

## *Step-by-Step*

# Creating Standards-Based Electronic Portfolios using Microsoft Word and Excel\*

*\*Windows Version*

## **The Reflective Portfolio document will include the following:**

**A Cover Page for the portfolio** - Include a Picture or graphic

**A Table of Contents** - This page will contain links to each Standard

**An Introduction to the Reader which serves as an overall reflection on the portfolio.**

**A list of standards, each with reflections on the following questions:**

- **Evidence/Artifacts (What?** - A list of artifacts and/or experiences that support the reflection). Hypertext links may be made to the individual documents.
- **Reflection (So What?** -Reflect on what was learned and how this leads to meeting the standards)
- **Future Learning (Now What?** - Address implications for future learning needed)

**In addition, a collection of portfolio artifacts will be stored in the same folder as the Portfolio Reflections document. A list of those artifacts will be made in Excel, with hyperlinks to the appropriate items.**

## **What to do? Here is the process we will cover:**

**Collect the documents in electronic form and store in a single folder**

Write brief reflection on each document using **Insert Menu -> Comment** command  
**OR** include a database that contains a list of your artifacts and your reflections.

**Create a list of the artifacts you have collected using an Excel Spreadsheet** (or a database, or a Table in Word). An Excel template (Artifacts-at-a-glance.xls) is available.

**[Page 3]**

- Enter the names of the artifacts
- Hyperlink to the documents.
- Set up columns for each of the standards to be demonstrated (or use template)
- Decide which standards the artifacts demonstrate and place a mark in the column under each standard.
- Create a comment in the field that explains your rationale for selecting this standard.

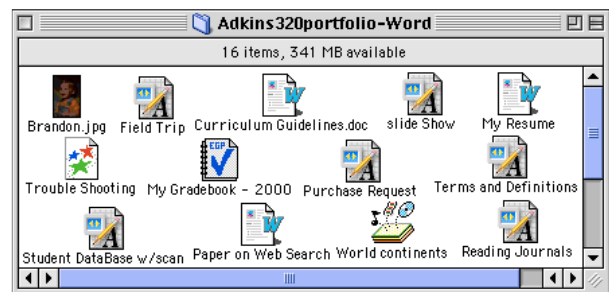
## Create the Reflective Portfolio in Word

- Open a new Word document (or use a document that lists the standards that you want to use as the framework for this portfolio). [Page 4]
- Insert the Standards to be used in your reflections (or use a template).
- Use Outline View of Word to create headings for each standard which show in the Document Map (left window), becoming "bookmarks" for navigation (select the **View Menu -> Outline Layout**) [Page 4-5]
- In the Outline View, at the beginning of the document:
  - Create a heading for a Cover Page for your portfolio
  - Create a heading for a Table of Contents for the Portfolio
  - Right after the Table of Contents, create a page to write an introduction, which is your overall reflection on the portfolio.
- Use the Style Menu to force page breaks for each Level 1 header [Page 6]
- Under each standard, include three paragraphs and headers: Evidence, Reflection, Direction or Future Learning Goals [Page 7]
- Identify the artifacts from the Excel spreadsheet for each standard
- Write Reflections and Future Learning Goals for each standard
- Create Hyperlinks to Artifacts [Page 8]
- Create a Table of Contents for the Portfolio with links to each section [Page 7]

## Stage 2 - Collecting the Artifacts

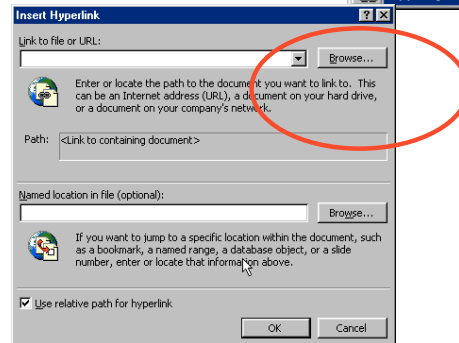
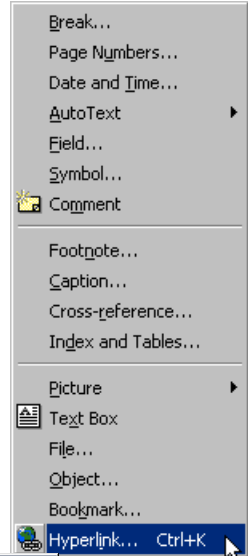
### Hints on collecting your Artifacts:

