Sakai 10 OSP Guide

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Evaluations (OSP)

Evaluations Overview

The Evaluations tool allows users with appropriate permission to evaluate work in a matrix cell after it has been submitted for evaluation by a participant in the site. If you are an evaluator, you use this tool to access the appropriate part of a participant's matrix, review the work shown there, and provide an evaluation of it.

In addition to using the Evaluations tool, evaluators with permission may also use the drop-down menu at the top of each matrix to access the copy of the matrix for each participant and click on a matrix cell belonging to a participant in order to evaluate the participant's work.

As an evaluator, you enter your ratings and comments on an evaluation form. This form is created by the CIG Coordinator (site organizer or other user in that role). By carefully designing evaluation forms for matrix cells, the CIG Coordinator can incorporate your institution's existing evaluation practices and assessment rubrics, such as evaluation scales and prompts for subjective evaluation, into the process of evaluating matrices.

To ensure effective reporting and avoid confusion, it is strongly recommended that your institution standardize evaluation scales across the cells of all matrices.

After you have evaluated a matrix cell, your ratings and comments are available to the participant whose work you have evaluated. Your evaluation is also available to other site members that have permission to evaluate or review the matrix cell.

The home page of the Evaluations tool contains a list of participant work that is ready to be evaluated. For each matrix cell title, the list contains its owner (if you have permission to see the name of the owner), the date the work was submitted, and an indication that the work was attached to a matrix cell.

If the list is longer than one page, use the buttons near the top of the screen to find the item you want.

- To display the first page of the list, click **First**.
- To display the previous page of the list, click **Previous**.
- To display the next page of the list, click **Next**.
- To display the last page of the list, click **Last**.

Evaluating Submitted Work

To evaluate submitted work, access the Evaluations tool and follow these steps:

1. Open the Evaluations tool.
2. If the Evaluations home page is not displayed, click the **Reset** button.
3. Examine the list of submitted matrix cells and click the title of the submission you want to evaluate. Sakai displays the appropriate matrix cell for the title you have selected.
4. Review the instructions and all forms and other attachments that have been submitted. [Note: To return to the Evaluations home page at any time, click the **Reset** button.]
5. In the evaluation section of the cell or page, click the **Add Evaluation** link.
6. Complete the fields in the evaluation form. Consider modifying the default title of your evaluation to make it easier for you and the participant to identify at a later time.
7. To submit your evaluation, click **Save Changes**. Sakai attaches your evaluation to the participant's matrix cell and re-displays the Evaluations home page. Or, to return to that page without submitting the evaluation, click **Cancel**.
8. If you clicked **Save Changes**, Sakai displays the Status and Progression page offering three choices:

Editing / Removing Evaluations

To edit or remove submitted evaluations, access the Matrices tool and follow these steps:

1. For an evaluation form to be edited or removed, the matrix cell with which it is associated must have the status of "pending" evaluation or "ready" for evaluation. If the status of the cell is "completed," the evaluation cannot be edited or removed.
2. Click within the matrix cell where your evaluation form is located.
3. In the Evaluation section, click the **Edit** or **Remove** link.
4. If you click on the **Remove** link, your evaluation will be removed immediately.
5. If you click on the **Edit** link, to add your changes, click **Save Changes**.
6. If you clicked **Save Changes**, Sakai displays the Status and Progression page. Follow the procedure in the "Evaluating Submitted Work" section above.

Aggregating Evaluations across Sites

To aggregate evaluations across sites, access the My Workspace site and follow these steps:

1. If your My Workspace does not have an Evaluations tool listed, click on the Worksite Setup tool.
2. Check the box for My Workspace and click **Edit** on the toolbar above.
3. Click the **Page Order** link located on the Site Info menu bar.
4. Click the **Add page(s) to your site** link located on the Site Info menu bar.
5. Check the box for the Evaluations tool.
6. Use the Page Order tool to move the Evaluations tool into your preferred location.
7. Verify that the Evaluations tool has been added and is in your preferred page order.
8. Click **Save**.
9. Once the Evaluations tool has been added to your My Workspace, click the **Evaluations** tool to manage evaluations across all sites.
10. Follow the steps in the "Evaluating Submitted Work" section above.

Your institution may or may not enable the Evaluations tool in My Workspace for maintain-level users. If the Evaluations tool has not been enabled in My Workspace, if Worksite Setup is not a tool in My Workspace, or if the Evaluations tool does not appear in Edit Tools in My Workspace Worksite Setup, ask your system administrator to modify the template for your My Workspace site.

Changing Evaluations Tool Permissions (For CIG Coordinators)

Permissions are more complex for evaluators than for most other site members. In order for you to act as an evaluator of work in a specific matrix cell, the following conditions must be met:

- You must be assigned the role of evaluator on this site.
- On the specific matrix cell, your role or your user name must be specified as an evaluator.
- Your role must have the "evaluate" permission in both the Matrices tool and the Evaluations tool

To change the default permissions for the Evaluations tool, access the tool and follow these steps:

1. If the Evaluations menu bar is not displayed, click the **Reset** button.
2. Click the **Permissions** button on the menu bar. Sakai displays the Permissions screen.
3. Referring to the list below, check boxes to select the appropriate permissions for users in each role.

- **View Owner** -- Users in this role may see the name of the user whose work is being evaluated in a matrix cell.
- **Evaluate** -- Users in this role may review site participants' finished work in matrices and offer summative feedback on it.

4. To save the permissions settings, click **Save**. Sakai saves the settings and displays the Evaluations home page. Or, to return to that screen without saving your changes, click **Cancel**.

Forms (OSP)

Forms Overview

In Sakai, forms are online structures that allow you to collect and store data. They are the electronic counterparts of paper forms, such as those you fill out to submit applications, complete surveys, and so forth.

As a portfolio site participant, you will not normally use (or even see) the Forms tool in your portfolio sites. That work has been done before you start. You will follow the work flow given by your instructors, during which you will fill out and save one or more forms, and use the completed forms (sometimes called form instances) as elements in the portfolio that you build.

Each form consists of a name, instructions to the user, and a set of input fields or boxes with field names. Both the instructions and the field names guide site participants in completing the form appropriately. The form itself, in the Forms tool, is a structure comprising places for data. When an instructor or other user in the role of CIG Coordinator creates and publishes a new form, the form is ready for data entry. When the form is filled out, the completed form data is stored in Resources. If the form was filled out in the process of completing a matrix cell, the data will be stored in the Portfolio Interactions folder in My Workspace > Resources. If the form was completed via the Resources tool, it will most often be stored in the participant's My Workspace Resources folder.

In Sakai, forms allow you to collect, store, and display information in matrices and portfolios. These forms can serve a variety of purposes. For example, you may use forms to collect routine information, such as contact information and educational or work history. You may also use forms to prompt users to document their learning or provide metadata for work they have completed. Other forms may be designed to guide users in documenting the details of a teaching experience, restating a particular learning outcome in their own words, or describing an internship experience. Some forms are specifically dedicated to guide users to reflect upon their learning, skills, course work, or other experiences. Still other forms can be used to collect feedback or evaluation from instructors or peers on the user's work.

In matrices, different forms can be presented to users in different roles:

- Site participants may be asked to fill out forms to provide background information, document work on projects, describe courses, reflect on co-curricular experiences, or organize thoughts about learning outcomes. These users fill out and save one or more completed forms as they work in each matrix cell.

- Site participants may also be asked to reflect upon the items they have included in the matrix cell by commenting on the origin of the items, the process of creating them, their strengths and weaknesses, what was learned, and what might be some next steps for improving them.
- Reviewers and evaluators may use forms to provide feedback on a site participant's work in matrix cell. These forms collect formative feedback (from reviewers) and summative feedback (from evaluators) on the work demonstrated in individual matrix cells. Forms for summative feedback can include an evaluation scale or an elementary or full-fledged clickable rubric with descriptors for the levels of each criterion.

Completing Forms in Resources

You may use the Resources tool to complete any form that has been made available to you via the Forms tool in any site in which you are a participant. (An exception may be forms reserved for specific uses in matrices.) For information on adding forms to sites, see documentation on adding forms.

To complete a form, follow these steps:

1. Go to My Workspace and open the Resources tool.
2. Select **New Form Item** from the Add pull-down list for an appropriate folder within your My Workspace Resources folder. Sakai displays the Select a Form screen.
3. Forms will be displayed according to the sites in which they have been made available. Select the appropriate form from the select box.
4. To proceed, click **Continue**. Or, to exit without completing the form, click **Cancel**. If you clicked **Continue**, Sakai displays the form you chose. The nature of the display will vary depending on the form.
5. You have these options:

- To proceed, fill out the form and click **Continue**.
- To return to the preceding screen and select another form, click **Back**.
- To exit without completing the form, click **Cancel**.

If you clicked **Continue**, Sakai displays the New Form Item screen. This screen can be used to edit properties of the newly completed form such as name, description, and accessibility. These properties can be modified later by going to Resources, locating the completed form, and selecting Edit Details under the Actions pull-down list. After completing the New Form Item screen as desired, select **Finish** to complete the form in Resources or **Cancel** to discard all progress in completing the form.

Note: If you complete a form in a folder in a site other than My Workspace, the completed form will be available to all participants in that site.

Note: Forms completed during the process of working with a matrix can be accessed by opening the Portfolio Interaction folder in your My Workspace Resources folder and opening the folders for the appropriate site and matrix.

Editing Completed Forms in Resources

To edit a form that you have already completed, follow these steps:

1. Open the Resources tool and the folder containing the form.
2. Select **Edit Content** from the Actions pull-down list for the form you want to edit. Sakai displays the completed form.
3. Make the appropriate changes.
4. To complete the edit, click **Save Changes**. Or, to exit without editing the form, click **Cancel**.

Deleting Completed Forms in Resources

To delete a form that you have already completed, follow these steps:

1. Open the Resources tool and the folder containing the form.
2. Select **Remove** from the Actions pull-down list for the form you want to edit. Sakai displays a remove confirmation screen.
3. To remove the form, click **Remove**. Or, to exit without removing the form, click **Cancel**.

Completed Forms and Data Types (For CIG Coordinators)

Within a particular matrix or portfolio you may specify that some forms are required, some forms can be completed only once, and some forms need not be completed at all if they are not appropriate.

Other forms can and should be used repeatedly to collect multiple versions of the same type of data in several completed instances of the same form. So, a participant may complete and save a contact information form many times to capture information about his or her home, work, school, summer residence, parents, study abroad and/or research locations. When working with portfolios, the participant can include any or all of these different completed form instances in one or more portfolios and/or one or more versions of a specific portfolio.

The instructions, fields, and field names in forms vary, depending on the information the form is designed to collect. Fields may also be as small or large as the creator of the form deems necessary.

Forms can contain many fields and types of data. The supported data types are as follows:

- **String** -- First Name, Street Address, Insights Gained, Feedback
- **Date** -- Birth Date, Date of Certification, Creation Date
- **Integer** -- Current Age, Social Security Number, Years at Current Address
- **Decimal** -- GPA, Mathematical Results
- **Boolean** -- A True/False or Yes/No Answer to a Question
- **File (anyURI)** -- File Attachment Demonstrating Participant Ability
- **Complex** -- A Group of Fields of the Same or Mixed Data Types

Each field in the form uses a specific data type. Fields can be configured to validate the user's input (for example, to ensure that the numeric value for a date falls within a plausible range). Also, the form creator can specify whether a field is optional or required and whether the field may be repeated (filled out more than once).

Available field types include text, rich text, date, selection (radio buttons for less than five options, drop-down menu for five or more), group, file (for attachments), and Boolean (check boxes).

Note: Complex fields (sub-forms) have had issues and are not recommended for use.

Forms may be published globally (that is, for use in all sites in the Sakai instance) or locally (for use in the current site only). Most forms are created for specific sites. However, if you create a form that has general applicability, you may recommend that it be published globally. Only a system administrator can publish a form globally (in response to your recommendation).

A portfolio template may display all fields from a form included in the template or only selected fields. The same form (and some or all of its fields) may be used in multiple portfolio templates and matrices.

Forms and Resources (For CIG Coordinators)

CIG Coordinators can create and publish forms for use in the site. Each form is based on an XML schema definition (.xsd file). The XSD file is usually created off line and later added to Resources from which it can be "added" to the Forms tool.

Important: We strongly recommend that you store all XSD files in your My Workspace Resources folder rather than in the portfolio site's Resources area. Site participants do not need to work with or see these files. By storing XSD files in your personal Resources area (preferably in a folder named Form XSDs or something similar), you prevent site participants from possibly being confused by them. This practice leaves the site Resources area free to be used as the place for files that are appropriate for all site participants. It also allows you to use a single copy of an XSD file in your My Workspace Resources to create forms in all of your sites. Alternatively, you may "hide" the XSD files in a portfolio site's Resources as single files or in a hidden folder (using Edit Details in the Actions drop-down menu).

The Forms tool is used to "add" XSD files from Resources, give them meaningful names, provide instructions for using them, and publish them for use by site participants. You may also use the Forms tool to export forms in one site and import them into another.

The Forms tool does not provide direct access to the forms you create. Instead, site participants access forms that they need to complete via the Matrices and Portfolios tools. In addition, they may create, view, and edit form instances in Resources.

Accessing a List of Forms (For CIG Coordinators)

To open the Forms tool, click **Forms** in the Sakai Tool Menu. Sakai displays the Manage Forms page.

The Manage Forms page contains a list of forms that have been created locally for your site. The forms are ordered alphabetically. For each form, you can see the name of form owner, when it was last changed, and its site and global states (published, unpublished, or waiting for approval).

If the list of forms is longer than one page, use the buttons near the top of the page (First, Previous, Next, or Last) to display other pages in the list.

Preliminary Steps for Adding Forms (For CIG Coordinators)

Preliminary Steps

Before adding a form, follow these steps:

1. Create, or find, the XSD file that defines the data structure that you want. Review existing global forms on your Sakai instance. You may find a form that suits your purposes, in which case you do not need to create a new one. You cannot create an XSD file in the Forms tool; to create an XSD file, use an off line XML editor or the Form Builder (Contrib) tool.

