Workspaces for Participating Areas
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About Workspaces

In AMS, a Participating Area is defined as any single area of an organization. This can be a degree program, department, or office inside your institution. As an individual, you may be affiliated with more than one participating area. You can see which Participating Areas you belong to by clicking the My Account link in the upper-right hand corner.

Workspaces in AMS are assigned to Participating Areas. Each member of a Participating Area will collaborate on the Workspaces assigned to that area.

A Workspace defines the requirements to which your Participating Area needs to respond. Each Workspace has an organizing structure and directions that have been defined by an AMS Coordinator. You can think of these requirements as requests for information.

To view the Workspaces to which you have access, look under the Workspaces heading on the AMS Home Page.

If you belong to multiple Participating Areas, then your Workspaces will be organized under a heading for each Participating Area. If your home page displays more than three (3) Participating Areas, you can filter the page by searching for the Participating Area name.

Workspace Permissions

There are two levels of permissions that you may be given for each Workspace. You may be given only the ability to view the contents of the Workspace or you may be granted editing access, as well. You can determine which level of access you were given by looking at the links associated with the Workspace on your home page.

If you see the View Content link, then you have been given view only access for that Workspace. You may view the directions and work added to the Workspace, but will be unable to add any content. You will also be able to participate in the Discussion area for the Workspace and view the history log of each requirement.

If you believe you should have the ability to add content to the Workspace, please contact a Manager for that Workspace. The Options and Info tab will list all Workspace participants and Managers. You can also contact TaskStream’s Mentoring Services at 800-311-5656 or at help@taskstream.com for assistance.

To access and view the Workspace, click the name of the Workspace or click the View Content link associated with the Workspace. You will be brought to the View Content tab. From this tab, you can click the categories and requirements from the left Edit Workspace Content frame to view the directions and any added content.

When you are viewing a requirement, you will be able to see whether the requirement is currently checked out. For a more detailed history log, click the Log tab.

Click the Discussion tab to participate in the Discussion area for the Workspace. Each requirement has its own discussion area. Select a requirement while in the Discussion tab to view the discussion area for that requirement.

Select Workspace Reports

Alignment Reports

Members of Participating Areas in a Workspace are able to run reports on the alignment between outcomes defined for their Participating Area and goals defined in the Organizational Goals Editor. As a member of a Participating Area, to access these reports:

1. On your AMS home page, adjacent to the Participating Area name, click the Select Report pull-down menu.
2. Select a report.
3. Click Go.
4. Click the Select Set pull-down menu.
5. Select a set (where the participating area has mapped outcomes).
6. Click Go.

Read the Report
The resulting report shows the alignment for all of the participating area’s outcomes with the goals or outcomes in the selected set.
The Participating Area’s outcomes are listed on the left. The goals or outcomes for the selected mapping set appear across the top. Icons indicate which outcomes are mapped to the goals or outcomes of the selected set and which have identified assessment measures.

Show Additional Information
By default, Show Descriptions displays Goal and Initiative information. Deselect to collapse the description.

(Optional) To display additional mapping information, select the box next to Show Additional Mappings.
If the outcomes or goals in the selected set (i.e., the items listed across the top row) have been mapped to other goals, these additional mappings appear when this option is selected.
If you click on the outcomes associated with additional mappings, a pop-up window opens to display the full Outcome Set.

Should you need to view details for a different set:
1. Click the Select Set: pull-down.
2. Select a new set.
3. Click Go.

View Assessment Details
If assessment methods have been defined for a mapped outcome, you can view the details about these methods via the View Detail link that appears under the mapping and assessment icons in the report grid.
The resulting screen displays the mapping information on the top.
The details of the planned assessments (and findings, if applicable) display below.

Output Options
You can generate:
- a print-friendly version of any level of detail (links within the report). Click Send to Printer Now.
- a PDF version. The PDF view opens in a new window. From the main menu, select whether to print the PDF or save the PDF to a desired location.

To fit more report data on the page, change your printer settings to "Landscape" mode:
Word 2007 or Word 2003

Assessment Plan Summary Reports
Members of organizational areas participating in Workspace(s) are able to run reports for that organizational area. These reports can be printed or converted to a PDF.

To access these reports, as a member of a Participating Area, click the Go To: pull-down menu on your AMS home page next to the name of the organizational area.

Select the Assessment Plan Summary Report from the list and click Go.

On the Search Criteria page, select a Workspace and an assessment plan requirement from the pull-down menus. Click Continue.
Read the Report

The resulting report shows a real-time summary of some of the information collected on the assessment plan and findings requirement for your participating area. It can be used to check the Participating Area progress and results within an assessment plan, including the total number of outcomes, measures and findings.

