

# Taskstream Workspace Participant FAQs



## Taskstream AMS Workspace Participant FAQs

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## Adding various types of content/artifacts to a Workspace

All the tasks described in this FAQ document require you to have Edit permissions for the Workspace to which you want to add information.

*If you have edit permissions to a Workspace, an "Edit Content" link displays to the right of the Workspace name on the Workspaces tab of your homepage.*

*If you see a "View Content" link, then you have been given view-only access for that Workspace and cannot add information.*

### Q: How do I create a curriculum map?

**A:** When a Workspace includes a curriculum map requirement, follow these steps to add a curriculum map:

1. From the *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the *Standing Requirements* on the left side of the screen, select the *Curriculum Map* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Create New Curriculum Map** button.
4. Enter your *New Map Title* in the field provided.
5. You will now need to choose the alignment set you wish to use in the map.
  - a. From the pull-down *Select Alignment Set* menu, choose either "View sets available within (your Participating Area)" or "Other sets distributed to (your Participating Area)".
  - b. Click the **Select** button that corresponds to the appropriate set.
6. When notified that your map will open in a new window, click the **OK** button to continue.

 *If the map does not open, it is likely that a pop-up blocker is enabled on your internet browser. Please consult the Taskstream Technical FAQs for instructions on disabling the pop-up blocker.*

Once the map is open, you will be able to see the elements (e.g., outcomes, objectives, goals, etc.) of your alignment set across the horizontal axis of the map.

7. For each specific course/learning activity that you wish to map:
  - a. Click the **Mapping Actions** button.
  - b. Select **Create New Course/Activity**

 *It is also possible to access the "Create a New Course/Activity" window by clicking the small gray triangle to the left of the "Courses and Learning Activities" area or any courses/learning activities you may have added*

- c. Enter the *Course/Activity ID* and the *Course/Activity Title* in the appropriate fields.

- d. (Optional) Enter a *Description*. For example, you may want to type or paste in content from a course catalog or other information pertinent to the course
  - e. (Optional) Enter a *Link* to an external web site, such as a web page from an on-line course directory.)
8. It will now be possible to indicate the alignment of your courses/learning activities to the elements in your alignment set. Click into the *Click* box in the intersection of the course/learning activity and the element to which you wish to align it in the map.

*For information on the significance of the mapping icons, please consult the legend at the bottom left of the map.*

9. Click the **Save Now** button to save your map.
10. Remember to click on the red **Check In** button for this requirement when you are finished.

### Q: How do I enter outcomes?

**A:** Outcome sets can be entered as either one or two level sets, depending on whether or not you choose to define overarching objectives

To create a **two-level outcome set** in AMS (overarching objectives with outcomes on the second level), please follow the steps below:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the *Standing Requirements* on the left side of the screen, select the *Learning Objective/Outcome* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Create New Outcome Set** button.
4. Enter a title for your outcome set in the *Set Name* field.
5. (Optional) **Designate Alignment/Mapping Preference.** If you want to enable inter-area alignment, whereby other areas in your institution can map to your outcome set, check the box "Outcomes in other sets will need to be aligned to Outcomes in this set. (When checked, mapping will be allowed)."
6. Click the **Continue** button.

*If other outcome sets have been created for this requirement, your new set will appear at the bottom of the Content page.*

7. To add a specific objective to your outcome set, click the **Create New Learning Objective** button.
  - a. Enter a concise label in the *Learning Objective* field (e.g., "Learning Objective 1" or "Civic Responsibility").
  - b. (Optional) Enter a more detailed *Description* of the objective.
  - c. Click the **Continue** button.

8. Click the **Create New Outcome** button under your new objective.
    - a. Enter a concise label in the *Outcome* field (e.g., "Outcome 1.1").
    - b. (Optional) Enter a more detailed *Description* of the outcome (e.g., "Students will demonstrate...").
-  *An ideal outcome will be specific, measureable, meaningful, and manageable.*
- c. Click the **Continue** button.
  9. (Optional) Click the **Add mapping** link to [map the outcome](#) to a goal or outcome set
  10. (Optional) Click the **Add another outcome** link to repeat step 8 above.
  11. Click the **Back to all outcome sets** link to return to the *Content* page and view all objectives and outcomes.
  12. Remember to click the red **Check In** button for this requirement when you are finished.

To create a **one-level outcome set** in AMS (no overarching objectives), please follow the steps below:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the *Standing Requirements* on the left side of the screen, select the *Learning Objective/Outcome* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Create New Outcome Set** button.
4. Enter a title for your outcome set in the *Set Name* field.
5. (Optional) **Designate Alignment/Mapping Preference.** If you want to enable inter-area alignment, whereby other areas in your institution can map to your outcome set, check the box "Outcomes in other sets will need to be aligned to Outcomes in this set. (When checked, mapping will be allowed)."
6. Click the **Continue** button.