2. When creating or editing an XSD file, plan the content carefully. Keep the following points in mind:

- Field names are displayed to the left of the text fields to which they apply.
- Field names wrap somewhat unpredictably.
- Long field names are difficult for participants to read.

3. Consider adding the new form to the Forms tool in a test site in order to view and change it as needed before including it in your production site.

Adding Forms (For CIG Coordinators)

To add a form, open the Forms tool and follow these steps:

1. If you have not already done so, upload the XSD file (as well as any alternate renders for the XSD) to Resources.
2. In the site where you wish to add the form, open the Forms tool.
3. If you are not already on the Manage Forms screen, click the Reset icon.
4. Click **Add** in the menu at the top of the page. Sakai displays the Add Form screen.
5. In the Name box, enter a meaningful name for the form. Choose the name carefully; be sure to choose a name that indicates the specific use of this form. After the form has been added to the site or published globally, its name will be visible in Resources to all site participants (or if published globally, to all participants of all sites in this Sakai instance). Therefore, if the form is tailored to a particular matrix cell, a generic name such as Reflection is misleading and makes the form seem appropriate for general use when, in fact, it is not. Use a generic name for a form only if the fields, field names, and instructions in it make the form suitable for use in a wide variety of situations.
6. Click **Select Schema File**. Sakai displays the Select Item screen.
7. Navigate the site and folder hierarchy to locate the XSD file you uploaded in step 1. Click **Select** next to the name of the file. The schema file will appear in the list at the top.
8. Click **Continue** to return to the Add Form screen. The name of the file you selected is shown in the Schema File (XSD) box.
9. In the Instruction box, enter instructions to help the participant complete the form. Use the icons and drop-down menus to format the text as appropriate.
10. If you developed an alternate form creation renderer (controling the data entry view) and/or form view renderer (controling the read-only view) for the XSD, use the Select XSL File links to upload and select the XSL renderers.
11. To check the form, click **Preview**. Enter test data into the preview of the form and click **Validate** to ensure the form works properly. Then click **Return** to go back to the Add Form screen.
12. To complete the process, click **Add Form**. (Or, to return to the Manage Forms page without adding this form, click **Cancel**.) Sakai creates the form and returns to the Manage Forms page. The new form is added to the list in an unpublished state.

Previewing Forms (For CIG Coordinators)

Before adding a form to a matrix cell or portfolio template, you can preview the form to make sure it's appropriate for your intended purpose:

- **Method One:** This method works for forms listed in the Forms tool, including "hidden" forms. However, it cannot be used to preview "global" forms, i.e., forms that the Sakai administrator has made available to all users.

1. Go to the work site containing the form you wish to preview. From the Tool Menu, click **Forms** to open the Forms tool.
2. On the Manage Forms page, locate the form you wish to preview, and click **Edit**.
3. On the Edit Form page, click **Preview**. An empty version of the form will appear.
4. To test the form, enter sample data in each field and click **Validate**. To return to the Edit Form page, click **Return**.
5. Click **Save Changes** or **Cancel** to return to the Manage Forms page.

- **Method Two:** This method works for site-specific and "global" forms, but cannot be used to preview "hidden" forms.

1. Go to My Workspace.
2. In the Tool Menu, click **Resources** to open the Resources tool.
3. Open the Add menu next to any folder, and choose **New Form Item**.
4. All of the forms to which you have access (except hidden forms) will be listed on the Select a Form page. Forms are organized into groups by site (the site in which the form resides) and then alphabetically by form name. Select the form you wish to preview, and click **Continue**. An empty version of the form will appear.
5. To test the form, enter sample data in each field and click **Continue**. The Edit Details screen for the form will be displayed. Otherwise, click **Back** to return to the list and preview another form, or click **Cancel** to return to Resources in My Workspace.
6. Give the completed form an appropriate name, complete the Edit Details screen, and click **Finish**. The Resources folder for My Workspace will be displayed.
7. Click the name of the completed form to review its content. (Remove the completed form if it is no longer needed.)

Editing Forms (For CIG Coordinators)

Using the Forms tool, you may change the name of a form and the instructions for using it. However, you cannot use the tool to change the structure (fields and data types) of the form itself.

To change the name or instructions for a form, access the Forms tool and follow these steps:

1. If you do not see the Manage Forms screen, click the **Reset** button.
2. Find the form you want to change, and click **Edit**. Sakai displays the Edit Form screen.
3. Change the content in the Name and Instruction boxes as needed. Use the icons and drop-down menus to format the instructions text as desired. To preview the form while editing, click **Preview**.
4. When you are finished, click **Save Changes** to save and return to the Manage Forms page. Or, to return to the Manage Forms page without saving, click **Cancel**.

Publishing Forms (For CIG Coordinators)

In order to make a form available to site participants, you must first publish it.

To publish a form, access the Forms tool and follow these steps:

1. If the Manage Forms page is not displayed, click the Reset button.
2. On the Manage Forms page, find the form you want to publish.
3. Optional: Click **Edit** to ensure that the information for the form is complete and correct. From the Edit Form page, click **Preview** to verify that the form structure and layout is correct. Make changes as needed, and save the changes before proceeding.
4. Return to the Manage Forms page and click **Publish** for the form you want to publish. Sakai displays the Publish Form confirmation screen.
5. To proceed with publishing the form, click **Yes**. Sakai displays the Manage Forms page. The Site State for this form is changed to "published." Or, to return to the Manage Forms page without publishing the form, click **No**.

Publishing Forms Globally (For CIG Coordinators)

Requesting Global Publication of a Form

If you have created a form that has general applicability, you may want to make it available for use in all sites. However, only Sakai system administrator(s) can publish a form globally (that is, across all sites in Sakai), so you must send the administrator a request.

To request that a form be published globally, access the Forms tool and follow these steps:

1. If the Manage Forms page is not displayed, click the **Reset** button.
2. On the Manage Forms page, find the form you want to submit to the system administrator for global publication.
3. Click **Publish Global** for the form. Sakai displays the Publish Form confirmation screen.
4. To proceed with the request, click **Yes**. Sakai displays the Manage Forms page. The Global State for this form is changed to "waiting for approval." Or, to return to the Manage Forms page without submitting the request, click **No**.

Publishing a Form Globally

If you are a system administrator, you may publish a form globally (that is, for all sites in a Sakai instance). To do so, log in and follow these steps:

1. Go to the Portfolio Admin site.
3. Access the Forms tool. Sakai displays the Manage Forms page.
4. Find the form you want to publish globally and click **Approve Global Publish** link beneath its name. Sakai displays the Publish Form confirmation screen.
5. To proceed with the request, click **Yes**. Sakai displays the Manage Forms page. Or, to return to the Manage Forms page without submitting the request, click **No**.
6. The form is now available for use in all sites.

Exporting and Importing Forms (For CIG Coordinators)

If you own more than one site, you may want to use a particular form in two or more sites. To do so, you may either recreate the form on the second site from the .xsd file in Resources or export the form to your desktop as a compressed file and then import it to the other site(s) where you plan to use it. The compressed ".zip" file contains the XML file defining the editable data fields, Name and Instructions, and the XSD file comprising the schema. You may also wish to acquire exported zip files for forms from other users for import to your site(s).

Exporting a Form

To export a zipped file for a form, access the Forms tool and follow these steps:

1. If the Manage Forms page is not displayed, click the **Reset** button.
2. Find the form you want to export.
3. Click **Export** below the name of the form.
4. Your browser will prompt you to open or save the file. Save the file to a local storage device. The exported form will have a .zip extension.

Importing a Form

To import a form, access the site to which you want to import it and follow these steps:

1. Upload the compressed ".zip" file to Resources (in the site you where you are maintaining this site's forms).
2. Access the Forms tool. If the Manage Forms page is not displayed, click the Reset button.
3. Click **Import** at the top of the page. Sakai displays the Import Form screen.
4. Click **Select File**. Sakai displays the **Add Attachment** screen.
5. Navigate the site and folder hierarchy to locate the .xsd file you uploaded in step 1. Click **Select** next to the name of the file. The .zip file will appear under Items to attach at the top of the page.
6. Scroll to the bottom of the page and click **Continue**. Sakai displays the zip file Import Form screen again. The name of the file you chose is displayed in the Import File box.
7. Click **Import**. Sakai imports the file from the Resources area and returns to the Manage Forms page. The imported form is listed under its original name with a site state of "unpublished". Or, to return to the Manage Forms page without importing the file into the Forms tool, click **Cancel**.

Deleting Forms (For CIG Coordinators)

Deleting a Form

Forms definitions can be deleted from the Forms tool only if they have never been used. Once the definition has been used to create and save a form instance, the form cannot be removed unless all associated form instances are deleted first. To delete a form:

1. In the Tool Menu of the portfolio site with the form you want to delete, click **Forms**.
2. On the Manage Forms page, locate the form you wish to delete and click **Delete**.
3. You will be asked to confirm the deletion. Click **Yes** to confirm or **No** to cancel.

After you confirm the deletion, the system will check whether the form has been used to create and save form instances. If the form is in use, you'll be notified that the form could not be deleted. If not, the form will be deleted and you'll be returned to the Manage Forms page.

Changing Forms Tool Permissions (For CIG Coordinators)

Changing Forms Tool Permissions

All site participants can complete forms without permissions to use the Forms tool. However, permissions to create, change, delete, export, and publish forms by using the Forms tool can be restricted by role. To assign or change permissions, access the Forms tool and follow these steps:

1. If the Manage Forms page bar is not displayed, click the Reset button.
2. Click **Permissions** at the top of the Manage Forms page. Sakai displays the Permissions screen.
3. Referring to the table below, check boxes to select the appropriate permissions for users in each role.

- **Create** -- Users in this role may create and import forms for use by themselves and/or site participants.
- **Edit** -- Users in this role may change the name, instructions, schema, and renderer(s) for forms.
- **Export** -- Users in this role may export a form to their desktops as a compressed file.
- **Delete** -- Users in this role may delete forms.
- **Publish** -- Users in this role may publish forms for use by site participants.
- **Suggest.global.publish** -- Users in this role may suggest a form for global publication (that is, publication across all sites within Sakai).

4. To save the permissions settings, click **Save**. Sakai saves the settings and displays the Manage Forms page. Or, to return to that screen without saving your changes, click **Cancel**.

Glossary (OSP)

Glossary Overview

The Glossary tool provides definitions for terms in matrices, including matrix row and column names and descriptions for matrix cells. Using the Glossary tool in conjunction with a matrix compensates for the limited space allowed for matrix row and column names. Within matrix cells, glossary entries also apply to terms in cell names and descriptions.

When participants move the mouse over a glossed term, Sakai displays a short definition or explanation that has been entered via the Glossary tool. When participants click on the name, it hyperlinks to more extensive information that has been entered via a rich text editor. CIG Coordinators (including site organizers and others) often use these hyperlinks to provide detailed information such as objectives, outcomes, or standards represented by each matrix row; a complete list of campus activities for each matrix level; or an extensive grouping of resources to develop a particular skill.

If you are a CIG Coordinator, the Glossary tool allows you to create the short and long definitions and explanations described above for matrices or wizards within a portfolio site. If you are a system administrator, you may use the Glossary tool in Portfolio Admin to define terms in matrices across sites within a Sakai instance using the Glossary Tool in the Portfolio Admin site.

The Glossary tool also allows you to manage glossary terms in other ways. You may:

- Change glossary terms.
- Delete glossary terms.
- Use a glossary created in one site in another site by exporting it from the first site and importing to the other site.
- Change glossary tool permissions for all users in any given role.
- The Glossary tool is usually located in the Guide category in a portfolio site.

To access the Glossary tool, click the launch button for Glossary. Sakai displays the Glossary home page.

The home page contains a list of glossary terms in alphabetical order, along with their short definitions. You have several options for viewing the glossary:

- To see the long definition or description of a term, click the term itself. Sakai displays the longer hyperlinked definition in a separate window. To close the window, click Close.
- To display the first page of terms, click **First**.
- To display the previous page of terms, click **Previous**.
- To display the next page of terms, click **Next**.

- To display the last page of terms, click **Last**.

Adding Glossary Terms (For CIG Coordinators)

To add a term to the glossary, access the Glossary tool and follow these steps:

1. If you do not see the Glossary tool menu bar, click the **Reset** button.
2. Click the Add link on the menu bar. Sakai displays the Add Glossary Term screen.
3. In the Term box, enter the term you need to define.
4. In the Short Description box, enter a brief definition of the term.
5. In the Long Description box, enter a longer definition or description, or add more extensive information to help participants fully understand the term. Use the icons and pull-down lists to format the text as appropriate.
6. Click the **Add Term** button. Sakai adds the term to the glossary and displays it in the list on the home page. The new term and the short definition you entered for it are displayed in the list. Or, to return to the home page without adding the term, click **Cancel**.

Editing Glossary Terms (For CIG Coordinators)

To edit a glossary term or either of its definitions, access the Glossary tool and follow these steps:

1. If you do not see the Glossary tool menu bar, click the **Reset** button.
2. Click the **Edit** link next to the term you want to change. Sakai displays the Edit Glossary Term screen.
3. Change entries in the Term, Short Description, and Long Description boxes, as needed. Use the icons and pull-down lists to format text for the long description as appropriate.
4. Click the **Save Changes** button. Sakai makes the changes and displays the list on the home page. The revised term and its short definition are displayed there. Or, to return to the home page without changing the glossary entry, click **Cancel**.

Deleting Glossary Terms (For CIG Coordinators)

To delete a term from the glossary, access the Glossary tool and follow these steps:

1. If you do not see the Glossary tool home page, click the **Reset** button.
2. Click the **Delete** link next to the term you want to remove. Sakai deletes the term from the list.

Sakai does not display a warning message before deleting the term. Instead, Sakai immediately removes the term from the list.

Publishing Glossary Terms Globally (For CIG Coordinators)

If you are a system administrator, you may publish a glossary term globally (that is, for all sites in a Sakai instance). To do so, log in and follow these steps:

1. Access the **Portfolio Admin** site.
2. Select the **Glossary** tool. Sakai displays the Glossary tool home page.
3. Add the term as instructed above. Because you are working in the Portfolio Admin site, Sakai makes this term available to all sites.