For all the reports, the information is presented in several sections:

- **Overall Statistics** - Displays a summary of the number outcomes included in the assessment plan, how many of them include measures and how many include measures with findings
- **Total Number of Measures** - Displays the total number of measures included. Depending on the setting of the assessment plan, it can include the results by measure level and measure type.
- **Total Number of Measures with Findings** - Displays the total number of measures that have findings included. Depending on the setting of the assessment plan, it can include the results by acceptable target achievement and ideal target achievement.

Customize Report

To customize the assessment plan components that are displayed on the page, select or deselect any of the checkboxes available on the *Show* area of the header.

To customize whether the results display percentages and graphs, select or deselect any of the checkboxes available on the *View* area of the header.

To include only results for measures that have findings specified, select the checkbox on the *Include* area of the header.

Selections made are remembered for the duration of the session.

Assessment Plan Detail Reports

Members of organizational areas participating in Workspace(s) are able to run reports for that organizational area. These reports can be printed or converted to a PDF.

To access these reports, as a member of a Participating Area, click the *Go To* pull-down menu on your AMS home page next to the name of the organizational area.

Select the *Assessment Plan Detail Report* from the list and click *Go*.

On the Search Criteria page, select a Workspace and an assessment plan requirement from the pull-down menus. Click *Continue*.

Read the Report

The resulting report shows a list of all of the outcomes, measures and findings for the Participating Area within a specific assessment plan. You can customize this report with fields/sections selections and filter by the data based on your selected criteria.

The left hand column of the Assessment Plan Detail report lists the outcomes included by the Participating Area in the specific assessment plan. The goal(s) mapped to the outcome appears below the outcome name.

The report also displays a column for the measures followed by a column for the findings. The fields displayed within the measure and findings columns depend on the settings for the assessment plan.
Customize Report

To exclude the mapped goals from the report, deselect the checkbox labeled Mapping located on the report header.

To include only measures that have findings specified, select the checkbox on the Include area of the header.

To customize the information that appears on the Assessment Plan Detail report, click Advanced Display Options located on the report header.

On this page, you can select which fields within the measures and findings areas you would like to display. You can also include other components of the assessment plan and findings such as the mission statement, overall reflections, added custom components, etc. To include or exclude a field, select or deselect the checkbox located to the left of the field name.

You can also select to filter the report by specific results for the measure type, measure level, acceptable target achievement and ideal target achievement. To filter the results, select one or more of the available options for each field.

NOTE: Selecting multiple options within one field mimics an OR function. Selecting options in multiple fields mimics an AND function.

Operational Plan Summary Reports

Members of organizational areas participating in Workspace(s) are able to run reports for that organizational area. These reports can be printed or converted to a PDF.

To access these reports, as a member of a Participating Area, click the Go To: pull-down menu on your AMS home page next to the name of the organizational area.

Select the Operational Plan Summary Report from the list and click Go.

On the Search Criteria page, select a Workspace and an operational plan requirement from the pull-down menus. Click Continue.

Read the Report

The resulting report shows a real-time summary of some of the information collected on the operational plan and findings requirement for your participating area. It can be used to check the Participating Area progress and results within an Operational Plan, including the total number of outcomes, actions and status reports.

For all the reports, the information is presented in several sections:

- **Overall Statistics** – Displays a summary of the number outcomes included in the operational plan, how many of them include actions and how many include actions with status reports
- **Total Number of Actions** – Displays the total number of actions included. Depending on the setting of the operational plan, it can include the results for the budget requests.
- **Total Number of Action with Status Reports** – Displays the total number of actions that have status reports included. Depending on the setting of the operational plan, it can include the results by current status and budget status.

If your Participating Area has not started some or any of the work on the operational plan, the main results displays one or more of the following notes:

- No outcomes have been included
- No actions have been included
- No status reports have been included
Customize Report

To customize the operational plan components that are displayed on the page, select or deselect any of the checkboxes available on the Show area of the header.

To customize whether the results display percentages and graphs, select or deselect any of the checkboxes available on the View area of the header.

To include only results for measures that have findings specified, select the checkbox on the Include area of the header.

Selections made are remembered for the duration of the session.

Operational Plan Detail Reports

Members of organizational areas participating in Workspace(s) are able to run reports for that organizational area. These reports can be printed or converted to a PDF.

To access these reports, as a member of a Participating Area, click the Go To: pull-down menu on your AMS home page next to the name of the organizational area.

Select the Operational Plan Detail Report from the list and click Go.

On the Search Criteria page, select a Workspace and an Operational plan requirement from the pull-down menus. Click Continue.

Read the Report

The resulting report shows a list of all of the outcomes, actions and status reports for the Participating Area within a specific operational plan. You can customize this report by choosing what fields/sections are displayed and by filtering the data based on your selected criteria.

The left hand column of the Operational Plan Detail report lists the outcomes included by the Participating Area in the specific operational plan. The goal(s) mapped to the outcome appears below the outcome name.

