



## **myFolio Release Notes**

August, 2021

As part of our summer platform update, the Folio Collaborative released the following improvements and new features. If you have any questions, please contact us at [support@foliocollaborative.org](mailto:support@foliocollaborative.org), or by phone at (800) 452-5078 Ext. 1.

### **OVERVIEW**

#### **New Look for Workspaces (pages 2-4)**

- Updated layout for Workspaces

#### **Improvements to Goals and the Goal Wizard (pages 5-6)**

- Goals Wizard customizations
- Steps 2 + 3 ("Challenges") of the Goals Wizard can now be skipped
- Goals can now be associated with a Category and not just one of the school-created Themes
- Additional Check-in frequencies - "Weekly" and "Once," in addition to the already existing "Monthly" interval have been added to Goals Check-ins

#### **Improved Look of myFolio (pages 7-8)**

- New, slightly adjusted look to nearly every page in myFolio
- New file uploader
- New formatted text editor
- Improved responsiveness, so myFolio looks and works even better on phones and tablets

#### **Improvements to Goals Check-in (page 9)**

- Additional Check-in frequencies - "Weekly" and "Once," in addition to the already existing "Monthly" interval have been added to Goals Check-ins
- Goals Check-ins can now be edited

#### **Year End Summary Insights Improvements (page 10)**

- Improved Filtering
- Notes are now grouped by the custom Year End Summary form
- Improved export of content to CSV

#### **Other Improvements (page 11)**

- Improved display of the Goals Insights fields
- Exporting Goals from the Goals Insights page now includes more fields

## NEW LOOK FOR WORKSPACES

We have updated the look and layout of Workspaces to make them easier to use. Items are organized under "Tabs."

- The Workspace main page features the Workspace Posts feed and the Leaders/Collaborators
- The Workspace Timeline overview and detail pages have a new look
- The Workspace Resources page displays items as tiles with thumbnails
- Members are on their own tab and are organized in tiles

### Workspace Main Page

School Roll Call Insights Workspaces Manage

Workspaces / Lower School Teachers

# Lower School Teachers

A workspace for Lower School Teachers.

0 Posts 2 Waypoints 0 Resources 6 Members

EDIT WORKSPACE ADD POST

Items related to the Workspace are organized under tabs.

Activity Feed Timeline Resources Members

## Activity Feed

No undismisssed posts

ADD POST

## Leaders

Katherine Johnson

## Collaborators

Matt Menefee

Donna King

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# Workspace Timeline Overview

Activity Feed **Timeline** Resources Members

Timeline [ADD TIMELINE](#)

**Lower School Teachers Timeline**

**Waypoints**

- Goals Meeting Due: September 30, 2021
- Mid-year Check-in Due: January 14, 2022
- Spring Observation Due: May 6, 2022

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## Timeline Detail

School Roll Call Insights Workspaces Manage 1 Dwight

**Lower School Teachers Timeline** [EDIT](#)

**Waypoints**

**Goals Meeting**

- due on: September 30, 2021
- completed by: Goals meeting

**Mid-year Check-in**

- due on: January 14, 2022
- completed by: Conversation note

**Spring Observation**

- due on: May 6, 2022
- completed by: Observation

**School Year View**

Legend: Timeline Begins (blue), Goals Meeting (orange), Mid-year Check-in (green), Spring Observation (red), Timeline Ends (purple)

Timeline: Sep 21 | May 22


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# Workspaces Resources

Activity Feed   Timeline   **Resources**   Members

## Resources

[ADD WEBSITE](#)   [ADD FILE](#)


 **Dwight Schrute**  
4 minutes ago  
[Creating-a-Culture-of-Collaboration-Whitepaper-Folio-Collaborative](#)

 **Dwight Schrute**  
13 seconds ago  
[Racial Equity and Inclusion Goal-Setting](#)  
DIVERSITY, EQUITY, AND INCLUSION


# Workspace Members

Activity Feed   Timeline   Resources   **Members**


## Members

 **Ed Reed**


**Waypoints**  
Goals Meeting Status: [Due on 2021-09-30](#)  
Mid-year Check-in  
Spring Status: [Due on 2022-01-14](#)  
Observation Status: [Due on 2022-05-06](#)

