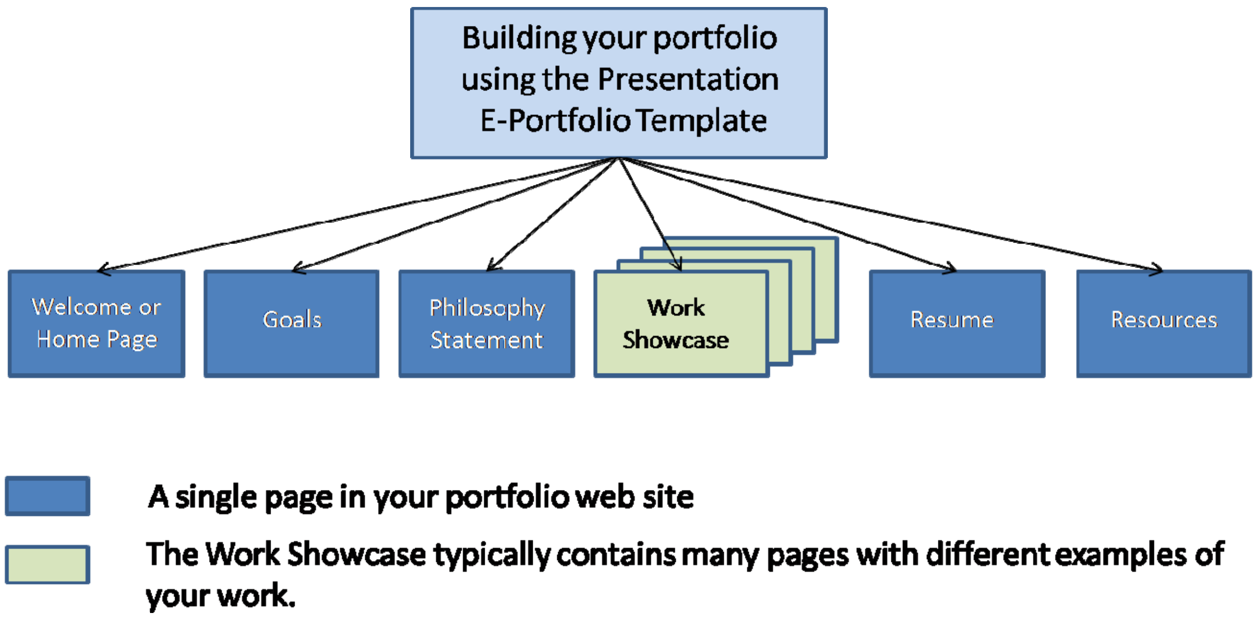
Creating a portfolio using the Sakai Portfolios tool

This document is targeted at CFEE 2010 portfolio grantees who want a first-hand experience in the Open Source Portfolio (OSP) tools of Sakai. Simply follow these steps to create a presentation portfolio.

Overview

The Sakai Portfolios tool allows you to showcase your work online. It uses pre-defined templates, layouts, or free-form design. This example will use the Presentation E-Portfolio template created at UD which provides a framework to create several pages in a web-based portfolio:



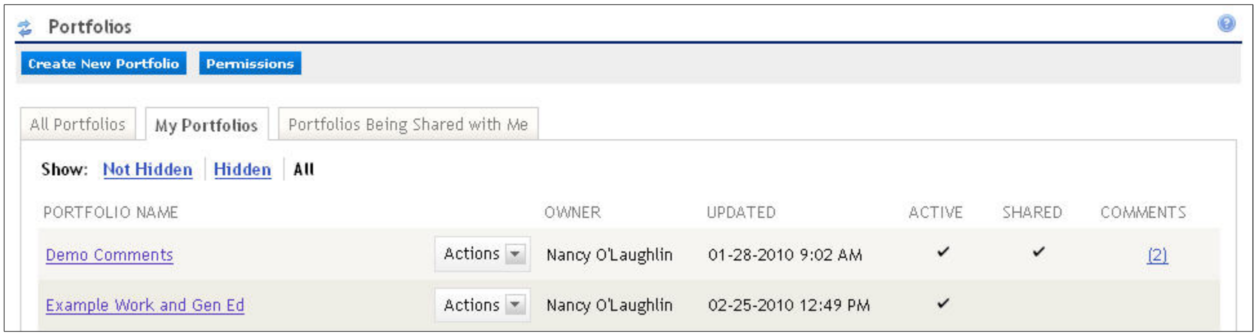
Users complete a form for each page in their portfolio. The form contains a text editor with a pre-formatted page of guidance to help the user plan content for that page.

