ePortfolio Support Guide

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v10.3
September 2014
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Reminder: Mozilla Firefox is the preferred browser when working within D2L.
ePORTFOLIO

ePortfolio is a personal portfolio tool for storing, organizing, reflecting on, and sharing items that represent your learning. You can include items such as documents, graphics, audio files, videos, presentations, and course work to demonstrate your improvement or mastery in certain areas.

You can control what items you want to include in your portfolio, how they are organized, and who you want to share them with. When you share items with your peers, mentors, or potential employers, you can give them permission to view items, edit items, see or add comments, and see or add assessments to receive feedback.

ACCESSING ePORTFOLIO

From the My Home page, select ePortfolio from the Resources dropdown menu.

UNDERSTANDING ePORTFOLIO TERMINOLOGY

Artifacts: Artifacts are the building blocks of everything that you can do in ePortfolio. They include items such as files, documents, audio/visual items, reflections or web links for inclusion in your ePortfolio.

Reflections: Use reflections to discuss items in your ePortfolio, record your thoughts on topics that interest you, set goals, and think critically about your learning.

Presentation: Presentations let you compile ePortfolio artifacts and reflections into an easy to view web project. Presentations provide a polished, professional medium to demonstrate your learning and accomplishments. The standard Tenure and Promotion ePortfolio presentation will be shared to all faculty seeking Tenure and/or Promotion.

Collections: Collections are groups of artifacts, reflections and presentations. For example, you might want to include all Surveys into a Survey collection. An item can belong to multiple collections at the same time.

Tags: Tags are used to categorize artifacts, collections and presentations so that it is easier to search for specific items. It is important to identify items with tags because there is no folder system in ePortfolio to organize artifacts.
OVERVIEW OF STEPS TO CREATE AN ePORTFOLIO PRESENTATION

- Add artifacts to ePortfolio
- Build collections (optional)
- Build a presentation
- Assign permissions
- Share your presentation

UNDERSTANDING THE DASHBOARD

The Dashboard is the main landing page for ePortfolio. To return to your Dashboard from another ePortfolio page, click ePortfolio from the tool navigation.

From the Dashboard page, you can add new content to your ePortfolio, review recent activity on your items and items shared with you, and check invites from your peers.

Adding new content

You can add new content to your ePortfolio using the options available in the Build your ePortfolio area or add reflections, file and link artifacts.

“What are you learning?” panel

The "What are you learning?" panel prompts you to record brief thoughts about a current learning experience which you can expand upon at a later date. You can also add file artifacts or a link artifact to your ePortfolio or associate them with your brief reflection.
Checking your invites

The Unread Invites area in your dashboard displays your recent invites, including the author of the invite, the message content, and the associated ePortfolio item.

View the Unread Invites area of your Dashboard for recent invites or click View invites page for past invites.

UNDERSTANDING THE EXPLORE PAGE

The Explore page consolidates items others have shared with you or publicly into one view. Others' shared ePortfolio items display in a list that you can sort by name or date modified, ascending or descending. Filters at the top of the list enable you to view content by item type.

From the Explore page you can:

- Browse items and depending on your sharing permissions, view and leave comments and assessments, and edit others' items.
- Click on a user's name to view all content shared from that user.
- Subscribe to an item or a user.
- Use the search field to find content. The search checks for matches within item titles, tags, descriptions, and owner names.

If you have permission to view comments or assessments on an item, the feedback activity icon appears beside items when there is comment and assessment activity.
UNDERSTANDING THE MY ITEMS PAGE

My Items consolidates all of your artifacts, reflections, presentations, collections, and learning objectives into a single view, enabling you to view, search, and manage all of your content from one location. On the My Items page you can:

- Add ePortfolio content by clicking on the Add, New Presentation, New Collection buttons
- Bulk add items to a presentation or collection or bulk associate items with learning objectives from the More Actions button
- Perform common actions on your ePortfolio items, such as view, preview (image and HTML file artifacts only), edit, copy (presentations only), delete, and share

Your ePortfolio items display in a list that you can sort by name or date modified, ascending or descending. Filters at the top of the list enable you to search and manage specific sets of content; you can filter by item type or sharing status.

Activity icons

Once you share items with others and they provide comments or rubric assessments, icons that represent this activity appear beside your items in the My Items listing.

You can click on these icons to view details about which individuals or groups you are sharing an item with or review comments and rubric assessments made on that item.