Exporting and Importing Glossary Terms (For CIG Coordinators)

If you own more than one site, you may want to use the same glossary in two or more of them. To do so, first export the glossary to your desktop as a compressed file first and then import it to the other site(s) where you plan to use it. When you import a glossary, you will be asked whether you want to replace any existing term with the imported term or ignore the imported term whenever a duplicate term is included in the import.

Exporting a Glossary

To export a glossary as a compressed file, access the Glossary tool on the appropriate site and follow these steps:

1. If you do not see the Glossary tool menu bar, click the **Reset** button.
2. Click the **Export** link on the menu bar. Sakai displays the Opening File window.
3. Follow the instructions.
4. The glossary will be exported to your desktop as a compressed file.

Importing a Glossary

To import a compressed glossary file, access the site to which you want to import it and follow these steps:

1. Add the file to Resources.
2. Access the Glossary tool. If you do not see the Glossary tool menu bar, click the **Reset** button.
3. Click the **Import** link on the menu bar. Sakai displays the Import Glossary Terms screen.
4. Click the **Select file...** link. Sakai displays the Select Item screen.
5. Select the compressed file for the glossary.
6. Under "When a term being imported exists," click to indicate whether you want the system to use the term being imported or ignore that term and use the existing term instead.
7. To import the file, click **Import**. Sakai imports the file, adds the terms to the glossary, and displays the Glossary home page. Or, to return to the home page without importing the file, click **Cancel**.

Changing Glossary Tool Permissions (For CIG Coordinators)

All participants who work with a matrix are permitted to view glossary definitions for row and column names. However, permissions to add, delete, change, and export glossary terms can be restricted by role, just as they can in other tools in Sakai.

To assign permissions, access the Glossary tool and follow these steps:

1. If you do not see the Glossary tool menu bar, click the **Reset** button.
2. Click the Permissions link on the menu bar. Sakai displays this screen:
3. Referring to the list below, click boxes to select the appropriate permissions for users in each role.

- **Delete** -- Users in this role may delete glossary terms.
- **Add** -- Users in this role may add and import glossary terms.
- **Edit** -- Users in this role may change glossary terms and their definitions.
- **Export** -- Users in this role may export a zip file of glossary terms.

To save the permissions settings, click **Save**. Sakai saves the settings and displays the Glossary home page. Or, to return to that screen without saving your changes, click **Cancel**.

Matrices (OSP)

Matrices Overview

A matrix is a framework for guiding students (or another group of users) through the process of creating a learning or assessment portfolio. In a matrix, portfolio assignments are represented as a table with two dimensions, holding cells organized into rows and columns with descriptive titles. Matrices are commonly used to track progress across criteria, milestones, or standards (represented as one dimension, say, the rows) in relation to different activities, levels, or periods of time (represented as a second dimension, say, the columns), but the rows and columns can also represent other things or concepts. The intersection of each row and column forms a cell with the row and column labels describing the intended content. The elements within the cell, such as forms to be completed, provide a means of guiding and documenting learning, encouraging reflection on the learning experience, and providing feedback and evaluation.

Matrices are highly customizable and can be used to document learning or achievements in many areas - general education, co-curricular development, program requirements, course activities, graduation standards, faculty promotion and tenure, and more. The matrix author (usually the CIG Coordinator role) determines the structure, purpose, and content of the matrix and each cell within it. The author guides participants through the activities for each cell by supplying instructions, rationale, and/or examples. Authors may also include forms that structure participant evidence of learning or achievement, forms that prompt participants to reflect upon their evidence, forms for designated reviewers to provide feedback on participant progress, and forms for designated evaluators to assess the work after a participant submits the cell. Finally, the author may also determine the order in which participants complete the cells.

Participants review the guidance in each cell, complete the forms that are presented and provide evidence from Resources to document their learning or achievement in relation to the criterion and level for the cell. Participants may also be asked to write reflections upon that evidence according to prompts provided in the cell. After the participant completes the tasks described in the guidance, s/he may be expected to submit the cell for evaluation. Site members with appropriate permissions can provide formative feedback to participants at any time. Summative evaluation occurs only after a cell has been submitted for evaluation.

CIG Coordinators (site organizers or other users in the CIG coordinator role) can create portfolio templates to display the content of a completed matrix or a matrix in process. Using these templates, participants are able to transform their matrices into presentations that can be shared with the public or selected audiences.

User Roles and Associated Actions in Matrices

Each user's role and permissions determine what the user can do in the Matrices tool. The four principal roles and the matrix actions associated with each role (via permissions in the out-of-the-box version of Sakai) are given below:

CIG Coordinator

- Design, create, modify, and delete matrices.
- Publish a matrix so that other roles can use it. (Important note: Do NOT publish a matrix until it is exactly the way you want it.)
- Export a matrix and then create an identical copy by importing it into the same site or a different site.
- Change the Matrices tool permissions for all users in any given role.
- Change the status of a matrix cell for an individual user or all users.

CIG Participant

- Add evidence of his or her learning to each cell by completing forms or attaching examples of work.
- Write reflections about his or her learning
- Submit cells for evaluation
- Read the feedback and evaluations of his or her work.

Reviewer

- Provide formative feedback on a participant's cell by completing a feedback form.

Evaluator

- Provide summative evaluation on submitted cells by completing an evaluation form.
- Change the status of a cell from Pending to Completed (or to Returned if additional work is needed) or leave the status as Pending (if additional evaluations are required).

Matrix Cell Status

Each cell in a matrix will exhibit a status from the possibilities below, which change as the users move through stages of the work. The status values are shown by colors that can be chosen in the creation of a matrix.

- **Ready** -- This cell is available for site participant work.
- **Pending** -- The participant has submitted this cell for evaluation.
- **Completed** -- The cell has been evaluated and its content is locked.
- **Returned** -- The evaluator has returned the cell to the participant to request changes or additions.
- **Locked** -- This cell is not available for site participant work at this time.

Assigning Permissions to Specific Matrices (For CIG Coordinators)

Permissions can be assigned to roles in a specific matrix by clicking the **Permissions** button to the right of the matrix name in the Matrices tool. The following permissions are available to assign to roles in the site containing a matrix.

- **Can use matrix** -- Allows matrix owner to attach artifacts, forms, and reflections to the cell.
- **Can view / access all matrix cells** -- Allows user to open and view all cells in the matrix, regardless of whether the user is a designated evaluator or reviewer for the cell. For viability, the user must also have "Can view / access user list and cell owner."
- **Can view evaluations created by another user** -- Allows user to open evaluation forms created by another user. Otherwise, evaluators, reviewers, coordinators, can only open evaluations that they themselves have created.
- **Can view feedback created by another user** -- Allows user to open feedback forms created by another user. Otherwise, evaluators, reviewers, coordinators, can only open feedback that they themselves have created.
- **Can manage matrix cell status** -- Allows user to change the status of a cell for the current user, all users, or a specific group via the Manage Status link.
- **Can view / access user list and cell owner** -- Allows user to see the drop-down list of user names and the user name for each matrix. Users need this permission in order to navigate and access participant work via the Matrices tool. Supports "blind" evaluation. Without this permission, evaluators can access student work only via the Evaluations tool, with participant names suppressed.
- **Can view all groups** -- Allows the user to see the matrices of all users regardless of group assignments. Without this permission, reviewers, evaluators, and coordinators can only see the matrices of participants in the groups to which they belong.

Designing Matrices (For CIG Coordinators)

Many of the guidelines that apply to designing other types of wizards also apply to designing a matrix. First and foremost, avoid unnecessary complexity. Although it is possible to add lengthy instructions, links to files, and numerous forms to each cell, doing so may overwhelm your users. Focus on the essentials. If something seems to have little or no value at any point, leave it out.

To design a matrix, follow these steps:

1. Analyze the activity or process that the matrix will support.
2. Identify the two dimensions of the work -- perhaps (1) criteria or standards and (2) components or stages-- and map them to the rows and columns to reveal the structure that you will need.
3. Identify the content needed (instructions, files, forms, etc.) for each cell of the matrix and for the matrix as a whole.
4. Draw a diagram showing the organization of the matrix's components. Do NOT omit this step. Matrices are fairly complex and many aspects of them cannot be changed after publication, so it's very important to diagram the matrix and identify the content for each cell before creating them in the Matrices tool.
5. If you plan to attach files to provide information to users of the matrix, create those files and store them in Resources in the site containing the matrix.
6. Identify the cells in which formative and summative feedback are needed. Before making decisions in this regard, think carefully about the load placed on reviewers (those that provide formative feedback) and evaluators (those that provide summative feedback). Also, keep in mind that after a cell matrix has been submitted for evaluation, participants can no longer change it.
7. Identify people to provide formative and summative feedback. Be sure they have appropriate permissions. Typically, the people that provide formative feedback are assigned to the Reviewer role and those that provide summative feedback are assigned to the Evaluator role. Role assignments are made in the Site Info tool and the permissions associated with each role are defined in the Matrices tool via the Permissions link.
8. If you plan to use non-global forms in the matrix to provide structure for site participant work, reflection prompts, and review and evaluation of work in the cells, store the XML schema documents (.xsd files) files for those forms in Resources. Then add each form schema to the Forms tool so the forms can be incorporated into your matrix. For more information on this step, see documentation on the Forms tool.

9. In most cases, it is good practice to use a single cascading style sheet (CSS) throughout the matrix. If you plan to use a style sheet other than the default, store the .css file for it in Resources. Then add the .css file to the Styles tool so it can be applied to the matrix. For more information on this step, see documentation on the Styles tool.

Associating Matrices with Sites (For CIG Coordinators)

In order to link an assignment to a matrix cell, you will need to associate the site in which the assignment resides with the Matrices tool in the site containing the matrix. Correspondingly, in order to link a cell in one matrix to a cell in another matrix, you will need to associate the site in which the second matrix resides with the Matrices tool. Normally the CIG Coordinator or owner of the site containing the matrix to receive content from an assignment or another matrix creates the association. Sites CAN be associated with themselves in order to link assignments to matrices or matrix cells to cells in other matrices within the same site. To a matrix in one site with assignments or matrices in another site, you must be a member of both sites.

In the site containing the target matrix (or matrices):

1. From the Tool Menu, choose **Matrices**.
2. From the main Matrices page, choose **Manage Site Associations**.
3. Click **Add** next to the site you want to associate with the Matrices tool.
   Note: If the site you want to associate is not visible on the screen, you can choose to show more sites using the drop-down menu, or use the arrow keys to display the next page. You can also search for a particular site by the site's title or ID.
4. You can continue to add sites one by one by clicking **Add** next to the site you want to associate. You can also associate all of the sites displayed on the current page by clicking **Add All**.
5. Click Save when you are finished adding sites, and then click **Yes** to confirm the association.
6. Once a site has been associated with the Matrices tool in the same site or any other site, any assignment or matrix cell in the associated site can be linked to one or more matrix cells in the site with which it has been associated.

Removing Site Associations (For CIG Coordinators)

When a site association is removed, all linked submissions (i.e., linked assignments or matrix cells) can no longer be accessed via the matrices in the current site.

To remove site associations:

1. From the Tool Menu of the portfolio site, choose **Matrices**.
2. Choose **Manage Site Associations**.
3. Select the sites by checking the boxes, and click **Remove Association**.
4. Click **Remove**, when prompted, to confirm.

Linking Matrix Cells (For CIG Coordinators)

Before you create the link, you must associate the site containing the cell you want to link with the site containing the target matrix cell. See documentation on associating matrices with other sites.

In the site containing the cell you want to link:

1. From the Tool Menu, choose **Matrices**.
2. Locate the matrix containing the cell to be linked and click **Edit** to the right of its name.
3. On the Edit Matrix screen, click the cell you want to link.
4. At the top of the Edit Cell screen, click **Create/Edit Matrix** Links.
   Note: If Create/Edit Matrix Links is not visible, the current site has not yet been associated with the Matrices tool in any other sites. You may need to contact the portfolio site owner to request the association.
5. From the drop-down menu next to "Site," choose the portfolio site containing the matrix to which you wish to link the assignment.
   Note: If the portfolio site you are looking for is not listed in the drop-down menu, the current site has not yet been associated with the Matrices tool in that site. You may need to contact the portfolio site owner to request the association.
6. All of the matrices in the selected portfolio site will be displayed. To see the description and guidance for a cell, click the question mark icon.
7. To link the current cell to a cell in the selected matrix, check the box in the cell. You can check multiple cells.
8. To link the cell to matrix cells in another site, select the site from the drop-down menu, and check the desired cells.
9. When you are finished making links, click **Save** to return to the Edit Cell screen. Then click **Save Changes** to return to the Edit Matrix screen.
10. When the linked cell is opened, information about the links is displayed. In addition, when a student submits the cell, the completed cell appears in the Items area of the matrix cell(s) to which the cell has been linked.
    Note: To see a list of the items linked to a specific cell, edit the Matrix containing the cell. Then edit the cell in question and click **View Items Linked to this Cell**. Each linked item is listed along with the item type and name of the site in which the item is located.

Linking Assignments with Matrix Cells (For CIG Coordinators)

Before you create the link, you must associate the site containing the assignment you want to link with the site containing the target matrix cell. See documentation on associating matrices with other sites or the same site.

In the site containing the assignment you want to link:

1. From the Tool Menu, choose **Assignments**.
2. Locate the assignment to be linked and click **Create/Edit Matrix Links** to the right of its name.
3. On the screen displaying site associations for linking assignments, use the drop-down menu to select the site in containing the matrix with which you want to link. Note: If the site containing the matrix to which you want to link is not included in the drop-down menu, the current site has not yet been associated with the Matrices tool in that site. You may need to contact the CIG Coordinator or owner of the site to request the association.
4. All of the matrices in the selected site will be displayed. To see the description and guidance for a cell, click the question mark icon.
5. To link the assignment to a cell in the selected matrix, check the box in the cell. You can check multiple cells.
6. To link the assignment to matrix cells in another site, select the site from the drop-down menu, and check the desired cells.
7. When you are finished making links to the matrices in a particular site, click **Save** to return to the Assignments tool.

When the linked cell is opened, information about the links is displayed. In addition, when a student submits the cell, the submitted assignment appears in the Items area of the matrix cell(s) to which the assignment has been linked.

