



# Effective e-Portfolios

## 2011 Training Guides

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## Introduction

Electronic Portfolios provide students with a rich and dynamic experience that allows them to document growth from the beginning to end of their program. Electronic Portfolios, or E-Portfolios, allow students to create and share individual work samples into one collection of material. Starting at the beginning of a student's use of LiveText, each member can create and store key work samples in their Documents area or File Manager.

Since the introduction of course-based activities in C1, programs have moved toward more course-embedded assessments. This has had an effect on how students and faculty perceive and experience LiveText. Individual faculty members can now create their own document templates for assignments. They can also accept a wide variety of files and artifacts created outside of LiveText documents as artifacts. These artifacts are often assessed by courses as part of a comprehensive assessment plan aligned to learning outcomes.

The intended goal for this session is to show how programs and institutions can provide students and faculty more “bang for the buck” by incorporating a portfolio into the program's current activities or enhancing the current portfolio.

## The Goals of the Portfolio

LiveText's web-based platform can be used to create Electronic Portfolios that serve a wide range of purposes. The desired outcome for the program when setting up a portfolio needs to be discussed by the program or unit with a clear goal identified. Electronic portfolios are designed for organizing, sharing, and presenting work done in the program; for reflecting on experiences, both in the program and during field/internship experiences; for sharing personal beliefs, goals and ongoing professional growth. In addition to the student's experience, colleges often use the portfolio for assessing program effectiveness. Whether for accreditation or for program improvement, the portfolio can also serve as an important source of data to drive program changes.

Many programs have developed Electronic Portfolios to fulfill their specific requirements. In this guide we will focus on three main types of Electronic Portfolios: Professional Portfolios, Program Portfolios and Reflective Portfolios. Professional portfolios are focused on a presentation of an individual's experiences in order to help gain employment or track professional activities and development. Program portfolios are a way for the program to collect critical assignments that are used to track the student's growth while in the program. Reflective portfolios are usually structured around program goals or outcomes and are focused on collecting activities and journals from the student in which they present and describe how they have worked toward and achieved these goals.

LiveText is designed to meet each of these needs for programs of all disciplines. The purpose of this guide is to demonstrate how to create portfolio templates from the



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administrator or faculty role. With a suite of user-friendly tools available to them, LiveText members can create a professional or personal portfolio that meets their respective needs, with the ability to apply a variety of styles that makes each portfolio unique. Through appropriate template design, training and submission practices, a single LiveText portfolio can meet each of the three goals individually or collectively—serving as a professional portfolio for the student, as an effective data collection tool for the program, and a rich and reflective activity for an individual student’s personal growth.

This guide will focus on the process from the student’s perspective but the same techniques can be applied for faculty portfolios, program reports or other collections of work for presentation.

### The Professional Portfolio

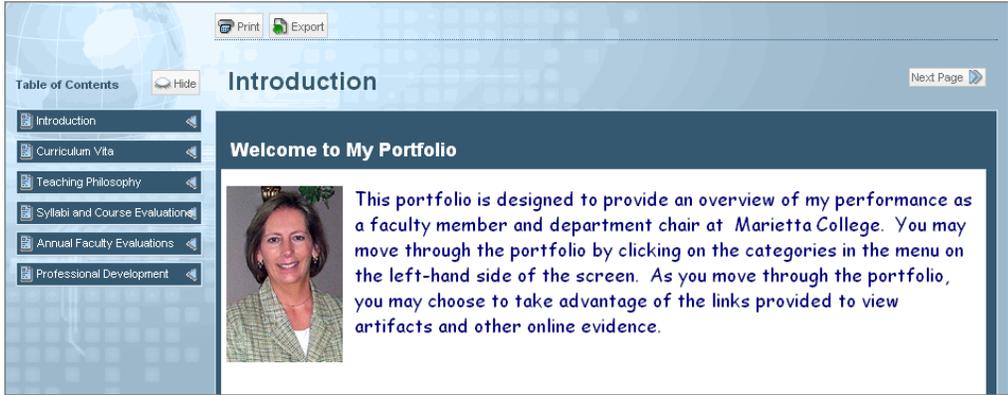
For the purposes of this guide, a “professional” portfolio is an electronic presentation of the individual’s abilities, skills, and experiences. The professional portfolio is shared with colleagues, potential employers or professional organizations. Commonly, the individual will include things like a resume, objective statement, a short biography and examples of work that are selected to appeal directly to the intended audience, as seen in Figure 1. For example, Business students applying for a market research position would select projects featuring data collection and analysis over advertising or budgeting projects.

Most often programs will develop a template for students to utilize when authoring a portfolio. The template for the portfolio can be built using pages and sections, with general guidelines for what should be included. Often, these portfolios will have a very loose structure and the portfolio experience will rely heavily on student creativity. Using LiveText for this type of portfolio would generally involve training students on how to add content; create their own pages and sections; customize the applied style; and best practices for what types of activities and artifacts to include. Faculty can also create professional portfolios like the one seen in Figure 2.

**Figure 1: Student Professional Portfolio**

The screenshot displays a professional portfolio interface. On the left is a 'Table of Contents' with a 'Hide' button and a list of sections: Introduction, Understanding, Practicing, Reflecting, Engagement, Diversity, Collaboration, Field Experiences, Credentials, and Concept Maps. The main content area is titled 'Introduction' and features a blue header. Below the header is a paragraph of text: 'Welcome to my educational e-portfolio. My name is Cindy Runion. I am married to my best friend and husband of twelve years, Matt. We have been blessed with two wonderful children, Tyler is 11 and Maddie is 8.' This is followed by another paragraph: 'I decided to pursue certification in early childhood and special education through Mercer University because of the rewarding teaching experiences I have had over the last 7 years. As a mother, I firmly believe that education starts in the home. I have supported my family's education since they entered preschool. I taught preschool for four years at Mount Calvary Baptist Church in Marietta, Georgia where my children attended and I worked mainly as a three and four year old lead teacher.' A third paragraph begins: 'More recently, I have been a School Health and Safe Sitter Instructor for the WellStar Hospital Foundation's Corporate and Community Health Department for a little over a year. Being a School Health Instructor has'. To the right of the text is a portrait photo of a woman with brown hair, smiling.

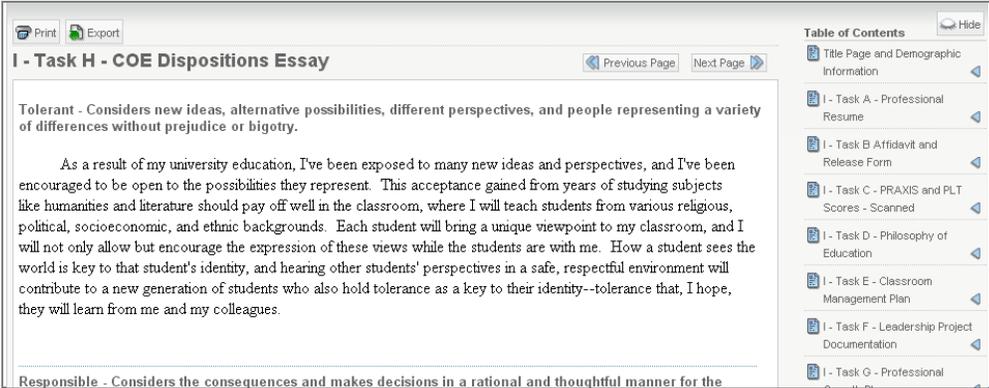
Figure 2: A Faculty Professional Portfolio



### The Program Portfolio

The “Program” Portfolio is a collection of key tasks, critical assignments or hallmark activities that are required by the institution for all students. The purpose of this portfolio is to collect all of the artifacts used to meet program goals or accreditation standards. The program will identify key activities to be assessed and then collect them all in one portfolio. These activities are mapped out for the student when they create the portfolio, and students will be responsible for putting the artifacts in the appropriate place in the portfolio as they complete the activity.