Process for creating a portfolio

- Create a new portfolio
- Add or edit content
- Organize the Work Showcase with categories
- Fill in forms with required information
- Share the portfolio

Login to Sakai, and go to the E-Portfolio Group site.

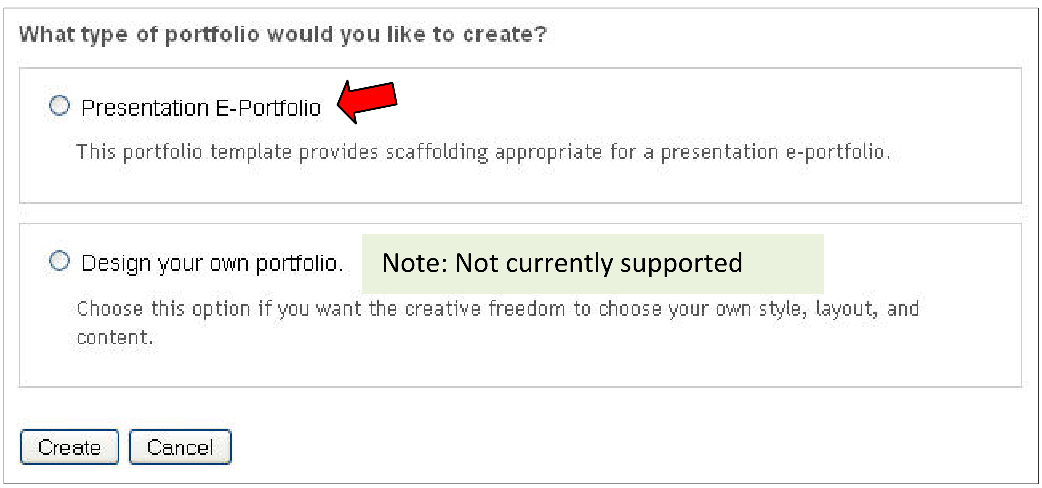
Click the Portfolios tool on the left. The Portfolios tool home page displays a list of all portfolios you are able to view.



