3. Content

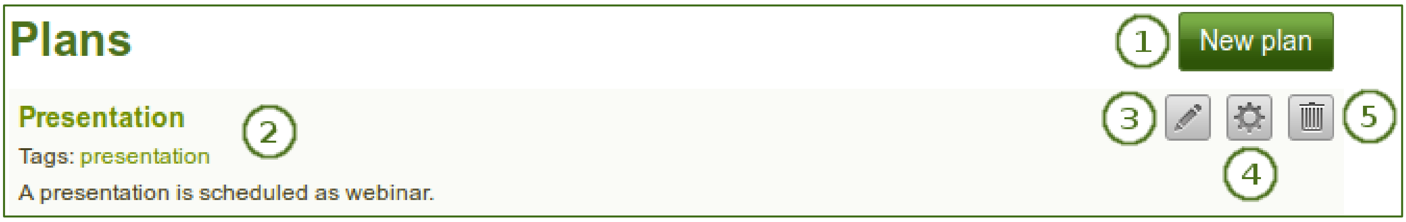
3.6. Plans

Content > *Plans*

Plans are simple ToDo lists. They are particularly well-suited to plan medium and long-term endeavours. A plan can consist of a number of individual activities with which completion dates are associated.

You could use the functionality to:

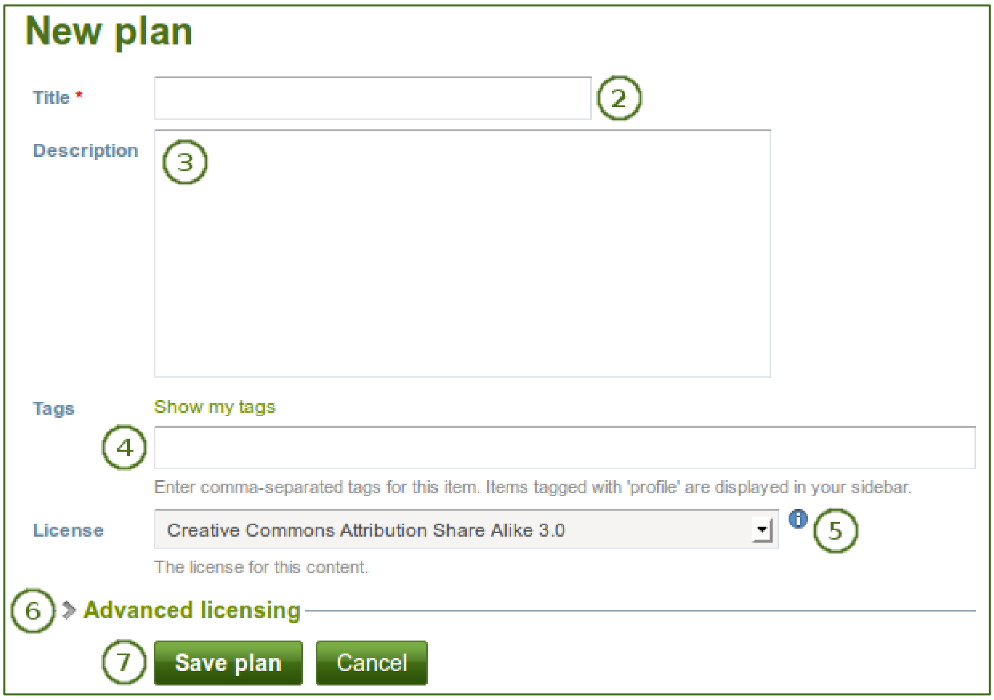
- set yourself individual goals for a large task.
- manage your personal learning activities and keep an eye on how many you have already accomplished during the time frame that you have set yourself.
- keep track of workshops you would like to attend for your professional development over time.



Overview page of Plans

1. Click the ***New plan*** button to create a new plan.
2. Your existing plans, their descriptions and tags are displayed.
3. Click the ***Edit*** button to change the title, description (and license) of your plan.
4. Click the ***Manage*** button to add and edit tasks for your plan.
5. Click the ***Delete*** button to delete your plan.