- Interject personality into the portfolio design. Use some of the graphics capabilities of the format, fonts and Word Art to add style and flair to the portfolio.
- Identify the portfolio artifacts (examples of your work, hopefully in electronic form) or experiences you have that demonstrate that you have met this standard. Store them in a single folder on a hard disk, server or the Internet. (See References for more details on Storage)
- You might create a separate list of all of the artifacts that you have collected and how they might demonstrate your competency. Setting up a database or a table to organize the information about the artifacts is another strategy. (See Portfolio at a Glance template and Excel section below)
  - Some authors recommend that reflections be written for each artifact, to explain why it is in the portfolio. Write a brief reflection explaining about each artifact and why it should be included in your portfolio.
- On your hard drive, floppy disk or server, set up an electronic folder to store and organize the artifacts (any type of electronic document).
- Use **appropriate** multimedia to add style and individuality to portfolio.
  - Use a scanner (or camera) to digitize images
  - Use a microphone and sound digitizing program to digitize audio artifacts
  - Use a video camera, digitizing hardware and software to digitize video artifacts



## Create a list of your Artifacts in Excel

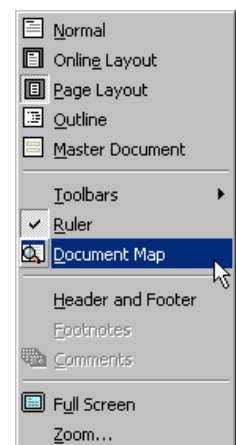
- Open an Excel Spreadsheet and name it “Artifacts.xls” (or use a prepared template)
- Across the top row, identify the contents of each column:
  - Artifact name
  - Column for each standard being demonstrated
- List the artifacts down the first column (you may want to make that column wider and the Standards columns narrower)
- Create hyperlinks to the artifacts
  1. Highlight the cell you want to turn into a Hyperlink,
  2. Select **Insert Menu -> Hyperlink...**
  3. Click **Select** button and identify the file to be linked. Be sure that the file is saved in the same folder as the Excel document. Be sure only the file name shows in the file name window (as shown)
  4. Click **OK**. The text in the cell becomes colored and underlined.
  5. To follow the link just created, **Click** in the cell. The document will open (assuming the software is available)
  6. To change the link in the cell, use the arrow keys to navigate to the cell, and repeat Step 2 (Select **Insert Menu -> Hyperlink...**)



## Stage 3 - Selection, Reflection & Direction - The Reflective Portfolio

### Set up the portfolio demonstrating your chosen standards

- Open a new Word document and select the **View Menu -> Document Map**. The document will show a Document Map on the left and a document window on the right.
- Put a header on the document that will appear on every page that shows your name and the name of the group of standards you are demonstrating.



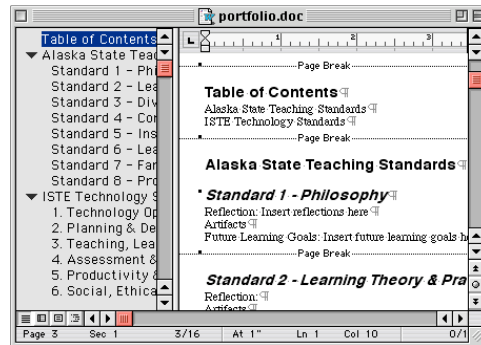
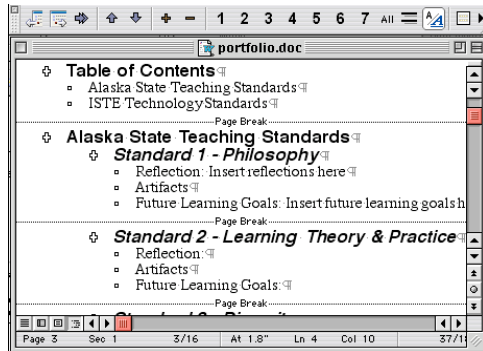
## Copy the Performance Indicators into the document

