eFolio Instructions and Help

Help! with eFolio
online help library, form to ask a question and live chat can be found at:
http://efolio.custhelp.com
phone: 1.800.456.8519
e-mail: go to the website above to “ask a question” or try mnsconline@custhelp.com

Sign-up code: umnlic

Advice: eFolio is now in version 2. It is a good idea to listen to former licensure candidates about WHAT to include in your portfolio, but HOW to include it will be much different than with version 1.

Finding Your Site:
To direct people to your eFolio site you will give them this address:
http://firstnamelastname.v2efoliomn.mnscu.edu
To edit and work on your eFolio site go to this address:
http://firstnamelastname.v2efoliomn.mnscu.edu/owner/

Content v. Presentation:
The concept of content being separate from presentation is very important to understand when thinking about your eFolio. eFolio is a data driven content presentation system, so when we are creating content we can keep it separate from the decisions we make about how to present that content. We don’t have to create multiple copies of the same content when presenting it. We FIRST create the content by uploading files, typing text, or answering some questions that pertain to the content type. THEN we decide how to present the content by including the various different types of content that we have created. We don’t do both at the same time. If you can begin to understand this concept, your eFolio experience (and a lot of your computing experiences in general) will go much more smoothly.

It is best to think of creating content as putting together a package of specifically related information: a bit of text, an image, etc., and then placing it into a file drawer to be used wherever and whenever you want later within your portfolio.
YOU MUST HAVE CONTENT IN THE SYSTEM BEFORE YOU CAN PRESENT IT TO YOUR VIEWERS.

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Previewing your site (what it will look like as a live web site):

Clicking the Preview button will open your site in a new window. Because you are logged in as the administrator, the site will be visible to you no matter if you have it set to public, private, or disabled.

Site-Wide Properties:

Site Properties: The Properties button for sites, sections, and content looks like a screwdriver and a wrench crossed. “Site properties” determines characteristics of the entire site. Site Label, Status, Heading, Slogan, Footer, Description, Keywords

Site Label: The name of the site within the administration system. Version 2 allows for more than one site to be created per user.

Status: 
Public = Entire site is viewable by anyone
Private = Viewable by approved users
Disabled = Not available for viewing
(You can also change site status on the main screen)

Heading: “Title” viewed on every page.

Slogan: “Subtitle” or phrase on every page.

Description: A description of your site that will be seen when searched for in a search engine. It will not be viewed publically on your site.

Keywords: Descriptive words used to let search engines know the important content in your site.
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**Designs:** There are multiple site designs to choose from including the default site design for the UMN CEHD. This will be the design theme of your entire site and will determine colors, layout, and default fonts.
Making site/sections visible or invisible:

**Site:** You can make your entire site publically visible, privately visible to invited users, or disabled and not visible using the dropdown on the main screen or by choosing the status in the Site Properties section discussed above.

**Sections:** Click the section you want to hide and then click **Properties**. Click the **Status** radio button, **Enabled**, **Disabled**, or **Hidden**. Enabled makes the section viewable by anyone, Hidden makes the section be not included in the site navigation, but allows it to be found with a URL, and Disabled makes the site invisible to anyone. There is no way to make sections password protected. If you want a certain section to be protected, create a special separate site containing that information and make it private.

Sorting:

To sort your sections, subsections, and content within a particular page simply click and drag them to where you want them to appear in the hierarchy.
Creating Subsections: Click on the section you would like to create a subsection under and then click the Add button. (You can create main sections by clicking the “Home” section and then clicking add.)