3.6.1. Create a new plan



Create a new plan

1. Click the ***New plan*** button on the ***Plans*** overview page.

2. **Title**: Give your plan a title. This field is mandatory.
3. **Description**: Give your plan a description. It is visible when you select a plan for inclusion into a portfolio page.
4. **Tags**: Add tags to your plan for easier searching later on. Separate each tag with a comma. You may also choose tags from the ones that you have created previously by clicking on ***Show my tags*** and then clicking on the tags you want to use.
5. **License**: Choose the license for the plan. You can set your default license in your account settings.
6. **Advanced licensing**: If you click it, you see two additional license fields, "Licensor" and "Original URL", that you can fill in if this is not your own plan.
7. Click the ***Save plan*** button to keep your new plan.

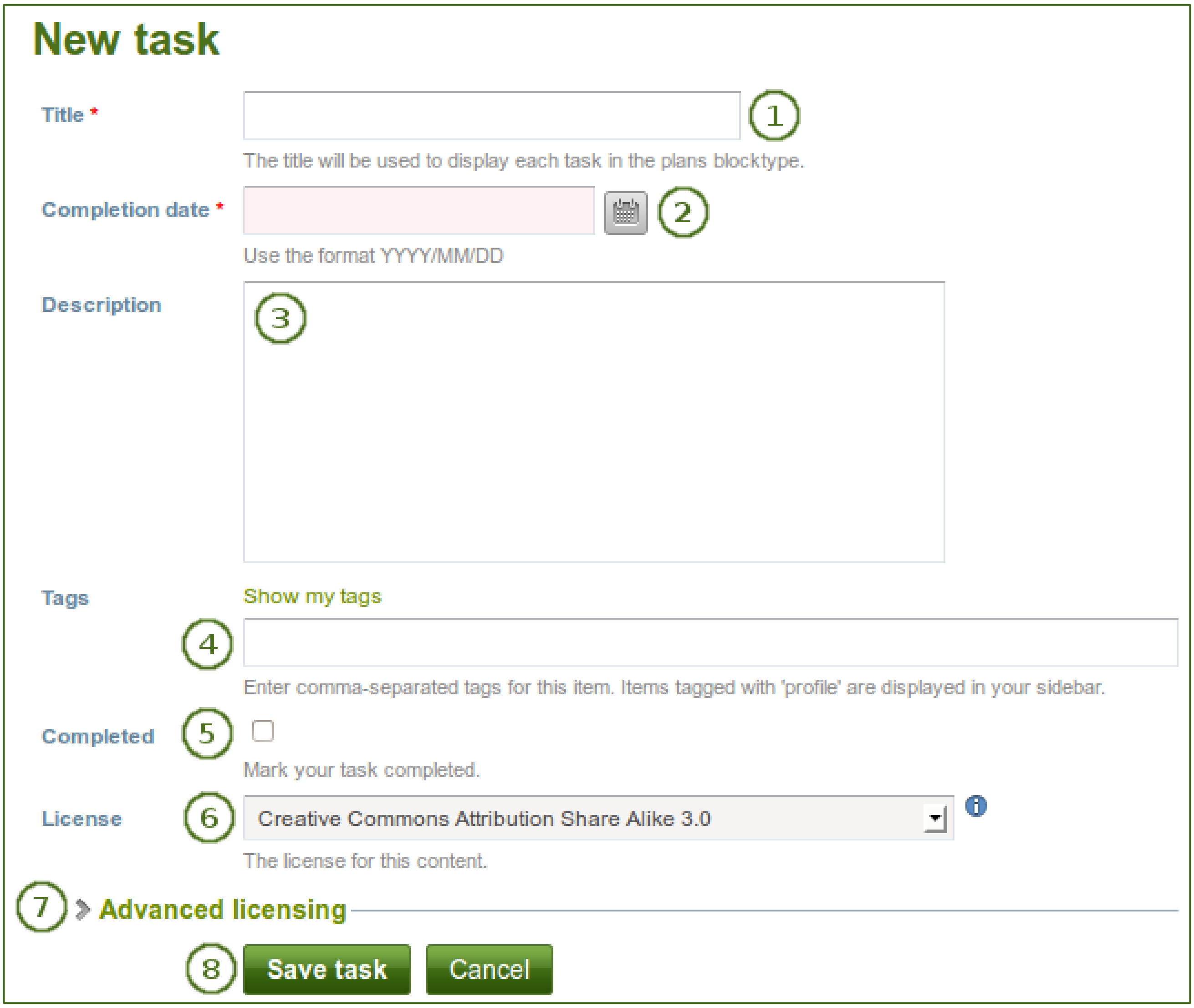
Now you can add individual tasks to your plan.