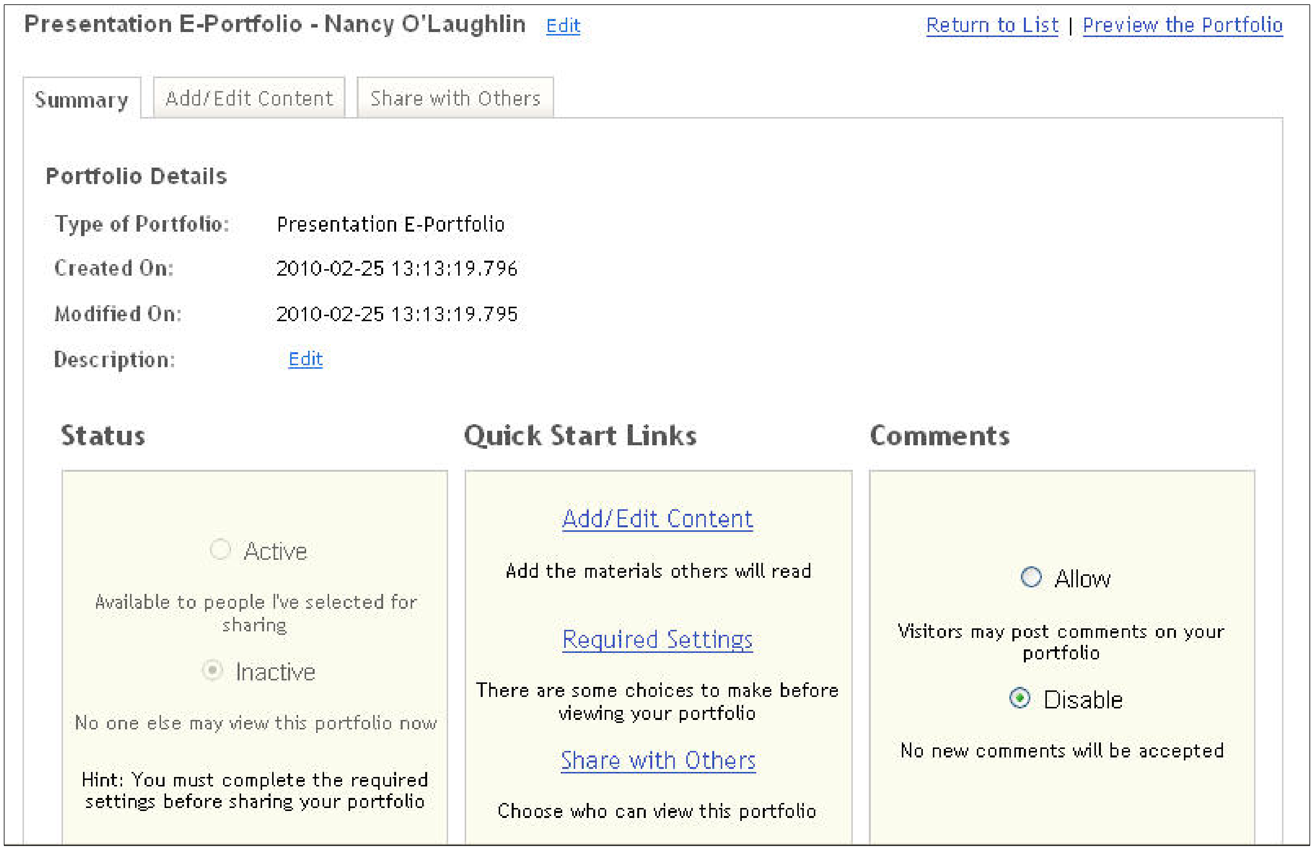
Create a New Portfolio

The process of creating a portfolio involves selecting new content for the portfolio or modifying what is already there.

Click the **Create New Portfolio** link at the top of the portfolio page. If the Portfolios home page is not displayed, click the Reset button. The portfolio templates available for your use will be listed first along with their descriptions. Select the Presentation E-Portfolio radio button.



Click **Create**. You will be taken to the portfolio Summary page.