Enter the page Title, the URL shortcut, and the page’s status. Title is what you would like to call the section. This will be its title in the administrative hierarchy and it will be the page’s title in the browser. URL Shortcut is the part of the specific web page address for the section that you have created.

http://firstnamelastname.v2efoliomn.mnscu.edu/urlshortcut

Creating Users:
eFolio allows you to create multiple sites within the same system. You may wish to protect some or all of your sites so that they are visible to only a certain select set of people. To set up visitors’ accounts so they can access one of your private sites click Accounts, then Visitors, and Add New. You will be asked to fill out various bits of information about the visitor. The only things required to give the visitor access are the visitor’s first and last name and email address. You can then check the box for any private site you would like them to have access to, click OK, and the system will send them log in information.
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**Uploading Files:** The most basic form of content is an uploaded file. These are often documents, spreadsheets, pictures, videos, etc. Remember the portfolio presents information to users over the internet, so if you would like to present existing files to viewers, you must first get the existing content you would like to present loaded into the system so it can be presented. (If the content that you would like to present is already available at another site on the internet and will not be part of a page’s aesthetic design, it would most likely be better to create a link to the content using the URL content type rather than uploading it again.) To upload an artifact, click **New Content → Upload**, and then choose if the uploaded artifact is an image or another file type. **Images can be incorporated directly into pages while files, when added to the content of a site, will be presented as links that will allow the file to be downloaded onto viewer’s computer.** If you would like the text of an existing document such as a resume to be shown directly in a page, you should cut and paste the text into a Basic content item. (Content items are explained below.)

![Image](image_url)

Clicking the **Browse** button in the upload screen will allow you to find the document or image you want to upload from your computer. The file must have a title, and images must have roll-over text. If an image is supposed to be used in the site as a link to another page, you can also drag a URL content item in or by clicking the **Add** button designate a site to associate it with the image.

**Photos, clip art and graphics, original work, CVs, charts, spreadsheets, video and voice files among others can be added to the site’s content by using the Upload functionality. They all can be either directly incorporated as assets in the site or included as parts of a Content Item.**
Creating Content Items: To create content you should first pick a content type. Click New Content and choose the type of content you would like to include. The most basic and simple to use is the “Basic” content type which allows you to give the content a title, type text, and incorporate some other advanced content creation functionality. Once a piece of content has been created it can be found in the “My content” section. Please explore the other types of content to learn more about the types of things that can be included in your portfolio.

To create a Basic Content Item click Basic and then Create. The New Basic screen will allow you to create and organize the content of the specific item. In this example of the Basic content type the content item needs a title. You can also paste or type in text that you would like to be presented on the screen in the Full Text field. The Full Text field allows you to enter and format text including symbols, lists, and tables. You can also create simple links to external sites by using the link creation button. The Related Content portion allows you to drag various uploaded files into the content items. This way the files will appear to be associated with your content. Reflections are a field that allows you to add personal commentary to the content item. The Full text and related items display the “stuff” of what you want to show the viewer and the reflection is your commentary on it.

It is important to remember though, that these are just conventions. The varying fields and content types can be used creatively to allow you to get the look and feel that you like for your site. It is important to make the site your own.
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Including Content Items: To include the content items that have been created into a particular page, simply choose the page in which you would like to include the item and drag the item from the My Content section into the appropriate place in the Build Area of that page. To do this click on the section in which you would like to include a content item and then click Build. You may then drag existing content items (including images and document links) into the Build Area into the appropriate area in the appropriate order. Of course, you can also drag the content items around to put them in the correct order as well. You can also drag images directly into existing content items or allow them to stand on their own.

Editing Content and Item Properties: Once the content item is included in the page, you have three options for modifying it. Hover over the content item and the editing buttons for the item will appear. To delete the item, click the Delete Page Content button 🗑️. To edit what is actually included in the item, click the Edit Content button 📝. This will open a screen similar to the screen used to create the initial content item. (You can also edit or delete a content item by clicking it in the My Content section and then clicking Edit or Trash.) To manipulate what is included as part of the content item on the page, click the Content Properties button 🗝️. Once in the Content Properties screen, by clicking on the available fields for the content item and checking and unchecking the Show Field checkbox you can determine what available fields for the item are displayed on the page.