



## How-to Guide: Sending Portfolios

### Purpose

This guide is a step by step set of instructions to assist faculty in the sending of portfolios in Tk20. Tk20 uses the term “sending” when referencing to the process of assigning work to students, including assigning portfolios. Note that this how-to guide only covers the sending of preconfigured portfolio templates. Creating [a portfolio template](#) is an administrative task that requires an administrator role in Tk20.

### Assumptions

This guide assumes that you have a faculty role in Tk20, can log in, and know how to complete basic navigation tasks in the system. It also assumes that you need to send out a portfolio based on an portfolio template that has already [been configured](#) and is active in the system.

### Step by Step Instructions

**Step 1:** On the left side menu, click on “PORTFOLIOS,” followed by “PORTFOLIOS,” and then “Portfolios.” The screen will show any portfolios you have previously sent out.

**Step 2:** Click on the  button to start the sending process.

**Step 3:** On the first page, you will select a template to use. Most portfolio templates are named with the department and program name abbreviation. If the portfolio is used in a particular class, it should also include the course number. Select the template by clicking on the bullet selector and clicking the  button.

1. SELECT TEMPLATE

2. SELECT RECIPIENTS

3. SELECT ASSESSOR(S)

4. REVIEW AND FINISH

**Step 4:** Next you will select the students who will receive the portfolio. Click the  button, and you will get an option to select “Person,” “User Group,” or “Program.” Be careful here, as Tk20 will let you send a portfolio to any user, even those outside of your course or program.

- If you click “Person,” you will see a user search screen. You can find recipients by their first name, last name, or student ID number. Once you find the user you are searching for, put a checkmark in the box next to their name and click the  button. You can repeat this process until all the students are selected.
- If you click “User Group,” you will see several predefined groups of Tk20 users. Once you find the user group you are searching for, put a checkmark in the box next to their name and click the  button. If you need a custom list created for you, you will have to email [tk20@columbusstate.edu](mailto:tk20@columbusstate.edu) with each user’s first name, last night, and student id number (909 number). Creating a user group in Tk20 is not an instant process and may take several days to complete.

- If you click “Program,” you will see all the degree programs that are currently loaded into Tk20. These should be the same programs that students are assigned in Banner. Once you find the program, you are searching for, put a checkmark in the box next to their name and click the **Add** button. Clicking the button will add all students who are listed in the program to the portfolio recipient list. There is no way to select individual students or cohorts from this screen.

Once all the students, groups, or programs that you want to receive the portfolio are listed, click the **Next** button.



**Step 5:** The select assessor(s) screen shows all of the assessment stages that have been predefined in the portfolio template and all of the assessor slots for each stage. Often, there will only be one stage and one assessor slot, so do not worry if there is only one to assign. For each assessor, click on the hyperlinked text, which will usually look like this: [Select University Assessor](#). The assessment tools (rubrics) will be listed with each assessment slot, so you know what that assessor will be filling out. Note that each assessment slot is keyed to a particular type of user, so if it says “select university assessor,” the assessment can only be assigned to someone with the faculty role in Tk20.

If you do not know who will be the final assessor, you can leave this step incomplete, and the assessor can be assigned later. Selecting one now is the easiest way to bulk assign assessors; if you wait until later, you will have to assign assessors individually to each student. Once all the assessors are assigned (or you have decided to wait until later), you should click the **Next** button.



**Step 6:** On the next screen, enter the name of the portfolio. This name is the name that the students will see and does not have to be the same name as the portfolio template. Next, set a date for the portfolio. Portfolios are set by default to “Send Now,” which means students will get notification and be able to start work as soon as you complete this screen, but you can set a “Send Later” date and time if you are setting up the portfolio now but want to have it sent to students in the future. You can also add customer reminders for students on this screen.

The last option on this screen is to add additional administrators for this portfolio. Adding an administrator will allow another faculty to add assessors, make changes, and review the progress of portfolios (but administrators cannot assess portfolios unless they are also assigned as assessors).

After you have made the selections on this screen, click the **Next** button. Clicking the next button will send the portfolio to all users that you specified on the “Select Recipients” step. If you scheduled the portfolio to be sent later, this will be queued.



**There are a few important things to note about how portfolios work in Tk20.**

- Even if you are assigning a portfolio as part of a course requirement, students will not see the portfolio under their course work screen. Students will see the portfolio by clicking on “PORTFOLIOS,” followed by “PORTFOLIOS,” then “Portfolios,” and then by selecting their “Received Portfolios” tab. This tab should have all the portfolios that have been assigned to the student.
- Many students will click on the “Submit” button after the complete a portfolio tab, thinking they have to submit that tab before continuing. When they do this, they will not be able to complete anything else in the portfolio (because they have technically submitted everything). Let students know if they accidentally submit their portfolio, they can “recall” it from their “Received Portfolios” tab (see note above). They need to put a check in the box next to the portfolio that they want to recall and click on the  button. This will remove it from the assessment stage so they can add more content or make changes.
- If you have more than one role in Tk20 (like program administrator), you will need to make sure you are in a faculty role to assess a portfolio that was created using a “University Assessor” assessment slot. To assess portfolios, click on “PORTFOLIOS,” followed by “PORTFOLIOS,” and then “Portfolio Assessments.” This screen displays all portfolios (by the individual student) who you have been assigned to assess. If the student’s name is grayed out, the portfolio has not be submitted for assessment yet. For more information on assessing portfolios, see the “How-To Guide: Assessing Portfolios.”