Workbook #1:
Getting Started with Karuta

Introduction

This workbook provides a basic example to help you build your first portfolio workflow using Karuta. Subsequent workbooks will show you how to create more advanced portfolios.

To follow this workbook you will need a designer account in a Karuta installation, either your own installation or the public one at http://www.eportfolium.com/karuta. You can create your designer account from the login page.

This workbook will guide you through the steps of creating a portfolio model and other components for a general education portfolio. After creating and testing the model, you will instantiate (i.e. copy) it to provide portfolios for each intended user.

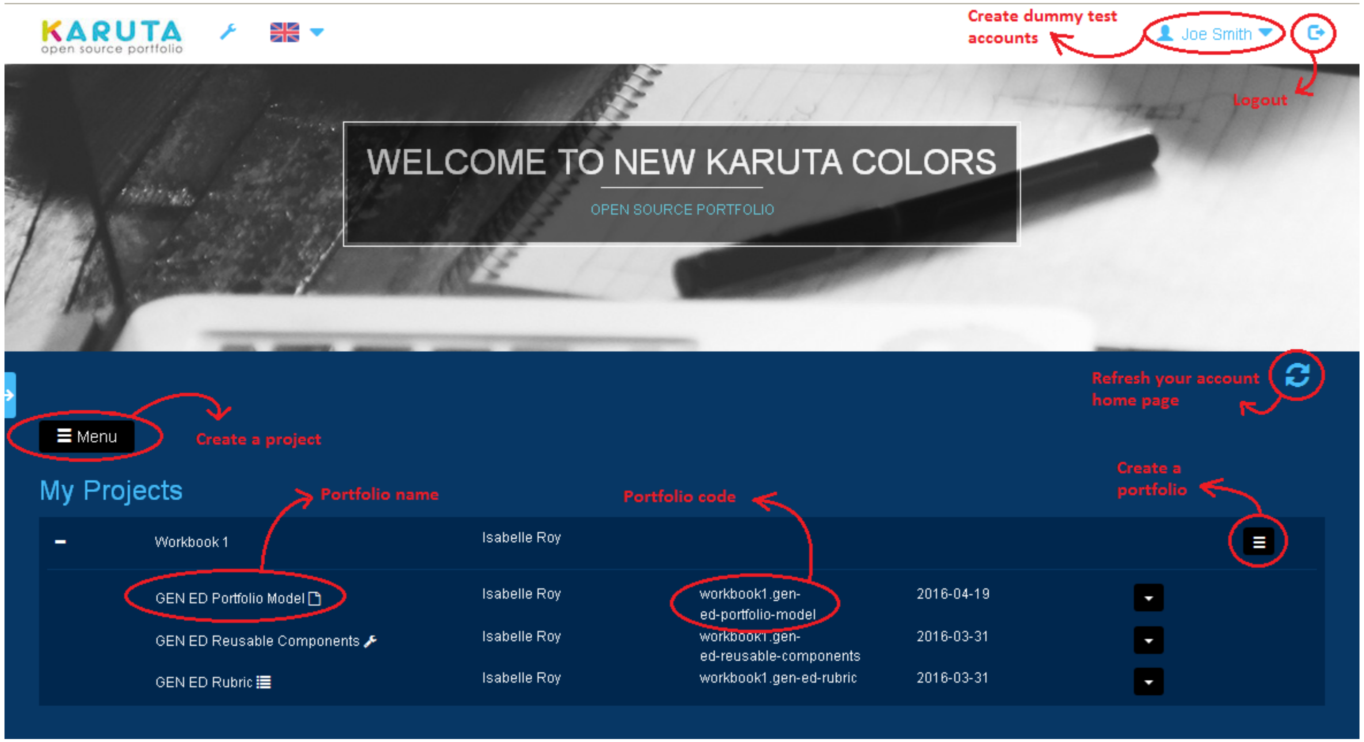
In this tutorial you will learn how to create the following:

- A basic portfolio model with a student profile page;
- A rubric portfolio with self-evaluation and teacher evaluation rubrics;
- A reusable components portfolio with a learning outcomes page that can be copy-pasted into multiple portfolio models;
- Two learning outcome pages in the portfolio model that are copied from the reusable components portfolio.