Note: To see a list of the items linked to a specific cell, edit the Matrix containing the cell. Then edit the cell in question and click **View Items Linked to this Cell**. Each linked item is listed along with the item type and name of the site in which the item is located.

Creating Matrices: Step 1: Creating a Framework (For CIG Coordinators)

To create the framework for a matrix, open the Matrices tool and follow these steps:

1. If the Matrices home page is not displayed, click the tool **Reset** button.
2. In the Matrices menu near the top of the screen, click the **Add** button. Sakai displays the Add Matrix screen. The screen is divided into sections with labels that describe the type of options or features available in the section.
3. In the Information section, enter a title for the matrix and a description of its purpose. Only the title is required.
4. In the Colors and Style area, the Style field allows you to apply a custom cascading style sheet to the Matrix.

   - To apply Sakai's default style to the matrix, skip this step and proceed directly to the next step.
   - To apply another style to the matrix, click **Select Style**. Sakai displays the Manage Styles screen. This screen lists the styles available for use in your matrices. Click the **Select** link for the style you want to apply to this matrix. Sakai returns to the Add Matrix screen. The name of the style you chose is displayed in the Style box. Or, to return to that screen without selecting a style, click **Go Back**.

- Under Matrix Status Colors, select colors to indicate the status of each cell in the matrix. To change a status color, click the palette icon for the status, and select the desired color. See the Overview for an explanation of the status values.
- The Structure section is where you will define the rows and columns for your matrix. To add a column, click **Add Column**. Sakai displays the Add/Edit Column screen:
  - In the Name box, enter a name for display in the column header. Keep in mind that shorter names for columns allow for better use of screen space.
  - To select a background color for this column other than the default (gray), click the color palette icon for the Background Color box and select the desired color.
  - To select a color for the text in this column other than the default (black), click the color palette icon for the Font Color box and select the desired color.
  - To save your work on this column, click **Update**. Sakai displays the Edit Matrix Properties screen, including information for the column you have just created. Or to return to the Edit Matrix Properties screen without adding this column, click **Cancel**.

- Repeat the previous step as needed to create the remaining columns for your matrix. Caution: Think carefully about the number of columns in the matrix. After publishing a matrix, you can add columns but you cannot delete them.

- To change the descriptive label for columns to something other than the word "Column," enter the term you prefer in the Column Label box.
- To add a row to the matrix, click **Add Row**. Sakai displays the Add/Edit Row screen.
  - In the Name field, enter a name for display in the row header.
  - To select a background color for this row other than the default (gray), click the color palette icon for the Background Color box and select the desired color.
  - To select a color for the text in this row other than the default (black), click the color palette icon for the Font Color box and select the desired color.
  - To save your work on this row, click **Update**. Sakai displays the Edit Matrix Properties screen, including information for the row you have just created. Or to return to the Edit Matrix Properties screen without adding this row, click **Cancel**.
- Repeat the previous step as needed to create the remaining rows for the matrix. Caution: Think carefully about the number of rows in the matrix. After publishing a matrix, you can add rows, but you cannot delete them.
- To change the descriptive label for rows to something other than the word "Row," enter the term you prefer in the Row Label box.
- Under Progression, click the appropriate radio button to select the way you want participants to work through the cells in the matrix. The progression determines which cells have Ready status and which are locked. (For instance, with horizontal progression, the cells in the first column are ready to accept input and the cells to the right are locked. As soon as a cell is submitted, the cell to its immediate right changes from locked to ready.) Choose from None, Horizontal, Vertical, Open, or Determined by Instructor.
- Check the Permissions under the link at the top of the Edit Matrix screen, with reference to "User Roles and Associated Actions in Matrices" , and change them if necessary.
- Unless you w ant to specify defaults for forms, feedback, and evaluation, skip to step 15.
- Specify participant forms, feedback, and evaluation as follows. These default options apply to all cells, but can be overridden in individual cells. The drop-down lists will show the forms published globally as well as those in the Forms tool of the site.
  - In the "Participant Forms" area, from the drop-down menu next to "Custom Form", select a form if you wish, and click **Add**. Custom forms are typically used to collect structured data from participants. Then, if participants will be expected to write reflections in most or all cells, from the drop-down menu next to "Reflection," select a reflection form.
  - In the "Feedback" area, if you want reviewers to be able to provide formative feedback on the content of the cell, select feedback options using the radio buttons, and then, from the drop-down menu below next to "Feedback", choose a form.

    - To assign reviewers to give formative feedback, click **Add Reviewers**. On the page that opens, you can assign reviewers by name or role. Click the name or role you wish to add, and then click Add. You can use the **Shift** or **Ctrl** keys to add multiple names or roles, and Remove to make changes. Click **Save** to save your choices and return to the Add Matrix page.
    - By clicking **Allow participant to send feedback invitations to additional reviewers**, you give participants the option of inviting feedback from reviewers they choose. This option is also available in each matrix cell.

- If you want designated evaluators to provide summative, formal feedback. Select and evaluation form from the drop-down menu in the "Evaluation" area. To prevent students from viewing completed evaluation forms, check **Hide evaluations from participants**.
- To assign evaluators to provide summative feedback, click **Add Evaluators**. On the page that opens, you can assign evaluators by name or role. Click the name or role you wish to add, and then click Add. You can use the **Shift** or **Ctrl** keys to add multiple names or roles, and the **Remove** button to make changes. Click **Save** to save your choices and return to the Add Matrix page.
- When you have finished creating your matrix, review all of your choices making changes if necessary. Then click **Create Matrix** to save your work. Or, to exit without adding a new matrix, click **Cancel**. If an error is detected, such as a missing component, the Edit Matrix Properties screen will return so that you can correct it and then click **Save Changes**.
- If you clicked Create Matrix successfully, Sakai saves your changes and displays the new matrix on the Edit Matrix screen. Note the following:
    - The matrix title you specified in step 3 is displayed in the top left corner of the table. If you entered a description in that step, it is displayed above the table.
    - The column names, background colors, and text colors you chose are displayed as the column headers.
    - The row names and colors you chose are displayed as the row headers.
    - The legend shows the colors you selected to indicate cell status.

Creating Matrices: Step 2: Setting Up Cells (For CIG Coordinators)

Once you create the matrix structure, you need to add appropriate content to and configure each cell. A matrix cell can contain guidance, evidence (or artifacts) selected by the participant, a form for the participant to write a reflection, and forms for formative feedback and summative evaluation of the contents of the cell. All elements in the cell are optional and will not appear unless you choose to include them. (Note that unless you add a form to a cell for user input, the participant will have no place to enter written remarks in that cell, although attachment of files may still be enabled.)

To set up cells for a matrix, open the Matrices tool and follow these steps:

1. If the Matrices home page is not displayed, click the **Reset** button.
2. Find the matrix you want to work on and click the **Edit** link next to its name. Sakai displays the Edit Matrix screen.
3. Click the desired cell. Sakai displays the Edit Cell screen. The screen is divided into sections with labels that describe the type of options or features in the section.
4. Under Cell Settings, review the cell title. The default title includes the name of both the column and row that intersect at this cell. Change the title of the cell, if needed. An entry in the Title box is required. (Note: If the names of rows or columns are long, the title for the cell can be cumbersome. Consider modifying the cell title to shorten it and make it serve some useful purpose.)
5. Enter a description (objectives, etc.) of the cell, if desired. (Note: The description field can be a useful way to insert a brief set of instructions or guidance.)
6. In the Initial Status box, select either **Ready** or **Locked** to indicate whether this cell is to be available to participants as soon as the matrix is published. If you selected the horizontal or vertical progression in step 12 of the previous section, that decision is already made.
7. To apply a separate cascading style sheet to this cell, see "Step 1: Creating the Framework," step 4, above.
8. If you do not want participants to be able to attach files to the cell, check the **Disable Participant Attachments** box.
9. To see a list of items linked to this cell, with their types and source site names, click **View Items Linked to this Cell**. If you wish to link this cell to a wizard or other cell, see "Associating a Site with the Matrices Tool."

10. Under Guidance, enter or attach instructions, prompts, and/or other information needed by the participants in order to complete the cell. Five guidance pages are available for this purpose:

- "Instructions": For providing on what to do in the cell.
- "Rationale": For describing the purpose of the cell.
- "Examples": For describing and attaching examples of work similar to what participants should provide.
- "Rubric": For exhibiting the guidelines for evaluation of this cell.
- "Expectations": For providing a list of the tasks to be completed or the abilities to be documented.

- Under Participant Forms, leave the "default form(s)" box checked or uncheck it to reveal the Custom Form(s) menu for selecting forms that participants will complete in the Evidence area of the cell. To add a custom form for this purpose, select the desired form from the menu and click Add. You may repeat this process to add additional forms. CAUTION: Selecting the form from the drop-down menu is not sufficient to add the form to the matrix cell. You must click the Add button for the form to be saved as part of the matrix cell workflow (and Save Changes, as noted below).
- If the participant will be asked to write a reflection, leave the "default form (s)" box checked or uncheck to a select a custom form, as above, for the desired reflection form.
- Under Feedback and Evaluation, select form to support each of these activities if needed, following the same procedure as for Participant forms.
- For reviewers and evaluators, leave the "default" box checked or uncheck it to click the link **Select Reviewers** or **Select Evaluators** to specify the users or roles that will be responsible. Use the **Add >>** and **Remove <<** choices if you wish to alter the set already defined. You can allow participants to invite their own additional reviews by checking **Allow participants to send feedback invitations to additional reviewer**s.
- When you have finished editing the cell, review all of your choices making changes if necessary. Then click **Save Changes** to save your work. Or, to exit without saving, click **Cancel**.
- To set up other cells in the matrix, repeat steps 3-15.

Creating Matrices: Step 3: Previewing and Publishing Matrices (For CIG Coordinators)

Publishing a matrix makes it available for use by site participants. Publishing is a two-step process. The first step is to place the matrix in "preview" mode, which makes it available, to all roles, for testing purposes only. Once you are satisfied that the matrix is working properly, it can be published.

To preview and publish a matrix, open the Matrices tool and follow these steps:

1. If the Matrices home page is not displayed, click the **Reset** button.
2. Locate the matrix in the list, and note the Status column.
3. If the matrix is unpublished, a Preview link appears to the right of the matrix name. Click **Preview** to place the matrix in preview mode. The matrix is now available to all site members for testing. All user data added to or created in the matrix while it is in preview mode will be removed when the matrix is published.
4. If the matrix is in preview mode, a Publish link appears to the right of matrix name. Click **Publish** to purge all test data and begin using the matrix for its intended purpose.

Exporting and Importing Matrices (For CIG Coordinators)

There may be situations in which you want to make a copy of a matrix for use in the same site as the original or in another site. (No participant contents are saved.) To do so, you first export the matrix to your desktop as a .zip archive and then import into the site where you plan to use it. After the matrix is imported, you can edit the structure and contents as needed, following the instructions under Editing a Matrix.

Exporting a Matrix

To export a matrix as a .zip archive file, open the Matrices tool and follow these steps:

1. If the Matrices home page is not displayed, click the **Reset** button.
2. Find the matrix you want to export.
3. Click the **Export** link next to the name of the matrix. You'll see a Save dialog box.
4. Save the file to the desired location on your local storage device. Do not attempt to edit the contents of this file if you plan to import it.

Importing a Matrix

To import an exported matrix, go to the site where the matrix will be imported and follow these steps:

1. Upload the exported matrix (i.e., the .zip file) to Resources.
2. Open the Matrices tool. If the Matrices menu is not displayed at the top of the page, click the **Reset** button.
3. Click the **Import** button in the Matrices menu. Sakai displays the Import Scaffolding screen.
4. Click **Choose File**. Sakai displays the Add Attachment screen.
5. Locate the .zip file you uploaded in step 1 and click the **Select** link in the Actions column.
6. Click **Continue** at the bottom of the page to return to the Import Scaffolding screen.
7. Click **Import** to import the file and open the matrix for editing.
8. Edit the Matrix Properties page as needed. You can add, delete, or move rows and change any of the settings on the page.
9. When you are finished editing the structure and settings of the imported matrix, review all of your choices making changes if necessary. Then click **Save Changes** to save your work.
10. Sakai displays the Edit Matrix screen where you can edit the content of each cell, if needed.

11. To return to the Matrices home page, click **Return to List**.

Editing Matrices (For CIG Coordinators)

If you have not yet published a matrix, you may change any part of it. Preview mode allows you to test out the matrix and still change any part of it. Once published, you are limited in what you can change.

To revise a matrix, open the Matrices tool and follow these steps:

1. If the Matrices home page is not displayed, click the **Reset** button.
2. Find the matrix you want to change and click the **Edit** link next to its name. Sakai displays the Edit Matrix screen.
3. In the Matrices menu near the top of the screen, click **Edit Properties**. Sakai displays the Edit Matrix Properties screen.
4. Scroll to the Structure section on the page.
5. To change the name or colors of a column or row, click the **Edit** link next to its name and proceed as instructed in Creating a Matrix.
6. To remove a column or row, click the **Remove** link next to its name. Sakai displays the Remove Column (or Remove Row) window. To proceed, click **Continue**. Sakai deletes the column (or row) and returns to the Edit Matrix screen (Note: You cannot remove rows or columns after the matrix has been published.)
7. To move a row or column, use the **Up** and **Down** links next to the column or row name, which work as expected for rows. For columns, clicking **Up** moves the corresponding column one position to the left and **Down** moves it one column to the right.
8. To change other selections and entries on this page, proceed as instructed in Creating a Matrix.
9. When you have finished changing your matrix, review all of your choices making changes if necessary. Then click **Save Changes** to save your work. Or, to exit without adding a new matrix, click **Cancel**.

Deleting Matrices (For CIG Coordinators)

Although it is possible to delete a matrix from the Matrices tool, exercise extreme caution when doing so. Deleting a published matrix removes all associations with uploaded files, reflections, feedback, evaluations, and reports and cannot be undone. (Note that completed forms and files exist in the participant or reviewer or evaluator work spaces and remain there.)