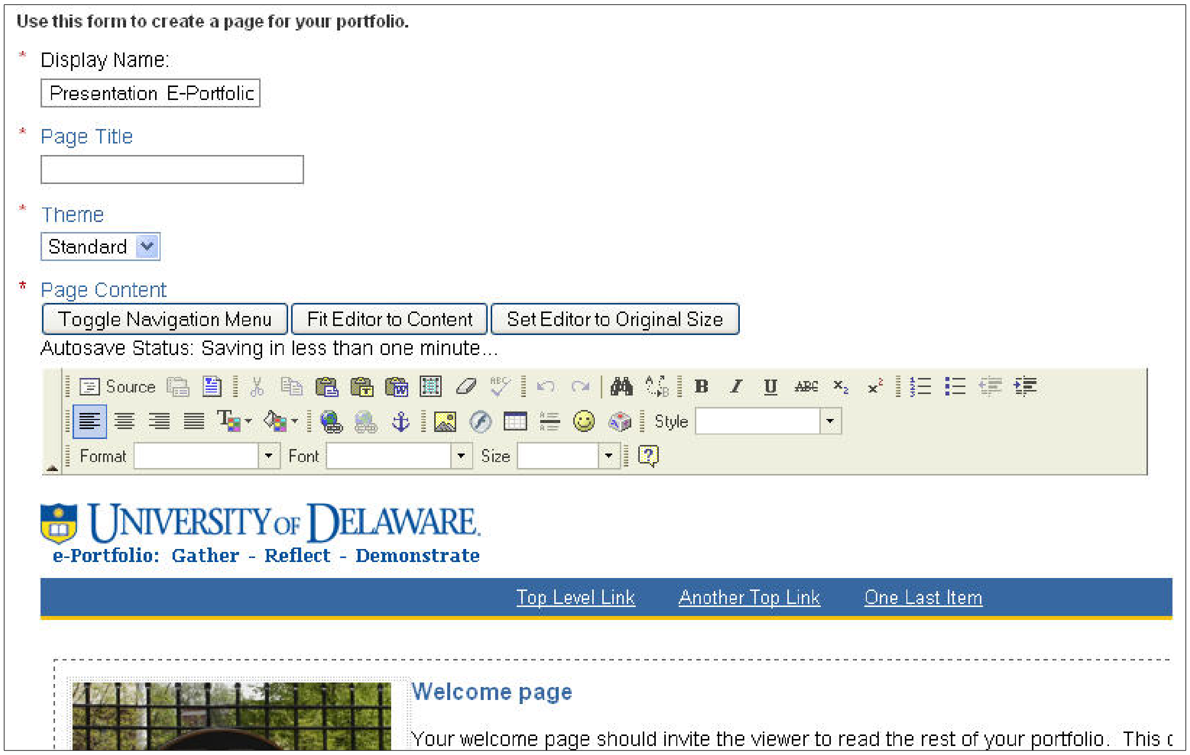


The Summary page consists of three primary sections: Status, Quick Start Links and Comments. Under Quick Start Links, click **Add/Edit Content**.

Add/Edit Content

The Add/Edit Content page consists of separate sections for each page in the template (e.g. Welcome, Goals). Since we have not yet created any content, click the **Create New** link to add a page for the Welcome section.

Use the form on this page to create your Welcome text for your portfolio.



Display Name

It is important to give a display name that is meaningful for the content you are creating. You will use the display name to select this page later for your e-portfolio. Note: If the field is not blank, first erase the default name that is present and replace it with your own.

Page Title

The Page Title is the actual navigation link that will be in your e-portfolio. In the example below, Home was selected for the Page Title instead of something like Welcome.

Theme

Select a theme to visualize what the headers and styling might look like while you are creating your page. You will be asked to select a theme for each page you create. This is for visualization help only. The theme that will be carried throughout the e-portfolio is selected in the Required Settings.

Page Content

You have been given a text editor to create your page. A pre-formatted page with guidance has been provided to help you plan content for that page. After reading the guidance, erase what is there and build your own page.

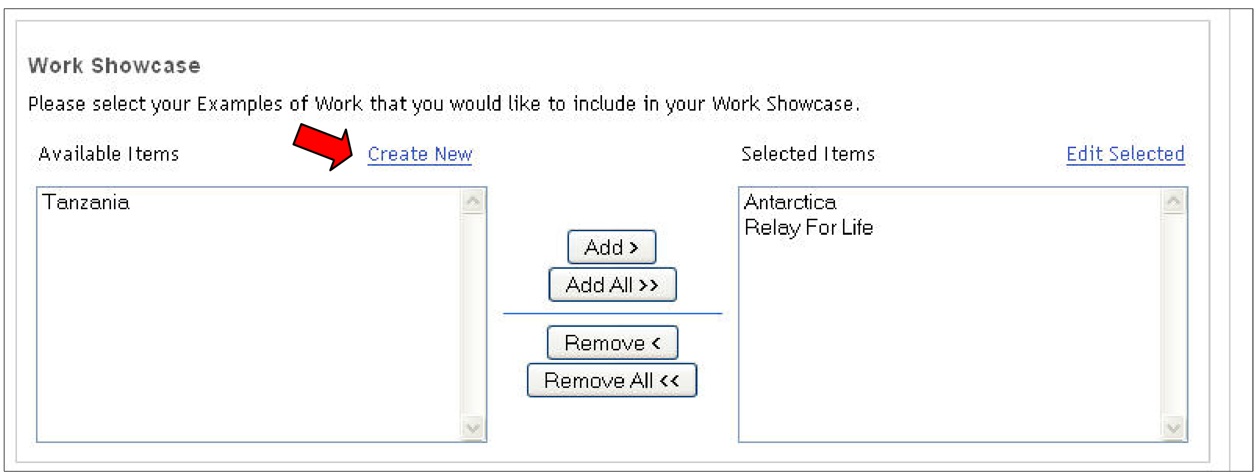
Remember you must **Save Changes** when you have finished your work on that page. There is an autosave built in to help prevent you from losing any work. Upon saving you will return to the main

Add/Edit Content page. Once a page has been created, it can be selected to be included in your portfolio, by selecting it from the drop down menu.