Clicking on the sharing group icon or individual icon opens an item's Sharing Settings dialog. From here you can modify who can access your item. Clicking on the feedback icon opens an item's View page where you can review comments and rubric assessments from others.
UNDERSTANDING ePORTFOLIO SETTINGS

Settings allow you change display options and preferences for your ePortfolio. Click 🛠 Settings on the Dashboard, My Items, Explore, or Sharing Groups page to access these preferences.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
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<tr>
<td><strong>Display Options</strong></td>
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<tr>
<td>Default list size</td>
<td>Select the number of items to display in your newsfeed, My Items, and Explore lists.</td>
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<tr>
<td>Number of activities on newsfeed items</td>
<td>Select the maximum number of events you want to display in each newsfeed item.</td>
</tr>
<tr>
<td>My Modifications</td>
<td>Choose whether to include activity you make on your own items to your newsfeed.</td>
</tr>
<tr>
<td>Number of unread invites on dashboard</td>
<td>Select how many unread invites appear on your Dashboard.</td>
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<tr>
<td><strong>Item Defaults</strong></td>
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<tr>
<td>Item feedback</td>
<td>Choose whether you want to allow comments or assessments by default when creating new items.</td>
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*Note*: These settings enable commenting and assessments; you still need to set permissions around who can add comments or assessments.
USING ARTIFACTS

You must first upload your files, reflections, etc. into the ePortfolio area in order to add them to a collection or presentation.

Adding reflections

Use reflections to discuss items in your ePortfolio, record your thoughts on topics that interest you, set goals, and think critically about your learning.

1. On the My Items page, click Reflection from the Add button.

2. Give your reflection a Title.
3. Enter your thoughts in the Reflection field.
4. Select “Allow others to add/view comments if they have sufficient permission” if you want to provide others the option to comment on your reflection.
5. Click Save.

Adding linked web addresses

If you want to include an existing website as an artifact in your ePortfolio, you can reference the address (URL) for the site rather than uploading files.

1. On the My Items page, click Link from the Add button.

2. Enter the Name you want the URL to be stored as.
3. Enter the URL.
4. Enter a Description of the site or its significance.
5. Add any tags you want the artifact to have.
6. Click Save.
Uploading files

Upload files from your computer or personal storage device that demonstrate your improvement or mastery in an area of interest or that you would like to include in your ePortfolio.

1. On the My Items page, click File Upload from the Add button.

![File Upload button](image)

2. Click Upload to browse for the file you want to add.
3. Click Done.
4. Confirm that you selected the correct file, then click Next.
5. Give the artifact a Name and Description.
6. Add any tags you want the artifact to have.
7. Click Save.

Creating web documents

ePortfolio provides the option to create HTML artifacts using a simple HTML Editor. HTML files may contain formatted text, images, videos, audio files, and links to content in Learning Environment.

1. On the My Items page, click Web Document from the Add button.

   ![Web Document button](image)

2. Enter the File Name you want the file to be stored as.
3. Use the HTML Editor to add your content.
4. Click Next.
5. Enter the Name you want to display for the file and a Description.
6. Add any tags you want the artifact to have.
7. Click Save.
Adding form responses (for Faculty only)

You are able to use add responses to form templates as an artifact to your ePortfolio. Forms templates, created by your institution or course leaders collect information using a set of question fields that you fill out.

1. On the My Items page, click Form Response from the Add button.

2. Click the name of the form template you want to fill out.
3. Fill out the form template.
4. In the Artifact Details area, provide a Name and Description unique to this form response.
5. Add any tags you want the artifact to have.
6. Click Save.
Associating reflections with items

Reflections can be independent ePortfolio items or associated with artifacts, learning objectives, collections, or presentations. Associating reflections with other items helps other users see the relationship between the items and makes it easier to revisit your goals and assumptions later.

Reflections are only visible to other users if you share them, associate them with an item, or add them to a collection or presentation.

- When you share a reflection that is associated with an item, users can only view the name of the associated item unless that item is also shared with them.
- Sharing an item associated with a reflection allows users to view the reflection as part of the item.
- If you include a reflection in a collection or presentation, it inherits the permissions of that collection or presentation.

Associate a reflection with an artifact, learning objective, collection, or presentation

1. Click Edit from the dropdown menu of an existing reflection.
2. Click Add in the Associated Items section.
3. Select whether you want to associate the reflection with an Artifact, Collection, Presentation, or Learning Objective.
4. Select the items you want to associate from the list that appears, then click Add.
5. On the Edit Reflection page, click Save and Close.
CREATING AND EDITING PRESENTATIONS

Adding new presentations

Presentations let you compile ePortfolio items into a web project to showcase your achievements. Your presentations can have multiple pages and use different themes and layouts. Presentations provide a polished, professional medium to demonstrate your learning and accomplishments.