- Cut and paste into the document (or use a template), putting each performance indicator on a page by itself, using page breaks (**Insert Menu -> Break**). To create a page break from the keyboard, type **Shift+Enter** keys simultaneously. (or see alternative below)

## Create Navigation Headings with the Outline View

Outline View

Normal View with Document Map



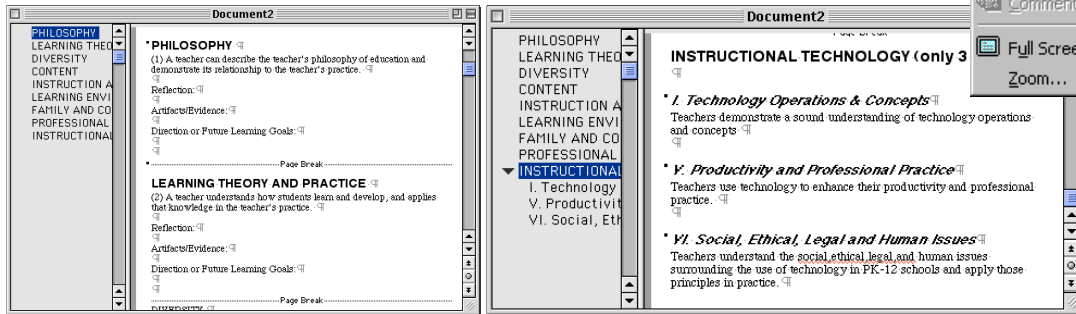
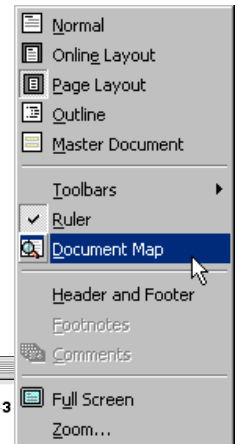
From the Outline View, use the arrows in the upper left corner of the Outlining Toolbar to create outline levels in the document. The left arrow “promotes” the paragraph to a higher level. The right arrow “demotes” the paragraph to a lower level. The double arrow “removes” the outlining level. The numbers (1-7) reveal all the paragraphs up to that level. Click on **All** to see the entire text.



Promote Demote Remove

# Using the Document Map

According to the MS Word Help, the Document Map is a separate part that shows an outline of a document's headings. You can use the Document Map to quickly navigate around the document and keep track of your location in it. The Document Map is automatically visible when the **View Menu -> Online Layout** is selected, but may be displayed in any view by selecting the **View Menu -> Document Map**, or clicking on the **Document Map** button on the Menu Bar.



In the Document Map, click on the heading you want to view. The heading in the Document Map is highlighted to show your location in the document. If the description in the Document Map is cut off, simply rest your pointer over the heading, and the entire heading will appear.

If you have two or more levels of headings, they will show in a hierarchy with a black triangle in the Document Map. Clicking on the triangle will hide and show the sub-headings.