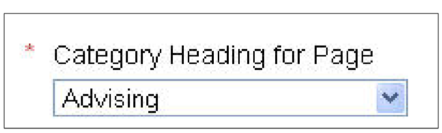
This same form is used to create the Goals, Philosophy, Resume or Links & Supporting Materials page. The only difference is the guidance for that page. Just click **Create New** to add additional content for your portfolio. Remember to **Save Changes** at the bottom of each page you create.

Organize the Work Showcase with categories

The Work Showcase page is organized by categories which help structure the navigation of this page. Select **Create New** in the Work Showcase section.

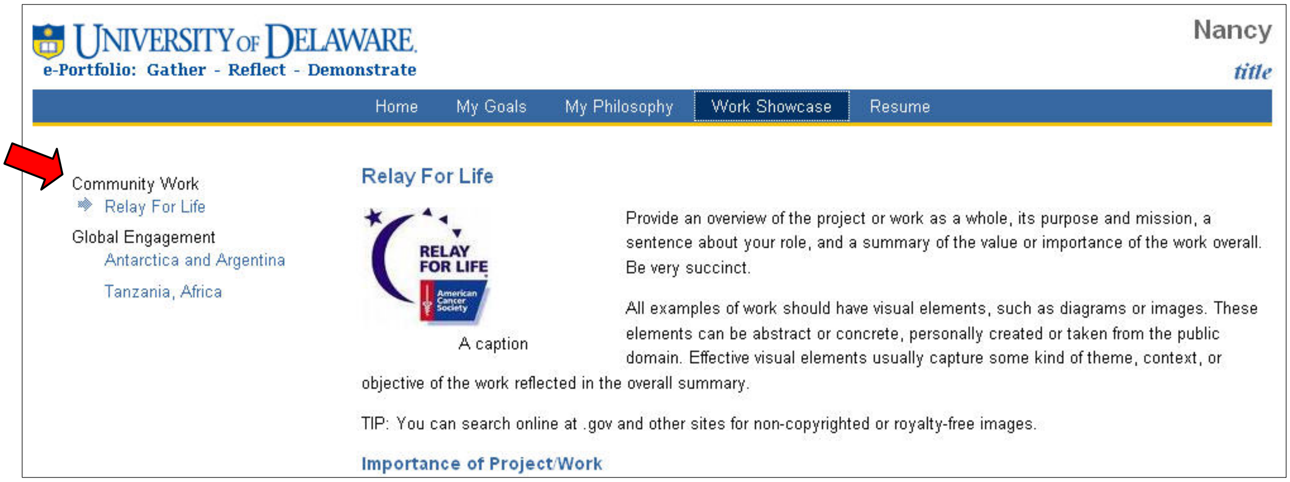


Complete this form to highlight one example of your work. Besides the guidance for this page, the primary difference between this form and the form completed for the other pages in the portfolio is the selection of a **Category Heading**.



The **Category Headings** are used to organize the owner's work samples and structure the page's navigation.

In the image below, Community Work and Global Engagement are example **Category Headings**.