3.6.2. Add tasks to a plan

There are several ways to add a task to a plan:

- Click on ***Add task*** right after you saved your plan.
- Click on ***Content*** > ***Plans*** > the title of the plan > ***New task***.
- Click on ***Content*** > ***Plans*** > the ***Manage tasks*** button > ***New task***.

Once you are in the ***New task*** screen, you can create your new task.



Add a new task to a plan

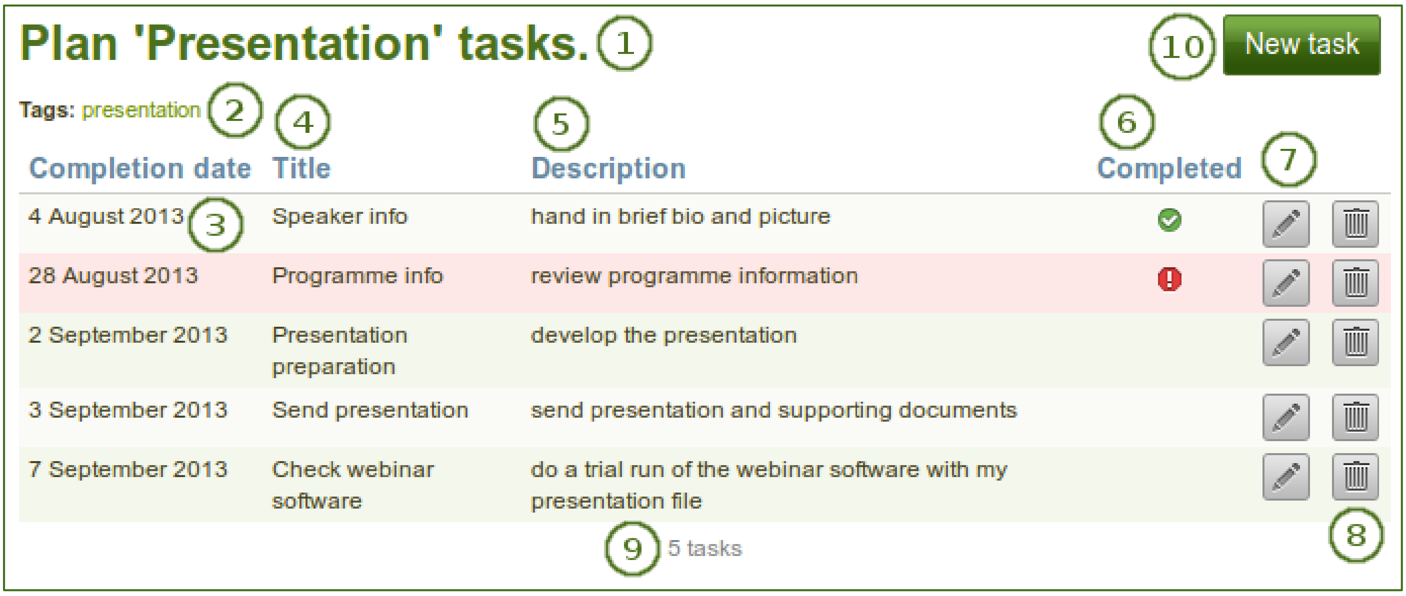
1. **Title**: Enter a title for your task. This field is mandatory.
2. **Completion date**: Provide a completion date. Either choose the date via the ***calendar*** icon or enter it in the format YYYY/MM/DD (Year - 4 digits / Month - 2 digits / Date - 2 digits), e.g. 2012/06/27. This field is mandatory and allows for tasks to be marked overdue automatically.
3. **Description**: Provide more detailed information about the task.
4. **Tags**: Add tags to your plan for easier searching later on. Separate each tag with a comma. You may also choose tags from the ones that you have created previously by clicking on ***Show my tags*** and then clicking on the tags you want to use.
5. **Completed**: Tick this check box if you have already completed the task.
6. **License**: Choose the license for the plan's task. You can set your default license in your account settings.
7. **Advanced licensing**: If you click it, you see two additional license fields, “Licensor” and “Original URL”, that you can fill in if this is not your own plan's tasks.
8. Click the ***Save task*** button to finish editing your task.
9. Add more tasks immediately or at a later point.