The report also displays a column for the actions followed by a column for the status reports. The fields displayed within the actions and status reports columns depend on the settings for the operational plan.

Customize Report

To exclude the mapped goals from the report, deselect the checkbox labeled Mapping located on the report header.

To include only actions that have status reports specified, select the checkbox on the Include area of the header.

To customize the information that appears on the Operational Plan Detail report, click Advance Display Options located on the report header.

On this page, you can select which fields within the actions and status reports areas you would like to display. You can also include other components of the operational plan and status reports such as the mission statement, status summary, added custom components, etc. To include or exclude a field, select or deselect the checkbox located to the left of the field name.

You can also select to filter the report by specific results for the current status and budget status. To filter the results, select one or more of the available options for each field.
NOTE: Selecting multiple options within one field mimics an OR function. Selecting options in multiple fields mimics an AND function.

Edit Content

Workspace Structure

The first level, or the General Information page, of the Workspace will contain important information related to the completion of the Workspace or the accountability processes as defined by the AMS Coordinator.

The second level or the Category level is primarily used to organize the template. The categories may include information about the category or the requirements contained within it. You will not be able to enter any information within the category levels.

The third level, or the Requirement level, includes the areas to which you will need to add content. Directions may be included by the AMS Coordinator. Depending on the Workspace’s setup, you will be able to submit for review or share the work you create in these areas.
NOTE: If a review method with a due date has been set for one or more of the requirements or categories in the Workspace, the date by which you must submit the area for review will appear when you roll the cursor over the category or requirement name in the structure.

**Workspace Content**

**Add and Edit Work**

To add work to or edit a requirement, you must first check it out. If you have view-only access, then this button will not appear.

To check out a specific requirement, select it in the left frame, and then click the **Check Out** button associated with the requirement.

While you have a requirement checked out, no other member of your participating area will be able to edit it.

If the Requirement includes an Outcomes Set, no other member of your Participating Area will be able to modify that Outcomes Set until you check the requirement back in.

For more information, see the Outcomes section of this Help Area.

If you see the **Edit Content** link, you will be able to add and edit content within the Workspace. To access and edit the Workspace, click the name of the Workspace or click the **Edit Content** link associated with the Workspace. You will be brought to the **Edit Content** tab.

Once you have checked out a requirement, no other member of your participating area will be able to edit the requirement until you check it back in.

When you are done editing a requirement, click the **Check In** button to make it available for editing by other members of our Participating Area.

Any time you click the **Check In** link, you will be brought to a check in form. Select the Check in all other areas box to check in any other requirements that you may have checked out as well.

You can include a comment in the revision history log; enter it in the comment field. This is a great way to make other members of your Participating Area aware of any changes you made within the requirement.
If the requirement area requires review, you will need to choose to either return to the work area or to go to the submission area to submit the requirement for review.

After completing the check in form, click the Submit button.

**Share Requirement**

Sharing a requirement will make it viewable to all AMS Coordinators who have oversight and reporting permissions over your Participating Area, through the At-A-Glance: Status report.

To share a requirement, click the Share box located within each requirement. Deselect the Share box to stop sharing it.

NOTE: If a requirement is submitted for review, it cannot be unshared. For more information about review, please refer to the Submission & Read Reviews section of the Help Area.

**Print Requirement**

You can print requirements by clicking the Print icon associated with the requirements you want to print. A print view will pop-up in another window. You can then print the requirement by selecting the Print option from the File menu.

**Export to PDF**

You can generate a PDF version of the requirement by clicking the PDF icon associated with the requirements you want to export. A PDF view will pop up in another window. You can then print or save the PDF.
Custom Requirements

About Custom Requirements

Custom requirements have directions and response options defined by the AMS Coordinator.

To add content to a custom requirement, click the Check Out button then choose the type of content you want to add by clicking one of the available buttons across the bottom of the screen.

The help topics that follow describe each of the types of content that you can add. AMS Coordinators define the types of content that are available for each requirement. As a result, you can view different combinations of content types depending upon the requirement. These options can include: Text & Image, Slideshow, Attachments, Form, Videos, Links, and/or Reports.

Add Text & Image

To add text or a single image to a custom requirement in a Workspace, click the Text & Image button on the toolbar at the bottom of the page. You will be taken to a new screen for adding/editing text and an image.

NOTE: If you have the HTML Toolbar enabled, you are able to format text. To enable the HTML Toolbar, click Help and Preferences link and click the Enable link to activate the toolbar.

When enabled, the HTML Formatting Toolbar allows you to add formatting to text input areas without the need for HTML. This toolbar is available in most TaskStream tools where there are large text input areas.

Formatting options include: Bold, underline, and italics, Text alignment (left, right, center), Bulleted Lists (Ordered and Unordered), Font control (type, size, color, special symbols), Hyperlinks, Cut, Copy, Paste, Multiple Undo, Paste from Other Documents (cleans up various types of tags - Word, Plain Text, etc.), Advanced linking - open pop-up, links to anchors, emails, etc., Full window preview, and One-click table formatting.