1. On the My Items page, click New Presentation.
2. Give the presentation a Name and Description.
3. Add any tags you want the presentation to have.
4. Select the check boxes in the Comments/Assessments section if you want to provide others the option to review your presentation when you share it.
5. Click Save.
Adding items to presentations

Note: Items that are to be added to an ePortfolio presentation must first be uploaded to ePortfolio.

Use the Content/Layout tab to add items to your presentations. You can add items on a single page or create multiple pages.

1. Click the Content/Layout tab on the Edit Presentation page.

2. Click Add Component in the content area you want to add an item to.
3. Select the type of item you want to add.

4. Select the item you want to add.
5. Click Add.
Adding a Text area to presentations

Use the Content/Layout tab to add a text area to your presentations. Click the Content/Layout tab on the Edit Presentation page.

1. Click Add Component in the content area you want to add an item to.
2. Select Text area

3. Enter an Area Name
4. In the Content area you can enter text, paste and format text, access the insert stuff button, etc.

5. Click Save
Adding Information from my profile to presentations

Use the Content/Layout tab to add a text area to your presentations. Click the Content/Layout tab on the Edit Presentation page.

6. Click Add Component in the content area you want to add an item to.
7. Select Information from my profile. This is the information that you have set up in your profile.

8. To select which items from your profile you would like to include, select Edit Display Options from the My Profile Information dropdown menu.

9. Click Save
Copying presentations

1. On the My Items page, click 🔄 Copy from the dropdown menu next to the presentation name.

The following information copies:

- the presentation’s description, tags, and comments and assessment properties
- the theme
- the banner title, description, and appearance
- all pages, page layouts, page content, display options, and display orders

The following information does not copy:

- permissions
- comments or assessments for the presentation
- reflections associated with the presentation

Note: You can copy presentations only from your own ePortfolio.

Editing display options for ePortfolio items

1. On the Content/Layout tab, select Open from the dropdown menu of a page.
2. Click Edit Display Options.

3. Change the Title or Description of the item, if desired.

   *Note:* This will only change the title or description within the presentation.

4. Choose whether you want the artifact to display in-place or as a link (if applicable).

   *Note:* You can display the following file types in-place: HTML, BMP, GIF, JPG, and PNG.

5. Choose whether you want to auto-fit the artifact to the content area it displays in, or maintain its original size (if applicable).

6. Select which reflections associated with the artifact to display in the presentation (if applicable).

7. Select the appropriate options related to displaying comments and assessments.

   *Note:* The Comments enabled check box on the Edit Display options page corresponds to the Comments Enabled check box that appears on the Content/Layout tab. Selecting one enables the other and vice versa.

8. Click Save.

### Modifying presentation layouts

Use the Content/Layout tab to change where the navigation area appears on presentation pages and the arrangement of content.

- **Edit Presentation Navigation:** Sets where the page navigation appears. This is a presentation-level setting; you cannot select a different navigation position per presentation page.

- **Edit Page Layout:** Sets the positioning of the content areas. This is a page-level setting; each page in your presentation can have different page layouts.
Item dropdown menus enable you to move items to different content areas, change the order of items within a content area, and remove items from your presentation.

Use the Pages section of Content/Layout tab to add new pages to your presentation and reorder existing pages. If you have a large presentation, you can hide pages from the navigation by editing their Page Properties.

**Changing presentation themes**

Themes are default style templates that give your presentations a consistent look and feel. Themes are comprised of styles which control one aspect of the design. For example, there are separate styles that control the look of titles, links, dates, and images.

D2L provides many presentation themes, but you may change some or all aspects of a theme.

**Choose a theme**

1. On the Edit Presentation page, click the Theme tab.
2. Click Select beside the theme you want to apply to your presentation.
Modify a theme

1. Click the Edit styles icon beside your current theme.

![Current Theme: Watercolor](image)

2. Select the page element you want to modify.

   Tip Use the Filter drop-down list to view specific groupings of elements.

3. Use the options that appear under the Preview area to edit the style.
4. Repeat for remaining elements.
5. Click Save.

Setting banner text

A banner appears at the top of every page in a presentation. The presentation title usually appears in the banner, much like a header in a book. You can include additional text in the banner as a description.

On the Edit Presentation page, click on the Banner tab to enter a banner title and description.

![Banner settings](image)
Note: The theme of the presentation controls the style of the banner, including the background and fonts used. Use the Theme tab to modify banner and presentation styles.

Customizing navigation between presentation pages

Users can view the various pages of your presentation (ex. About Me, Writing Samples, etc) by clicking the page names in the page navigation panel. You can also link the user to another page within the presentation by adding links to content areas. This provides greater flexibility in customization and organization of your presentation.

For example, a student may have three separate pages on their eportfolio: an About Me page, a Writing Sample Collection page, and Writing Sample page. In the middle of her About Me page, she may reference her skills and insert a custom quicklink to direct readers to Writing Samples page for further information.