3.6.3. View all tasks of a plan

You can view the tasks of the plan in two different ways if you are the author of the plan:

1. At ***Content*** > ***Plans*** > Click on a plan.
2. Add a plan to one of your pages.

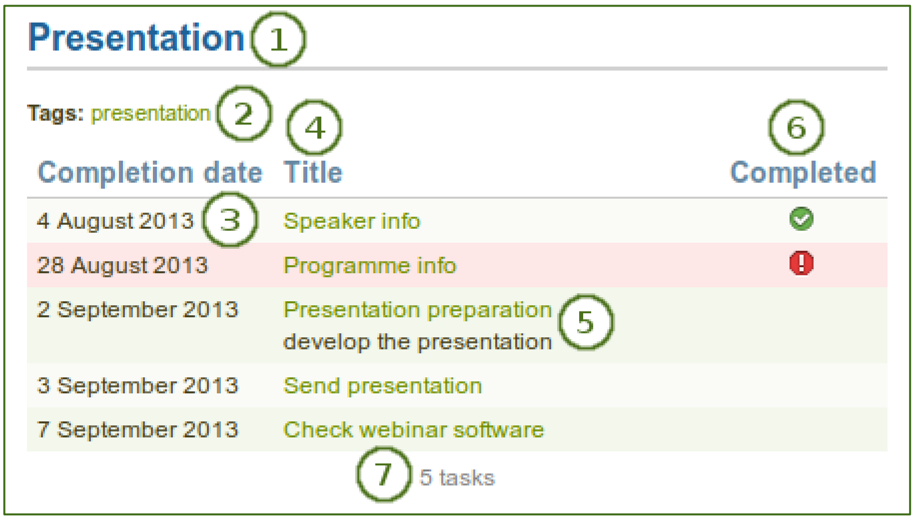
3.6.3.1. View a plan under Content



Plans under Content

1. The title of the plan under which you created the tasks is shown.
2. **Tags**: The tags that you associated with the plan are displayed.
3. **Completion date**: You can see the completion date for each task.
4. **Title**: The title of each task is shown.
5. **Description**: The description for each task is displayed.
6. **Completed**: The completion of each task. If a task is complete, it receives a check mark. If it is overdue, a warning is displayed.
7. Click the ***Edit*** button  to make changes to a task.
8. Click the ***Delete*** button  to delete a task.
9. The number of tasks in your plan is displayed.
10. Click the ***New task*** button to create a new task in this plan.

3.6.3.2. View a plan on a portfolio page



What a plan looks like in a portfolio page. Clicking on the title of the task shows / hides the task description.

1. The title of the plan. You can change that as part of the block title.
2. **Tags**: The tags are displayed.
3. **Completion date**: You can see the completion date for each task.
4. **Title**: The title of each task is shown.
5. When you click the title, which is linked, you can see the description for this task.
6. **Completed**: You see whether the tasks are completed, not yet completed or overdue.
7. The number of tasks in this plan is displayed.

3.6.4. Edit tasks in a plan

1. Click the ***Manage tasks*** button  or the title of the plan on ***Content*** > ***Plans***.
2. Click the ***Edit*** button  next to a task that you want to change.
3. Make your changes or mark a task as completed.
4. Click the ***Save task*** button and your changes are recorded.