These features are available and supported on the following browsers: PC: IE 6+, AOL 9+, Firefox 2.0+, Chrome 2.0+, Opera 9.3+ Mac: Safari 3.0+, Firefox 2.0+.

Save Work

Click the Save Draft button to save your text and continue to add more text. Once you have completed your work, click the Save and Return button to exit the content editing screen.

Character Count and Spell Check

Use the Character Count and/or Check Spelling button to calculate the number of characters or check for any spelling errors in your text.

Add an Image

You can choose to upload your own image file in either a .gif or .jpg format, or choose from a selection of stock images.

To add an image, click the Add an image to your text section link.
To upload your own image, click the **Browse** button. A dialog box will open, allowing you to select and open the image file from your computer. The path of the file will appear in the File: field.

**NOTE:** Images must be less than 512 KB in size. Mac users need to be sure to add the .gif and/or .jpg extension to the file name.

You may want to add a title for the image, as well.

To select a stock image, first select a category from the pull-down menu. Then click the title of the image you want to use. A preview of the image will appear in the area to the right of the image list.

After selecting an image, you may want to change where it is placed in relation to your text by selecting an option from the **Image Placement** pull-down menu. You can also change the size of the image using the **Scale Image** pull-down menu.

Once you save your work, you will have the option to choose a different image or delete the image you selected.

**Edit or Delete Saved Text & Image**

After you have saved your work, you may want to edit the text or image that you added. On the main Edit Content screen, click the **Edit Text & Image** button to return to the editing area. To delete the section entirely, click the **Delete Section** button corresponding to the Text and Image Section.

**Add Slideshow**

To add multiple images as a slideshow to a custom requirement in a Workspace, check out the requirement and click the **Slideshow** button on the toolbar at the bottom of the screen. You will be taken to a new screen for adding/editing a slideshow.

Enter a title for the slideshow and check the **Save Changes** button.

To upload images to your slideshow:

1. Name the image. 
   **NOTE:** If you do not enter a title for the image, the file name will be used as the title.
2. Click the **Browse** button to select the image file you want to upload.
3. Add a description of the image *(optional)*.
4. Click the **Add Image** button.

To add additional images, repeat the same process as above. All of your uploaded images will be displayed on the right side of the page. You may add up to twenty images.

**NOTE:** Images that are 2 MB or less in size can be uploaded to the Slideshow. However, images greater than 512 KB will automatically be compressed. If the images cannot be successfully compressed to less than 512 KB in size, you will not be able to upload the image without first optimizing it using a digital graphics program.

**Save Work**

Click the **Save** button to save your changes and continue working on the slideshow. Once you have completed your work, click the **Save and Return** button to exit the slideshow editing screen.
Edit or Delete Saved Slideshow

After you have saved your work, you may want to edit the slideshow that you added. On the main Edit Content screen, click the Edit Slideshow button to return to the editing area. To delete the section entirely, click the Delete Section button corresponding to the Slideshow Section.

Add Attachments

To arrive at this page, from the Workspace content area, you selected to add supporting attachments to a measurement. To attach files to a custom requirement in a Workspace:

1. Check out the requirement.
2. Click Attachments. The system navigates to a new screen to add/edit attachments.

Attach a New File(s)

To attach a new file:

1. Name the file.
2. From the Select File area, click Browse
3. Locate your file.
4. (Optional) Add a description for the file.
5. (Optional) To verify that there are no spelling errors, click Check Spelling.
6. Click Add File. Attached files are listed on the right side of the page where they can be edited or deleted.

Attach Previously Uploaded Files

If you have file attachments that you have already attached to other areas in TaskStream, you do not need to upload them again.

If you attach a previously uploaded files, it does not use additional storage space.

To attach a previously uploaded file:

1. From the Select File area, select the Reattach a previously uploaded file option.
2. Select the category area (Web Pages, Web Folios, etc.) in which the file is currently attached.
3. Select the specific file that you want to attach.
4. (Optional) Rename the file.
5. (Optional) Add a description for the file.
6. (Optional) To verify that there are no spelling errors, click Check Spelling.
7. Click Add File. Attached files are listed on the right side of the page where they can be edited or deleted.

Attach TaskStream Work

To attach work that you have created in TaskStream (e.g., rubrics, web pages):

1. From the Select Category pull-down menu, choose the category of work that you want to attach.

The 'Form/Survey' option displays in AMS for measurements only. When you attempt to edit the form/survey, the system alerts you that the form is attached as an assessment measure in a workspace.