Link to presentation pages in content areas

1. Click the Content/Layout tab on the Edit Presentation page.
2. Click Page Properties from the dropdown menu of the page you want as a link.
3. Copy the Page Link URL.
4. Click the page where you want the link to appear.
5. Click Edit from the dropdown menu of the component you want to add your link to. Add a component to the page if none currently exists.

6. Insert the link using the URL you copied in step 3 through one of the ways below:
   - Insert a quicklink using the HTML Editor
   - Insert a link using Insert Stuff
CREATING COLLECTIONS

Creating new collections

Collections are groups of artifacts, reflections, presentations, and learning objectives. An item can belong to multiple collections at the same time. For example, you can add a short story you wrote to a collection called “Fiction” as well as a collection called “Creative Writing 101” and there will only be one copy of the story (artifact). Collections can be added to a Presentation.

1. **On the My Items page, click New Collection.**

![New Collection Button](image)

2. **Give the collection a Name and Description.**

![New Collection Form](image)

3. **Add any tags you want the collection to have.**

4. **Click Save and Close or Save.**

5. **Select the check boxes in the Comments/Assessments section if you want to provide others with the option to comment or assess your collection when you share it with them.**
Adding ePortfolio items to a collection

There are multiple ways to add items to a collection:

1. Add items manually on the Edit Collection page.
2. Add multiple items at once by clicking Add to Collection from the More Actions button.
3. Select Add to Collection from the dropdown menu of an item.
4. Create a Tag List on the Edit Collection page that defines which items to automatically include in a collection based on their tags.

1. Add an item to a collection from the Edit Collection page

   a) Click Edit from the dropdown menu of the collection you want to add items to.

   b) Click Add to Collection.

   c) Click Artifacts, Presentations, Reflections, or Learning Objectives.

   d) Select the items you want to add.

   e) Click Add.
2. Add an item to one or more collections from the My Items page

   a) Select the items you want to add to the collection from the My Items listing.
   b) Click Add to Collection from the More Actions button.
   c) Select the collections you want to add the items to.
   d) Click Add.

3. Add an item to a collection using an item's dropdown menu (drop-down)

   a) Click Add to Collection from the dropdown menu of the item you want to add.
   b) Select the collections you want to add the item to.
   c) Click Add.

4. Create a tag list that automatically populates a collection

   Important: All items that use the tags that you specify in the tag list are automatically added to the collection. If you share the collection with other users, you automatically share all of the items.

   a) Click Edit from the dropdown menu of the collection you want to add items to.
   b) Click Add to Collection.
   c) Click Tag List.
   d) Give your tag list a name.
   e) Enter the tags you want in the tag list.
   f) Click Save.

   Tip: Create multiple tag lists if you want to create an OR condition, where items tagged with either "x" or "y" are added to a collection. For example, if you want to add all items tagged with the phrase "Science and Technology" and either "Green Energy" or "Solar Energy", you should create two tag lists. The first tag list should contain the phrases "Science and Technology" and "Green Energy". The second tag list should contain "Science and Technology" and "Solar Energy".
MANAGING COMMENTS AND ASSESSMENTS IN ePORTFOLIO

Configuring assessment settings

Enabling comments on an artifact, collection, reflection, presentation, or learning objective allows users who are viewing the item to leave feedback. Use this feature to collaborate with peers so they may congratulate you on your work, provide constructive criticism, or point out additional resources.

Enabling assessments for an artifact, collection, reflection, presentation, or learning objective allows users with the appropriate permissions to evaluate the item using a rubric. You must select which rubric, from the list provided by your organization, that you want used when you are being evaluated.

When others comment on and assess an item in your portfolio, their feedback becomes a part of the item. You can see it below the item's details when viewing the item, or through the feeds and widgets on your ePortfolio dashboard.

Set your preferences so comments or assessments are enabled by default

1. Click 🏛️Settings from any page in ePortfolio.
2. Select Allow comments on reflections, artifacts, collections, presentations, and learning objectives by default or Allow assessments on artifacts, collections, presentations, and learning objectives by default.
3. Click Save.

Enable comments

1. Open the Edit page for the artifact, collection, reflection, presentation, or learning objective you want to enable comments for.
2. Select Allow others to add/view comments if they have sufficient permission.
3. Click Save and Close.

Note: Click Share from an item's dropdown menu to assign permissions to a user.

Enable assessments

1. Open the Edit page for the artifact, collection, reflection, or presentation you want to enable comments for.
2. Select Allow others to add/view assessments if they have sufficient permission.
3. Click Add Rubrics.
4. Select the rubric you want to attach and click Add Selected.
5. Click Save and Close.