To delete a matrix:

1. From the Tool Menu of the work site containing the matrix you wish to delete, open the Matrices tool.
2. If the Matrices home page is not displayed, click the **Reset** button.
3. On the Matrices home page, locate the matrix you wish to delete, and click **Delete**. (Note: If there are several matrices with the same name and you are uncertain about which one to delete, open and/or edit each matrix to look for clues, e.g., the presence of uploaded files and reflections, completed evaluations, and feedback forms.)
4. You will be asked to confirm your action. Click **Continue** to confirm and return to the Matrices home page. Or, to exit without deleting the matrix, click **Cancel**.

Changing Matrices Tool Permissions (For CIG Coordinators)

To change the default permissions for all of the matrices in a site, open the Matrices tool and follow these steps:

1. If the Matrices menu is not displayed at the top of the page, click the **Reset** button.
2. Click the Permissions button on the menu. Sakai displays the Permissions screen.
3. Referring to the list below, check boxes to select the appropriate permissions for users in each role.

- **Create** -- Allows users with designated role in the site to create a new matrix.
- **Revise Any** -- Allows users with a designated role to edit any matrix in the site.
- **Revise Own** --.Allows users with a designated role in the site to edit the matrices they have created.
- **Delete Any** -- Allows users with a designated role to delete any matrix in the site.
- **Delete Own** - Allows users with a designated role in the site to delete matrices they have created.
- **Publish Any --** Allows users with a designated role to publish any matrix in the site.
- **Publish Own** -- Allows users with a designated role in the site to publish matrices they have created.
- **Export Any** -- Allows users with a designated role to export any matrix in the site.
- **Export Own** -- Allows users with a designated role in the site to export matrices they have created.

To save the permissions settings, click **Save**. Sakai saves the settings and displays the Matrices home page. Or, to return to that screen without saving your changes, click **Cancel**.

To change the permissions for an individual matrix, see documentation on creating matrices and user roles and associated actions in matrices.

Changing the Status of Matrix Cells (For CIG Coordinators)

The CIG Coordinator can reset the status of any cell for one user or all users, regardless of the previous status of the cell. This feature is helpful when a user takes an action resulting in a change of cell status that needs to be undone; for example, a student accidentally submits a cell before completing a required reflection. The cell is now in "Pending" status, which is read-only, so the student is unable to add the reflection. In such cases, the CIG Coordinator can intervene and reset the status of the cell.

To change the status of a matrix cell, follow these steps:

1. If the Matrices home page is not displayed, click the **Reset** button.
2. Find the matrix with which you wish to work. Sakai displays the selected matrix.
3. In the upper left corner of the screen, a drop-down list of users is displayed. Select the user whose cell status you wish to change. (Note: If the site contains multiple groups, you may see also a Select group drop-down list. Use this menu to restrict the list of users to a specific group from which you can select the individual. This can be helpful if the site contains a large number of users.)
4. Sakai displays a read-only copy of the matrix for the user you specified. Verify that you are viewing the correct participant's matrix before proceeding (immediately above the user name drop-down menu, the name of the participant should appear in a message like 'View "PUL Matrix" (READ ONLY): Firstname Lastname').
5. In the upper left corner under "Matrices", click **Manage Status**.
6. From the drop-down menu next to "Change Status to", choose **Ready, Pending, Completed, Returned**, or **Locked**.
7. Choose the appropriate radio button:

- For this user only
- For all users (Note: Exercise extreme caution when selecting For all users. This option should be used only in rare cases when an evaluator or the CIG Coordinator has made a mistake affecting all users.)

- Click **Continue** to change the status as chosen and return to the matrix cell, or click **Cancel** to return to the matrix cell without changing the status.
- Click **Back to the Matrix**, and verify the cell's status by checking its color.

Accessing and Completing Matrices

To access a matrix and work in one or more of its cells, open the Matrices tool and follow these steps:

- Go to the site in which the matrix is located (your instructor or the person facilitating the portfolio activity will provide you with site name).
- Click **Matrices** in the Tool Menu to open the Matrices tool.
- If the Matrices home page is not displayed, click the **Reset** button.
- Click the name of the matrix with which you wish work. Sakai displays your copy of the selected matrix. The name of the matrix is shown in the upper left corner of the table. Within each cell are instructions for you to follow in order to complete a specific task or demonstrate competence in a particular area.

As shown in the legend beneath the table, each cell is color coded to indicate its status.

- **Ready**: This cell is available for you to work on.
- **Pending**: You have submitted your work in this cell for evaluation.
- **Completed**: You have received an evaluation of your work in this cell and are not required to perform any additional work.
- **Returned**: Your work has been returned to you for further attention.
- **Locked**: This cell is not yet available for you to work on.

The row and column labels in the matrix may be hyperlinks. If so, moving your mouse over the label displays a short description of the purpose of the cell. To see a longer description, click the title of the column or row.

To open and work in a cell, click it.

Read the instructions and other guidance at the top of the page carefully. To open an attachment in the guidance, click the file name of the attachment.

Depending on the makeup of the cell and the progress you have made on it to date, choose any or all of the following:

- Add or select a saved version of the form(s) listed at the top of the Evidence area of the page. For instructions on completing forms, see documentation on adding forms.
- Identify work samples you want to include and attach them to the cell. For instructions on attaching work to a cell, see documentation on attaching examples of your work.
- Reflect on your work. For instructions, see documentation on reflecting on your work.
- Review any formative feedback that has been offered in relation to your work. For instructions, see documentation on viewing feedback on your work.

- Revise your work. For instructions, see documentation on revising your work.
- Delete forms or work you have attached. For instructions, see documentation on deleting forms and attached work.
- Submit your work for summative evaluation. For instructions, see documentation on submitting your work for evaluation.

To return to the matrix at any time, click the **Back to the Matrix** button. Sakai displays the matrix.

Adding Completed Forms to Matrix Cells

Forms are the electronic counterparts to paper forms, such as those you fill out to submit applications, complete surveys, and so on. Each form consists of a name, instructions to the user, and a set of custom data entry fields with descriptive labels. If the matrix cell contains forms for you to complete, they will be listed at the top of the Evidence area of the cell. Each form has two links: "Add" and "Select".

To add a copy of the form to the cell:

1. Click the "**Add**" link to the right of the form name.
2. When the form opens, read the instructions at the top of the form (if provided) and enter the requested information.
3. When you are finished, click **Save Changes** to return to the matrix cell.

You may also select a previously completed copy of the same form and add it to the cell. To do so:

1. Click the "**Select**" link to the right of the form name. Sakai displays the Add Attachment screen and the contents in your My Workspace Resources folder.
2. All or almost all of your forms are saved in the Portfolio Interaction folder by default. Beneath Portfolio Interactions is a folder for each portfolio site in which you are a member. Each site folder contains sub-folders for each matrix in the site and beneath these folders are separate folders for each form type used in the matrix or wizard. Browse to the location where the desired form is stored and click the **Select** link to the right of the form you wish to use. (Note: The Select link only appears next to saved form instances that were created with the same data entry form used in the cell).
3. Scroll to the bottom of the page and click **Continue** to return to the matrix cell.
4. The selected form should now appear in the Evidence area of the cell.

Attaching Evidence of Work to Matrix Cells

You may attach evidence of your work that have been uploaded to or created in My Workspace Resources. To do so, follow these steps:

1. If you have not done so already, upload or create the items you plan to attach in the Resources tool in My Workspace.
2. If you plan to display your work in a publicly available portfolio, click **Edit Details** under the Actions menu for each item or a folder containing the items and click the checkbox for making the item (or folder) publicly viewable.
3. In the Items section of the page, click **Add** to the right of the sub-section for Attachments. Sakai displays the contents in your My Workspace Resources folder.
4. Locate the item(s) you want to attach and click **Select** to the right of each item's name. The selected items are listed at the top of the page under Items to Attach.
5. When you have selected all your attachments, scroll to the bottom of the page and click **Continue** to return to the matrix cell.
6. The items you selected should now appear in the Evidence area of the cell.

Reflecting on Work in Matrix Cells

The instructions in the cell may ask you to write a reflection about what you've learned. To enter a reflection about your work, follow these steps:

1. In the Reflection area of the cell, click **Add**. Sakai displays a reflection form.
2. Read the instructions at the top of the form (if provided) and complete the form.
3. When you are finished, click **Save Changes** to return to the matrix cell.

Revising Work in Matrix Cells

Before submitting your work in a cell, you may revise any of the content you have added, as described below.

- To revise a form in the Evidence or Reflection area of the page:

1. Click the **Edit** link next to its name.
2. Make the desired changes.
3. Click **Save Changes** to return to the matrix cell.

- To revise an attachment:

1. If you have not already done so, edit or upload the revised file(s) to My Workspace Resources.
2. In the Evidence section of the page, click **Add/Drop**. Sakai displays the contents in your My Workspace Resources folder.
3. Under Items to Attach, remove the item(s) you wish to replace with revised version(s).
4. Locate the revised item(s) and click **Select** to the right of their names. The selected items are listed at the top of the page under Items to Attach.
5. When you have selected all your attachments, scroll to the bottom of the page and click **Continue** to return to the matrix cell.
6. The revised items you selected should now appear in the Evidence area of the cell.

Deleting Work in Matrix Cells

Sakai displays a Remove link next to the name of each form and item you have added to a cell. To delete any of these items, simply click the corresponding **Remove** link. Sakai deletes the item immediately.

Caution: Sakai does not require a confirmation before deleting attachments and forms. Take your time and think carefully before deleting items.

Submitting Work in Matrix Cells for Evaluation

When you have completed your work in a cell, you may be expected to submit it for evaluation.

Caution: After you submit a cell for evaluation, you can no longer make changes to it. Make sure all of your work is complete and ready for review before you submit the cell.

To submit a matrix cell, follow these steps:

1. Click the **Submit for Evaluation confirmation** button in the Reflection area of the page. Sakai displays a screen asking you to confirm.
2. To confirm your submission, click **Submit**. Or, to cancel the submission process and return to the screen for this cell, click **Cancel**.
3. If you clicked Submit, Sakai submits your work for evaluation and returns to the cell displaying this message: "Status is pending and cannot be altered".
4. Return to the matrix by clicking **Back to the Matrix**.
5. Notice that the cell color corresponds to the pending status (consult the legend below the matrix). After a cell has been evaluated, the evaluator sets the status Ready or Completed. Cells that are returned to the "ready" status require you to perform additional work and resubmit. The Completed status indicates that your work in the cell is finished -- you can view it along with the feedback and evaluation provided to you, but you cannot change it.

Viewing Feedback on Work in Matrix Cells

One or more members of the site may be assigned to review matrix cells and provide feedback on the work done in them by site participants. If feedback has been offered for one of your matrix cells, you will notice one or more completed feedback forms in the cell. To read the feedback you have received, follow these steps:

1. Feedback may appear in In the Feedback section of the page or beneath completed forms and attachments.
2. To read the feedback, click the title of the feedback form. Sakai displays the feedback in a new tab or window.
3. After reading the feedback, close the tab or window.

Providing Formative Feedback in Matrix Cells

If you are a Reviewer or have the Review permission, you may examine the contents of a participant's matrix at any time and offer formative feedback on the work you find there. You may also return to a cell you have reviewed before, review any further work that has been done there, and provide additional feedback. To review and provide feedback on a matrix, open the Matrices tool and follow these steps:

1. If the Matrices home page is not displayed, click the **Reset** button.
2. Find the matrix you want to review and click its name. Sakai displays the selected matrix. In the upper left corner of the screen, a drop-down list of users is displayed. Select the user to whom you wish to give feedback. (Note: If the site contains multiple groups, you may see also a Select group drop-down list. Use this menu to restrict the list of users to a specific group. This can be helpful if the site contains a large number of users.)
3. Sakai displays a read-only copy of the matrix for the user you specified. Verify that you are viewing the correct participant's matrix before proceeding (immediately above the user name drop-down menu, the name of the participant should appear in a message like 'View "PUL Matrix" (READ ONLY): *Firstname Lastname*').
4. Icons in a cell indicate that the user has attached material to it. The background color of a cell indicates its status.
5. Click on a cell to open it and review its contents.
6. Click the names of any forms, items, and reflections to open and review them.
7. To provide general feedback, click **Add Feedback** in the "General Feedback" area to open the Feedback form. To offer feedback on a specific item in the "Items" area, click **Add Feedback** next to the item to open the Feedback form for that item.
8. Fill in the form according to any instructions given in it. You may type your feedback directly into the text box or copy and paste text from another document.
9. When you have completed the feedback form, click **Save Changes** to return to the matrix cell. Or, to return to the matrix cell without saving your changes, click **Cancel**.
10. To return to the matrix display, click **Back to the Matrix**.

Adding Evaluations to Matrix Cells

Evaluators can use either the Matrices tool or the Evaluations tool to add an evaluation to a matrix cell. To add an evaluation using the Matrices tool, follow these steps:

1. If the Matrices home page is not displayed, click the **Reset** button.
2. Find the matrix you want to evaluate and click its name. Sakai displays the selected matrix. In the upper left corner of the screen, a drop-down list of users is displayed. Select the user to whom you wish to give feedback. [Note: If the site contains multiple groups, you may see also a Select group drop-down list. Use this menu to restrict the list of users to a specific group. This can be helpful if the site contains a large number of users).
3. Sakai displays a read-only copy of the matrix for the user you specified. Verify that you are viewing the correct participant's matrix before proceeding (immediately above the user name drop-down menu, the name of the participant should appear in a message like 'View "PUL Matrix" (READ ONLY): *Firstname Lastname*'.)
4. Icons in a cell indicate that the user has attached material to it. Cells color-coded as "Pending" are ready for evaluation.
5. Click on a pending cell to open it and review its contents.
6. Click the names of any forms, items, and reflections to open and review them.
7. In the Evaluations area, click **Add**. Fill in the form according to any instructions given in it. You may be asked to fill in required fields, submit a grade or rating, and add a comment. You may type your comments directly into the text box or copy and paste text from another document.
8. When you are finished filling in the Evaluation form, click **Save Changes**. To exit without saving your evaluation, click **Cancel**.
9. After saving your changes, you will be prompted to choose one of the following work flow options:

   - Set Status to "**Complete**." Choose this option if no further work is required and the evaluation process is complete. The Items, Reflections, and Evaluations areas of the cell will be locked.
   - **No Changes to Status**: Choose this option if you or other evaluators will be adding further evaluations to the cell.
   - Set Status to "**Ready**." Choose this option to unlock the Evidence and Reflections areas of the cell, so the student can edit, delete, or add attachments, forms, and reflections.