 **Helen Robinson**


**Waypoints**  
Goals Meeting Status: [Due on 2021-09-30](#)  
Mid-year Check-in  
Spring Status: [Due on 2022-01-14](#)  
Observation Status: [Due on 2022-05-06](#)

 **Donna King**


**Waypoints**  
Goals Meeting Status: [Due on 2021-09-30](#)  
Mid-year Check-in  
Spring Status: [Due on 2022-01-14](#)  
Observation Status: [Due on 2022-05-06](#)

 **Matt Menefee**

**Waypoints**  
Goals Meeting Status: [Due on 2021-09-30](#)  
Mid-year Check-in  
Spring Status: [Due on 2022-01-14](#)  
Observation Status: [Due on 2022-05-06](#)

 **Katherine Johnson**

**Waypoints**  
Goals Meeting Status: [Due on 2021-09-30](#)  
Mid-year Check-in  
Spring Status: [Due on 2022-01-14](#)  
Observation Status: [Due on 2022-05-06](#)

 **Marie Davis**

**Waypoints**  
Goals Meeting Status: [Due on 2021-09-30](#)  
Mid-year Check-in  
Spring Status: [Due on 2022-01-14](#)  
Observation Status: [Due on 2022-05-06](#)

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## GOALS AND THE GOALS WIZARD

The Goals Wizard is now customizable to better fit the goal setting process. You can customize virtually all of the questions, prompts, etc. in the Goals Wizard to fit your school's needs. Goals can now be associated with a Category and not just one of the school-created Themes.

### Goals Wizard Customizations

Clicking on the Manage menu item "Goals Wizard Manager" (available only to myFolio Admins) brings you to a page where the Goals Wizard can be customized.

The screenshot shows the 'Goals Wizard Customizations' page. At the top left, there is a 'RESET ALL FIELDS TO DEFAULT' button with an information icon. An orange arrow points to it with the text 'Reset ALL steps back to default.' Below this is the 'Primary Action Word' section, which has a text input field containing 'Opportunity' and a 'RESET FIELD TO DEFAULT' button. An orange arrow points to the input field with the text 'Editable prompts/help text.' The main section is 'Editable Content for Step 2', which includes a 'Step 2 Help Text' area with a rich text editor (containing the text 'Identify opportunities that are present within your Goal.') and a 'RESET FIELD TO DEFAULT' button. An orange arrow points to the rich text editor with the text 'Step you are editing.' To the right of the rich text editor is a 'Content location' preview showing a list of items, with a red box highlighting one item and an orange arrow pointing to it. Below the rich text editor is a 'Step 2 Question 1' section with a text input field containing 'What opportunities are available in your Goal?' and a 'RESET FIELD TO DEFAULT' button. An orange arrow points to the input field with the text 'Reset just the single field back to default.' To the right of the question input field is another 'Content location' preview, similar to the one above, with a red box highlighting one item and an orange arrow pointing to it.

**All of the Wizard's steps have editable components.** When you have made your changes, click the "Update" button at the bottom of the page to save your changes.

This block shows a blue button labeled 'UPDATE' on the left. To its right, the text 'Click "Update" to save your changes.' is displayed in orange. At the bottom of the page, there is a footer with the text 'Help with Folio · Privacy Policy · Terms of Use · Credits' in blue.

Steps 2 + 3 ("Challenges") of the Goals Wizard can now be skipped. Skipping step 2 automatically skips step 3. The "Skip" button is automatically on in myFolio, so there is no need to do any set-up for this feature.

CREATE A GOAL (STEP 2/5)

## 2 Identify Your Challenges

Selected Theme  
Enhance collaboration

What challenges do you currently face at work? \*

Enter at least one challenge.