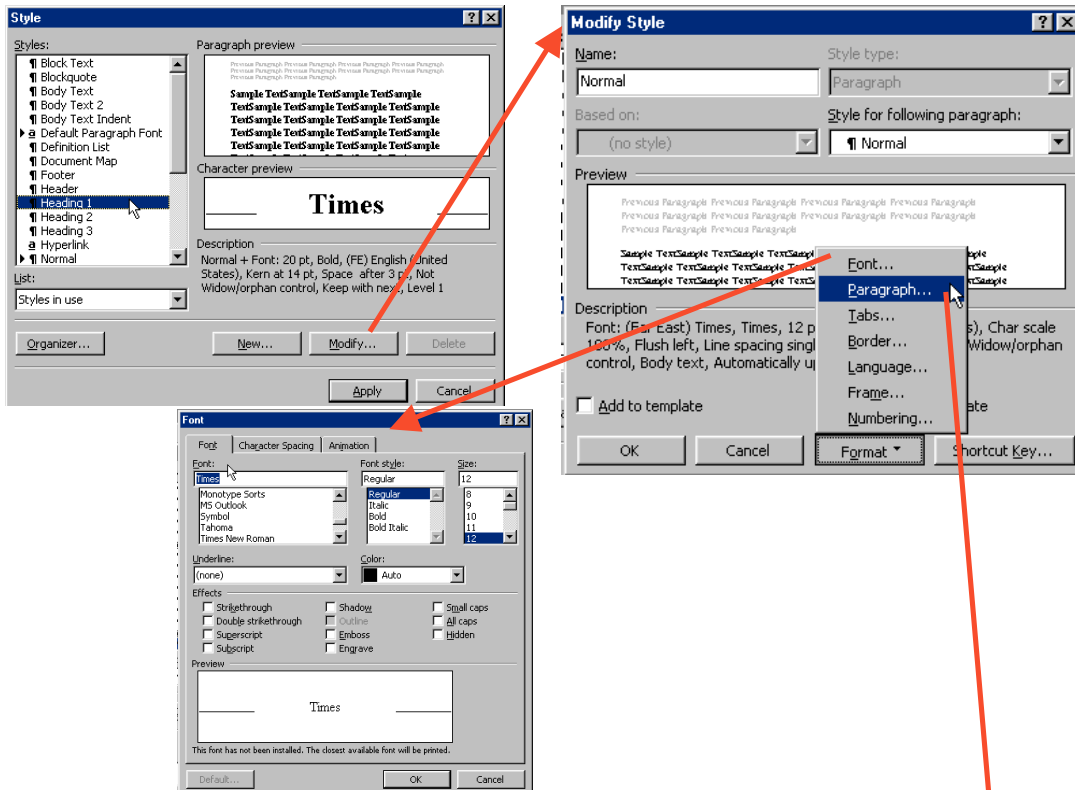
For further information, consult the Microsoft Word Help files, using search terms "Document 2Map" and "Outlining"

*Document Map Button*



## Using the Style Menu

- Use the **Format Menu -> Style...** to change the format style for each Heading level. Every paragraph assigned a Heading Style will share the same formatting unless changed.



Select **Font** to change the font for a paragraph.

## Change the Paragraph Style to Create Page Breaks

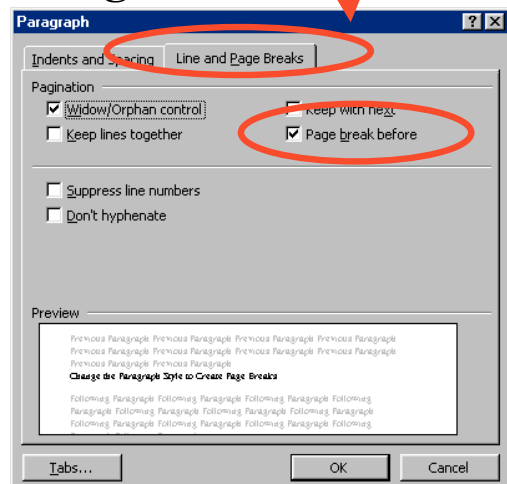
Be sure you have selected only the **Heading 1** Style!

Select Paragraph Format and select the **Line and Page Breaks** tab.

Click on the **Page break before** button.

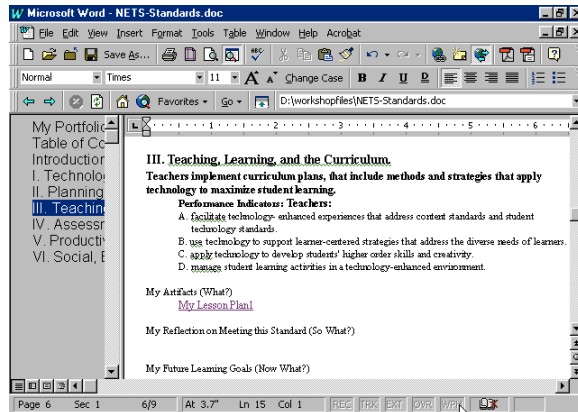
Click **OK** twice and **Apply**.

Every paragraph that has been designated a Heading 1 in the Outline will now be on a page by itself **when you view the document in Page Layout View** (or Print Layout in Windows)



## Write Reflections on each Standard

- Under each standard, include three paragraphs headers: Reflection, Evidence, Direction or Future Learning Goals.
- Write a reflection for each standard that explains how you think you are progressing toward achievement of this standard. In other words, how you think you have accomplished this standard.