Note: Click Share from an item's dropdown menu to assign permissions to a user.
Editing and commenting on ePortfolio items

You must have the appropriate permissions to leave comments, assessments, or annotations on an item in a user's ePortfolio. You can receive permissions to comment on, assess, or edit a user's work in one of two ways:

- The user gives you the appropriate permissions.
- You set up a forced sharing group for users in a particular course that gives you the appropriate permissions.

Encouraging users to give you permission to comment on and assess portfolio items that relate to course work is an excellent way to provide users with informal, intermittent feedback.

Submitting ePortfolio items to dropbox folders

You can submit your ePortfolio items to a dropbox folder in D2L for formal assessment. When you submit an item to a course dropbox folder, a copy of the item goes to the Dropbox tool. Future changes to the item do not transfer to the Dropbox copy.

Tip: If your item has comments and assessments but you don't want to include them with your Dropbox submission, clear the Comments/Assessments check boxes on the item's Edit page before you submit it to a dropbox folder. This does not remove previous comments and assessments from the item itself. After you make your Dropbox submission, you can select the Comments/Assessments check boxes to re-enable comments and assessments.

1. Go to the Dropbox tool in the appropriate course.
2. On the Dropbox Folders page, click on the folder you want to submit to.
3. Click Add a File.

   Note: If you submit a reflection or artifact to a dropbox, quicklinks to associated items will be included in the submission. For instance, a submitted artifact will include links to associated reflections. A submitted reflection will include quicklinks to artifacts it is associated with.

4. Select ePortfolio from the left tool menu.
5. Select the item you want to add.
6. Click Select Item.
7. Enter any comments you want to include with your submission.
8. Click Submit.
UNDERSTANDING THE BASIC CONCEPTS IN SHARING

Viewing items shared with you

There are various ways for you to discover, categorize, follow, and review content shared with you in ePortfolio.

Invites

Invites enable you to promote the content you’re sharing with specific people. When you share an item with others, you also have the option to send an invite to those you’re sharing your item with from the Sharing Settings dialog.

An invite contains information about who shared the item, when it was shared, what type of item it is, and any description or tags it has. The sender might also include a message letting you know why they shared the item.

When you receive an invite from another user to view an item in their ePortfolio, a notification appears in the Message alerts on the minibar and the invite displays in the Unread Invites area of your dashboard. You might also receive an email informing you of the invite.

Subscriptions

Subscriptions enable you to follow activity on items or from specific people that interest you. You can subscribe to user or item activity from your dashboard, the Explore page, or your invites.

- Subscribe to an item by clicking **Subscribe** in the dropdown menu of the item.

- Subscribe to other users by toggling the **Subscribe** icon beside their names.
Use the Subscriptions filter on your dashboard to view activity on items or from users you subscribed to. Recent subscription activity also appears in your minibar alerts.

Unsubscribe to items or users by toggling the icon or click Unsubscribe.

**Minibar alerts**

Alerts on the minibar signal new activity related to your subscriptions and invites.

- The Message alerts display recently received invites.
- The Update alerts display assessments made on items or by people you've subscribed to.
- The Subscription alerts display comments made on items or by people you've subscribed to.

**Email and SMS notifications**

If you want to receive ePortfolio updates externally, use the Notifications tool located in your personal menu on the minibar to set up the following instant notifications:

- **Feedback added to subscribed items**: Receive updates about comments and assessments made on items or by users you've subscribed to.
- **Another user has subscribed to your updates**: Receive a notification when someone has subscribed to you or one of your items.
- **Feedback added to my items**: Receive updates about comments and assessments made on your items.
Sharing with internal and external users

Use permissions to share ePortfolio items with other users. You can set up separate permissions options for each artifact, collection, reflection, presentation, and learning objective in your ePortfolio so you can pick and choose what content you share with others. You can assign permissions to individual users, sharing groups, groups of users based on course or department enrollment, or the general public through a URL (presentations only). You can choose whether others can see the item, see comments, see assessments, add comments, add assessments, and/or edit the item.

Sharing items with internal users

You can share items with other users in WCU by selecting individual users, all users in a course or group you are enrolled in, or a previously saved sharing group.

Assign permissions for a user or group of users

1. Click ⬇️ Share from the dropdown menu of the item you want to make available to others.
2. Select when you want users to see the item in the Visibility section of the Sharing Setting dialog.
3. Click Add Users and Groups.
4. Browse for the users you want to add. Use the Search for field to narrow your browsing results. Users with cascading roles must perform a search to display results.
5. Click on users or sharing groups in the browse listing to add them to the Selected Users list. Click the 🗑️ Remove icon beside users or sharing groups you want to remove from the Selected Users list.
6. Select the permissions you want the selected users to have and click Add.