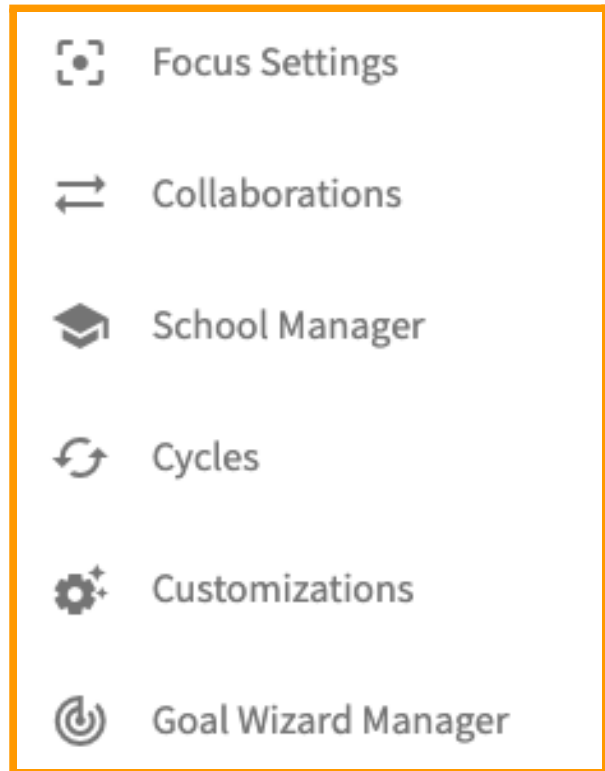
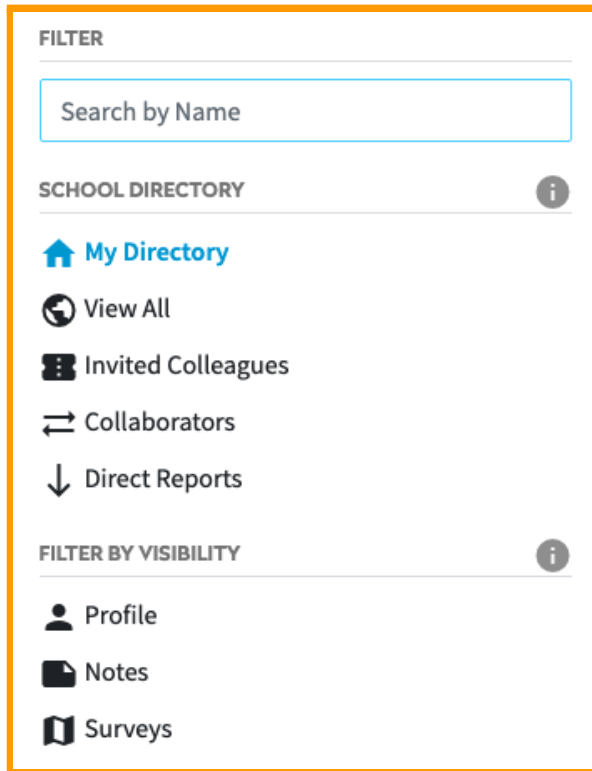
  
  
  
[+ ADD CHALLENGE](#)

[BACK](#) [SAVE & FINISH LATER](#) **SKIP** [NEXT](#)

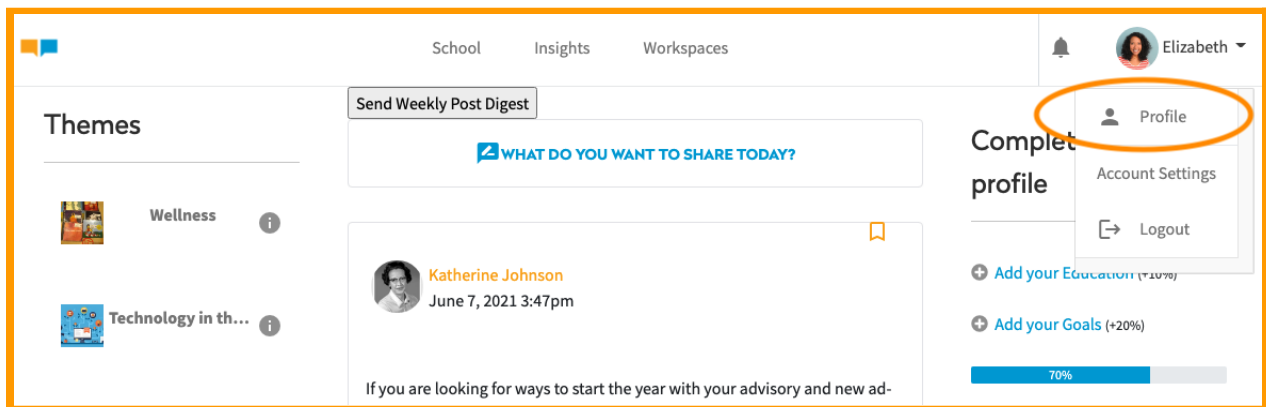
## IMPROVED LOOK OF myFOLIO

We have continued the visual refresh of myFolio from last year and have made some additional changes:

- Cleaner, more consistent look across the pages of the platform
- Improved responsiveness, so myFolio looks and works even better on phones and tablets
- New, more consistent icons



The link to the employee's Profile has been moved to a menu item ("Profile") under their picture/name in the upper right of the page.