*If other outcome sets have been created for this requirement, your new set will appear at the bottom of the Content page.*

7. Click the **Create New Outcome** button under your new objective.
  - a. Enter a concise label in the *Outcome* field (e.g., "Outcome 1.1").
  - b. (Optional) Enter a more detailed *Description* of the outcome (e.g., "Students will demonstrate...").

 *An ideal outcome will be specific, measureable, meaningful, and manageable.*

- c. Click the **Continue** button.
8. (Optional) Click the **Add mapping** link to [map the outcome](#) to a goal or outcome set
9. (Optional) Click the **Add another outcome** link to repeat step 7 above.
10. Click the **Back to all outcome sets** link to return to the *Content* page and view all objectives and outcomes.
11. Remember to click the red **Check In** button for this requirement when you are finished.

*When you are viewing existing outcome sets on the Content page, you may choose to reorder, delete, or edit the set name and properties:*

- *To re-order the outcomes within your outcome set, click the **Reorder** button.*
- *To rename your outcome set or change the mapping preference, click the **Edit Set Name/Properties** button.*
- *To delete the outcome set altogether:*
  - a. *You must first delete all of the outcomes within the outcome set.*
  - b. *When all outcomes have been deleted, click on the **Delete Set** button.*

#### **Q: How do I map or align my outcomes with another set of outcomes, goals, or standards?**

**A:** Follow these steps to align outcomes to organizational goals in AMS:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the *Standing Requirements* on the left side of the screen, select the *Learning Objective/Outcome* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Map** link to the right of the outcome you would like to map.
4. Click the **Create New Mapping** button.
5. From the pull-down **Select category of set to map to** list, select "Goal sets distributed to [the area you are working in]" and click the **Go** button.

*The other selections in this dropdown menu will allow you to select sets that other Participating Areas have created and chosen to share with the rest of the institution for the purposes of inter-area alignment ("Outcome sets in other organizational areas") or intra-area alignment ("Outcome sets in...[the area you are working in]").*

6. Select the appropriate goal set and click the **Continue** button.
  - a. Select the specific elements within the set to which to align the outcome.

- b. Click the **Continue** button to save your selections.
7. To return to your outcome sets, click the **Back to outcome sets** link.
8. Remember to click the red **Check In** button for this requirement when you are finished.

#### Q: How do I create an assessment plan?

**A:** When a Workspace includes an Assessment Plan requirement in any assessment cycle, please follow these steps to add assessment measures:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the appropriate assessment cycle on the left side of the screen, select the click on the *Assessment Plan* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Create New Assessment Plan** button.
4. Click the bar labeled **Outcomes and Measures** to expand this section and then click on the **Select Outcomes** button.
5. Click the **Select Existing Set** button.
  - a. Select the outcome set for which you are creating an assessment plan.
  - b. Click the **Continue** button.
6. The outcomes in the selected set are displayed on screen. *EITHER* use the **Include All** checkbox to select every outcome in this set *OR* check individual boxes to indicate which outcomes you want to **Include** in this plan.
  - a. Click the **Accept and Return to Plan** button.
7. Click the **Add New Measure** button under one of your outcomes.
8. In the fields provided, enter a *Measure Title* and indicate the *Measure Type/Method* and *Measure Level*. Enter *Details/Description* of your assessment plan. Enter an *Acceptable Target* for this assessment cycle, as well as a long-term *Ideal Target*. Identify *Key/Responsible Personnel* and use the *Implementation Plan (timeline)* to add the steps of your assessment plan.
  - a. Click the **Apply Changes** button to save this information.
9. You may upload documents such as rubrics or other supporting documentation by clicking on the **Add/Edit Attachments and Link** button under *Supporting Attachments*.
10. Remember to click the red **Check In** button for this requirement when you are finished.

#### Q: How do I import or copy measures that I've already entered?

**A:** When you have already created measures in AMS, you can use these steps to import or copy them into an Assessment Plan:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the appropriate assessment cycle on the left side of the screen, select the click on the *Assessment Plan* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Create New Assessment Plan** button.
4. Click the bar labeled **Outcomes and Measures** to expand this section and then click on the **Select Outcomes** button.
5. Click the **Select Existing Set** button.
  - a. Select the outcome set for which you are creating an assessment plan.
  - b. Click the **Continue** button.
6. The outcomes in the selected set are displayed on screen. *EITHER* use the **Include All** checkbox to select every outcome in this set *OR* check individual boxes to indicate which outcomes you want to **Include** in this plan.
  - a. Click the **Accept and Return to Plan** button.
7. To copy this measure for another outcome, click the **Add New Measure** button under the new outcome.
  - a. Click the **Import Measure** button.
  - b. Check the *Show measures for ALL outcomes* box.
  - c. Click the **Copy Selected** button.
8. Click the **Apply Changes** button.
9. You may upload documents such as rubrics or other supporting documentation by clicking the **Add/Edit Attachments and Link** button (under *Supporting Attachments*).
10. Remember to click the red **Check In** button for this requirement when you are finished.