2. From the second pull-down menu, choose the specific artifact that you want to attach.
3. (Optional) Add a description for the file.
4. (Optional) To verify that there are no spelling errors, click Check Spelling.
5. Click Add File. Attached files are listed on the right side of the page where they can be edited or deleted.

Edit or Delete Saved Attachments
After you have saved your work, you can edit the attachments that you added. On the main Edit Content screen, click **Edit Attachments**. To discard a section entirely, click **Delete Section**.

**Add Videos**

To add videos to a custom requirement in a Workspace, click the **Videos** button on the toolbar at the bottom of the page. You will be taken to a new screen for adding/editing videos.

**Add a New Video File**

Click the **Video** button to upload videos. You will be able to upload videos up to 50 MB in size. When you click the **Video** button, you will be taken to the Add/Edit Video page. The Add Video option defaults to the Upload New Video attachment form.

1. Name your video.
2. Click the **Browse** button to locate the video file on your computer.
3. Add a description of your video *(optional)*.
4. Specify the length of your video in minutes *(optional)*.
5. Click the **Add Video** button.

Attached video files are listed on the right side of the page where they can be edited or deleted.

*NOTE: You can upload any type of video file format from the Video tab.*

**Add Previously Uploaded Video Files**

If you have video files attached to any of your work in TaskStream, you can easily add them by clicking the **Previously Uploaded Videos** radio button:

1. Select the specific video file that you want to attach in this area.
2. Rename the video *(optional)*.
3. Add a description of your video *(optional)*.
4. Specify the length of your video in minutes *(optional)*.
5. Click the **Add Video** button.

Attached video files are listed on the right side of the page where they can be edited or deleted.

*NOTE: Attaching previously uploaded videos will not use additional storage space.*

**Edit or Delete Saved Videos**

After you have saved your work, you may want to edit the videos that you added. On the main Edit Content screen, click the **Edit Videos** button to return to the editing area. To delete the section entirely, click the **Delete Section** button corresponding to the Videos Section.

**Add Links**

To arrive at this page, from the Workspace content area, you selected to add supporting web links to a measurement.
To attach files to a custom requirement in a Workspace:

1. Check out the requirement.
2. Click Attachments. The system navigates to a new screen to add/edit web sites.

Add an external web link
To add an external web link:

1. Enter the name of the link.
2. Type (or paste) the associated website URL into the appropriate field.
3. (Optional) Enter a link description.
4. (Optional) To verify that there are no spelling errors, click Check Spelling.
5. Click Add Link.

Edit or Delete Saved Links

After you have saved your work, you can edit the links that you added. On the main Edit Content screen, click Edit Links. To discard the section entirely, click Delete Section.

Add Reports

To arrive at this page, from the Workspace content area, you selected to add supporting reports to a measurement. To add saved LAT reports to your Workspace, click Reports. To navigate to the Manage Attached Reports screen which displays a list of reports that have already been attached, you must be an AMS Coordinator AND have an LAT account in which you have saved reports.

How to attach a saved report

1. Click Select Saved Report. A list of LAT reports saved by you or shared by other LAT Site Coordinators display on the Saved report list along with the name of the saved report, the date when the report was saved, and the name of the Site Coordinator who saved the report. The report list is divided into the following sections:
   - Performance by DRF Category
   - Performance by Standards
   - Performance by Standards (Comparative Report)
   - Performance by Rubric Criteria (Custom Report)
   - Performance by Rubric Criteria (Comparative Report)
   - Form-based Author Submission Results
   - Form-based Evaluation Results
   - Survey Report

   The list can be filtered by report category. Click the Show pull-down and select the category. To update the list, click Go.
2. (Optional) To quit your action, click Cancel.
3. (Optional) To view the report, click on the report name.
4. To attach a report, click Select adjacent to the report name.
5. From the Add link to saved report... screen, enter a report name.
6. Enter a description for the report link.
7. Make your selection from the following preference settings:
   - Author Anonymity - controls whether Authors’ names are displayed on the attached saved report or appear encoded.
- **Evaluator Anonymity** - controls whether evaluators’ names are displayed or hidden on the attached saved report.
- **Access to Author work** - controls whether or not Authors’ work can be accessed by the user who views the attached report.
- **Export to Excel** - controls whether the Export to Excel link appears on the saved attached report by the user who views the attached report.

8. *(Optional)* To verify that there are no spelling errors, click **Check Spelling**.
9. *(Optional)* To quit your action, click **Cancel**.
10. Click **Apply Changes**.

This page enables you to view the attached report(s), edit the attached report preferences *(the name of the report link, the anonymity options, and the export to excel permission)*, and discard an attached report.

### Complete Form

The Form section of the Content Editor includes a custom form that needs to be completed as part of fulfilling the requirement to which it is attached. As with the directions and content options for custom requirements, forms are created by the AMS Coordinator. If the Coordinator has added a form to a requirement, the Form section always appears and cannot be removed.

