



Template Building Reference Guide

This reference guide is intended for those iWebfolio users who will be building templates to be used at their institution. The primary functions covered in the guide are: creating templates, setting properties for the template, publishing templates, creating measures, and associating measures to the template.

Navigating Within iWebfolio

When navigating within iWebfolio you should **not** use the back button on your browser. Use the navigation buttons within the application. Using the back button on your browser will give unpredictable results.

The following browsers are supported by iWebfolio

- Apple MACs: Firefox and Netscape are supported. (Safari and Internet Explorer are not supported).
- Windows: Internet Explorer 5.x or greater, Netscape 7.x or greater and Firefox are supported

Building Templates

Templates provide an outline for creating a portfolio. Templates may be developed only by those reviewers granted permission to do so by the iWebfolio administrator at your institution. Often, groups of faculty members will develop a template based on the program's intended student outcomes. The template is then included within the institution's list of templates, under the appropriate folder. For example, a template may contain department or program objectives, portfolio instructions, and professional standards. When the portfolio owner creates a portfolio based on the template, the information from the template is automatically inserted into the portfolio.

How do I create a template?

1. Under the 'Home' category in the left hand navigation bar click 'Templates'
 2. Click "Create New Template"
 3. You will be prompted to name your template. Choose a name that is brief but descriptive.
 4. You will then be given the opportunity to set up the categories, contents, and default options for the portfolios built on the template. (See "How do I change the categories within my template?" and/or "How do I add a new 'Item'?" for specific instructions)
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How do I change the categories within my template?

Adding a New Category

1. Under the 'Home' category in the left hand navigation bar click 'Templates'
2. Click 'edit' next to the template you wish to change.
3. Click the 'Contents' tab
4. Click the 'Add new category'
5. Enter the Category Name
6. Add any information you wish in the large text box. This information will be displayed when you view the category. Use the tool bar to format the text, insert images, or insert links to documents you have already uploaded into iWebfolio.
7. Click 'save & continue' if you wish to save your work but continue working on the category, 'save & return' if you wish to save your work and return back to the contents tab, or 'cancel' if you wish to quite adding the category without saving.

Editing a Category

1. Under the 'Home' category in the left hand navigation bar click 'Templates'
2. Click 'edit' next to the template you wish to change.
3. Click the 'Contents' tab
4. Click the category you wish to edit along the left hand side of the portfolio. You will see any content associated with the category displayed.
5. Click 'edit' near the upper right hand of the screen.
6. You will be able to edit the 'Category Name' as well as the category content. You can use the category *toolbar* to format the category content.

Re-ordering Categories

1. Under the 'Home' category in the left hand navigation bar click 'Templates'
2. Click 'edit' next to the template you wish to change.
3. Click the 'Contents' tab
4. Use the small arrows to the right of each category name to move the category up or down.

Deleting Categories

1. Under the 'Home' category in the left hand navigation bar click 'Templates'
2. Click 'edit' next to the template you wish to change.
3. Click the 'Contents' tab
4. Click the category you wish to delete along the left hand side of the portfolio. You will see the content associated with the category displayed.
5. Click 'Remove' near the upper right hand of the screen. All the files, template items, and/or websites attached to this category will be removed from the portfolio, but not from "My Files," "My Template Items," or "My Websites."

How do I add an Item under a category?

1. Under 'Home' in the left hand navigation bar click 'Templates'
2. Click 'edit' next to the template you wish to change.
3. Click the 'Contents' tab
4. Click the category along the left hand side of the portfolio to which you want to attach the item. The category you select along the left hand side will be presented with an 'Attachments' tab along the bottom. Make sure the 'Attachments' tab is selected.
5. Click 'Add Attachment'.
6. The "My Template Items" window will open. (Note: If a new window does not open you may have pop-up blocker on. You must allow pop-ups from iWebfolio to continue)
7. If you want to attach an already created item, simply click 'Attach' to the right of the item. If you want to create a new item, click 'Add new item'.
8. You will be prompted to enter the 'Item Name'. The item name should be short, meaningful and describe what is in the item (e.g., Contact Information, Computer Skills, Vacation Pictures, etc.). You will also be able to provide any comments about the item.
9. From the drop-down menu, select the folder where you wish to save the item.
10. The large text box will allow you to create what you would like portfolio owners to see when they click on the item. In addition to typing text, you can use the toolbar to format the text, add color, provide links to files you have already uploaded into iWebfolio, or insert thumbnail images. You can use the item toolbar to format the item content as you wish.