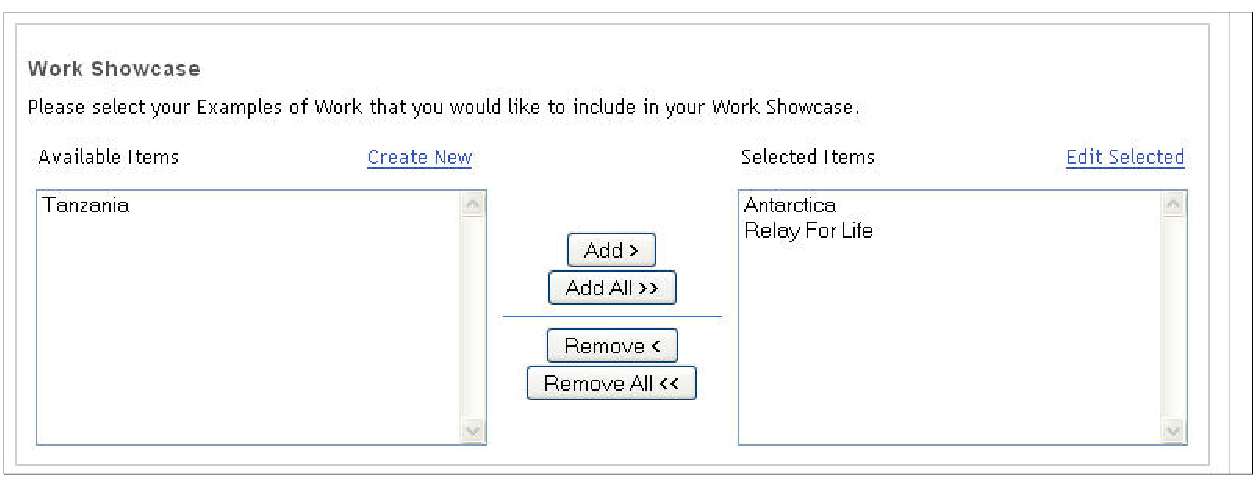


While completing this form, remember that what you fill in for the Display Name and Page Title is important. When deciding which pages to include in your portfolio, you will select the Display Name. The Page Titles become the navigation links.

Remember to **Save Changes** at the bottom of each page you create in the Work Showcase section.

How to select pages for the Work Showcase

After saving your changes you return to the main **Add/Edit Content** page. Once a page has been created, it can be selected to be included in your portfolio. You can select as many pages as you want for the Work Showcase, by clicking on the Display Name under Available Items. Use the control key to select multiple items not in succession, or use the shift key to select items that are continuous. After making your selection, click Add or Add All. These pages should now appear in the Selected Items box and are included in your portfolio.



You may view your portfolio at any time by clicking the **Preview the Portfolio** link in the upper-right corner of the page. Remember you must complete the **Required Settings** prior to viewing your portfolio. If you have not yet completed these settings, click the **Summary** tab at the top of this page. The link for Required Settings is located under the Quick Start Links on the Summary Page.

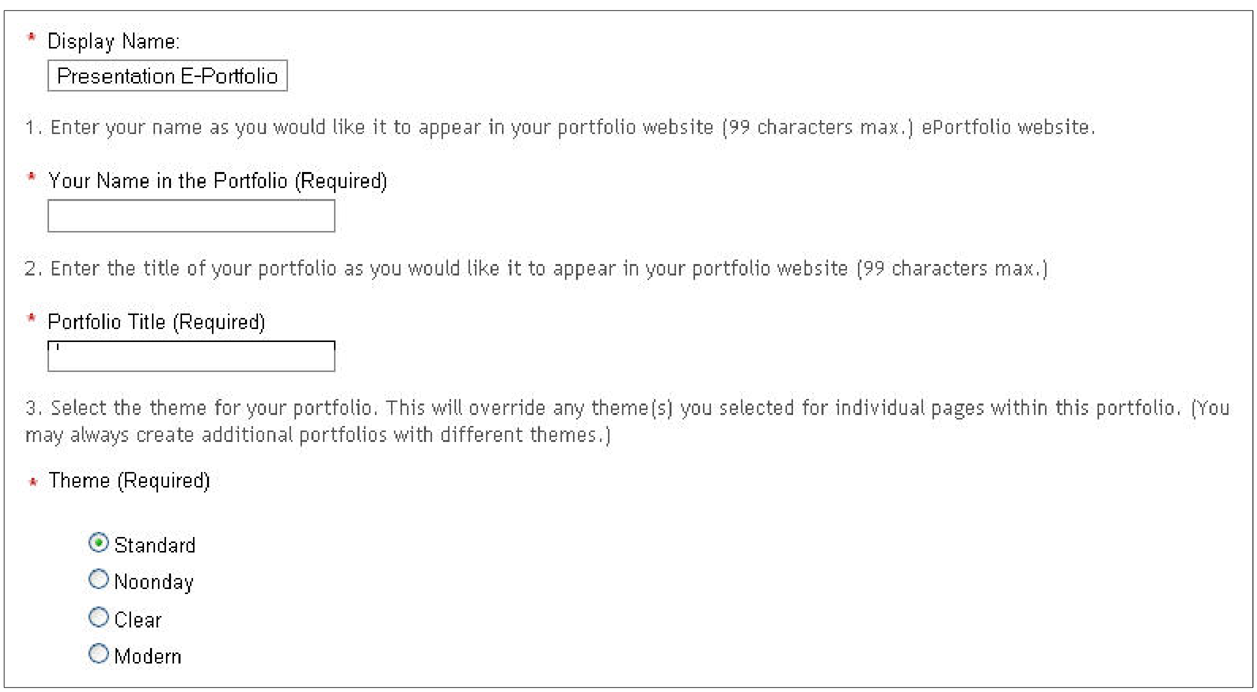
To return to the list of all portfolios, click the **Return to List** link in the upper-right corner of the page. Your portfolio will appear in the list with any other portfolios that you have created or ones that have been shared with you.