1. Click a requirement.
2. Click **Respond to Form** or **Form** *(located on the content toolbar at the bottom of the page)* to open the form page. The Respond to form page loads.
3. Complete the form fields. The form may contain a combination of the following element types:
   - Section header
   - Subsection header
   - Open ended (text/comment area)
   - Open ended - 2 column format (text/comment area)
   - Choice - one answer (radio buttons or pull-downs)
   - Choice - multiple answers (checkboxes)
   - Rating Scale

   **If the form contains at least one (1) Open-ended (text/ element area) or Open ended – 2 column format (text/comment area) element with a Medium or Long answer text box for your response, the HTML Formatting Toolbar preference link displays on the form.**

   If enabled, the HTML Formatting Toolbar appears in Medium or Long answer boxes. Toolbar disappears when you click away from the text fields. Disable the HTML Formatting toolbar via the Help and Preferences link. As a result, the text areas display all text including the HTML tags.

   To keep better track of the character count of the text areas, the number of characters used displays an ongoing count below the text box. When new text is added, a 2-second delay on the count could occur before it refreshes.
4. *(Optional)* To save your form entries periodically, click **Save Draft**.
5. Click **Save and Return**. The system navigates back to the main requirement area.

### Edit Saved Form

After you have saved your work, you can edit your responses on the form. In the main Edit Content screen, click **Edit Form**.
Character Count

To keep better track of the character count of the text areas, a number of characters field displays an ongoing count. When new text is added, a 2-second delay on the count could occur before it refreshes.

The Character Count for the Open-ended text areas not only includes the text entered BUT ALSO includes HTML tags, therefore if you enter text, and then enable the toolbar, the character count appears greater than before (due to the tags). This could cause the character count to exceed the maximum allowed for the text fields. In that case, you must shorten your submission to be able to save your text. You are not able to proceed until the character count is correct.

If you click on the HTML option on the toolbar, you can see which HTML tags (e.g., bold, italics) have been added to your total count.

When the form template is created, be sure to account for the extra characters the HTML tags adds to the text areas and select an appropriate character count.

Mission Statement

About Mission Statements

The Mission Statement requirement allows you to create, re-use and modify a single mission statement for your Participating Area.

Because you can have a single mission statement for your participating area that you can be asked to submit in a number of different places, every Mission Statement requirement will automatically be pre-populated with the most recent version of your Participating Area’s mission statement when you work on it.
Once you have checked out the requirement, click the **Add/Edit Work** button. The Mission Statement requirement provides a text area where you can define or edit the mission statement for your participating area. The Workspace creator can include directions on how to write a mission statement.

**NOTE:** There is a 7000 character limit in the Mission Statement section.

If your Participating Area has entered a mission statement in another Mission Statement requirement or area, in this or any other Workspace, it will automatically appear in the Mission Statement Text field. If you want, you can edit this mission statement.

You can spell check or get a character count by clicking the appropriate button.

Once you have completed the mission statement, click the **Submit** button.

Editing the Mission Statement for your Participating Area automatically creates a new version of it.

If it is currently being used in other requirements, you will be prompted to update the mission statement in every other requirement where it is being used.

If any of the other requirements are locked, you will not be able to update the mission statement in those requirements.
For existing work, if you would like to preserve the version used the time the requirement was completed, you should NOT choose to update the mission statement in that requirement. A good example of this may be preserving an Assessment Plan that has been completed and finalized.

Choose the requirements in which you would like the mission statement updated and then click the Apply Changes button.

This Mission Statement is associated with the requirements listed below.

<table>
<thead>
<tr>
<th>Check all areas to update (if any):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Outcomes Assessment</strong> (2012 Strategic Planning)</td>
<td></td>
</tr>
<tr>
<td>✓ 2008-2009 Assessment Cycle: Assessment Plan</td>
<td></td>
</tr>
<tr>
<td>Last modified 2/13/2008 5:46:27 PM</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Standing Requirements: Mission Statement</td>
<td></td>
</tr>
<tr>
<td>Last modified 2/18/2008 11:29:21 AM</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Annual Outcomes Assessment</strong> (ABET Accreditation)</td>
<td></td>
</tr>
<tr>
<td>✓ Standing Requirements: Mission Statement</td>
<td></td>
</tr>
<tr>
<td>Last modified 2/13/2008 7:17:49 PM</td>
<td></td>
</tr>
</tbody>
</table>

Instances of the Mission Statement that have not been updated will have a Newer Version Exists message displayed. You can update these to the latest version at any time by clicking the Update link. Please note that once you update, you can NOT revert back to an earlier version.

Outcomes

About Outcomes

The Outcomes requirement is a special tool that allows you to define and edit sets of outcomes for your Participating Area. Depending on the setup of your Workspace, each set may be made up of Objectives and Outcomes, which can be used in a variety of ways in AMS.
Please keep in mind that your organization may have another name for outcomes (e.g., student learning outcome, SLO, learning goal).