- Choose the appropriate radio button, and then click **Submit**.
- You will be returned to the cell in which you were working. Click **Back to the Matrix** to return to the matrix.

To add an evaluation using the Evaluations tool, follow these steps:

1. Select the Evaluations tool from the left hand Tool Menu. If the home page of the Evaluations tool is not displayed, click the **Reset** button.
2. The Manage Evaluations screen will display with a list of matrix cells or wizard pages that have been submitted for evaluation. You will only see cells or pages you have permission to evaluate.
3. Click the title of a cell or page pending evaluation to open it and review its contents.
4. Click the names of any forms, items, and reflections to open and review them.
5. In the Evaluations area, click **Add**. Fill in the form according to any instructions given in it. You may be asked to fill in required fields, submit a grade or rating, and add a comment. You may type your comments directly into the text box or copy and paste text from another document.
6. When you are finished filling in the Evaluation form, click **Save Changes**. To exit without saving your evaluation, click **Cancel**.
7. After saving your changes, you will be prompted to choose one of the following work flow options:

   - Set Status to "**Complete**." Choose this option if no further work is required and the evaluation process is complete. The Items, Reflections, and Evaluations areas of the cell will be locked.
   - **No Changes to Status**: Choose this option if you or other evaluators will be adding further evaluations to the cell.
   - Set Status to "**Ready**." Choose this option to unlock the Evidence and Reflections areas of the cell, so the student can edit, delete, or add attachments, forms, and reflections.

- Choose the appropriate radio button, and then click **Submit**.
- You will be returned to the cell in which you were working. Click **Back to Evaluations** to return to the Evaluations tool.

Accessing Matrices from My Workspace

When the Matrices tool is added to My Workspace, it displays a list of all of the matrices to which you have access. Using this tool, you can open any matrix in the list without visiting the site in which the matrix is located. To turn on the Matrices tool in My Workspace, follow these steps:

1. Click on the **Site Info** tool.
2. Click on the **Page Order** link located on the Site Info menu bar.
3. Click on the **Add page(s) to your site** link located on the Site Info menu bar.
4. Check the box next to the Matrices tool.
5. Verify that the Matrices tool has been added and is in your preferred page order.
6. Click on the **Save** button.
7. Once the Matrices tool has been added to your My Workspace, click **Matrices** to see all of the matrices to which you have access.
8. To work with a matrix in the list, click its title.

(Note: Different institutions may or may not enable the Matrices tool in My Workspace. If the Matrices tool has not been enabled in My Workspace, if Site Info is not a tool in My Workspace, or if the Matrices tool does not appear under Edit Tools in My Workspace > Site Info, then you will need to ask your system admin to modify the template for your My Workspace site. Additionally, the Matrices tool by default only appears in My Workspace for maintain-level users.)

Portfolio Templates (OSP)

Portfolio Templates Overview (For CIG Coordinators)

A portfolio template defines the layout, style, and content of all portfolios that are based on it. If you are a CIG Coordinator (a site organizer or other user with permission), you can create templates that support the intended purpose(s) of portfolios on your site. You might create one template to support resumes or other forms of self-presentation. You might create another for displaying the results of a teaching and learning process collected by matrices for general education or co-curricular progress. Or you might create a portfolio template that is tailored for an assessment and accreditation portfolio, such as those that integrate learning across many sites to show learning in relation to institutional values or desired outcomes.

Site participants are not required to use templates for their portfolios. If the institutional implementation of Sakai permits, they may also design their own portfolios using portfolio layouts and styles.

Portfolio templates are best used when the CIG Coordinator wishes to guide site participants in specific ways rather then allowing them to create portfolios according to their own ideas and specifications. The most effective way to work with portfolios is to first use a portfolio template to guide and instruct participants in creating effective portfolios; then at a later time, direct participants to design their own with a variety of portfolio layouts and styles that allow them more freedom in putting their own creativity into portfolios for similar or different purposes.

Each portfolio template is based on an .xsl file. This file specifies the layout for the portfolio, the pathways to the content for the portfolio, and, optionally, the pathway to a .css file that defines the portfolio style.

Optionally, a template can also include an "outline options" or "portfolio properties" form, which is now called Required Settings in the work flow for users that create portfolios. These options or settings allow participants to add content to their portfolios by keying or copying and pasting text directly into it. Required settings (or outline options) are often used when it is easier or more intuitive for participants to add content directly rather than creating each distinct item as a form in Resources. Required settings can be used to prompt for and collect information such as a site participant's name, a date, a title, and subtitle for the portfolio, captions for images, and/or one or more reflections. They are also used when the participant needs to specify a particular level of a matrix to include in a portfolio.

Required settings (outline options) are presented to the participant in separate screen during the process of creating a portfolio. The CIG Coordinator defines the fields on the screen (which is, essentially, a form) by adding an .xsd file for it to the portfolio template.

To access the tool, click the **Launch** button for Portfolio Templates. Sakai displays the Portfolio Templates home page.

The screen contains a list of the portfolio templates on your site. If the list is longer than one page, use the buttons under the Portfolio Templates menu bar to display other pages in the list.

- To display the first page of the list, click **First**.
- To display the previous page of the list, click **Previous**.
- To display the next page of the list, click **Next**.
- To display the last page of the list, click **Last**.

Using Resources with Portfolio Templates (For CIG Coordinators)

The Portfolio Templates tool allows CIG Coordinators to add templates that define the content, style, and layout of portfolios to be created by site participants. Each template is based on an .xsl file and may include other files, such as .css, .xsd, and javascript files. These files must be uploaded to Resources to make them available to the Portfolio Templates tool. If there is a chance that other CIG Coordinators or administrators will need to edit your portfolio template at a later date, it is recommended that you store the files for the template **in a publicly viewable folder** in the Portfolio Admin Resources folder. Alternatively, to prevent others from accessing the files for your template, you may store them in your My Workspace Resources folder or in a hidden folder in the portfolio site in which they will be used. See information on "Publishing a Template" below for more information.

After adding a template, the CIG Coordinator may use the Portfolio Templates tool to perform any of the following activities.

- Change and delete files that make up a portfolio template.
- Create a new template by changing the files and using them to create another portfolio template.
- Use a template created in one site in another site by exporting it as a zip file from the first site, uploading the zip file to Resources, and importing it into the Portfolio Templates tool in the second site.

Preparing to Create Portfolio Templates (For CIG Coordinators)

Before creating a portfolio template in Sakai, consider the following questions and suggestions.

- What are the objectives of the type(s) of portfolios that will be based on this template?
- What content must be included in participant portfolios to achieve these objectives?
- In what order should participant content be presented?
- Does your institution have existing portfolio templates that you might use or modify for your purpose(s)? If so, begin with an existing template and modify it as needed.
- If no suitable template exists, are you able to write an .xsl file for a portfolio template from scratch? If so, upload the appropriate file to Resources.
- Otherwise, follow the instructions beginning at http://confluence.sakaiproject.org/display/OSPDOC/Portfolio+Templates and continuing onto subsequent linked pages to create a portfolio template. You will begin a passthrough template, which is provided along with the instructions.
- Do users need to enter additional information such as a portfolio title and subtitle and/or captions for images? Do they need to select a single level of a matrix to include in the portfolio? If so, create an "outline options" .xsd file to allow users to provide this information via Required Settings, upload it to Resources, and make note of its root node.
- If your institution has a default "style" that includes a standard set of fonts, colors, or if your institution has created other styles, which style is best suited for portfolios built on this template? Upload the appropriate .css file to Resources and make note of its name.
- What other files do you need to use in this portfolio template? You may include image, sound, video, javascript, and other types of files to enhance participant display of information in the portfolio. Upload the appropriate files to Resources and make note of the name for each file.

Creating Portfolio Templates: Step 1: Provide a Name and Description (For CIG Coordinators)

To give the template a name and description, access the Portfolios Templates tool and follow these steps:

1. If the Portfolio Templates home page is not displayed, click the **Reset** button.
2. In the Portfolio Templates menu bar near the top of the screen, click the **Add** button. Sakai displays the Add Portfolio Template, Step 1 of 4, screen.
3. Enter a name for this layout in the Name box.
4. If desired, enter a helpful description in the Description box for participants to use in selecting this template. This is especially useful if participants will have several options from which to choose.
5. Under Show within Portfolio Navigation, specify whether portfolios based on this template will display in the window from which they are accessed or in a new window. It is recommended that you choose **No** to display the portfolio in a new window. Options and results are as follows:

- Yes -- Portfolios based on this template will display in the window from which they are accessed. |
- No -- Portfolios based on this template will display in a new browser window. |

To proceed, click **Continue**. Sakai displays the Build Template, Step 2 of 4, screen (see below). Or, to return to the Portfolio Templates home page without adding any of this information, click **Cancel**.

Creating Portfolio Templates: Step 2: Specify the Layout and Required Settings (For CIG Coordinators)

After completing the steps outlined in the documentation for Creating a Portfolio Template: Step 1, click **Continue**. Sakai will display the Build Template, Step 2 of 4, screen.

To specify the layout for this template, follow these steps:

1. To the right of the Basic Template Outline box, click the **Select File** link. Sakai displays the Add Attachment screen.
2. Select the .xsl file you need. To select the file from Resources or from another location, follow the instructions for selecting an item. (If you do not have a specific .xsl file for the portfolio template, follow the steps for creating one at http://confluence.sakaiproject.org/display/OSPDOC/Portfolio+Templates and subsequent pages; then upload the resulting file to Resources.)
3. After you click Finish, Sakai displays the Build Template, Step 2 of 4, screen again. The name of the file you selected is shown in the Basic Template Outline box.
4. Optionally, provide outline options (required settings) using the drop down menu for Outline Options Form Type to choose the desired form. (This form must have already been created in the Forms tool in the site or globally in Portfolio Admin.)
5. After you click Finish, Sakai displays the Build Template, Step 2 of 4, screen again. The name of the form you selected is shown in the Outline Options box.
6. Choose one of the following options:

- To continue to build the template, click **Continue**. Sakai displays the List Content, Step 3 of 4, screen.
- To stop working on this template and save the work you have done so far, click **Finish**. Sakai displays the Portfolio Templates home page. Your new template is listed on this screen. You may continue to work on the template at any time.
- To return to the Add Portfolio Template, step 1 of 4, screen, click **Back**.
- To exit without saving any of the information you have entered in this template creation session, click **Cancel**. Sakai displays the Portfolio Templates home page.

Creating Portfolio Templates: Step 3: List User Content (For CIG Coordinators)

After completing the steps outlined in the documentation for Creating a Portfolio Template: Step 2, click **Continue**. Sakai will display the List Content, Step 3 of 4, screen.

This screen allows you to identify the forms, matrices, and uploaded files for portfolios that use this template. To select this material, follow these steps:

1. In the Type box, use the pull-down list to select the type of item the site participant can or must add. A selection here is required. The list contains the names of all forms on the site, along with choice of Matrix and Uploaded File. If site participants can or must:

- Complete and attach a specific form, select the name of that form here.
- Attach a matrix, select **Matrix**.
- Attach any other type of resource (simple text, URL, file, etc.) select **Uploaded file**.

2. Referring to the list of steps below, enter an appropriate name in the Name box. This entry is required. If you are following the steps at http://confluence.sakaiproject.org/display/OSPDOC/Portfolio+Templates, you will begin the process with a passthrough.xsl file.

- Form - The root node in this file.
- Uploaded file - The name by which the .xsl file identifies this file; if the template is based on passthrough.xsl, any one-word name by which you want the final .xsl file to identify this file.
- Matrix - The name by which the .xsl file identifies this matrix; if the template is based on passthrough.xsl, any one-word name by which you want the final .xsl file to identify this file.

3. Enter a descriptive name for the item in the Title box. This entry is required as well.
4. In the Description box, enter instructions to site participants on how to select an item, if desired. These instructions display to site participants when they use the template to create a portfolio.
5. Under "Allow Multiple Selection," choose one of these options:

- If the creators of these portfolios may include more than one instance of this information (as is the case for accomplishments, job experience, and other things that occur more than once), click **Yes**.
- Otherwise, click **No**.

6. Click **Add to List**. Sakai displays information about this item in the bottom part of the screen.
7. To add another item to the template, repeat steps 1-6.
8. To reorder items so they are displayed to the portfolio creator in a different order, change the numbers in the Sequence boxes. (This change will not affect the sequence of the items in the final portfolio. The order of items in the portfolio is determined by the .xsl file you selected in Step 2 above.)
9. To edit an item you have added, click the **Edit** link below its name and make changes as needed. For more information, see instructions in steps 1-6.
10. To delete an item you have added, click the **Delete** link below its name. Sakai deletes the item immediately. Caution: Be sure you want to delete an item before clicking **Delete**. Sakai does not display a delete verification window before deleting the item.
11. After adding as many items as you wish, choose one of the following options:

- To continue to create the template, click **Continue**. Sakai displays the Select Supporting Files, Step 4 of 4, screen.
- To stop working on this template and save the work you have done so far, click **Finish**. Sakai displays the Portfolio Templates home page. This template is listed on the screen. You may work on this template further at any time.
- To return to the Build Template, Step 2 of 4, screen, click **Back**.
- To exit without saving any of the information you have entered in this template creation session, click **Cancel**. Sakai displays the Portfolio Templates home page.

Creating Portfolio Templates: Step 4: Select Supporting Files (For CIG Coordinators)

After completing the steps outlined in the documentation for Creating a Portfolio Template: Step 3, click **Continue**. Sakai will display the Select Supporting Files, Step 4 of 4, screen:

This screen allows you to identify any additional files that are to be used in this template. These files may include .css files (style sheets) and image, sound, video, javascript, and other files that define the look and feel, navigation, graphics, and other features of the portfolio template.