Figure 3: Student Program Portfolio



### The Reflective Portfolio

Similar to the program portfolio, the reflective portfolio is designed around meeting program goals or standards. The reflective portfolio differs in that students self-select artifacts and projects they feel best demonstrate their understanding of the standard or their attainment of the program goal. Often the student will also do a justification, summary, or reflection to explain why they feel the selected artifact meets the goal or standard. They often also explain how the project contributed to their personal growth.



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**Figure 4: Student Reflective Portfolio**

**Table of Contents** Hide

- Introduction
- Educational Philosophy
- 1. Assessment
- 2. Communication
- 3. Continuous Improvement
- 4. Critical-thinking
- 5. Diversity
- 6. Ethics
- 7. Human Development and Learning
- 8. Knowledge of Subject Matter
- 9. Learning Environments
- 10. Planning
- 11. Role of the Teacher
- 12. Technology

**Written Communication**

**Course:** EDF1005

**Professor:** Dr. Judy Lever Duffy

**Semester completed:** Fall 2009

**Attachments:**

[FEAP\\_2\\_written\\_Communication.doc](#) [Teacher\\_Interview.docx](#)

**Assignment Description:** Each student must interview a veteran classroom teacher, one who has been teaching for a minimum of five years. After completing the interview the student will write a two-page critical reflection/summary paper based on the answers the teacher gave to the questions asked during the interview.

**Reflection:** During the interview I learned various things about how to be effective in a classroom. One of the most important factors to think about is communication. Teachers must establish rules, which in this case were simple rules of respect, and everything must be accepted and understood. There is also a need for clarity of assignments and use of many strategies to teach a variety of students who have

### Structure of the Portfolio

The structure of each portfolio is shaped by the needs and requirements of each program and the purpose of the portfolio. When creating the portfolio template, Programs often mirror the design of their traditional paper process, with different sections containing instructions on what material is needed. When utilizing LiveText for an electronic portfolio, students can be provided much richer templates that guide the student much more clearly. The individual program determines the best way to achieve the portfolio goals and then structure a template accordingly.

### Organizing Artifacts in the Portfolio

In LiveText, institutions can design portfolio templates that guide students through the portfolio process. This can include a combination of required content, self selected artifacts, and reflective activities. Each of these areas are optional to the use of the portfolio system. What is needed by each program is a well-planned, clear layout with detailed directions.

#### Required content

The template for a portfolio should be viewed as a framework students will fill with their own work. Commonly, institutions will create pages that follow a standardized table of contents, and provide empty text and image sections for any required content. However, sometimes the template is intended only to give students a starting point for customizing the portfolio format on their own if the student will be required to pull in an artifact from a course as an assignment.

**Self-Selected Artifacts**

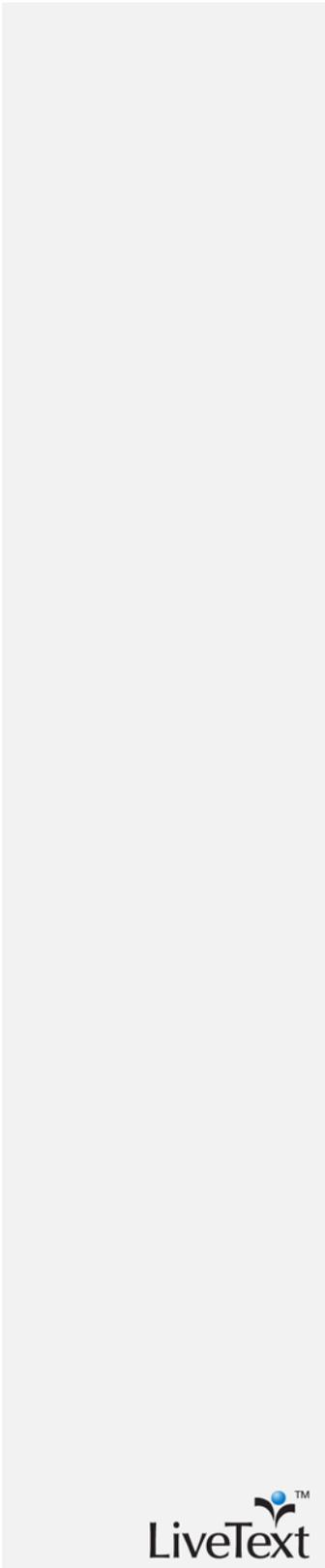
Guidelines or expectations should be spelled out for portfolios featuring self-selected artifacts. As the portfolio takes shape, the instructions are generally removed and replaced with the artifact. The guidelines will help the student select an appropriate artifact and function as a placeholder for the artifact, but no other requirement is spelled out.

**Reflections**

Similar to the section above, students will select artifacts they feel best demonstrate their achievement or understanding of the program’s goals. Programs may also want to include instructions or guidelines to students to write a rich, effective reflection on the activity. This can help the student in several ways. First, it helps them make better artifact selections by guiding them and having them carefully consider the artifacts before bringing them into the portfolio. It will also help by asking thought-provoking questions for them to articulate this in the portfolio reflection. Lastly, it can help them describe the activity itself to an audience who may not be familiar with the project or its significance to the student’s growth in the program.

**Effectively Using All Three in the Same Portfolio**

Programs can also design portfolio templates for students that can include a combination of required content, self selected artifacts, and reflective activities. All that would be required of a program is planning the layout and providing guidance.



## EFFECTIVE e-PORTFOLIOS

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### Creating a Portfolio Template

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A portfolio template has three different functions that assist the user in entering information into the document: Communicating requirements; providing structure; and providing LiveText Assistance. The portfolio template will communicate requirements to users through directions throughout the portfolio. From beginning to end, the user has prompts and instructions on how the portfolio will be populated with required artifacts and what the end-product should look like. Since users may be obtaining the portfolio template at different points throughout the program, it is extremely helpful to provide thorough instructions and prompts so that any one user can complete the requested artifacts at any point in time.

The portfolio template will communicate requirements to users that may include a page with an introduction and/or a page with a table of contents that contain the following information: An explanation of the required artifacts and what courses they're collected in; the requirements of the portfolio at designated checkpoints or benchmarks; an explanation of the requirements for each artifact; or even the assessment rubric that will be used on the completed portfolio.

Templates standardize the layout of what the students are turning in and make it easier for faculty to navigate the group of submissions because they are consistent. The student is given pages and sections to fill in rather than having to create the document from scratch.