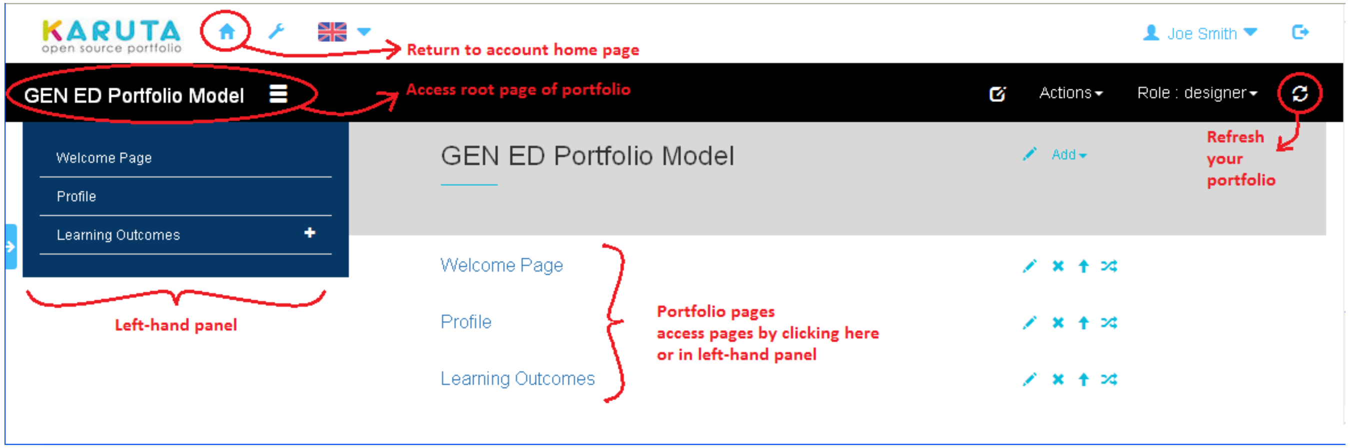
Karuta functions as set of interlocking portfolios. The portfolio model is the one to be instantiated (copied) for each student. In a standard scenario, the portfolio model will call upon two other portfolios: a rubric portfolio, which is used to populate choice boxes, and a reusable components portfolio, which is used to copy-paste reusable portfolio parts. This copy-paste mechanism is used in two ways: by portfolio designers to create multiple sections in the portfolio model that are very similar, and by end-users to add content to their portfolio as the need arises.