Note: You can adjust permissions for individual users by clicking the 🆕 Edit Permissions icon beside their name in the Sharing List grid.
7. If you want to send an invite to specific users in the Sharing List, select the check boxes beside their names and click Send Invite.

8. Click Close.

Sharing presentations with external users

You can share ePortfolio presentations with people who are not part of WCU such as friends, parents, or potential employers.

You can share presentations with external users in two ways:

- You can make the presentation publicly available to anyone through a URL. When you share a presentation this way people can only view the presentation. They cannot add comments to, add assessments to, or edit the presentation.
- You can send a personal invite to view your presentation via an email and the recipient can follow the attached link to view the presentation. The recipient must set up a username and password, and then they can see and add comments or assessments based on the permissions you gave them. External users cannot edit presentations.

Make a presentation publicly available through a URL

*Note:* If you make a presentation public via URL, the system includes social media icons (Twitter, Google+, and Facebook) at the top of your presentation to enable further sharing.

1. Click Share from the dropdown menu of the presentation you want to make available by URL.
2. Select “Anyone with the URL below can access this item” from the presentation's Sharing Settings and click Close. Share the provided URL with others.
Make a presentation externally available to specific people and assign them permissions

1. Click Share from the dropdown menu of the presentation you want to make available to external users.
2. Click Add Users and Groups from a presentation's Sharing Settings.

3. Click “Click to share the presentation with an external user”.

4. Enter the External Email Address of the external user you want to send an invite to and click Add.

5. Select the permissions you want the external users to have and click Add. The system automatically notifies external users of their granted permissions.
6. Click Close.

Note: The recipient must follow the link in the invite and set up a username and password to view the presentation. The invite expires after three days (or another amount of time set by your organization).
Sending invites

When you send an invite to internal users you are sharing an item with, you have the opportunity to leave them a message about why you are sharing the item and what you’d like them to do with it. Depending on how the user’s preferences are set up, they will receive the message in their email, the Invites area of their dashboard, or an RSS Reader. Recent invites also appear in the Message alerts on the minibar.

1. In the Sharing Settings dialog for an item, send invites to specific users in the Sharing List by selecting the check boxes beside their names, then click Send Invite.
2. Complete the invite and click Send.

Important: If you send an invite to a sharing group that includes all users at your organization or all users in a particular course or department, all of the users in the group will receive the invite. This may be bothersome to users who do not know you.

Creating quicklinks to ePortfolio items

Create quicklinks to ePortfolio content in the same way as other quicklinks. However, the person following the link must have that item shared with them. If you want to include quicklinks to ePortfolio items in your course content, ensure your course participants have permission to view the item.

1. Open the HTML Editor.
2. Click Insert Quicklink.
3. Click ePortfolio Item from the Insert Quicklink dialog.
4. Select whether you want to link to a personal or shared item.
5. Do one of the following:
   - Click on the item you want to link to.
   - Click Options to edit your link title and choose how you want the link to open. Click Insert.
6. Save the HTML file.

Important: If you include a quicklink or an eP item link to an ePortfolio item in a form, reflection, artifact, or presentation, the referenced item does not inherit permissions from the item containing the link. This means that individuals viewing an item from the quicklink or eP item link must also have direct permission to view the referenced item and follow the link; otherwise, they receive an error message letting them know they do not have permission to view the item.

Similarly, if you include a quicklink in an ePortfolio item to a Learning Environment item, such as a content file, individuals can only follow the link if they have permission to view that item; otherwise they receive an error message letting them know they do not have permission to view the item.
## Sharing permission options

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
<th>Available for</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Allows selected users to see your ePortfolio item on the Explore page.</td>
<td>Anyone</td>
</tr>
<tr>
<td>See comments from others</td>
<td>Allows selected users to see the comments other users have left on your ePortfolio item.</td>
<td>Internal users, External user with personal invite</td>
</tr>
<tr>
<td>Add comments</td>
<td>Allows selected users to add comments on your ePortfolio item.</td>
<td>Internal users, External user with personal invite</td>
</tr>
<tr>
<td>See assessments from others</td>
<td>Allows selected users to see rubric assessments other users have left on your ePortfolio item.</td>
<td>Internal users, External user with personal invite</td>
</tr>
<tr>
<td></td>
<td>*Not available for reflections</td>
<td></td>
</tr>
<tr>
<td>Add assessments</td>
<td>Allows selected users to evaluate your ePortfolio item using a rubric.</td>
<td>Internal users, External user with personal invite</td>
</tr>
<tr>
<td></td>
<td>*Tip Make sure you add the rubric you want evaluators to use on the item's Edit page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Not available for reflections</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allows selected users to make changes to your ePortfolio item.</td>
<td>Internal users</td>
</tr>
<tr>
<td></td>
<td>You can track changes in the item’s Change Log.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** To use the comments and assessments permissions, you must make sure the comments and assessments check boxes are enabled on the item's Edit page and that a rubric for assessing items has been attached to the item. These check boxes are selected by default, but it is possible to clear them (if you want to temporarily remove the ability to comment on or assess an item), and you can change the default setting so they are not selected on new items.
**UNDERSTANDING CASCADING PERMISSIONS**

