

# How to develop your Personal Knowledge/Skills Portfolio Using FolioOne™

## Contents

- Subscribing to FolioOne
- Logging in to FolioOne
- Entering Personal Information
- Recording your Learning Experiences
- Adding Records to your Personal Knowledge/Skills Portfolio
- Editing Records in your Personal Knowledge/Skills Portfolio
- Using your Personal Knowledge/Skills Portfolio
- Using your Planning Portfolio
- Associating with an Outside Organization
- Calculating Knowledge Management Units (KMU)
- Troubleshooting

## Subscribing to FolioOne

Personal Subscriptions to FolioOne are secured through organizations such as employers, employment agencies, schools or some sponsoring organization. A list of sponsoring organizations can be secured by sending an email to [support@folioone.com](mailto:support@folioone.com) requesting a list of sponsoring organizations. The list will be sent by return email.

## Logging in to FolioOne

1. Browse to FolioOne at [www.folioone.com](http://www.folioone.com) and click the **FolioOne Login** link in the left menu.
2. Enter your **Personal ID** and your **Password** and then click the “Log On” button.

## Entering Personal Information

After logging into FolioOne at the top of the page you will see a row of links on a blue background like this:

My Info | My Portfolio | Planning | Requests

This is your main menu for FolioOne. These links help you work with your Knowledge/Skills Portfolio (KSP) in the following ways:

**My Info:** Displays your personal information

**My Portfolio:** Displays your KSP

**Planning:** Displays learning experiences for future study

**Requests:** This allows you to apply for association with another organization

To enter your personal information click on “My Info” on the top toolbar. This will take you to a page containing your personal information. Fill in our edit the fields as necessary. When you are finished, click the “Update” button.

## **Recording your Learning Experiences**

After logging into FolioOne you will want to see your Personal Knowledge/Skills Portfolio. Click on “My Portfolio” and the first page of your KSP will be displayed. You may now add learning experiences to your KSP or edit existing items as needed.

## **Adding Records to your Personal Knowledge/Skills Portfolio**

The following links appear at the top of your Knowledge/Skills Portfolio:

[View](#) | [Add Class](#) | [Search](#) | [Groups](#) | [Settings](#)

### Adding Individual Items

1. Click “Add Class” from the row of links.
2. On the following screen, click on **Individual Item**. Fill out the form on the next screen as completely and accurately as possible. Below are some tips:
  - For learning experiences of the type “Self Study”, use your personal information for the “Provider” and the address-related fields.
  - “Class Hours” refers to the total number of hours spent in class or during that learning experience. To edit, click on the title of that experience and edit as necessary. When you are finished, click the “Update” button.
  - “Lab Hours” refers to the total number of hours spent in the laboratory.
  - “Grade” only accepts a standard letter grade. If the learning experience was on the “pass/fail” basis, or if no grade was offered, then leave this field blank.
3. When you have finished, click the “Save” button.

### Adding From an Organization Class List

This feature is available after obtaining an association with another company or organization.

1. Click “Add Class” from the row of links.
2. On the following page click on **Organizational Class List**. The next page contains a list of organizations to which you are associated.
3. Select an organization and then click “Continue” at the bottom of the form. The following page contains a list of classes offered by that organization.
4. Select the class you wish to add by clicking on it and then click the “Select” button. The following page contains a form with much of the class’ data already entered.
5. Fill out the “Finish Date” and “Grade” fields. (For hints, refer to part 2 of “Adding an Individual Item”). Then, click the “Add” button.

### **Editing Records in your Personal Knowledge/Skills Portfolio**

1. Scroll down through your KSP until you see the learning experience whose data you wish to edit. Click on the title of that experience. The following screen displays data for that learning experience
2. Edit the fields as necessary. When you are finished, click the “Update” button.

### **Using your Personal Knowledge/Skills Portfolio**

Your KSP is a tool that helps you in many ways:

1. Your KSP is a database of your knowledge. It can help you to remember the details of past jobs and learning experiences when writing resumes, filling out job applications, and applying for scholarships and other aid.
2. Because FolioOne is web-based, you can access your KSP from virtually anywhere in the world.
3. You can make your KSP available for inspection by anyone by giving them your Personal ID and a VIEW ONLY ACCESS password. Click on “Admin” at the top-right of the main menu and then click on “View-Only Access” to create a VIEW ONLY ACCESS password.
4. At the top of your KSP is a list of **Group Shortcuts**. These are Group names and define the subject matter of a learning experience. Clicking on any of these shortcuts brings up that section of your KSP, eliminating the need to scroll through your entire portfolio to locate a particular section.

### **Using your Planning Portfolio**

After logging into FolioOne, click on “Planning” on the main menu. The following screen allows you to work with your Planning Portfolio. The following links appear at the top of your Planning Portfolio:

My Plan | Add Class | Settings | Organizational Plan

These links aid you in using your Planning Portfolio. To add an individual item to your Planning Portfolio, follow the instructions under “Adding Individual Items” in the “Adding Records to your Personal Knowledge/Skills Portfolio” section. To add from an Organization Class List, follow the instructions under the “Adding From an Organization Class List” in the “Adding Records to your Personal Knowledge/Skills Portfolio” section.

### **Associating with an Outside Organization**

1. After logging into FolioOne, click the “Requests” link from the main menu. The following screen allows you to make your KSP available to other organizations.
2. Scroll through the list in the left-hand column and select the organization with which you wish to associate. Next, scroll through the list in the right-hand column and click on the relationship you wish to have with this organization. Finally, click the “Submit” button.
3. If your request to associate is accepted by the requested organization, your KSP will be available to the new organization in the database.
4. To associate with multiple organizations, repeat step 2 as many times as needed.

### **Calculating Knowledge Management Units (KMU)**

This feature may be used only for learning experiences whose category is “Lifetime Learning”.

1. Scroll down through your KSP until you see the learning experience whose KMU's you wish to calculate. Click the title of that experience and on the following page is the Learning Experience data form.
2. Immediately above the Learning Experience data form you will see the following links:

Class | KMU

3. Click KMU and you will see the form asking for data used in calculating KMU's. (It also contains fields to track your expenses during that learning experience.)
4. Fill out the left-hand column of the form as completely and as accurately as possible. Below are some tips:
  - For learning experiences of the type “Self Study”, use your personal information for the Instructor fields.
  - “Homework/Class (hrs)” refers to the number of hours of homework per hour spent in class, or per hour of the learning experience.

- “Student’s Cost (\$)” refers to all expenses related to that learning experience. This includes all fields in the right-hand column of the form.
5. When you are finished, click the “Calculate KMU” button.
  6. The number of KMU’s computed for this learning experience is shown at the bottom of the data form for the experience.

## **Troubleshooting**

**Question:** *I cannot log in to my FolioOne subscription.*

**Answer:** Verify that you are using the correct Personal ID and Password.

**Question:** *Is there a Help section inside of FolioOne?*

**Answer:** After logging into FolioOne in the top-right of the main menu there is a HELP link. If you click that link it will open the Help section. The following links appear at the top of the Help section:

Home | Navigation | Setup | Forms

Click any of these links for help on specific topics.

**Question:** *Is there someone I can contact for FolioOne Support?*

**Answer:** If you continue to have problems, send an email to [support@folioone.com](mailto:support@folioone.com) describing your problem.