Workbook 1 Screen Shots

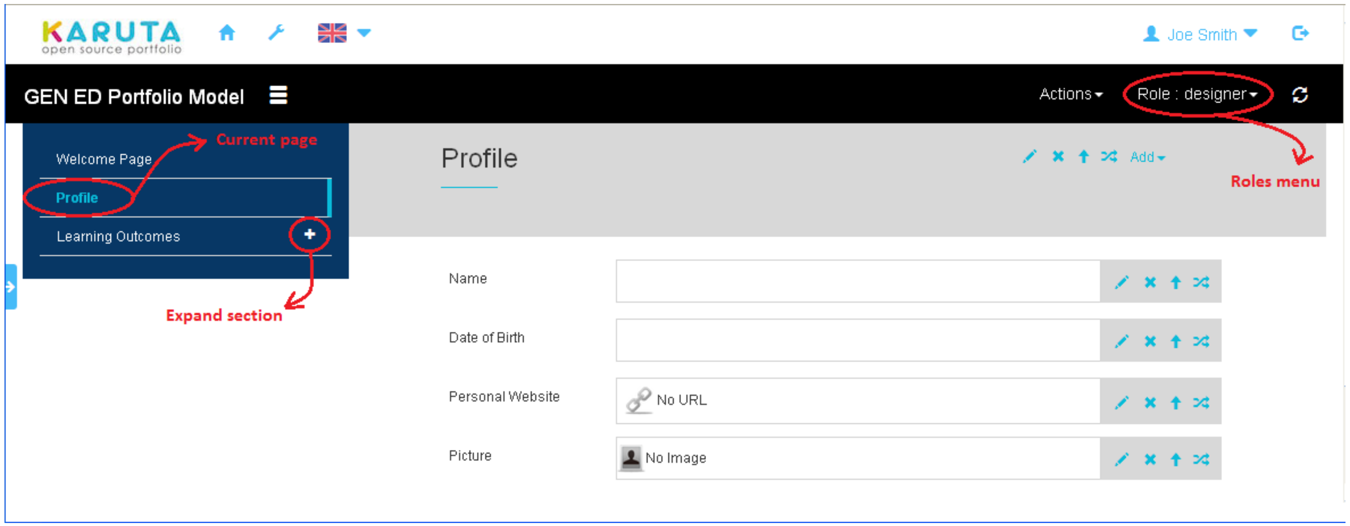
Account Home Page



Portfolio Root Page



Student Profile Page



Part I. Creating a Karuta Project

1. From your account home page, click the Menu button Menu and choose Create a Project. The project will contain all the portfolios you create using this workbook.
2. In the dialog box, enter a code and a label for the project.
   a. The code is used internally by Karuta and can only include alphanumeric characters and dashes (no spaces or any other characters including accents and other punctuation).
   b. Project codes must be unique on the Karuta server. For this reason we recommend you append your name or employee ID to your project code.
   c. The label is a more user-friendly name for users to refer to the project.
   d. For this example, enter "`workbook1-`*`your-name`*" for the code and "`Workbook 1 - `*`Your Name`*" for the label.
3. Open the project by clicking the plus sign to the left of the project name.

Part II. Creating a Basic Portfolio Model with a Profile Page

1. Click the stacked bars button for your project and choose Create a Portfolio Model.
2. In the dialog box, enter a code and a label for the portfolio.
   a. Portfolio codes and labels follow the same rules as those for a project.
   b. Portfolio codes must be unique within a given project.
   c. For this example, enter "`gen-ed-portfolio-model`" for the code and "`GEN ED Portfolio Model`" for the label. Karuta will automatically prefix your code with the name of your project.
3. Open the portfolio model you created by clicking on its label on your account homepage.
   a. When you open a portfolio model, you land on the user's welcome page. As a designer, you need to start adding pages from the root page. To access the root page, click on the portfolio name at the top left of your screen.
   b. For this portfolio model, begin with a first page for the student to enter basic profile information.
   c. Create the page by clicking the Add button Add and choosing Page. Open the new Page element by clicking on its label ("`New Page`").

Menu
Create a project or import previously exported portfolios.

Portfolio and Project Codes:
Alphanumeric characters and dashes only.

Open or close a project.

Create portfolios in a project.

Page Element:
A portfolio page.

Add
Add an element to a portfolio.

d. The pencil button will allow you to rename the page. Label it “`Profile`”. (At this time you do not need to enter a code for elements inside a portfolio.)

4. There are multiple types of data elements with which users can enter information in a portfolio. We will use four of these on the Profile page, for the name, date of birth, website and picture of the student.
   a. Click the Add button and choose Field.
   b. Click the pencil button to open the dialog box to edit this element.
   c. Give the Field element the label “`Name`”.
   d. In the same dialog box, click the Metadata tab and assign the Edit Resource role to students by typing “`student`” in the corresponding box. This means students will have the pencil button to edit this element.
   e. You can choose whatever names you want for the roles of the various users of your project and Karuta will create them dynamically. In this tutorial we use “`student`” and “`teacher`” because they are most common.
   f. Close the dialog box.
5. Click the Add button successively to add a Calendar element for the date of birth, a URL for the student’s personal website, and an Image for the student’s picture. In each case, use the pencil button to label the element and assign the Edit Resource role to “`student`”.
6. The Profile page is now complete. Click the house icon at the top left of the page to return to your Karuta account home page.

Part III: Creating a Rubrics Portfolio

1. Click the stacked bars button of your project and choose Create Rubrics. Give the new portfolio the code “`gen-ed-rubric`” and label it “`GEN ED Rubric`”.
2. Open the GEN ED Rubric portfolio by clicking on its label. Click the Add button and choose Page to create a new page.
   a. Open the page by clicking on its label (“`New Page`“).
   b. Use the pencil button to rename the new page “`Miscellaneous Rubrics`”.

Edit an element.

Field Element:
A short text.

Calendar Element
A date.

URL Element:
A hyperlink.

Image Element:
An image file.

Return to your account home page.

c. Click the Add button and choose Subsection to add a subsection to this page. Use the pencil button to rename the subsection “`Self Evaluation`” (Label field).