### Creating a Document Template

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Creating a template in LiveText starts with the basic document creation. Administrators and faculty developing the templates decide what the intended use and purpose of the template will be by choosing a document and layout. The overall document structure and creation process is the same whether the document is a template for portfolio use, individual assignments, coursework, or even assessments. Documents are made up of one or more pages, which appear in the table of contents. These pages are made up of one or more sections, which can be expanded in the table of contents. Each section of a document is designed to develop content for that document. How students and faculty use these section varies based on the purpose and requirements. Whether typing information out, uploading file attachments, adding pictures or videos, each user controls the information and unique style that takes shape in their document. Assessment Documents, portfolios, and templates share the same structure; therefore, the knowledge of editing documents is the basis for creating most materials used by students and faculty.

## Pages in a Document Template

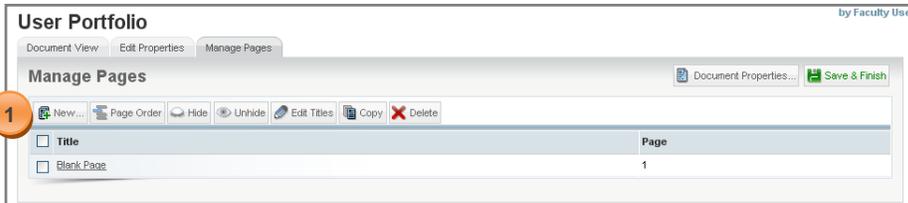
Pages in LiveText are used to group together multiple sections of content that will be loaded on the screen at one time. The contents of a page that extend beyond the user's screen can be made visible by scrolling down. All pages of a document are listed at the highest hierarchical level in the Table of Contents. Every document must have at least one page, but there is no system limit on the number of pages a document may contain.

In a template, pages are generally used to outline the main areas of the activity that the student will need to complete. Pages of a template will often be named for outcomes, objectives or a list of required components of the document that the student will complete.

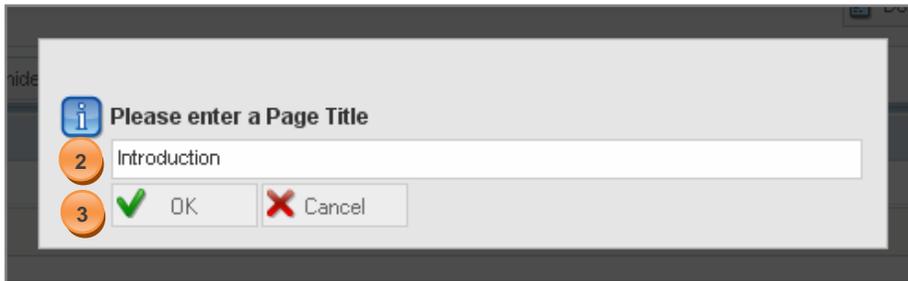
## Creating a New Page

From within a document, click the Manage Pages tab. The Manage Pages tab is the third tab from the left within the document.

1. Click the **New** button.



2. Enter a Page Title.
3. Click the **OK** button.



4. The page will be displayed in the Manage Pages screen.
5. Click the Save & Finish button in the top right corner of the screen to view the document.



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### Managing Pages

After pages have been created it is possible to make changes to the pages and the layout of the document without losing the content. The functions on the “Manage Pages” tab include:

1. **Page Order**—Re-order pages quickly without retyping content.
2. **Hide** —The page will exist in the new document after a template is used, but the page will not be visible except on the “Manage Pages” screen. All contents of the page are retained.
3. **Unhide**—Reveal hidden pages.
4. **Edit Titles**—Quickly change all selected pages at once without needing to edit each separately.
5. **Copy**—“Clone” all contents on a page to reduce the need to retype.
6. **Delete**—Permanently remove a page and all its contents. This is not reversible.

Note: Hiding Pages is an easy way for students to repurpose their portfolio for different viewers. Students can quickly hide specific pages and share a visitor pass with potential employers, instructors, or peers, with only the specific content that is related to that designated recipient. When pages are hidden, all material is retained by the author but it is not visible to the outside viewer.

### Sections in a Document Template

The sections on a page are one or more areas that allow the author to house specific content. A page may contain multiple sections and can even have multiple types of sections on a single page:

**Text and Image**—This is the most commonly used section type. This provides a text area for students to enter content. It also provides a place to put instructions or guidelines in the template. Each “Text and Image” section allows users to attach up to 10 files.

**Standards**—Templates can have standards sections included to display standards from the LiveText database without retyping or copying them in from other sources. Students can also be prompted to align their document to standards by including a blank section for their own standards.

**Resources**—This section type allows the author to include other resources such as Learn360 content.

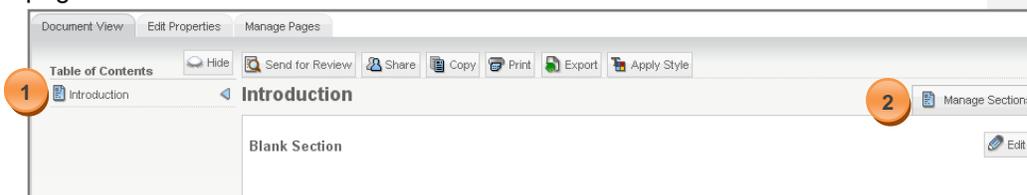
**Rubrics**—Templates can provide areas for students to create their own rubrics using the same editor the programs use to build assessment documents. While they cannot

be used to collect data, faculty can review the artifact which includes a rubric, make comments and score the student's performance using assessment documents.

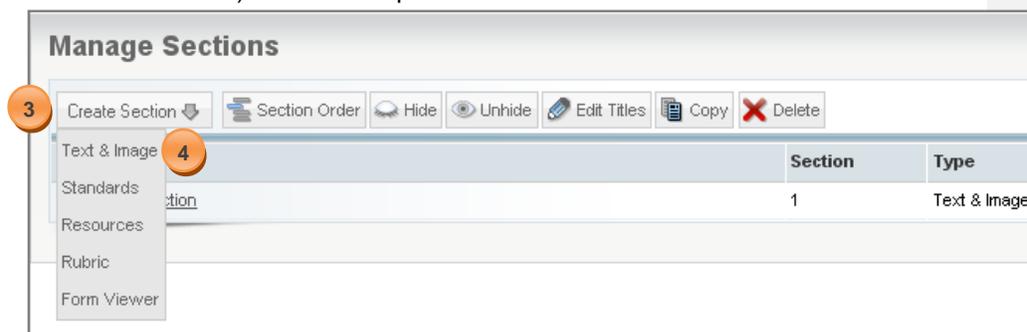
Form Viewer–Responders to a form can link in those responses in a document.

## Creating a New Section

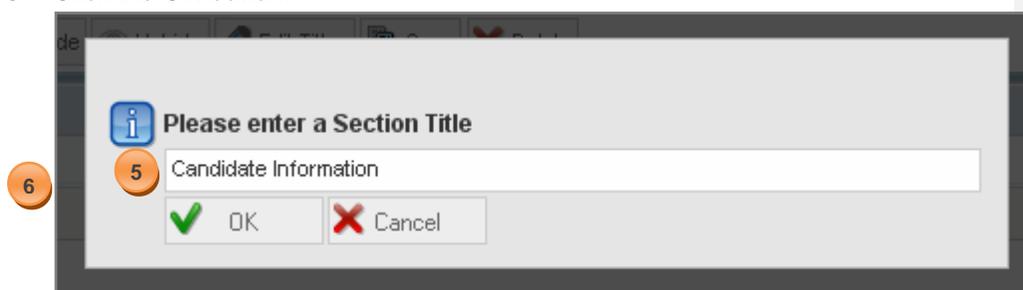
1. From within a document, click the page title in the Table of Contents to be edited.
2. Click the **Manage Sections** button located in the top right corner of each page within the document.