It is important to define what is meant by the terms goals, objectives, and outcomes within this tool.

Goals (e.g., strategic initiatives, general education outcomes) are usually defined at a higher level in the organization. In AMS, these are managed as Organization Goal Sets and can only be created by AMS Coordinators. While they are not measured directly within AMS, you can align the outcomes defined by your Participating Area with the goals in these sets.

Objectives are brief, clear statements that describe learning outcomes. They are more specific than goals, but are not written to indicate what students should know, think or do. Each objective may have several outcomes under it. Objectives are not typically measured, but the outcomes contained in them are. Objectives are added as part of each Outcomes Set created by a Participating Area.

NOTE: Objectives cannot be selected individually for Assessment in AMS, nor can they be directly mapped to other goals or outcomes. Specific, assessable, map-able items should be written as Outcomes.

Outcomes are specific, measurable, demonstrable achievements of learning, describing specific things students should know, think or do. Outcomes are measured in assessment plans, mapped to goals or outcomes, and are used in curriculum maps. Outcomes are added for each Objective in the Outcome Sets created by a Participating Area. Each outcome can be mapped to organizational goals or other outcomes or pulled into an assessment plan.

Outcomes Requirements serve two (2) purposes:

1. They allow you to create and modify Outcome Sets (Outcome Sets may include objectives and outcomes).
2. They allow you to submit Outcome Sets to a Reviewer, or share them with Coordinators if no review method is specified for the requirement.

The Workspace creator may include directions that guide you in how to create outcomes.
Create an Outcome Set

About Outcome Sets

AMS allows each Participating Area to define one (1) or more sets of outcomes. Outcome Sets are created by you or other members of the Participating Area and are automatically shared for use by everyone within that area. These sets can be attached to any Outcomes requirement, Assessment Plan, or Operational Plan, as many times as needed. There are a couple of ways to attach a set to a requirement.

- To create a set within an Outcomes Requirement, click Create New Set. New sets are automatically attached.
- Click Select Existing Set to select an Outcome Set that has already been created.

For the Assessment Plan and the Operational Plan, the AMS Coordinator can decide to allow Participating Areas to create Outcome Sets or restrict them to select only existing Outcome Sets.

In AMS there are two (2) types of Outcome Sets: 2-level Outcome Sets or single-level Outcome Sets. AMS Coordinators determine the type of Outcome Sets that Participating Areas are able to create.

In a 2-level Outcome Set, Participating Areas are able to create objectives as the first level and then outcomes as the second level. You can also think of objectives as general categories of outcomes.

In a single-level Outcome Set, Participating Areas are only able to create outcomes within a single objective that is automatically generated by the system.

Outcome Sets can be attached to more than one (1) requirement. Use Remove and Show links to select which specific items within a set are attached to that requirement.

Create an Outcome Set

1. Click Create New Outcome Set.
2. In the Set Name field, type a name for the set.
3. (Optional) Select to allow outcomes in other sets to be mapped to the outcomes in the set that you are about to create.
4. Click **Continue**.

5. *(Optional)* To quit your action, click **Cancel**.

6. Based on the selection made by the AMS Coordinator, you can either create **2-level Outcome Sets** or single-level Outcome Sets.

   If you are able to create 2-level Outcome Sets, click **Create New Objective** to create at least one (1) objective. Then, add outcomes to this objective.

   If you are able to create ONLY single-level Outcome Sets, then one objective is automatically created by the system for the Outcome Set. Your next step is to click **Create New Outcomes** to create at least one (1) outcome for this objective.

   **Only outcomes, not objectives, can be mapped to items in an Organization Goal Set or other Outcomes Sets or selected for inclusion in an Assessment Plan.**

7. *(Optional)* By default, **Show Descriptions** displays outcome information. Deselect to collapse the description.

8. *(Optional)* To hide the mapping information from this screen, deselect **Show Mappings**.

   **Within the Edit Content area, once an Outcome Set is completed and Outcome Sets are available in LAT, you can export to LAT via the Options and Info tab of the Workspace.**

---

**Remove and Delete Outcomes**

If the Outcome Set is attached to more than one requirement

You can REMOVE the set from the current requirement, but you cannot delete it. If you click **Remove Set**, the set is removed from the current requirement; but, the set is still available in other requirements.

You can HIDE Objectives or Outcomes from the requirement; but, you cannot delete them from the set. If you click **Remove next to each item**, the item is hidden from the current requirement ONLY. When the requirement is submitted for review or shared, the item does not display. To restore, click **Show**.