Required Settings for your portfolio

Required Settings are needed when you are using a template. Some portfolio options must be decided prior to viewing a portfolio.

Complete the form by entering:

- Display Name - Serves as the name of your portfolio within the system. A default name is provided. Change this default to a meaningful name. The display name is not shown in your portfolio.
- Your Name in the Portfolio - Your name as you would like it displayed in the e-portfolio website.
- Portfolio Title - The title of your portfolio as you would like it displayed in the e-portfolio website.
- Theme - Your choice of a theme for your portfolio. Your selection here will override any theme you may have chosen for individual pages in your portfolio. (Additional portfolios can be created with different themes at any time.)



* Display Name:

Presentation E-Portfolio

1. Enter your name as you would like it to appear in your portfolio website (99 characters max.) ePortfolio website.

* Your Name in the Portfolio (Required)

2. Enter the title of your portfolio as you would like it to appear in your portfolio website (99 characters max.)

* Portfolio Title (Required)

3. Select the theme for your portfolio. This will override any theme(s) you selected for individual pages within this portfolio. (You may always create additional portfolios with different themes.)

* Theme (Required)

- Standard
- Noonday
- Clear
- Modern

Save all changes by selecting the **Save Changes** button at the bottom of this page.

After selecting the required settings, it is possible to view your portfolio by clicking the **Preview the Portfolio** link on the Summary page. If no content has been added, all you will see are your name, title, and theme.

To return to the list of all portfolios, click the **Return to List** link in the upper-right corner of the page. Your portfolio will appear in the list with any other portfolios that you have created or ones that have been shared with you.

Share your Portfolio

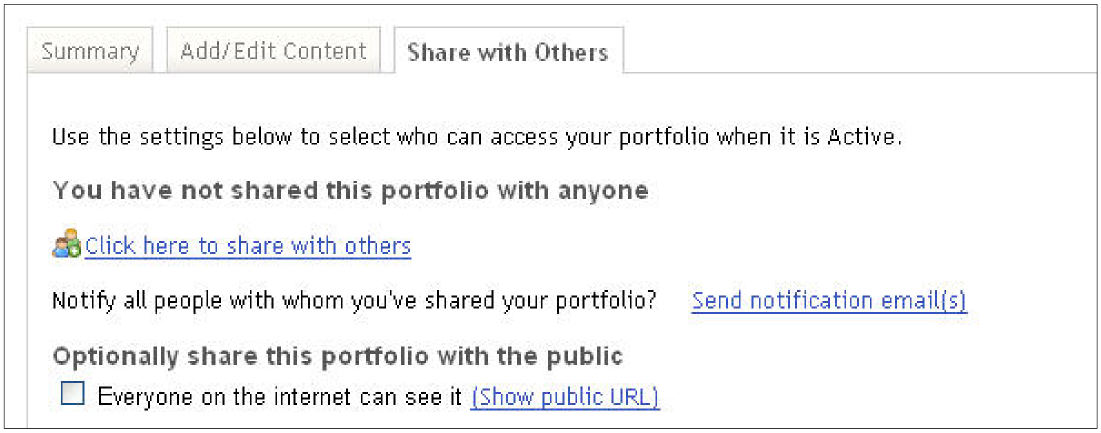
After you have created a portfolio, you may share it with others. You have the option of sharing it with individuals or to groups of people on your site, to individuals outside your site or outside the Sakai environment, or to a URL that can be accessed by anyone via a Web browser.