3. Click the **Create Section** button on the left side of the screen.
4. Select the section type (e.g. **Text & Image**, **Standards**, **Resources**, **Rubric**, and **Form Viewer**) from the dropdown menu.



5. Enter a Section Title.
6. Click the **OK** button.



7. The section will be displayed in the Manage Sections screen.

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8. Click the **Save & Finish** button located in the top right corner of the screen to view the document.

### Things to Consider When Building Templates

When the template is used by the student or faculty member to create their own document, the template is copied into the student or faculty member's individual account. All of the pages, sections, text, standards and styles from the template will be duplicated exactly in the user's account. The resulting document is not connected to the source template in any way, however. The owner of this new document is free to change whatever they like in their personal document. A common misconception is that by changing the template, administrators will affect documents made from an earlier version of the template. This is not the case.

Training both students and faculty on some of these basic skills will also provide them with the knowledge to customize or create their own materials. Students using a portfolio during their job search can create multiple portfolios that can be customized for each potential employer. Adding pages, sections or hiding certain portfolio components is a great way to customize their product. The same is true for Faculty portfolios.

## Domain Templates

Domain Templates are available to all users in the domain and are not restricted to a particular role or course. A best practice for Portfolio templates is to build them as domain templates so students and faculty can create a portfolio at any time.

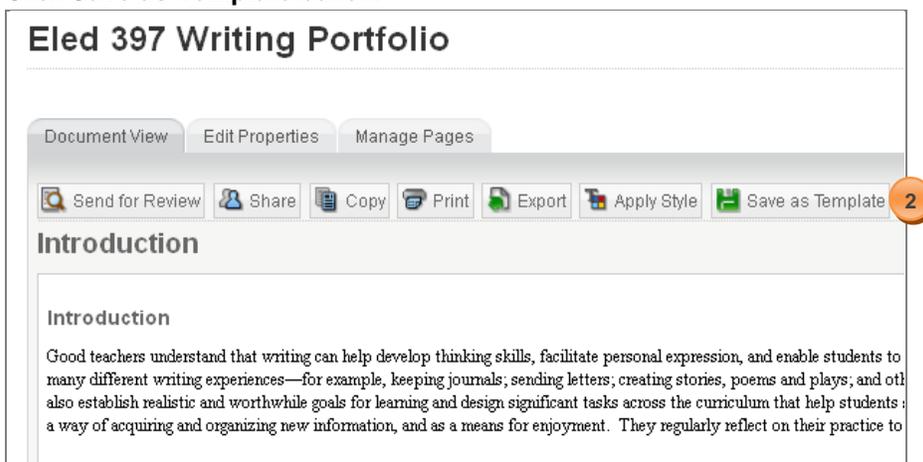
Commonly, this list is reserved for templates that are used for an entire department, program, or college.

**Best Practice:** Enable an administration account with domain template manager permission, as opposed to using individual accounts for the same purpose, so that templates can be edited and managed from a single account.

### Converting a Document to a Domain Template

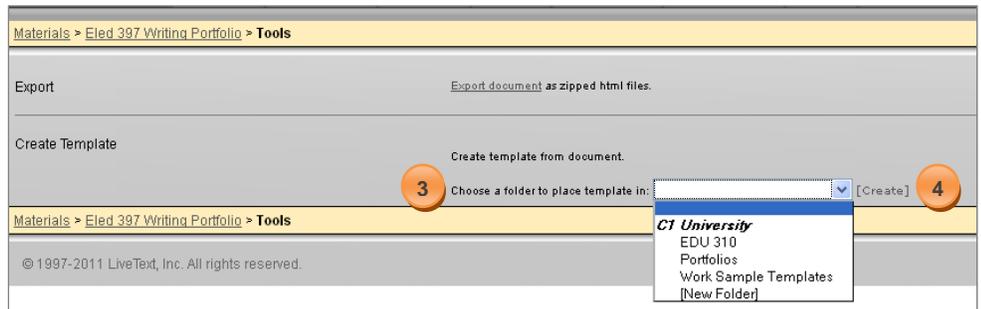
Users can access and copy these templates from the Template dropdown when creating a new document. Only faculty or administrators with template administrative rights can convert LiveText documents into domain templates. While every account can create a document, not every account can create domain templates. In order to convert a document into a domain template, faculty members must be enabled for this feature with a written request from their LiveText coordinator to LiveText Implementation or Technical Support. To create a domain template:

1. From the **Documents** tab, click the title of the document to convert to a Domain template.
2. Click **Save as Template** button.



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- Under the Create Template section, choose the appropriate folder for the template or select **New Folder**.



- Click **Create**.

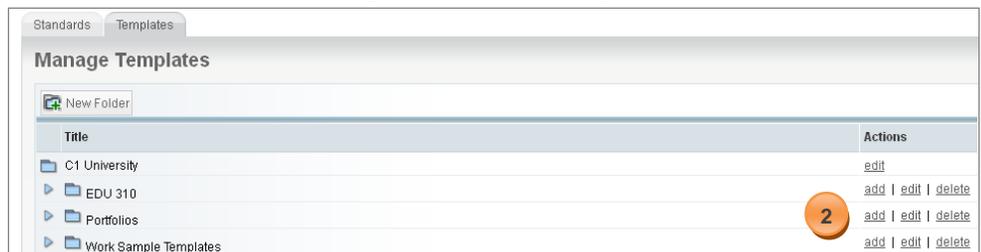
The new template will appear both in the list of documents in the Documents area and in the list of templates in the Templates area. The domain template can be identified by looking for the  icon. This is the “live” template that is available to all users in the domain.

Modifying this document will change the “live” template available but will not have any effect on documents that have already been created. Once a template is used, the resulting document is completely separated from the template.

### Managing Domain Templates and Folders

Domain Template Managers can customize the folders that templates appear in. This can be useful when organizing templates for easy access by students or faculty. These folders can be by program, document type, course or any other category the administrator may wish to use. These folders are visible to all members registered in the domain.

- Click **Templates** under the **Admin** tab to access all templates in the institution’s domain.
- Click **Add** for the corresponding folder that the template will reside in.



- The Template Chooser, a list of LiveText documents to choose from, will appear.

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4. Select the checkbox next to the template to be added to the folder.

Template Chooser ( showing 1-235 of 235 )

Add 5 Search

<input type="checkbox"/>	Title
<input type="checkbox"/>	081BSC 307 Clinical Portfolio
<input type="checkbox"/>	081BSC 307 Clinical Portfolio
<input type="checkbox"/>	20084 His-SS Teacher Education Portfolio
<input type="checkbox"/>	20084 ISU Teacher Education Portfolio
<input type="checkbox"/>	20084 LLC Teacher Education Portfolio
<input type="checkbox"/>	20084 Mathematics Teacher Education Portfolio
<input type="checkbox"/>	20084 Middle Level Teacher Education Portfolio

5. Click **Add**.

Administrators can customize the folders to address specific needs. In some domains, the folders have been created to match the different document types. This is not required, however, so folders can be renamed or removed if appropriate. Common uses include folders for each: Note: If the folder is removed the link to template is removed as well, however the template still remains in the author's account.