To select this material, follow these steps:

1. In the Name (used in xpath) box, enter the name for this file that is used in the .xsl file you chose in "Step 2: Specifying the Layout". If the template is based on passthrough.xsl, enter any one-word name by which you want the final .xsl file to identify this file. An entry in this box is required.
2. To the right of the Choose File box, click the **Select File** link. (An entry in this box is required.) Sakai displays the Select Item screen.
3. Select the file you need. To do so, follow the instructions for selecting an item. After you click **Finish**, Sakai displays the Select Supporting Files, Step 4 of 4, screen again.
4. Click Add to List. Sakai displays the file name in the bottom part of the screen. You must remember to click **Add to List** in order to save the file as part of your template.
5. To add another supporting file to the template, repeat steps 1-4.
6. To edit a file you have added, click the **Edit** link below its name and make changes as needed. For more information, see instructions in steps 1-4.
7. To delete a file you have added, click the Delete link below its name. Sakai deletes the item immediately. Caution Be sure you want to delete a file before clicking **Delete**. Sakai does not display a delete verification window before deleting the file.
8. Choose one of the following options:

- To save your work, click **Finish**. Sakai displays the Portfolio Templates home page. This template is listed on the screen. You may work on this template further at any time.
- To return to the List Content, Step 3 of 4, screen, click **Back**.
- To exit without saving any of the information you have entered in this template creation session, click **Cancel**. Sakai displays the Portfolio Templates home page.

Creating Portfolio Templates: Step 5: Finishing Up with Passthrough XSL (For CIG Coordinators)

If you have based your template on passthrough.xsl, follow these final steps:

1. Use the Portfolios tool to create a portfolio based on this template.
2. Display the portfolio.
3. Display the XML file that the system will use to generate the final HTML file by right-clicking anywhere on the portfolio display and selecting **View Page Source**.
4. Use any XSLT creator program to create an .xsl transformation file.
5. Using the Portfolio Templates tool, replace passthrough.xsl with the .xsl file you have created.

Publishing Portfolio Templates (For CIG Coordinators)

If you are a system administrator, be advised that any template that you create and publish in the Portfolio Admin site automatically becomes available to all sites on your Sakai instance. If you publish the portfolio template within a site, it will only be available to users in that site.

After you have created a template, you may use it to create your own portfolio. However, the template is not yet available for use by others. To make the template available for other site participants to use, you must publish it.

To do so, access the Portfolio Templates tool and follow these steps:

1. If the Portfolio Templates home page is not displayed, click the **Reset** button.
2. Find the template you want to publish and click the **Publish** link below its name. Sakai publishes the template.

Editing Portfolio Templates (For CIG Coordinators)

You may revise the title and description for a portfolio template. You may also attach different files. To revise a layout, access the Portfolio Templates tool and follow these steps:

1. If the Portfolio Templates home page is not displayed, click the **Reset** button.
2. Click the **Revise** link below the name of the template you want to change. Sakai displays the Revise Portfolio Template, Step 1 of 4, screen.
3. Proceed from screen to screen, changing entries as needed. For more information and instructions, see documentation on creating portfolio templates.

Copying Portfolio Templates (For CIG Coordinators)

To create a template that is similar to an existing template, you may want to copy the existing template and make changes to the copy. To copy a template, access the Portfolio Templates tool and follow these steps:

1. If the Portfolio Templates home page is not displayed, click the **Reset** button.
2. Find the template you want to use and click the Copy link below its name. Sakai copies the template and displays its name in the list.

The name of the new template is the same as that of the original, with the word "copy" added at the end.

Exporting and Importing Portfolio Templates (For CIG Coordinators)

If you own more than one site, you may want to use the same template in two or more of them. To do so, first export the template to your desktop as a compressed file first and then import it to the other site(s) where you plan to use it.

Exporting a Template

To export a template as a compressed file, access the Portfolio Templates tool on the appropriate site and follow these steps:

- If the Portfolio Templates home page is not displayed, click the **Reset** button.
- Find the template you want to work with and click the **Export** link below its name. Sakai displays the Opening File window.
- Follow the instructions. The compressed file will be exported to your desktop.

Importing a Template

To import a compressed template file from your desktop to a Sakai site, access the site to which you want to import it and follow these steps:

- Add the file to Resources.
- Access the Portfolio Templates tool. If the home page is not displayed, click the **Reset** button.
- Click the **Import** link on the Portfolio Templates menu bar near the top of the screen. Sakai displays the Import Template screen.
- Click the **Select file** link. Sakai displays the selected Item.
- Select the compressed file for the template by following the instructions for selecting an item. After you click **Finish**, Sakai displays the Import Template screen again. The name of the file you chose is shown in the Template File box.
- To import the file, click **Import Template**. Sakai imports the file and displays the Portfolio Templates home page. The imported template is listed there. Or, to return to the home page without importing the file, click **Cancel**.

Deleting Portfolio Templates (For CIG Coordinators)

You may delete a template only if it is not being used in any portfolios (published or unpublished). If the template is in use, you must delete the portfolios based on it before you can delete the template, itself.

To delete a template, access the Portfolio Templates tool and follow these steps:

1. If the Portfolio Templates home page is not displayed, click the **Reset** button.
2. Find the template you want to remove and click the **Delete** link below its name. Sakai displays a delete confirmation window.
3. To delete the template, click **OK**. Sakai deletes the template and displays the Portfolio Templates home page. Or, to return to the home page without deleting this template, click **Cancel**.

Changing Portfolio Templates Tool Permissions (For CIG Coordinators)

To change permissions for users in one or more roles, access the Portfolio Templates tool and follow these steps:

1. If the Portfolio Templates menu bar is not displayed, click the **Reset** button.
2. Click the **Permissions** button on the menu bar. Sakai displays the Permissions screen.
3. Referring to the list below, check boxes to select the appropriate permissions for all users in each role.

- **Copy** -- Users in this role may create new templates by copying existing templates.
- **Publish** -- Users in this role may publish templates for use by site participants.
- **Delete** -- Users in this role may delete templates.
- **Create** -- Users in this role may use the Portfolio Templates tool to create and import templates.
- **Edit** -- Users in this role may change templates.
- **Export** -- Users in this role may export a template to their desktops as a compressed file.

To save the permissions settings, click the **Save** button Sakai saves the settings and displays the Portfolio Templates home page. Or, to return to the home page without saving your changes, click **Cancel**.

Portfolios (OSP)

Portfolios Overview

An electronic portfolio is a collection of one or more web pages that presents information of your choosing and allows you to share it with others. Portfolios serve real-world purposes, such as career development and the job search, documentation of and reflection on experience and learning, professional development, and collaboration. For example, you might create a portfolio for your resume or curriculum vitae. You might create a portfolio to demonstrate your proficiency in relation to programmatic or institutional learning outcomes or in relation to a set of professional development goals. You might also make a portfolio to showcase art, writing, or other talents and skills you have developed. Other uses of portfolios include collaboratively reporting on group projects and presenting learning you have demonstrated in matrices or wizards. These are just a few of the many ways people have used on line portfolios.

To create and work with a portfolio in Sakai, you will use both the Resources tool and the Portfolios tool. First, collect the material you want to present in your My Workspace Resources folder. Then use the Portfolios tool to present the information.

The Portfolios tool allows you to do all of the following:

- Create a portfolio by using a portfolio template made available by your institution to help fulfill course, program, or institutional requirements.
- Choose material for your portfolio by selecting forms, matrices, uploaded files, and URLs from Resources.
- Publish portfolios for audiences of your choosing. Your audience may include both site participants and people that are not members of the site.
- Notify others that a portfolio has been shared with them.
- Change, comment on, and delete your portfolios.
- Invite comments on your portfolios and view and manage comments you receive.
- View and comment on the portfolios that have been shared with you by others and view comments you have made about these portfolios.
- View statistics on those that have accessed your portfolios.
- Download a copy of a portfolio to your desktop.

Portfolios Home Page

This page defaults to a list of all portfolios you have permission to view. By selecting one of the additional tabs at the top, you can view just your own portfolios or portfolios that have been shared with you. Under the tabs you can select the appropriate link to show portfolios that are not hidden, hidden, or both. If any list is longer than one page, use the buttons on the right side above the list to display other pages.

- To display the first page of the list, click **First**.
- To display the previous page of the list, click **Previous**.
- To display the next page of the list, click **Next**.
- To display the last page of the list, click **Last**.

At the top of this page are two links.

1. Create New Portfolio (Click here every time you want to create a new portfolio.)
2. Permissions (Click here to change the default permissions for the portfolio tool.)

The following information is provided for each portfolio listed on this page:

- The portfolio name.
- The owner.
- The date it was last updated.
- A check if it is active, or viewable by those with whom it has been shared. (An inactive portfolio's name is faded to help identify those portfolios that are inactive.)
- A check if it has been shared.
- A tally of comments which you are allowed to view. Click the tallied number to view the comments. Space will be blank if comments were not allowed.

In addition there are different "Actions" that can be taken on any portfolio based on the permissions you have for that portfolio. These may include:

- Share
- Edit
- Statistics
- Download
- Delete
- Hide or Show

Creating Portfolios

The process of creating a portfolio involves selecting new content for the portfolio or modifying what is already there. In addition, decisions have to be made about:

- Setting the status. (The default is inactive - no one else can view the portfolio.)
- Choosing template for your portfolio.
- Deciding whether or not to allow comments.
- Determining which site participants or users outside the site will have access to the portfolio.
- Optionally notifying others that a portfolio has been shared with them.

To begin, click the **Create New Portfolio** link at the top of the Portfolio home page. If the Portfolios home page is not displayed, click the **Reset** button.

If more than one portfolio template is available in the site, decide which one you want to use.

- The portfolio templates available for your use will be listed along with their descriptions. Select the appropriate radio button for the template you wish to use.
- If it appears on your screen, the "design your own portfolio" is no longer recommended for use.
- Click **Create**. You will be taken to the portfolio Summary page.

Summary Page
The Summary page consists of three primary sections: Status, Quick Start Links and Comments. In addition users can:

- Change the title by selecting the **Edit** link next to the title of the portfolio at the top of the page. Modify the title in the box provided and select **Save Changes**. If you are not changing the title, select **Undo** to get out of this mode.
- Enter the portfolio description. Under Portfolio Details, click the **Edit** link next to Description. A box appears to type in your description. Click **Save Changes**. If you decide not to change the description, select **Undo** to get out of this mode.
- Return to the list of all portfolios, by clicking the **Return to List** link in the upper right hand corner of the page.
- See your portfolio by clicking the **Preview the Portfolio** link in the upper right hand corner of the page. [Note: This option is not available until you have selected your Required Settings.]

- Click on either of the two tabs located at the top of this page: **Add/Edit Content** or **Share With Others**. [Note: These tabs take you to the same page as the links in the Quick Start Links section.]

Status

To set the status for a portfolio:

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

To see the change, return to the list of all portfolios by clicking the **Return to List** link in the upper right hand corner of the page.

Notice that the portfolio name appears in bold in the list, that the name is not grayed out, and that there is a check in the Active column.

Quick Start Links

- Add/Edit Content - same as the Add/Edit Content tab located at the top of the Summary page.
- Required Settings- listed only if using a portfolio template made available in the site.
- Share With Others - same as the Share with Others tab located at the top of the Summary page.

Add/Edit Content

Adding content will be different depending on whether you are creating a template based portfolio or designing your own.

Because each portfolio template may be slightly different, enter information and attach files and other materials as instructed on the page. Options to select available items from a drop-down list, create new items, or edit existing items may be provided.

If a Required Settings button appears on the page for creating for the portfolio, there are additional settings, such as your name, the title of the portfolio, and a possible choice of theme that you must complete. To complete these settings, click the **Required Settings** link provided on the Summary page. When you have completed your choice of required settings, click **Save Changes**, or to return to the Summary page without completing the settings, click **Cancel**.

You may view your portfolio at any time by clicking the **Preview the Portfolio** link in the upper right hand corner of the page. [Note: If there are Required Settings for your portfolio, you must complete these settings first. Otherwise you will not be able to see the basic styling of the portfolio including the theme, your name, and title of the portfolio.]

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

Required Settings in Portfolios

If Required Settings appears on the Summary page when creating a portfolio from a portfolio template, then certain options must be decided prior to viewing the portfolio. These settings will vary according to the specific portfolio template. You may be asked to enter or select any or all of the following:

- **Display Name** - Serves as the name of your portfolio within the system. A default name is provided, change this default to a meaningful name. The display name is not displayed in your portfolio.
- **Your Name in the Portfolio** - Your name as you would like it displayed in the portfolio website.
- **Portfolio Title** - The title of your portfolio as you would like it displayed in the portfolio website.
- **Theme** - Your choice of a theme for your portfolio. (Additional portfolios can be created with different themes at any time.)
- Save all changes by selecting the **Save Changes** button at the bottom of the page.

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

Sharing Portfolios

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

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

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

Sharing With Others

On this page, you will decide the specific people or roles you wish to view your portfolio and whether you want to share your portfolio with the public. [Note: Before a portfolio can be viewed by others, you must make sure that it is Active. See Status for instructions. Also, if you are using a template-based portfolio with Required Settings, these settings must be completed. See Required Settings for instructions.]

- Share the portfolio with designated people or role:
    - If you have not yet shared your portfolio with anyone, select **Click here to share with others**. A list of all users in the site is provided. Place a check in the box next to the name of each person you want to share your portfolio. Click **Add Selected Users** to add these users and continue to add other users. Click **Add and Return** to add these users and go back to the list of users you have selected to view your portfolio, or click **Return** if no one has been selected.
    - If you want to give more people or designated roles access to view the portfolio, click **Add more people/roles**. There are five ways to select additional people. Using the Select by drop-down menu, choose one of the following:
        - ***browsing for people***: This function provides a list of all roles and all users that have access to the site. Click the box next to each person from the site with whom you want to share your portfolio. Click **Add Selected Users** to add these users. You may continue to select other users using other methods via the Select by drop-down menu. When you are done selecting users, click **Add and Return** to add these users and go back to the list of users you have selected to view your portfolio, or click **Return** if no one has been selected.