New look to the Employee Profile page.

The screenshot displays the Employee Profile page for Elizabeth Martin. At the top, there is a navigation bar with 'School', 'Insights', and 'Workspaces' tabs, and a user profile dropdown for 'Elizabeth'. The main header features the name 'Elizabeth Martin' and her email 'teacher11@hillacademy.org', accompanied by a circular profile picture and a '+ ADD GOAL' button. Below the header is a navigation menu with 'About', 'Goals', 'Notes', 'Professional Development', and 'Resources'. The 'About' section includes 'Your Last Spotlight' (a post by Dwight Schrote), an 'Overview' section with a 'CONTACT' link to 'teacher11@hillacademy.org', and a 'Five Words' section with a 'WORD CLOUD' icon and five tags: Leadership, Visionary, Driven, Patient, and Happy. A 'Work' section is partially visible. On the right, a 'Complete your Profile' progress bar shows 90% completion, with a '+ Add your Education (+10%)' button. Below this is a 'Can view your Profile, Notes, & Surveys' section listing users: Henry Fonda, Hill Academy Admin, Dwight Schrote, and Teacher K.



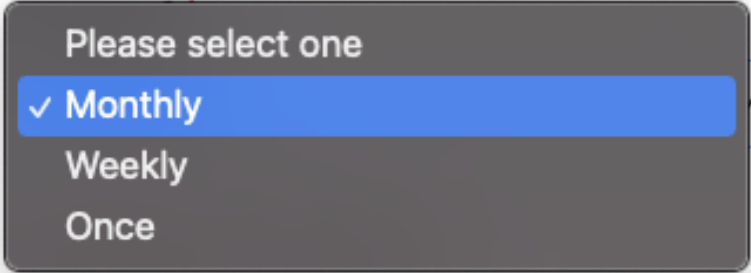
## IMPROVEMENTS TO GOALS CHECK-IN

Not just "Monthly" anymore, we've added the additional check-in options of "Weekly" and "One-time".

How often do you want to check in on your

Please select one

- ✓ Monthly
- Weekly
- Once

A screenshot of a dropdown menu. The menu is dark grey with a white border. It contains the text "Please select one" at the top. Below it are three options: "Monthly" (which is selected and highlighted in blue with a white checkmark), "Weekly", and "Once". To the right of the menu is a small white circle with a black 'i' inside, indicating an information icon.

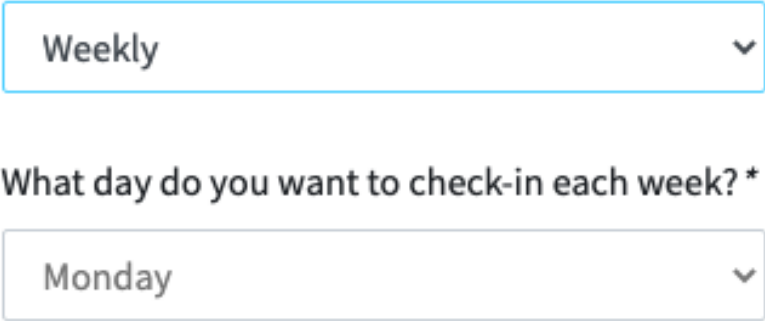
How often do you want to check in on your progress? \*

Weekly

What day do you want to check-in each week? \*

Monday

Next Check-In: 2021-07-01

A screenshot of a form. The first question is "How often do you want to check in on your progress? \*" with a red asterisk. Below it is a dropdown menu showing "Weekly" and a downward arrow. To the right is an information icon. The second question is "What day do you want to check-in each week? \*" with a red asterisk. Below it is a dropdown menu showing "Monday" and a downward arrow. At the bottom, it says "Next Check-In: 2021-07-01".