- Role (Student, Faculty, etc)
- Course
- Program/Department
- Activity Type (Portfolio, Lesson Plan, Assignment, etc)

Folders have a single level, so administrators cannot create folders within folders. A template can be added to multiple folders for easy access if associated with multiple groups.

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### Assignment Templates

Assignment Templates are based on documents that have been created in faculty or administrator accounts. The difference between Assignment templates and Domain templates is based on the process for distributing the templates. Assignment Templates are distributed through courses and are only accessible by the participants in that course. The use of Assignment Templates helps administrators and faculty provide the correct document to students. When the term is over, access to the Assignment Template is disabled. This is useful if the portfolio is introduced in a specific course or if a Portfolio course is loaded and the first portfolio submission is tracked and assessed.

Administrators can also choose to provide additional access to Portfolio Templates through the use of the Domain Template Manager. After students start working on their Portfolio it is saved to the Documents tab in their My Work area. The use of Assignment Templates helps administrators and faculty provide the correct document to students.

### Setting up Assignment Template

1. Click on the **Course Name** or **Course Code**
2. Click on the **Assignments** tab.
3. Click on **New**.

The screenshot shows the course interface for EDU 531 - 4. The 'Assignments' tab is selected. Below the navigation tabs, there is a section titled 'Course Assignments Overview'. A red circle with the number 3 highlights the 'New...' button in the toolbar.

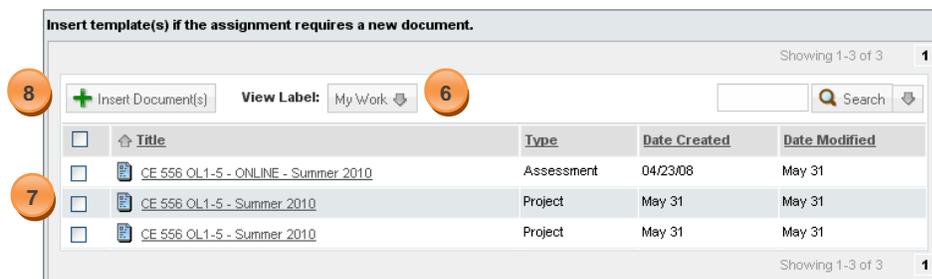
Assignment	Date Assigned	Due Date	Status	Progress

4. After filling in the assignment information scroll down to the Assignment Templates Area
5. Click on the **Browse...** button.

The screenshot shows the 'Assignment Templates' section. A red circle with the number 5 highlights the 'Browse...' button. The text above the button reads: 'Insert template(s) if the assignment requires a new document.'

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- Select a Label (e.g. My Work, Inbox, or a custom label) where the document is listed.



- Select the checkbox located to the left of each document to be added.
- Click the **Insert Document(s)** button.
- Click the **Save Assignment** button to confirm.

On the Assignment Details page, the name of the Template Document will be listed with the version number. Administrators have the ability to copy assignments to other courses and sections. Each faculty member has the ability to copy this assignment to any course or section they instruct. Copying this assignment to other sections will maintain the reference to the same version of the document. Administrators and Faculty members have the ability to copy assignments from previous terms to current terms. This process allows courses to use that same assignment and templates from course to course.

Note: Documents that have been used as Assignment Template will not be indicated with the "T" icon in the documents area. Additionally, modifying the source document does not affect the assignments in which the template has already been added.

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### Building a Portfolio

Now that the portfolio template has been distributed and the student has access to it to create their own portfolio, here are some tips for training and facilitating portfolio development.

### Creating a Portfolio

**Note:** Users should keep in mind that each time a template is used; a new portfolio document is created. Since users often want to keep portfolios fairly consistent, it is recommended to create one portfolio from the template, and copy it when appropriate rather than starting from scratch. Users should be instructed to use the “New Document” function or the “Use This Template” button only once to avoid confusion about which portfolio document contains their content.

### Introduction / Welcome Pages

This content is often authored directly into the document. This is a great introduction to editing and managing the portfolio for new users as it is a relatively easy task, it can be used early on to get new users trained, and can provide valuable information later on when comparing an early autobiography, philosophy of education, personal goals or other reflection to a similar activity later in the program. This is a great way for students to self-reflect on their own personal growth as a result of their experiences in the program and helps them see value in the development of an e-portfolio.

### Adding Artifacts

Adding artifacts to the portfolio will rest on several possibilities of entry: the artifact is a required element of the portfolio, or the artifact was a student-selected artifact that was not part of the portfolio, the artifact is a non-LiveText file type, or the artifact could be a form that was taken in LiveText. With the artifact being a required element, it can be directly entered into the portfolio and submitted for an assignment or specific task. With the artifact being student-selected, the artifact may have been completed through another course-based assignment that is not already contained within the portfolio. With that, the student will have to enter the artifact into the portfolio as a LiveText link. With the artifact being a non-LiveText file type, it will have to be uploaded from the File Manager as an attachment in the portfolio. With the possibility of the artifact being a form, a Form Section will have to be created within the portfolio to include these answers. Below are some ways that artifacts can be added to the portfolio.

### Authoring in the Portfolio

The **Text and Image Section** can be used to customize the document for graphic and aesthetic reasons. The **Text Editor** allows the user to edit text much like Microsoft Word, in that users can edit the font, change the font color, change the font size, or even change the text positioning. With these tools, users can embellish the artifacts within their portfolios to create an eye-catching submission.

Images can help deliver a message about the artifact at hand. There are many reasons images can be used in the portfolio, but for a student portfolio, imagery can be used to inform the viewer or it can be used to enhance an artifact.

## File Attachments

The File Manager is a repository for any and all non-LiveText documents. Users can upload Word documents, JPEGs, PDFs, PowerPoint files, or even movie files into the File Manager. With this added tool, users have more possibilities to customize their portfolio with imagery, movies, or PDFs. When files are uploaded to the File Manager, they can be attached into a section of a page within a LiveText document.

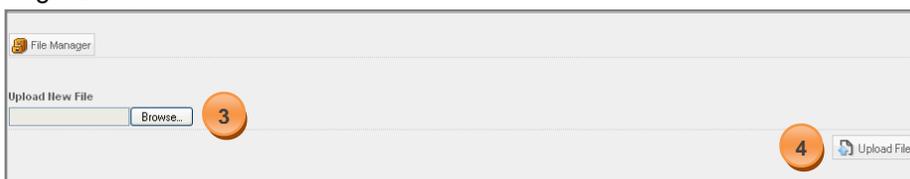
1. While editing a **Text and Image** Section, click on the **Insert Image** tab or the **File Attachment** tab.



2. To upload a new file to the **File Manager**, click **Upload New File...**



3. Browse for the file on your computer.
4. When the file is located, click **Upload File**. The file will be attached to the Page Section.



Click **Save & Finish**.



## EFFECTIVE e-PORTFOLIOS

### Copying Text from Other Sources

Copying text from other sources can be performed within the Section Editor of a document but pasting formatted text will not translate correctly into LiveText. It is recommended to use the **Paste as Word text** tool in LiveText, so that any formatting attached to the copied text will be removed.