3. Click the Add button of the Self Evaluation subsection and add an Item element to the subsection.
   a. Click the pencil button to edit the Item element.
   b. Click the Metadata tab and assign a Semantic Tag. All Item elements that will appear in the same choice box must share the same semantic tag. Like the portfolio code, only alphanumeric characters and dashes can be used for the semantic tag. In this case, assign the semantic tag “`self-evaluation`”.
   d. In the same dialog, click the Resource tab. For the Item Code, enter “`@SMILEY-HAPPY`” (using all caps).
   e. Add two more Item elements to the Self Evaluation subsection, with the same semantic tag and Item Codes respectively “`@SMILEY-NEUTRAL`” and “`@SMILEY-SAD`”.
4. Add another Subsection element to the Miscellaneous Rubrics page and rename it “`Teacher Evaluation`” (Label field).
   a. Add three more Item elements to the Teacher Evaluation subsection.
   b. These three Items must share the same semantic tag. In this case, we will assign the semantic tag “`teacher-evaluation`”.
   c. For the first Item, assign the Item Code “`@BDG1`” (all caps) and Item Label “`Has not reached the objective`”.
   d. For the second Item, assign the Item Code “`@BDG4`” (all caps) and Item Label “`Has reached the objective`”.
   e. For the third Item, assign Item Code “`@BDG5`” (all caps) and Item Label “`Has exceeded the objective`”.
5. The rubric is now complete. Return to your Karuta account homepage via the house icon.

Part IV: Creating a Generic Learning Outcome Page in a Reusable Components Portfolio (that you will copy-paste multiple times into the portfolio model)

1. Click the stacked bars button of your project and choose Create Components. Give the new portfolio the code “`gen-ed-reusable-components`” and label it “`GEN ED Reusable Components`”.

Subsection Element:
Subsection on a portfolio page.

Item Element:
One element of a choice box.

2. Open the Components portfolio by clicking on its label. Add a new page and rename it "`Learning Outcome Page`".
   a. To re-use this page multiple times, you must give it a Semantic Tag that is unique within your project. In this case, assign the semantic tag "`learning-outcome-page`".
   b. Open the Learning Outcome Page and add a Subsection element as a first subsection. Rename it "`Evidence Submission`".
   c. In the Metadata tab assign the Submit role to "`student`". This allows students to submit their evidence when they are ready. After submission, students can no longer modify their submissions. This represents the virtual equivalent of handing in a physical copy to the teacher.
3. Click the Add button of the Evidence Submission subsection and add a Document element.
   a. Use the element's pencil button to label it "`Evidence`" and assign the Edit Resource role to "`student`".
   b. Add a TextField element to the Evidence Submission subsection. Label it "`Documentation and Reflection`" and assign the Edit Resource role to "`student`".
4. Add a Get_Resource element to the Evidence Submission subsection.
   a. This will create a choice box. Label it "`Self Evaluation`" and assign the Edit Resource role to "`student`".
   b. To specify which choices will populate the choice box, scroll down to find the Search field at the bottom of the Metadata tab and enter the following:
      i. the rubric portfolio code, followed by a dot;
      ii. the semantic tag of the Item elements that will populate the choice box, followed by a dot;
      iii. the word "`label`".
   c. In this case the result is "`gen-ed-rubric.self-evaluation.label`".
   d. Close.
   e. Click the pencil button for Self-Evaluation again and click the downward arrow to make sure the choice box appears.
5. Add a Send Email element to the Evidence Submission subsection.
   a. Click the pencil button and fill in the first name, last name, and email address of the intended recipient. (You can use this information to create a test user account later in the process.)
   b. Assign "`student`" to the Edit Resource role.

Document Element:
A file of any type, not displayed but downloadable.

GetResource Element:
A choice box.

6. Add a second subsection to the Learning Outcome page and label it “`Teacher Evaluation`”.
   a. Add a Get_Resource element to this subsection, label it “`Evaluation`”, assign the Edit Resource role to “`teacher`”, and edit the Search field at the bottom of the Metadata tab as follows: “`gen-ed-rubric.teacher-evaluation.label`”.
   b. Add a TextField element, label it “`Comments`”, and assign the Edit Resource role to “`teacher`”.
7. We now want to give students a way to add additional documents if they need to. For this we will create a document element editable by students, and then create a custom menu for the students to copy-paste this element if and when they need it.
   a. Return to the Gen Ed Reusable Components portfolio root page by clicking the portfolio name above the left panel.
   b. Create a new page.
   c. To be usable from the Learning Outcome page, the page containing the document element must be placed higher in the hierarchy. Click the new element’s upward arrow once to move the new page above the Learning Outcome page.
   d. Open the page by clicking on its label and rename it “`Miscellaneous Components`”.
   e. Refresh the portfolio with the refresh button at the top right of your screen to update the left hand panel.
   f. Add a subsection to the Miscellaneous Components page, and rename it “`Additional Document to Be Added by Students`”.
   g. Add a Document element to the new subsection and label it “`Evidence`”. Under the Metadata tab assign the unique semantic tag “`student-document`” and assign “`student`” to the Edit Resource, Delete and Move roles.
   e. The Delete role will allow the student to remove any Document elements added by mistake. The Move role will allow the student to modify the order in which the Document elements are presented. Note that in the current portfolio model, after students submit evidence, they will not be able to edit, delete, or move it.
8. Go back to the Learning Outcome page and use the pencil button for Evidence Submission subsection to create a custom Menu allowing the student to add extra documents as needed.
   a. Find the Menu field at the bottom of the Metadata tab and enter the following:
      i. The reusable components portfolio code, followed by a comma;