How do I set the properties for a Template?

1. Under 'Home' in the left hand navigation bar click 'Templates'
 2. Click 'edit' next to the template you wish to change.
 3. Click the 'General' tab.
 4. You can set the following properties for the template:
 - **Measure** – You may choose any measure that has been published at your institution for the portfolio as a whole. That is, the measure you choose here will be the measure used to evaluate the portfolio as a whole. Separate measures can be applied to each section of the template if you wish. The separate measure can be selected from the 'options' on the 'Contents' tab of the template.
 - **Hide from Portfolio Owners** - If you check this box, students will not be able to use this template. Prior to allowing students to use the template, you must 'Publish' the template. See 'How do I publish a template?' This check box will be disabled if you have not already published the template.
 - **One Portfolio per Owner based on this Template** – If you check this box, each student will only be able to create one portfolio based upon this template. The prohibits a student from accidentally creating multiple portfolios and forcing you to decide which portfolio is actually intended for your review. It is recommended this box be checked.
 - **Do not allow categories to be added or moved** – If you check this box, the general structure of the portfolios based upon this template can not be modified. That is, the students will not be able to add or move the categories. They will only be allowed to attach artifacts to the categories. It is recommended that this box be checked.
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- ***Allow portfolio owners to change presentation style*** – If this box is checked the student can modify the general presentation style of the portfolio. This includes such things as the background color, general navigation look and feel, banner theme. If this box is not checked, than you can dictate the presentation style for all portfolios based upon this template.

How do I set the options for each category and/or item in a Template?

1. Under ‘Home’ in the left hand navigation bar click ‘Templates’
2. Click ‘edit’ next to the template you wish to change.
3. Click the ‘Contents’ tab.
4. Click on the category or item along the left hand side of the screen for which you wish to set options
5. Click the ‘options’ tab along the bottom of the screen.
6. Set the appropriate options. Keep in mind that you must set the appropriate options for each category and item in the template.

How do I publish a Template?

1. Under ‘Home’ in the left hand navigation bar click ‘Templates’
2. Click ‘edit’ next to the template you wish to publish.
3. Click the ‘Publish’ tab.
4. Click on the folder you where you wish to publish the template. If you do not see an appropriate folder, contact the iWebfolio administrator at your institution.
5. Click the ‘publish’ button.
6. If you want to make the template available to owners (e.g., students) as well as other reviewers uncheck the check box on the ‘General’ tab ‘Hide from Portfolio Owners’.

Creating Measures

Measures are one of the ways reviewers can provide feedback to portfolio owners. Measures may only be created by those reviewers given permission to build measures by the iWebfolio administrator at your institution. There are three types of measures that can be created using iWebfolio: rubrics, drop-down measures, or numeric measures. Reviewers may create many different measures and may link measures with specific templates. Once linked to a template, the measure will be available to all reviewers of portfolios created from the template.

How create a Rubric?

Rubrics articulate the criteria for judging performance and indicate the qualities that differentiate among levels of performance. Rubrics, therefore, provide guidance for the portfolio owner and clarity for the reviewer. Rubrics may combine a point score for each element with a descriptor of the level of performance demonstrated by the element.

1. Under the 'Home' category in the left hand navigation bar click 'Measures'
2. Click 'Create New Rubric' at the top of the screen
3. Enter the appropriate information. Note that the first row and column of the rubric have been entered by default (e.g., Row 1, Column 1). You can click 'edit' by each of these to change the row and column. To add additional rows click 'add row'. To add additional columns click 'add column'. To enter the criteria for judging each row, click edit in the cell where the appropriate descriptor belongs. You may also change the order of a row or column by clicking the right/left or up/down arrow.
4. Click 'save'

How create a Drop-down Measure?

A drop-down measure assigns a descriptor (for example, "Exceeds Expectations") to an element of the portfolio. A numeric value can be assigned to each descriptor.

1. Under the 'Home' category in the left hand navigation bar click 'Measures'
2. Click 'Create New Drop Down' at the top of the screen
3. Enter the appropriate information. Use the 'enter drop down' link to enter your drop down descriptors (e.g., Below Expectations, Average, Exceeds Expectations, etc.)
4. Click 'save'

How create a Numeric Measure?

A numeric measure assigns a point score to each element of the portfolio. The point score you assign must fall within the minimum and maximum scores defined by the measure.

1. Under the 'Home' category in the left hand navigation bar click 'Measures'
 2. Click 'Create New Numeric' at the top of the screen
 3. Enter the appropriate information
 4. Click 'save'
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