Prior to sharing a portfolio, you must set the status to active if it is not already. To set the status for a portfolio:

- Access the Portfolios tool. If the Portfolios home page is not displayed, click the **Reset** button.
- Click **Actions, Edit** next to the portfolio you want to modify. The Portfolio Summary page appears.
- Under status, select the appropriate radio button for Active or Inactive.
- If you select Active, the "sharing" link will take you to the "Share with Others" page.

To share a portfolio, access the Portfolio tool and follow these steps:

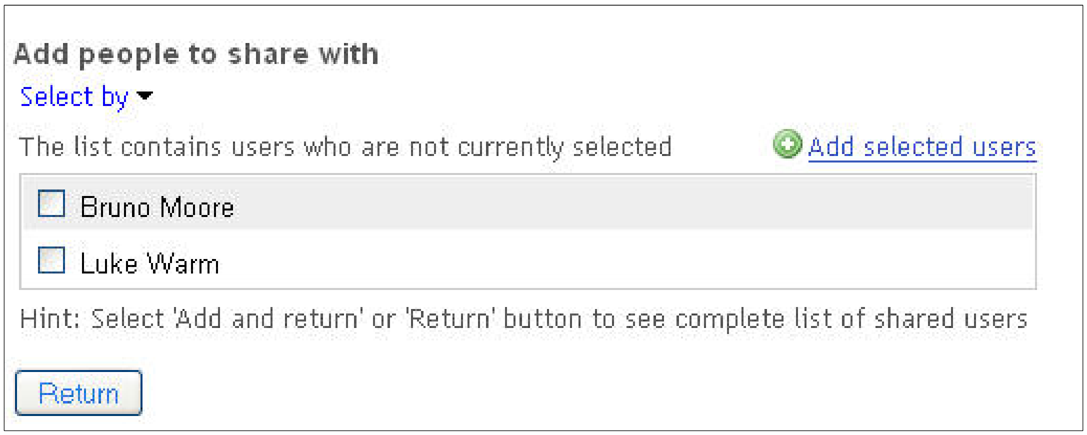
1. If the Portfolios home page is not displayed, click the **Reset** button.
2. Next to the portfolio you are interested in sharing, from the Actions menu, click **Share**. Sakai displays the Share with Others page for that portfolio. Anyone the portfolio has been shared with will be listed.



Share with Others page

There are two primary tasks on this page: to decide the specific people or roles you wish to view your portfolio and whether you want to share your portfolio with the public.

1. Share the portfolio with designated people or roles.
   - If you have not yet shared your portfolio with anyone, click the link, **Click here to share with others**. A list of all users in the site is provided. Place a check in the box next to each person's name with whom you want to share your portfolio. Click **Add Selected Users** to add these users and then continue to add other users. Click **Add** and **Return** to add these users and go back to the list of users you have selected to view your portfolio.



   - If you want to give more people or designated roles access to view the portfolio, click the link to the right, **Add more people/roles**. There are four ways to select additional people. Using the drop down menu next to "Select by," choose one of the following:

     - *browsing for people*
     - *entering a user id*
     - *picking roles related to this site*
     - *picking roles related to all sites*
   - If you want to remove someone from the list, place a check in the box next to either the person's name or role that you want removed. Click **Remove selected people/roles**.
   - If you want to notify the people you have shared your portfolio with, click the **Send Notification Email (s)** link. Shared users will be notified via email that you have shared your portfolio with them.

2. Share the portfolio with the public.

At any time, if you need to return to the list of all portfolios, click the **Return to List** link in the upper-right corner of the page.

If you wish to see the portfolio you are sharing with others, click the **Preview the Portfolio** link in the upper-right corner of the page.

NOTE: Because a local account is made for any added e-mail address in the system, if you wish to share your e-portfolio with an outside e-mail address, you can either:

- Use the public URL option and e-mail them the link, or
- Create a guest account for that e-mail address.