**Items in collections and presentations**

When you include an item in a collection or presentation, the item inherits permissions from the collection or presentation (permissions are cascading), with the following exceptions:

- The Add Assessments permission is not inherited because it requires that a rubric be associated with each item.
- The Edit permission is not inherited because it would allow users to make major, possibly unwanted, changes to your ePortfolio. If you want individuals to be able to edit items in a collection or presentation, you must give them the Edit permission on each item individually.

Inherited permissions do not override existing permissions on items. For example, if you give an individual the view, see comments from others, and add comments permissions for a specific item, but only the view permission is set for a collection that contains the item, the individual is able to see and add comments to the item. This is the case regardless of whether it is accessed from the collection or outside the collection.

**Items associated with a reflection**

When you associate a reflection with another item, the reflection does not inherit permissions from the item, nor does the item inherit permissions from the reflection.

Sharing a reflection associated with an item, only allows users to view the name of the associated item. However, sharing an item associated with a reflection allows users to view the reflection as part of the item.
IMPORTING AND EXPORTING ITEMS

Accessing the Import and Export tool

1. Click ePortfolio on the navbar or from the My Settings widget.
2. On the My Items page, click Go to Import/Export page from the More Actions button.

Importing ePortfolio items

You can only import D2L ePortfolio packages into your ePortfolio. If you have other items you want to add to your ePortfolio, use the Artifacts tool to add them individually.

Import an ePortfolio package

1. On the Import/Export ePortfolio Content page, click Import.
2. Upload your import file.
3. Click Next.
4. On the Preview page for the import package, enter any New Tags that you want all imported items to have.
5. Click Import.

Exporting ePortfolio items

When you export an item, you also export the item's description, tags, and settings. You do not export information about the user who created the item, users who left comments on the item, or assessments for the item. When you import an item, the system assumes that the item was created by the importing user.

With the exception of HTML presentations, you cannot export items for offline viewing. Exported items can only be imported into another Desire2Learn ePortfolio or systems that support the D2L ePortfolio XML format.

You can export your entire ePortfolio or specific items. If you export specific items, select Automatically include associated items to ensure you also export any related items you might want. If an item has multiple associations, it will only appear once in the exported zip file.
1. On the Import/Export ePortfolio Content page, click Export.

2. Click All Items.
3. Remove unwanted items from the export list by clicking the Remove icon beside those items.
4. Click Export.
5. Click View progress of the export package and click the link for your export file when the file packaging completes.

   Tip: If you want to navigate away from this page or close the window, you can retrieve your export package from the Import/Export area in the Recent Activity list.

6. Save the export file to your computer or storage device.

Export specific items in your ePortfolio

1. On the Import/Export ePortfolio Content page, click Export.
2. Click Selected Items.
3. Click Add Items.
4. Select the items you want to export and click Add.
5. Remove unwanted items from the export list by clicking the Remove icon for those items.
6. Click Export.
7. Click View progress of the export package and click the link for your export file when the file packaging completes.

   Tip: If you want to navigate away from this page or close the window, you can retrieve your export package from the Import/Export area in the Recent Activity list.

8. Save the export file to your computer or storage device.
Export a single ePortfolio item

Click Export from the dropdown menu of an artifact, reflection, collection, presentation, or learning objective. If you export a presentation, there is an option to export it to HTML format.

Exporting presentations in HTML format

If you have the appropriate permissions, you can export presentations to HTML format directly from a presentation’s dropdown menu.

Exporting your presentation to HTML format enables you to keep a copy of your presentation in a viewable format external to the system. This is useful if you change schools or graduate and you don't want to lose your work. Once you export your presentation to HTML, you can host it externally on your own website or save it on your computer to view offline.

Note: You cannot import an HTML presentation back into ePortfolio.

1. Click Export from the dropdown menu of the presentation you want to export.
2. Choose Export HTML version of presentation.
3. If you want your HTML presentation to include links to pages in the system, select All system links. Links to pages within the system require users to log in to the system and have the appropriate permissions.
4. Click Next.
5. Click the link for your export file when the file packaging is complete.

