it.	
Profile page Your profile page is what others see when they click on your name or profile picture.	
About Me	
Academic Materials	
Academic Technologies	
Co-curricular /Extracurricular Activities	
Introduction	

The 'About Me' row has a red box around its edit icon. On the right side of the interface, there is a user profile for 'ADITI THAKKAR', a section for 'ONLINE USERS (Last 10 minutes)' listing Aditi Thakkar, Nedie Chukwueze, Ivan Love, and Heather Askildsen, and a 'TAGS' section with the message 'You have not tagged anything yet'.

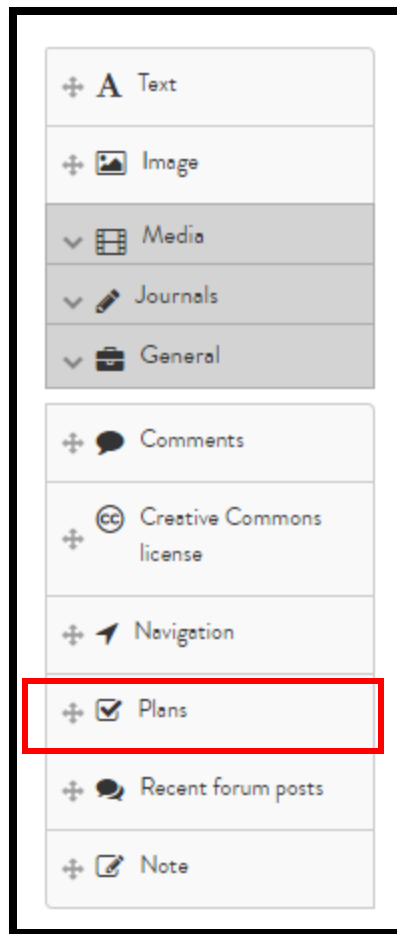
2. Click on the “General” tab.

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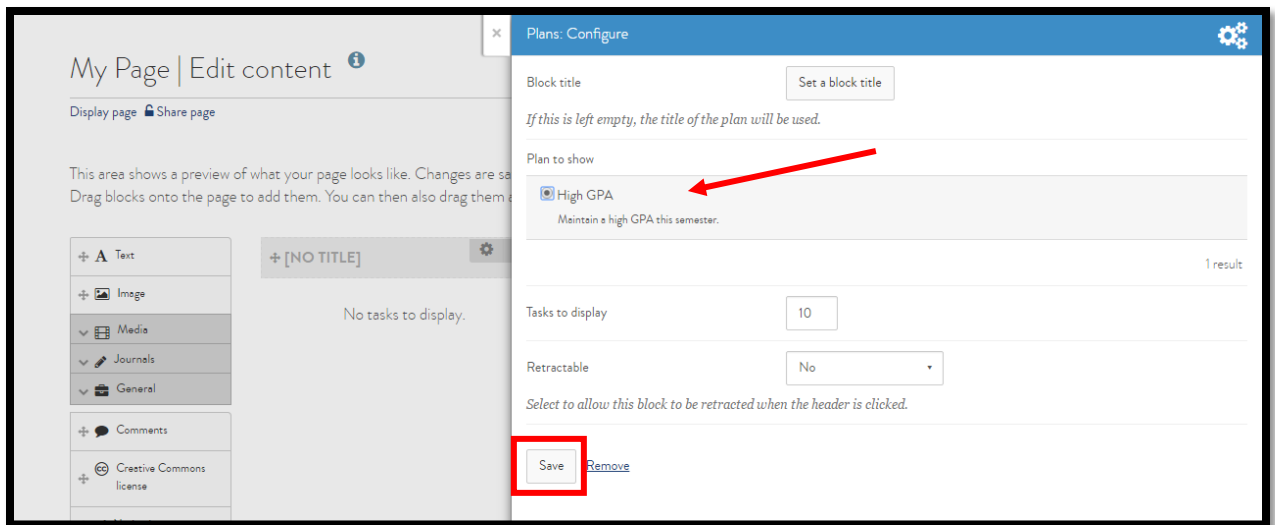
3. Select the “Plans” bar and **drag it** anywhere on your page.

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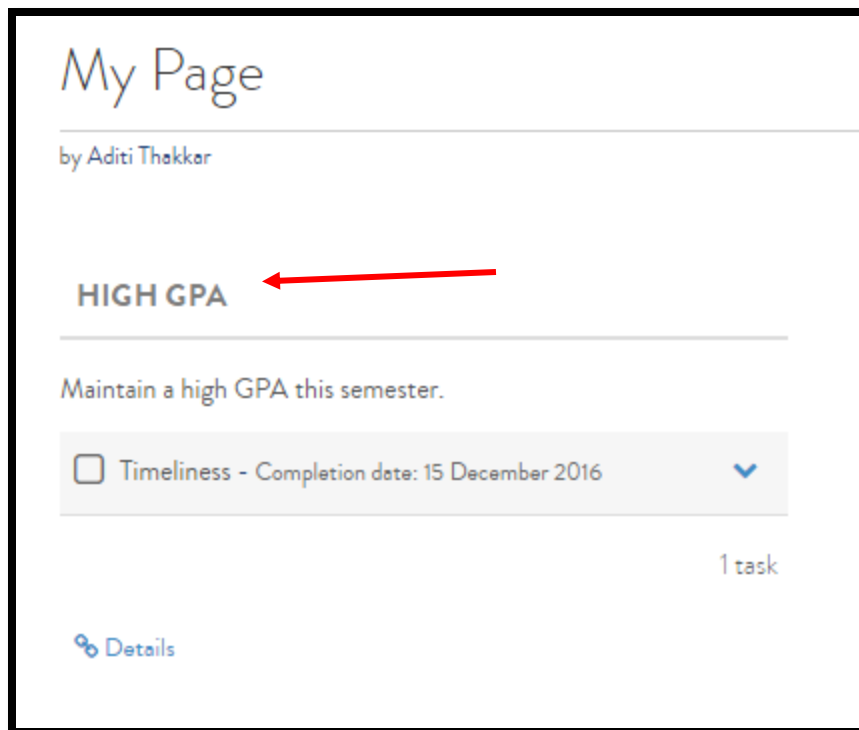


4. A pop-up window will appear, listing all the plans you have created. **Click** on the **plan** that you would like to display, then **click “Save”**.

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5. Your plan will now appear on your page.



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