Refresh or update the content of a portfolio or your account homepage.

   ii. The semantic tag of the reusable element, followed by a comma;
   iii. What you want the menu to say to the user, appended by the language tag "`@en`", followed by a comma;
   iv. The role of the user who will have this custom menu.
   b. In this case, the result is as follows: "`gen-ed-reusable-components,student-document,Additional Document@en,student`".
   c. Close.
   d. Click the new Menu button to review the newly available option.
9. The Reusable Components Portfolio is now complete. Return to your Karuta account homepage via the house icon.

Part V: Completing the GEN ED Portfolio Model by Creating Two Learning Outcome Pages from the Generic Reusable Component

1. Open the GEN ED Portfolio Model and access the root page by clicking the portfolio name above the left panel.
   a. We will use a Section element to group multiple pages that logically belong together. Use the Add button to add a Section element.
   b. Open the new element by clicking its label ("`New Section`"). Use the new element's pencil button to open its editing dialog.
   c. Rename the new Section "`Learning Outcomes`".
   d. Under the Metadata tab, edit the Menu field as follows: "`gen-ed-reusable-components,learning-outcome-page,Add a Learning Outcome Page@en,designer`". This will give you, the designer, a custom Menu button to copy-paste the generic Learning Outcome page into this section of the portfolio model.
   e. Close the dialog.
2. Click the Learning Outcomes section to open it. Use the new custom Menu button to add a Learning Outcome Page.
   a. Use the pencil button for the new page to rename it "`Written Communication`".

3. Use the same Menu button to add another Learning Outcome Page and rename it "`Teamwork and Collaboration`".
4. The portfolio model is now complete.

Part VI: Checking the Portfolio Model

1. Refresh your portfolio using the refresh button to update the left hand panel and the roles menu. (This is when Karuta creates your roles dynamically.) You should always do this after pasting parts and/or renaming Sections and Pages.
   a. Click the Role dropdown menu at the top right and choose student. The screen will display what a student would see.
   b. Open the profile page and make sure the student has a pencil button for every element.
   c. Click Learning Outcomes in the left panel and open each of the two pages. Make sure the student has the Menu and Submit buttons in the Evidence Submission subsection and the pencil button for all elements inside this subsection.
2. Click the Role dropdown menu again and choose teacher. The screen will display what a teacher would see.
   a. On each of the two learning outcomes pages, make sure you see the pink Not Submitted label and pencil buttons for the Evaluation and Comments elements.

Part VII: Instantiation and Sharing

1. For this last step, you need to create two dummy user accounts for testing. You can create test user accounts from your account homepage with the user menu button at the top right of your screen.
2. Creating copies of the model for each portfolio user is called instantiation and sharing. When you do this for a large group of students, you will use a Karuta batch script. But first, to test your model, you should complete the testing cycle by creating one user portfolio manually.
   a. From your account home page, click on the downward arrow button next to GEN ED Portfolio Model and choose Instantiate.
   b. The new instance will have the word "`-instance`" appended to the portfolio code.

Change your password or create test accounts.

Take an action on a portfolio.

c. Click the downward arrow button for the new instance and choose Rename.
d. Revise the code for the new portfolio to "`gen-ed-portfolio-joe-smith`" and the label to "`GEN ED Portfolio - Joe Smith`".

3. After instantiation, the portfolio must be shared with its different users.
    a. Using the same downward arrow button, choose Share with Users. Select the student role and choose one of your dummy accounts. Then click Share. The person's name will appear in the top shared section.
    b. Select the teacher role and select your other dummy account. Click Share. The person's name will appear in the top shared section.
4. Now you can log into these two user accounts and make sure that the portfolio is functioning correctly. With dummy users you should be able to test everything.