1. Copy text from an outside source by using either Ctrl C or by selecting the text, right-clicking the mouse and choosing Copy.
2. Inside the Section Editor of a document, click on the “**Paste as Word**” to 
3. A “**Paste as Word**” text box will appear.
4. Paste the copied text into the text box by using either Ctrl V or by right-clicking the mouse and choosing Paste.
5. Click **OK**.
6. The text will appear in the Section Editor with formatting.
7. Use the Section Editor tools to do any additional formatting of document in LiveText.

### Inserting other LiveText Documents

Since the artifact is student-selected, it may have been completed through another course-based assignment that is not already contained within the portfolio. In that case, the student will have to enter the artifact into the portfolio as a LiveText link.

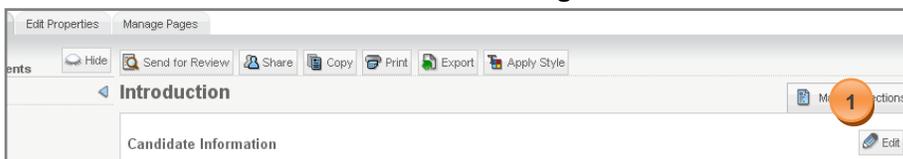
A LiveText Link may be inserted into a section of one LiveText document that leads to another LiveText document. Disable any activated pop-up blocking software before inserting a LiveText Link to allow the Insert LiveText Link pop-up window to open.

1. While editing a **Text & Image** section, click the **Insert LiveText Link**  icon.
2. Choose the label associated with the LiveText document from the **Materials** dropdown menu in the **Insert LiveText Link** pop-up window.
3. Check the checkbox that corresponds with the LiveText document.
4. Click the **Insert** button.
5. The link will appear as the document title in the Section Editor.

## Create a Form Viewer Section

The **Form Viewer** section displays your responses to a selected LiveText form and is only applicable if you have taken a LiveText form. The **Form Viewer** section allows for a form and its answers to be included in a LiveText document that can be shared with others for viewing and evaluation purposes.

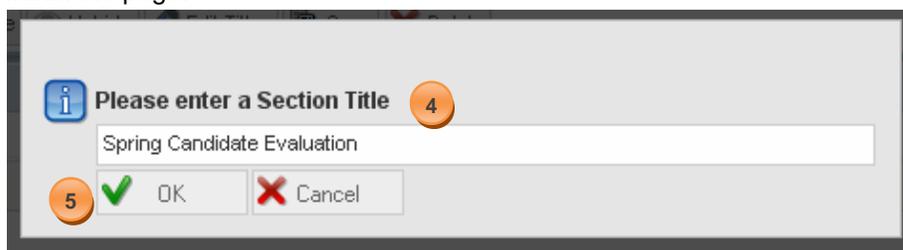
1. From within the Document View, click on **Manage Sections**.



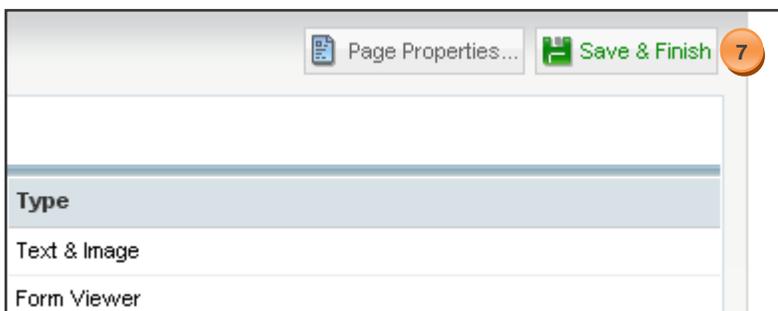
2. Choose **Create Section**.
3. Choose **Form Viewer**.



4. Enter a title for the **Form Viewer** section.
5. Click **OK**.
6. The Form Viewer Title will appear in the list of the sections created within the page.



7. Click **Save & Finish**.



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8. The Document View will open. Click **Edit** in the **Form Viewer** section created.
9. Choose the name of the form from the dropdown menu.
10. Click **Save**.

11. Answers from the selected form, along with the questions will populate within the **Form Viewer** Section.

### Customizing the Portfolio

Customizing each portfolio can start with the template that is provided by the administrator or faculty member. Additional document styles can be requested by LiveText Coordinator for each institution. Multiple styles can exist for programs within the same domain and are viewable by other programs. These style sets can include institutional logos, color, and images. Once the custom style has been completed, the author of the original template can apply the new style to the portfolio template. This provides a new and unique viewpoint for the users or viewer of the portfolio.

Users will need to keep in mind the audience for their portfolio and should customize it accordingly. Some of the styles available may not be appropriate for a job interview, but may be appropriate for a lesson plan used in a classroom setting. Much like choosing the background theme for a PowerPoint presentation, the background helps set the tone for the audience and set the mood for the experience. Users may have different audiences for whom to customize a portfolio, thus the need for variations of a portfolio. With that in mind, users can make multiple copies of a portfolio and utilize different styles for each portfolio to customize for the intended audience.

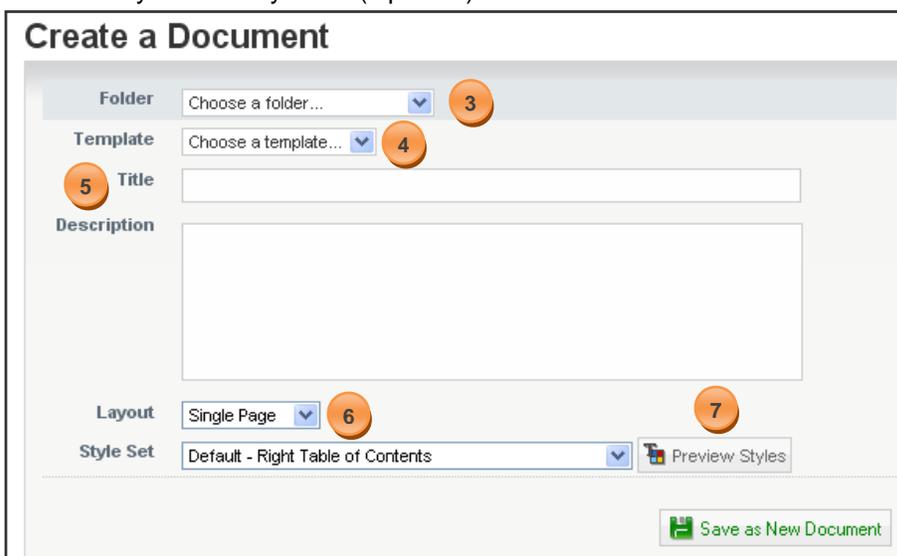
Having customizable documents encourages users to take ownership and pride in the work they produce, and it allows users to highlight their abilities and experiences to potential employers. Users may take advantage of the various Styles that are available for the document header and background to customize the look of the document pages, or users may even enhance the portfolio by uploading imagery and video.

### Document Styles

A feature of LiveText allows students to select from a library of styles to customize the colors, backgrounds and layout of their portfolio. Users will need to keep in mind the audience for their portfolio and should customize it accordingly. Sometimes, the user will have different audiences, and portfolios can be customized for each recipient. With that in mind, users can make multiple copies of a portfolio and utilize different styles for each portfolio to customize for the intended audience.