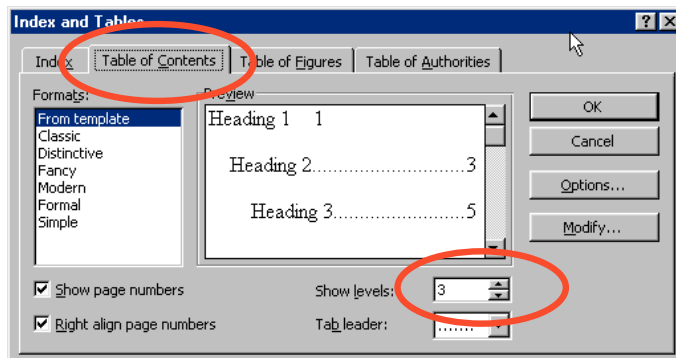
- List the artifact that constitute the evidence that supports your reflections.  
*The portfolio becomes a lifelong learning tool, when we take these reflections and set goals for future learning.*
- For the performance indicator, write a statement about what you still need to learn in this area, setting some reasonable goals for yourself so that you can achieve this standard.

**NOTE:** To save space, the screen examples shown here do not have these reflection paragraphs completed.

## Create a Table of Contents

When you have completed all of the reflections, you will want to add a Table of Contents

- Go to the Table of Contents Page (and press the return key at least once to create space for the Table to be placed)
- Select **Insert Menu -> Index and Tables...** and select the **Table of Contents** tab. Use the Outline levels to determine how much detail will show.

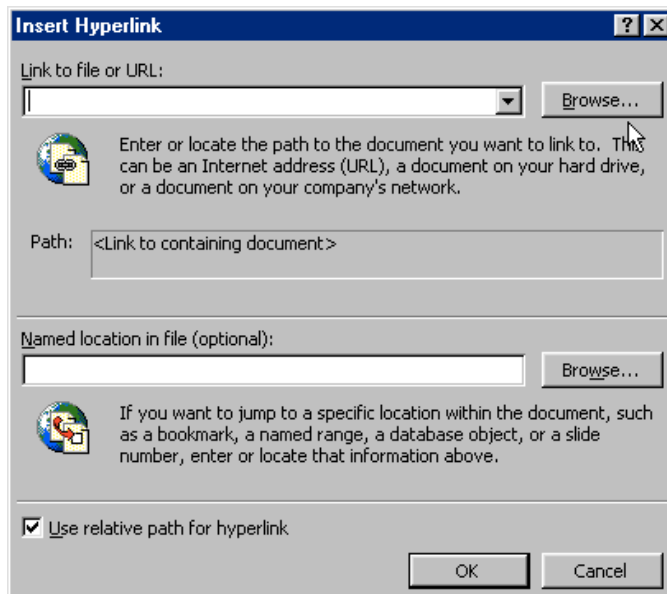


## Stage 4 - Add hypertext links - The Connected Portfolio

Word processing programs allow hypertext links to be able to navigate around the document or to open files created by other programs. Microsoft Word uses the **Hyperlink...** command under the **Insert Menu**. Select a file (or a bookmark within the same file). It is recommended that you organize all files within the same folder before making these links.

This approach works well with files created with the same software (e.g., Word) but can be problematic if a variety of software packages are used to create the various artifacts. It becomes necessary to have all of software available to open files created by these different programs, which the primary audience for your portfolio might not have (i.e., Inspiration, HyperStudio). To overcome this problem, all documents could be converted into a universally-readable format, such as Adobe Acrobat.

1. Highlight the text you want to turn into a Hyperlink.
2. Select **Insert Menu -> Hyperlink...**
3. Click **Select** button and identify the file to be linked. Be sure that the file is saved in the same folder as the portfolio document. Be sure only the file name shows in the file name window (as shown)
4. Click **OK**. The text becomes colored and underlined.
5. To follow the link just created, Click on the Underlined colored text.



For further information on using Microsoft Word, consult the Help files and the Microsoft tutorials at <http://www.microsoft.com/education/tutorial/classroom/o2k/word.asp> (Windows Office 2000) or <http://www.microsoft.com/education/tutorial/classroom/o98/default.asp> (Macintosh Office 98).

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