![Download File]

The file containing your exported items is ready for download:

**HIPE_HIMLExport_DLL_Student_201409161450.zip** (799.25 KB)

**Close**

*Tip:* If you want to navigate away from this page or close the window, you can retrieve your export package from the Import/Export area in the Recent Activity list.

6. Save the export file to your computer or storage device.

**Changes to presentation properties during HTML export**

<table>
<thead>
<tr>
<th>Property</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action bar</td>
<td>Does not include the action bar at the top of a presentation</td>
</tr>
<tr>
<td>Artifacts</td>
<td>Includes embedded artifacts and links to artifacts</td>
</tr>
<tr>
<td></td>
<td>Embedded image artifacts retain their alt tags</td>
</tr>
<tr>
<td></td>
<td>Embedded image and media artifacts retain their size settings</td>
</tr>
<tr>
<td></td>
<td>Artifacts retain their type icon if displayed as a link inline</td>
</tr>
<tr>
<td></td>
<td>Artifacts retain their title and description set using Edit Display Options</td>
</tr>
<tr>
<td>Assessments</td>
<td>Includes assessments made on items within the presentation</td>
</tr>
<tr>
<td></td>
<td>Does not include assessments made on the presentation</td>
</tr>
<tr>
<td>Comments</td>
<td>Includes all comments for artifacts and reflections</td>
</tr>
<tr>
<td></td>
<td>Does not include comments made on the presentation</td>
</tr>
<tr>
<td>Forms</td>
<td>Does not include forms linked via a quicklink</td>
</tr>
<tr>
<td>Learning Objectives</td>
<td>Includes embedded learning objectives and links to learning objectives</td>
</tr>
<tr>
<td>Permissions</td>
<td>Does not retain permissions; anyone can view content within an HTML presentation</td>
</tr>
<tr>
<td>Presentation layout</td>
<td>Page links, navigation settings, page settings, page names, and text areas remain the same</td>
</tr>
<tr>
<td>Presentation theme</td>
<td>Presentation themes retain their style settings, including custom replaced images</td>
</tr>
<tr>
<td>Property</td>
<td>Notes</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Profile details</td>
<td>Profile information exports as displayed in the presentation, including customized profile titles and social media icons. Only the fields set to display are exported; hidden profile information does not export with the presentation.</td>
</tr>
<tr>
<td>Quicklinks</td>
<td>All quicklinks retain their links to external URLs and artifacts stored within the export package. Quicklinks to system resources require users to log in to the system and have the appropriate permissions.</td>
</tr>
<tr>
<td>Reflections</td>
<td>Includes embedded reflections and links to reflections. Does not include reflections associated with the presentation.</td>
</tr>
<tr>
<td>Social media</td>
<td>Does not include social media icons from the top of public presentations.</td>
</tr>
<tr>
<td>Text areas</td>
<td>Includes all text formatting, equations and custom characters.</td>
</tr>
</tbody>
</table>

### Understanding the changes made to exported item properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Log for presentations</td>
<td>Does not include.</td>
</tr>
<tr>
<td>Assessments</td>
<td>Does not include.</td>
</tr>
<tr>
<td>Change Log for Edit permission</td>
<td>Does not include.</td>
</tr>
<tr>
<td>Comments</td>
<td>Includes comments, does not retain commenter's name.</td>
</tr>
<tr>
<td>Contents of a collection</td>
<td>Includes collection contents only if you export its items at the same time.</td>
</tr>
<tr>
<td>Forms</td>
<td>Includes form artifacts; does not include the form that the artifact is based on. System fields do not maintain their values; the system generates these values based on the user that imports the form. Does not maintain rubrics embedded in a form.</td>
</tr>
<tr>
<td>Items associated with a reflection</td>
<td>Includes associated items only if you export the items at the same time.</td>
</tr>
<tr>
<td>Items in a presentation</td>
<td>Includes items within a presentation only if you export the items at the same time.</td>
</tr>
<tr>
<td>Permissions</td>
<td>See [item] only.</td>
</tr>
<tr>
<td>Presentation layout</td>
<td>Navigation settings, page settings, page names, and text areas remain the same. Maintains profile settings, but displays information corresponding to the user who imports the presentation.</td>
</tr>
<tr>
<td><strong>Presentation theme</strong></td>
<td>Does not include presentation theme; presentations revert to the default theme of the system on import</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Reflections associated with an artifact</strong></td>
<td>Includes associated reflections only if you export the reflections at the same time</td>
</tr>
<tr>
<td><strong>Rubrics associated with an item</strong></td>
<td>Does not include</td>
</tr>
<tr>
<td><strong>Tag lists for a collection (dynamic collections)</strong></td>
<td>Does not retain tag lists; all collections become static on export</td>
</tr>
</tbody>
</table>