To select a style when creating a portfolio:

1. Click the **Documents** tab located in the top center of the screen.
2. From within the **My Work** tab, click the **New** button.
3. On the Create a Document Page choose a folder from the dropdown menu.
4. Choose a document template.
5. Enter a Title and a Description (Optional).
6. Select a Layout and Style Set (Optional).



The screenshot shows the 'Create a Document' interface. It features several input fields and dropdown menus, each marked with a numbered orange circle:

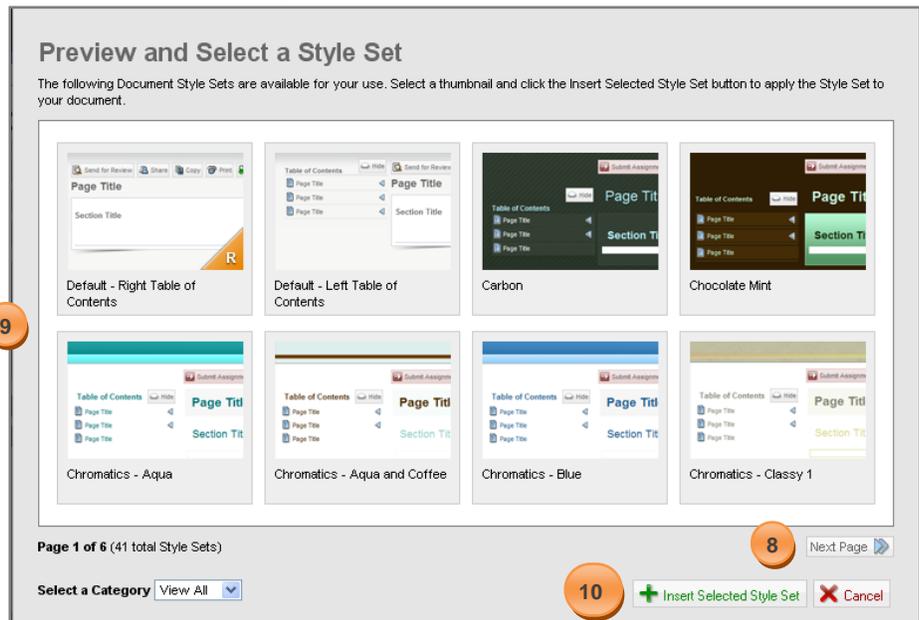
- 3**: A dropdown menu for 'Folder' with the text 'Choose a folder...'.
- 4**: A dropdown menu for 'Template' with the text 'Choose a template...'.
- 5**: A text input field for 'Title'.
- 6**: A dropdown menu for 'Layout' with the text 'Single Page'.
- 7**: A dropdown menu for 'Style Set' with the text 'Default - Right Table of Contents'.

Below the 'Style Set' dropdown is a 'Preview Styles' button. At the bottom right of the form is a 'Save as New Document' button.

7. Click **Preview Styles**.

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8. Page through the Style previews by clicking on Next Page.
9. Click on the desired Style preview.
10. Click Insert Selected Style Set.



11. Click the **Save as New Document** button located on the lower right side, below the Template Outline.

Users can also change the style while working within the document. This new feature allows the user to toggle between the various styles available without having to create a new document.

1. From within the document view, click **Apply Style**.



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2. Page through the Style previews by clicking on **Next Page**.
3. Click on the desired Style preview.
4. Click **Insert Selected Style Set**.

**Preview and Select a Style Set**

The following Document Style Sets are available for your use. Select a thumbnail and click the Insert Selected Style Set button to apply the Style Set to your document.

Page 1 of 6 (41 total Style Sets)

Select a Category

**4**

The document will now display the selected Style.

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### Copying a Portfolio

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One key advantage of keeping an electronic portfolio in LiveText is how easily users can make modifications. Another advantage is the ability to quickly make copies of portfolios. Making copies is useful when tailoring a portfolio for a specific audience. For example, a student will create a portfolio and add activities over time in the program, then take that portfolio to interviews, post it with resumes, or share it with potential employers. In the same way a job applicant would customize the resume and cover letter for a job, students can customize a portfolio to highlight their abilities as they relate to a specific position. To copy a portfolio:

1. Open the portfolio in the Documents area by clicking on its title.
2. Click the **“Copy”** button.
3. Enter an appropriate title for the new copy and click **OK**.
4. The screen will populate with the copied document.

The user will now be editing a new, separate document and can make modifications that will not affect the original document. Students and faculty members can create as many copies as they need. It is also recommended to make a separate Visitor Pass for each potential viewer so their visits can be tracked individually. This will be discussed in a later section, Sharing the Portfolio.

Students and faculty can share portfolios with other LiveText members as well as with outside evaluators, colleagues, or potential employers. Depending on how the program assesses these portfolios, there may be scoring with a rubric or a form that is completed with feedback and evaluation results submitted by the viewer of the portfolio. The following sections will describe common ways of sharing portfolios.

### Submitting and Assessing the Portfolio

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LiveText provides various methods for delivering portfolios to assessors or reviewers. Programs can make use of the C1 Assignment-based interface, Reviews, or even the editing capabilities for evaluating student portfolios. The improved structure and tracking of assignments possible in LiveText C1 allows individual instructors to assess artifacts submitted without requiring the student to submit an entire portfolio each time. This reduces the amount of time each instructor spends reviewing assignments for an individual assignment; however, this can reduce the amount of time students spend working on the portfolio during the actual course-. A good practice is to have the student attach the final, graded assignment into the portfolio and have periodic checks to ensure the portfolio is being developed over time and is progressing. Some institutions will set up a course assignment where the student submits the entire portfolio to a course instructor who is responsible for checking progress. Other institutions will have this responsibility fall on advisors or other identified faculty or staff by utilizing the “Send for Review” function for these checks.

Periodic portfolio checks can be either course activities built as assignments in C1 courses or stand-alone portfolio checks by someone with a LiveText account other than a course instructor using the Reviews area. Another option is to use visitor passes and evaluation forms launched to field supervisors or other evaluators who do not have LiveText accounts.

### Submit to a Course

For this method, the program will identify a course or series of courses where the instructor will do a portfolio review as a course activity. Students are responsible for completing the required portions of the portfolio and submitting it as a course activity. To do this, create a course assignment with any applicable rubrics and have the student submit the entire portfolio as they would for any other assignment. A rubric can be provided for scoring the portfolio, or a checklist can be used to inventory artifacts.

A good practice is to use a holistic portfolio rubric at several points. These points are often referred to as milestones, benchmarks or gates. The data collected using this rubric can be used to chart growth for an individual student but it can also be aggregated and used to show how the portfolio can demonstrate student growth over time. On the reporting page, the Course, Assignment title or Term can be used as a filter to distinguish between pre-assessments and the final portfolio review.

### Submitting for Review

Since some portfolio checks are done by an advisor, supervisor or other evaluator, that person may not have a particular student in a course at the appropriate assessment point. For this, the student should be instructed to submit the portfolio for review. This can be done at any time and is not anchored to a particular course or term. This gives flexibility to the program to allow for courses that are not taken in sequence. To best achieve this, the rubric can also be used, but rather than distinguishing assessment points by course or term, milestones should be built into the rubric so the evaluator can identify the appropriate assessment point during scoring and the report can accurately disaggregate assessment data based on these points.