# YEAR END SUMMARY INSIGHTS IMPROVEMENTS

- Improved Filtering
- Notes and now grouped by the custom Year End Summary form.
- Improved export of Note content to CSV

The screenshot shows the 'Year End Insights' dashboard. At the top, there is a navigation bar with 'School', 'Roll Call', 'Reports', 'Insights', 'Workspaces', and 'Manage'. A user profile for 'Dwight' is visible in the top right. The main heading is 'Year End Insights' with an 'EXPORT' button. Below this is a 'Filters' section with dropdown menus for 'CUSTOM FORM', 'TIME FRAME', 'SUPERVISOR', and 'EMPLOYEE'. An arrow points to these filters with the text 'Additional Filters.'. Below the filters is a 'CLEAR CURRENT FILTERS' button. The main content area shows a table of responses from a 'Test Self-Reflection Year End Summary' form. The table has three columns: 'Employee Name', 'Looking back on the past 6 weeks, what are the 3 things I would do differently?', and 'Here is another prompt to test'. Below the table, there is an 'EXPORT' button and the text 'Legacy Year End Summary'. An arrow points to this export option with the text 'Export Responses From Each Form.'. At the bottom, there is a small table with two columns: 'Employee Name' and 'Summary', showing 'Dwight Schrote' with the summary 'test'.

**Year End Insights** EXPORT

Additional Filters.

Filters: CUSTOM FORM TIME FRAME SUPERVISOR EMPLOYEE

CLEAR CURRENT FILTERS

Responses From Each Form are separated.

EXPORT Test Self-Reflection Year End Summary

Employee Name	Looking back on the past 6 weeks, what are the 3 things I would do differently?	Here is another prompt to test
Dwight Schrote	What are the 3 things I would do the same?asdfasf sfasdfsadf sadf asdf asdf	Looks like I can fill this in, type something? asdf
Dwight Schrote	What are the 3 things I would do the same? 1. One thing 2. Second thing 3. Third thing	Looks like I can fill this in, type something? Sure you can!
Gabriel Garcia Marquez	What are the 3 things I would do the same? - Run - Ride - Risk	Looks like I can fill this in, type something? More of all the things I can type.
Al Turing	What are the 3 things I would do the same? - Fish - Frolic - Have Fun	Looks like I can fill this in, type something? I'll type something math related.
Shawn Anderson	What are the 3 things I would do the same? - 1 - 2 - 3	Looks like I can fill this in, type something? Here is a thing.
Katherine Johnson	What are the 3 things I would do the same? - Learn - Look - Lunch	Looks like I can fill this in, type something? Here is something I typed
sean 20200529test	Boy, alot of stuff! What are the 3 things I would do the same? ONE TWO THREE	

EXPORT Legacy Year End Summary

Export Responses From Each Form.

Employee Name	Summary
Dwight Schrote	test

## OTHER IMPROVEMENTS

- The display of the Goals Insights fields has been improved.
- Exports Goals from the Goals Insights page now includes more fields.

The screenshot shows the 'Goals Insights' interface. At the top, there are navigation links: School, Roll Call, Reports, Insights, Workspaces, and Manage. A user profile for 'Dwight' is visible in the top right. Below the navigation is the 'Goals Insights' title and 'PRINT' and 'EXPORT' buttons. A 'Filters' section includes dropdown menus for GROUP, SUPERVISOR, EMPLOYEE, VIEW, CATEGORY, and TIME FRAME. A filter button shows 'Everyone You Can View' and a 'CLEAR CURRENT FILTERS' button. Below the filters is a 'Summary' section with 'Total Count: 190' and links for 'Goals Table', 'Word Cloud', and 'Employees'. The main content is a table with the following data:

Employee	Category/Theme	Goal	Action Items Count	Comments Count	Due Date	Supervisor
Teacher A	Not Available	Improvement classroom management skills	3	0	No Due Date Set	myFolio Supervisor
Jordan ABE	DELETED THEME	test	1	0	No Due Date Set	myFolio Supervisor
Jordan ABE	Technology in the classroom	Engage Students	2	0	No Due Date Set	myFolio Supervisor
Shawn Anderson	Not Available	My goal is to use a different screen width.	0	0	No Due Date Set	Katherine Johnson