- ***entering a user id***: Enter the User ID of the person you want to see your portfolio. To add additional User IDs click the **Add User** link to the right and enter another valid User ID. To continue to add additional viewers, click the "Select by" drop-down and choose another option. Click **Add and Return** to add these viewers or **Return** if no one has been selected.
- ***entering an email address***: Enter a valid email address for the person you wish to share this portfolio. To add additional email addresses click the **Add User** link to the right and enter another valid email address. To continue to add additional viewers, use the Select by drop-down to choose another option. Click **Add and Return** to add these users and go back to the list of users you have selected to view your portfolio, or click **Return** if no one has been selected. [Note: At this time, a local account will be made for any email address added to the system.]
- ***picking roles related to the site***: Select the role(s) of the people you want to view your portfolio (e.g. Reviewer). Anyone in the site with the selected role(s) will be able to view the portfolio. Click **Add Selected Roles** to add these viewers and continue adding additional users via the Select by drop-down menu options. Click **Add and Return** to add these users and go back to the list of users you have selected to view your portfolio, or click **Return** if no one has been selected.
- ***picking roles related to all sites***: Select the role(s) of the people you want to view your portfolio (e.g. Reviewer) from the list of all sites you are an active member. Anyone in those sites with the selected role(s) would be able to view your portfolio. Click **Add Selected Roles** to add these viewers and continue adding additional users via the Select by drop-down menu options. Click **Add and Return** to add these users and go back to the list of users you have selected to view your portfolio, or click **Return** if no one has been selected.

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

- Share the portfolio with the public:
  - If you want to share a portfolio via a public URL that anyone on the internet can see, check the box under the section titled Optionally share this portfolio with the public. Click the **Show public URL** link. Sakai displays the default URL for this portfolio. This URL can be given to anyone you wish to share your portfolio with via email or

another method of communication. To remove the URL from being displayed, click **Hide public URL**.

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

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

Editing Portfolios

You may change any portfolio you have created. To change a portfolio, access the Portfolios tool and follow these steps:

1. If the Portfolios home page is not displayed, click the **Reset** button.
2. Next to the portfolio you are interested in, from the Actions menu, click **Edit**. Sakai displays the Summary page for that portfolio.
3. Follow the instructions found on the Summary Page to make any changes needed.

Statistics on Portfolio Viewings

To see a list of users that have looked at a portfolio you created, access the Portfolios tool and follow these steps:

1. If the Portfolios home page is not displayed, click the **Reset** button.
2. Next to the portfolio you are interested in, from the Actions drop-down menu, click **Statistics**. Sakai displays the Portfolio Statistics screen. The screen contains a list that includes the name of each person that has looked at your portfolio and the date and time the user accessed it.
3. To return to the Portfolios home page, click the **Back** button.

Downloading Portfolios

If the portfolio template you are using has been set up for downloading, you may download (i.e., export) to your desktop any portfolio you have created with that template. The portfolio will be exported as a compressed (zipped) file made up of numerous HTML files. To download a portfolio, access the Portfolios tool and follow these steps:

1. If the Portfolios home page is not displayed, click the **Reset** button.
2. Next to the portfolio you are interested in, from the Actions menu, click **Download**.
3. Proceed as instructed.

Deleting Portfolios

You may delete any portfolio you have created. To delete a portfolio, access the Portfolios tool and follow these steps:

1. If the Portfolios home page is not displayed, click the **Reset** button.
2. Next to the portfolio you are interested in, from the Actions menu, click **Delete**. You will be asked to confirm this action.
3. To delete this portfolio, click **Continue**. Sakai deletes the portfolio and displays the Portfolios home page. Or, to return to that page without deleting the portfolio, click **Cancel**.

Hiding or Showing Portfolios

You may hide any portfolio you have created or show one that has been hidden. To hide or show a portfolio, access the Portfolios tool and follow these steps:

1. If the Portfolios home page is not displayed, click the **Reset** button.
2. Next to the portfolio you are interested in, from the Actions drop-down menu, click **Hide** or **Show**.

Viewing Portfolios

To view a portfolio access the Portfolios tool and follow these steps:

1. If the Portfolios home page is not displayed, click the **Reset** button.
2. Find the portfolio you want to view, and click its name. Sakai opens a new window and displays the portfolio. This page has two parts:
   1. The top portion of this page contains the actual portfolio.
   2. Below the portfolio is a comment area, if the owner has allowed for comments.

   - Displayed first are comments that have been made by individuals that have viewed the work.
   - Next is an area in which you may add comments of your own.

- If the portfolio has multiple pages, use the links to view other pages.
- To exit, close the window.

Commenting on Portfolios

Enabling and Disabling Comments

The Comments section of the Summary page is for enabling comments on your portfolio. If you want to allow people you have shared your portfolio with to add a comment, select **Allow**. Select **Disable** when you do not want comments or when you want no additional comments to be accepted.

If comments were allowed, then a link is provided directly to the comments with a count of how many were posted. When you click on the link you will be able to view all comments. You may also choose to click on the link **See presentation and comments**, which takes you to your portfolio and comments. Click the **Back to Portfolio** link or the **Back** button to go back to the portfolio Summary page.

Leaving a Comment

To leave comments on a portfolio you are viewing, follow these steps:

1. Scroll to the **Add comment** section near the bottom of the screen.
2. Enter a title and a comment of any length in the Title and Comment boxes, respectively. Both of these entries are required.
3. Under the subheading for Make this comment visible to, choose one of the following options:

   - Make the comment visible only to yourself by clicking the **Only Me** radio button.
   - Make the comment visible only to yourself and the person that created the portfolio by clicking the **The Owner and I** radio button.
   - Make the comment visible to the general public by clicking the **Everyone** radio button. This is the default option.

- To submit your comment, click **Submit**.
- To exit, close the window.

Viewing Comments on a Portfolio

There are two ways to view comments on a portfolio:

1. On the portfolio homepage, click the name of the portfolio. Scroll down past the portfolio content to the comments section.
2. On the portfolio homepage, locate the row for the portfolio you are interested in viewing comments. Click the number listed in the Comments column to the far right of that row. (The number indicates how many comments are viewable by you.) A comments page

appears. At any time you may view this portfolio by clicking the **See presentation and comment** link at the top of the page, or click **Back to list** to return to the portfolio homepage. [Note: You cannot see comments left by someone else that were marked as private.]

Each comment has a header in boldface type. The header includes the following:

- The title.
- The name of the person that left this comment.
- The date and time the comment was left.
- Depending on which method was selected to view the comments:

1. One or more links may be present in each comment header. Use these links to manage the comment.
2. One of these words: public, shared, or private, will be visible indicating whether everyone, you and the person that left the comment, or only you can view the comment.

- The next line or lines contain the comment itself.

Managing Comments on Your Portfolio

To manage a comment, you must be viewing the portfolio. Scroll down to the comments section and take any of these steps:

- Delete it by clicking the **Delete** link in the header. Sakai deletes the comment immediately. Caution: Be sure you want to delete a comment before clicking **Delete**. Sakai does not display a delete verification window before deleting the comment.
- Change the audience to include only yourself and the person that left the comment by clicking the **make shared** link.
- Change the audience to include everyone by clicking the **make public** link.
- For a comment you have left, change the audience to private by clicking the **make private** link.

Changing Portfolios Tool Permissions (For CIG Coordinators)

To change the default permissions for the Portfolios tool, access the tool and follow these steps:

1. If the Portfolios menu bar is not displayed, click the **Reset** button.
2. Click the **Permissions** button on the menu bar. Sakai displays the Permissions screen.
3. Referring to the list below, check boxes to select the appropriate permissions for users in each role.

- **Delete** -- Users in this role may delete any portfolio that has been shared with them. (Delete permission does not apply to deleting your own portfolio. Users may always delete their own portfolios, regardless of this permission setting.)
- **Comment** -- Users in this role may comment on portfolios.
- **Create** -- Users in this role may create their own portfolios.

To save the permissions settings, click **Save**. Sakai saves the settings and displays the Portfolios home page. Or, to return to that screen without saving your changes, click **Cancel**.

Styles (OSP)

Styles Overview (For CIG Coordinators)

Styles are sets of fonts, colors, and graphics. CIG Coordinators (site organizers, or other users in the site with permission) use styles to control the overall look of matrices and the individual look of matrix cells. Styles are created locally in portfolio sites but can also be created and or published globally across sites via the Portfolio Admin site.

Guidelines for Using Styles

In order to maintain consistency within a matrix, it is recommended that CIG Coordinators apply the same style to the entire matrix.

If you have site organizer permissions, you will use the Styles tool in your portfolio site to "create" a style by uploading a cascading style sheet (i.e., a .css file) from Resources, giving it a meaningful name, and (if desired) providing a description of it. This tool also allows you to change the name and description of an existing style, delete a style you no longer need, and change usage permissions for styles for all users in any role.

Once a style has been added to a site, it is available to all members of the site to use in creating or editing matrices. Only the creator of the style will see the style listed in the Styles tool. Any user with permission to create or edit matrices will see the style listed as available for selection on the screens for editing the properties of a matrix or matrix cell.

Users with access to the Portfolio Admin site may also create styles for use globally across all sites. Styles may also be suggested for global publishing via the Portfolio Admin site. If the system administrator publishes a style that has been suggested for global publishing via Portfolio Admin, the style will become available for creating or editing of matrices in all sites.

To access the tool, click the Launch button for Styles. Sakai will display the Styles home page.

This page contains a list of all styles on the site that you have created. For each style in the list, you will see a description, the name of the person that created the style, and whether it is still available to suggest for global publishing via the Portfolio Admin site.

If the list is longer than one page, use the buttons under the Styles menu bar to display other pages.

- To display the first page of the list, click **First**.
- To display the previous page of the list, click **Previous**.
- To display the next page of the list, click **Next**.

- To display the last page of the list, click **Last**.

Adding Styles (For CIG Coordinators)

If you are a system administrator, be advised that any style that you add to the Portfolio Admin site automatically becomes available for use in creating and editing matrices in all sites on your Sakai instance. The Styles tool may also be used in a single portfolio site to provide styles for matrix cells in that site.

To add a new style to your site, follow these steps:

1. Add the .css file for this style to Resources.
2. Access the Styles tool.
3. If the Styles home page is not displayed, click the **Reset** button.
4. In the menu bar at the top of the screen, click the **Add** button. Sakai displays the Add Style screen.
5. In the Name box, enter a descriptive name for this style.
6. If desired, enter a longer description of the style in the Description box.
7. To the right of the CSS file box, click the **Select File** link.
8. Select the .css file you need by following the instructions for selecting an item. After you click **Finish**, Sakai displays the Add Style screen again. The name of the file you selected is shown in the box.
9. To complete your work, click **Add Style**. Sakai displays the Styles home page again. The new style has been added to the list and is available for your site participants to use. Or, to return to the home page without adding the new style, click **Cancel**.

Editing Styles (For CIG Coordinators)

If you are a CIG Coordinator (site organizer or other user with permission), you may change the name, description, and .css file for any style you have created. You may also choose a different .css file for any unpublished style.

Caution: If you change a style that is already in use, you may cause problems for users that have designed their portfolios with that style.

To change a style, access the Styles tool and follow these steps:

1. If the Styles home page is not displayed, click the **Reset** button.
2. Find the style you want to change and click the **Edit** link below its name. Sakai displays the Edit Style screen. The boxes on this screen show your current entries for this style.
3. Change entries as needed.
4. To save your changes, click Save Changes. Sakai saves the changes you have entered and displays the Styles home page. Or, to return to that page without saving your changes, click **Cancel**.

Deleting Styles (For CIG Coordinators)

If you are a site organizer, you may delete a style if it meets these conditions:

To delete a style, access the Styles tool and follow these steps:

1. If the Styles home page is not displayed, click the **Reset** button.
2. Find the style you want to remove and click the **Delete** link below its name. Sakai displays a delete confirmation window.
3. To delete the style, click **OK**. Sakai deletes the style and displays the Styles home page. Or, to return to the home page without deleting this style, click **Cancel**.

Publishing Styles Globally (For CIG Coordinators)

Requesting Global Publication of a Style

If you have created a style that has general applicability, you may want to make it available for use in all sites in your instance of Sakai. However, only Sakai system administrator(s) can publish a style globally (that is, across all sites in Sakai).

To request that a style be published globally, access the Styles tool and follow these steps:

1. If the Styles home page is not displayed, click the **Reset** button.
2. Find the style you want to suggest for global publication.
3. Click the **Suggest for global publish** link below the name of the style. Sakai submits the style for consideration for global publication and displays the Styles home page again.

Publishing a Style Globally

If you are a system administrator, you may publish a style globally (that is, for all sites in a Sakai instance). To do so, log in and follow these steps:

1. Select the Portfolio Admin site.
2. Access the Styles tool. Sakai displays the Styles home page.
3. Find the style you want to publish and click the **Publish** link beneath its name. Sakai makes the style available to all sites.

[Note: If you delete a style that has been suggested for global publishing from the Portfolio Admin site, you will also delete the style from the site in which it was created.]

Changing Styles Tool Permissions (For CIG Coordinators)

To change permissions for users in one or more roles, access the Styles tool and follow these steps:

1. If the Styles menu bar is not displayed, click the **Reset** button.
2. Click the Permissions button on the menu bar. Sakai displays the Permissions screen.
3. Referring to the table below, check boxes to select the appropriate permissions for all users in each role.

- **Global Publish** -- Users in this role may suggest that a style be published globally (that is, for all sites). Only the system administrator can globally publish a style.
- **Publish** -- Users in this role may publish styles for use by site participants.
- **Delete** -- Users in this role may delete styles.
- **Create** -- Users in this role may add new styles.
- **Edit** -- Users in this role may change styles.
- **Suggest Global Publish** -- Users in this role may suggest a style for global publication.

4. To save the permissions settings, click the **Save** button. Sakai saves the settings and displays the Styles home page. Or, to return to the home page without saving your changes, click **Cancel**.

Setting Sakai Properties for OSP

Setting Sakai Properties for OSP (For CIG Coordinators)

Certain Sakai properties are relevant for the Open Source Portfolio (OSP) tools. These properties should be set by a system administrator.

For the full reference of all Sakai properties, consult:

http://confluence.sakaiproject.org/display/DOC/Sakai+Properties+Reference

For current OSP properties, consult:

http://confluence.sakaiproject.org/display/DOC/Sakai+Properties+Reference+-+OSP