It is important to check that the portfolio is in progress along the way to identify students who may be struggling with meeting requirements and offer assistance or counseling when appropriate. It can also show summative data on the process for accreditation. Most importantly for some programs, it prevents the student from throwing together a portfolio at the end and not understanding the developmental nature of the portfolio.



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### Visitor Passes

Visitor passes are the most efficient and powerful way to share a portfolio with outside evaluators. The benefits of a visitor pass include limiting or controlling access, tracking visits, and flexibility to maintain several passes with different content. The Visitor Passes can be created from a student account, a faculty account, and even an administrator account.

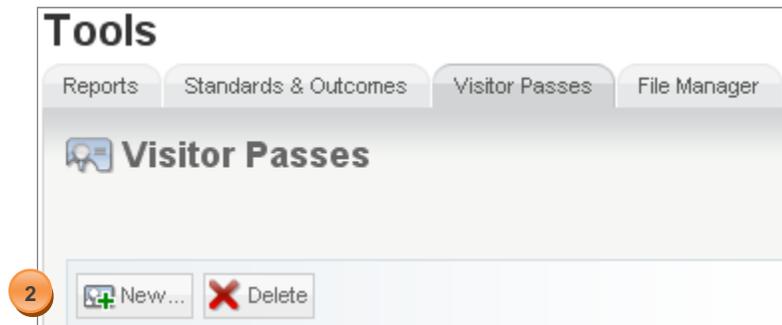
#### Creating a Visitor Pass

1. From the Student or Faculty Dashboard, click on the **Visitor Passes** link on the right under **Quick Links**.

In an administrative account, since a Dashboard does not exist, the Visitors Pass link can be accessed while in the Courses tab.



2. Click the **New** button.



3. Give the Visitor Pass a unique title and a description.
4. Click the **Save** button.

 A screenshot of the 'Create a Visitor Pass' form. The form has two main input areas: 'Title' and 'Description'. The 'Title' field contains the text 'Portfolio Pass for Joe Nagel' and has a small note 'Must be at least 3 characters.' to its right. The 'Description' field is a large text area containing a single vertical bar '|'. At the bottom right of the form, there are two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon). An orange circle with the number '3' is positioned to the left of the 'Title' field, and another orange circle with the number '4' is positioned to the left of the 'Save' button.

- The Visitor's Pass will be listed with a code consisting of letters and numbers.

<input type="checkbox"/>	Title	Description	Visitor's Pass	Documents	Actions
<input type="checkbox"/>	Outside Discuss...	5	0D7C1EB4	2	<a href="#">Edit</a> <a href="#">Documents</a> <a href="#">Visits</a>
<input type="checkbox"/>	Portfolio Pass ...		4E42801C	0	<a href="#">Edit</a> <a href="#">Documents</a> <a href="#">Visits</a>

## Sharing Documents with a Visitor Pass

Visitor Passes are empty by default when each one is created. Once the visitor pass has been created the next step is share documents with the visitor pass. Without this step of linking the portfolio to the visitor pass there will not be any materials displayed when visitors log in to the visitor pass.

The portfolio now needs to be added as a document in the visitor pass. Do the following:

- From within the document, click the **Share** button. The Share button is located above the page title on the center left side.
- Enter the visitor pass title (not the code), in the Search Viewer text box.

Share Copy Print Export Apply Style Save as Template

**Search for Users/Groups/Visitors.**

Type in individual names or usernames, such as "John Doe" or "janesmith".

Look in:  My Institutions  All Users

**Search Viewer** portfolio pass

**Search Editor**

**Portfolio Pass for Joe Nagel**  
(visitor)

Advanced Sharing Options...

- Based on the first few letters of text entered, LiveText's Auto Complete Share Mechanism predicts the name of the Visitor Pass with whom the user wants to share. The system will display the first 15 matches below the search text box. If the user is not listed, the system was not able to identify the user. There were either no matches or several matches. Revise your entry, and try again.
- Click the **Visitor Pass title** from the list that appears.

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- Click **Add to Share** button when you find the user with whom you want to share.

- Give the Visitor Pass code to the visitor and direct them to [www.livetext.com](http://www.livetext.com) and the Visitor's Area on the main page. Here they will enter the code and click "Visitor Login" to view the portfolio or other shared documents.

### Managing Visitor Passes

Many students will opt to create visitor passes for each individual viewer when sharing their portfolio. On the visitor pass list, students can view settings (e.g. visitor pass name and description). They can also view which documents are shared with the visitor pass and access them quickly for editing or updating. Using the "Visits" area, students can track how many times their document has been accessed by visitors. This is one reason why creating a pass for each visitor is helpful. The student can get an idea of who is interested and how often her portfolio has been accessed.

### Logging into a Visitor Pass

From the LiveText home page at [www.livetext.com](http://www.livetext.com), go to the Visitor Pass Login area at the top of the webpage. The visitor pass code can be entered and will give access only to the documents shared within the pass. Visitors only see prepared and limited materials determined by the student. Visitor passes do not grant visitors any editing capabilities or student or faculty views.

## Exporting Documents

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Documents such as portfolios can be completely exported from LiveText. The exported file is in Zip format and includes all files for the portfolio including the HTML document itself, all referenced pages and any file attachments. Often, this exported file is extracted and the contents are placed on a CD, DVD, thumb drive or hosted elsewhere on the web. This is a good way for all users to download their portfolios and other LiveText documents for distributing to visitors without internet access or store if they are no longer planning to use LiveText. Some students have found creative ways to distribute portfolios, such as “Business Card” type CDs that contain roughly 180MB of space and can be printed with their own contact information printed on them. Some opt for the high capacity of DVDs or thumb drives for portfolios with large amounts of media content.

These devices or media can be set up to “auto-run” and open when the viewer uses it. This makes it extremely easy to use and highlights the strong technology skills of the student. It also addresses any possible Internet connectivity issues that the user may experience by making the portfolio available on a removable media.

## Public Documents

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LiveText users have the ability to turn their portfolio or any other document in their MyWork area into a public document. This feature allows users to make their document accessible without the need to login to account to view or the need of a visitor pass. Public documents can be accessed by typing in the URL of the document in the address bar of the web browser. There is no visitor tracking and no restrictions on access. Public documents can be easily linked from other sites, however, so this method is preferred for very general portfolio documents. Public documents will not be included in the results on search engines such as Google or Yahoo, See the LiveText Help section for more information on public documents or contact your Implementation Coordinator.



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### Summary

Electronic Portfolios have become a very dynamic and informative tool used by faculty and students across various Programs. Effective portfolios can be the cornerstone of a program's data collection, of the student's reflective experience on their own learning, and are a tremendous way to demonstrate the student's potential impact on the community. Setting clear goals for your program's portfolios, designing useful templates, developing a simple yet robust assessment process, and developing effective communication can help programs establish a multi-faceted portfolio with value to all involved. LiveText's E-Portfolio and Assessment Management Platform have been combined to offer Institutions the ability to collect assessment data while offering students and faculty the ability to create E-Portfolios for Professional and Reflective purposes.