#### Q: How do I add assessment findings or results?

**A:** Follow these steps to add assessment findings or results to a requirement in a specific assessment cycle:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the appropriate assessment cycle on the left side of the screen, select the click on the *Assessment Plan* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the bar labeled **Findings per Measure** to expand this section, then click the **Add Findings** button.
4. Enter your *Summary of Findings, Recommendations, and Reflections/Notes* for this specific assessment cycle.
5. Indicate whether your *Acceptable Target Achievement* was "Not Met," "Met," or "Exceeded."
6. Indicate whether your findings are "Moving Away" from, "Approaching," or have "Exceeded" the *Ideal Target Achievement*.

7. Click the **Submit** button.
8. Remember to click the red **Check In** button for this requirement when you are finished.

#### Q: How do I add an action/operational/continuous improvement plan?

**A:** As you follow these steps, please bear in mind that, according to your institution's culture and terminology, the artifact referred to here as an "Action Plan" may be referred to as an "Operational Plan", "Continuous Improvement Plan" or something similar along these lines

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the appropriate assessment cycle on the left side of the screen, select the click on the *Action Plan* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Create New Operational Plan** button, then click on the **Actions** bar to expand this section.
4. To link your action plan to assessment findings:
  - a. Click the **Select Outcomes** button.
  - b. Then click the **Select Existing Set** button.
  - c. Select the appropriate set and click the **Continue** button.
5. The outcomes in the selected set are displayed on screen. *EITHER* use the **Include All** checkbox to select every outcome in this set *OR* check individual boxes to indicate which outcomes you want to **Include** in this plan.
  - a. Click the **Accept and Return to Plan** button to complete your outcome selection.
6. Click the **Add New Action** button for the outcome for which you'd like to add an action.
  - a. If applicable, you may select the findings that support your action plan and click the **Continue** button.
7. Enter an *Action Item Title*, describe your *Action details*, outline your *Implementation Plan (timeline)* and identify *Key/Responsible Personnel*. Under *Measures*, indicate how you will know this action plan has been achieved. Describe how *Budget approval required?* works at your institution, price a *Budget request amount*, and indicate whether the *Priority level* is "Low," "Medium," or "High."
8. Click on the **Apply Changes** button.
9. You may upload documents such as budget sheets, applications, forms, or other supporting documentation by clicking the **Add/Edit Attachments and Links** button (under *Supporting Attachments*).
10. To copy this action plan for another outcome, click the **Add New Action** button under the new outcome.
  - a. Click the **Import Action** button.
  - b. Check the *Show actions for ALL outcomes* box.
  - c. Select the action you would like to import and click the **Copy Selected** button.
  - d. Click the **Apply Changes** button when you are finished editing.

11. Remember to click the red **Check In** button for this requirement when you are finished.

### Q: How do I report on the status of my action/operational/continuous improvement plan?

**A:** Follow these steps to add a status report to an existing action/operational/continuous improvement plan requirement in a specific assessment cycle:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. From within the appropriate assessment cycle on the left side of the screen, select the click on the *Status Report* requirement and click the **Check Out** button in the upper right corner of the screen.
3. Click the **Action Statuses** bar to expand this section, then click the **Add Status** button under the Action for which you would like to update the status.
4. Indicate whether the *Current Status* is "Not Started," "In Progress," "Completed," or "Not Implemented."
5. Indicate whether the *Budget Status* is "Approved," "Pending Approval," "Not Approved," or "Other." You may add *Additional Information* and *Next Steps* and click the **Submit** button.
6. You may upload *Substantiating Evidence*, such as budget sheets, reports, etc., by clicking the **Add/Edit Attachments and Links** button.
7. To add an overall **Status Summary**, click that bar to expand the section, then click the **Edit** button. Similarly, you may add an overall **Summary of Next Steps** by clicking on that bar to expand the section and clicking the **Edit** button.
8. Remember to click the red **Check In** button for this requirement when you are finished.

### Q: How do I add an LAT report as substantiating evidence?

**A:** A saved LAT report can be uploaded to an AMS Workspace using the following steps:

1. From *Workspaces* tab on the home page, click either the name of the workspace or the **Edit Content** link to the right.
2. Select the appropriate requirement and click the **Check Out** button in the upper right corner of the screen.

*LAT Reports are commonly uploaded as "Substantiating Evidence" in the "Assessment Findings" requirement.*

3. Click the **Add/Edit Attachments and Links** button.
4. Click the *Reports* tab (the third tab), in the upper right corner.
5. Under *Choose Report*, click the **Select a Saved Report** button.
6. A list of saved reports displays. Click the **Select** button to the left of the title of the report you want to upload.
7. Select your preferences and click the **Apply Changes** button to complete the attachment.
8. Remember to click the red **Check In** button for this requirement when you are finished