---

**Objective: 1**

**Outcome: 1**

---

**Outcome One**

- Create New Objective
- Reorder
- Rename Set
- Remove Set

---

**Objective: Objective for Outcome One**

- [Edit]
- [Remove]

- Create New Outcome

---

**Outcome: Final Outcome for Outcome One**

---

No Mapping
If the Outcome Set is attached to only one requirement
You can PERMANENTLY DELETE the Outcome Set. Click **Delete Set**. *This is an irreversible change.* If you need to remove the set from the current requirement, but not delete it permanently, contact your AMS Coordinator and ask for another Outcomes Requirement to which you can attach the set.

*If your set or outcome is attached to work in LAT, the system does not allow you to delete it.*

You may PERMANENTLY DELETE Objectives and Outcomes from a set. Click **Delete** next to each item in the set. This permanently deletes the item from the set. It is preferable, in most cases, to mark an outcome as **obsolete**, rather than delete.

Mark an Outcome as Obsolete
To mark an Objective or Outcome as obsolete, click **Edit** associated with an item. Then, change its status.

If you mark an Objective or Outcome obsolete, this propagates to any requirement the set could be attached to in the future.

Existing use of the item is not affected.

Versioning of Outcome Sets
Since an Outcome Set can be attached to more than one (1) requirement at a time, you may want your changes to be reflected in other Assessment Plans or Outcomes requirements.
If the outcome is attached to another requirement, AMS prompts you to update it. You have the option to choose to update some areas and not others. If you choose not to update the objective or outcome, a New Version Exists flag and update link appear next to it, so that other users in your Participating Area are aware a change has been made.

This objective is associated with the requirements listed below.

**Annual Outcomes Assessment** (Workspace: 2012 Strategic Planning)
- 2009-2010 Assessment Cycle: Outcomes III

Do Not Update Other Areas - Return to Workspace  
Update Selected Areas

Objectives and outcomes can only be updated to the newest version available; they cannot revert back to an older version. Items that are locked, such as those submitted for review, cannot be updated. Changes to outcome mapping do not cause a new version to be created; all instances of the Outcome Set are updated automatically. Changes to the order of the set are also updated automatically, in all instances of the Outcome Set.

**Outcomes in regards to Assessment and Operational Plans**
Outcome Sets can also be attached to Assessment Plan and Operational Plan requirements, in the Outcomes and Measures section and the Actions section, accordingly. Again, create a new one to attach a set, or the select an existing set. If you need to define a measure for an outcome, you must select Include for each individual outcome. The same rules regarding Remove, Delete, and Versioning for Outcomes requirements apply to Assessment Plan and Operational Plan requirements.

**Add Objectives and Outcomes**

It is recommended that you read the 'About Removing and Deleting Outcomes' portion of the 'About Outcome Sets' section of the Help Area before continuing.

**Add Objectives**

Once you have created an Outcome Set, you can add items to it.

The steps involved depend on whether you are able to create 2-level or single-level Outcome Sets.

If you are able to create 2-level Outcome Sets, click the **Create New Learning Objective** or **Create New Operational Objective** button to create at least one Objective. You will then add outcomes to this objective.

If you are able to create only single-level Outcome Sets then one objective will be automatically created by the system for the Outcome Set. You will not be able to create any additional objectives. All outcomes will be created under this single objective.

NOTE: For information about 2-level and single level Outcome Sets, please refer to the Create a New Outcome Set section of the Help Area.

To create an objective, start by adding a title.
If you want, you can also add a description.

Click the Continue button.

After adding an objective, it will display in the Outcome Set.

You can edit or remove/delete it by clicking the corresponding link.

Add Outcomes

To add outcomes to an objective, click the Create New Outcome button found underneath the heading for the objective.
Add a title for the outcome.

You can also add a description.

Click the *Continue* button.

While creating objectives and outcomes, you can **Spell Check** or perform a **Character Count** by clicking the appropriate button.

After adding an outcome, it will display under the appropriate objective.

**NOTE:** If the AMS Coordinator allowed participating areas to create single-level Outcome Sets, you will only have one objective for your Outcome Set. This objective is automatically generated by the system and cannot be edited.
Map Outcomes to Organization Goal Sets

After entering an outcome, you have the option to map the outcome, add another outcome, or return to all Outcome Sets.

To map the outcome to a goal, click the Add Mapping link.

Choose an Organization Goal Set to which you want to map your outcome and then click the Continue button.

Select the type of outcome or goal set to which you want to map the outcome. Set types include:

- **Goal sets distributed to [your organizational area]** – these sets are ones created in the Organization Goals Editor and distributed to this Participating Area. These sets are usually higher level goals or outcomes and may include institution-wide learning goals, competencies, strategic objectives or state, national or regional accreditation standards.
- **Outcome sets created by [your organizational area]** – these sets include all of the sets created by individuals within your organizational area (e.g., your program or department) for which mapping has been enabled. These may include sets created in the same requirement, other requirements in the same Workspace, or even requirements in other Workspaces in which your organizational area is participating.
- **Outcome sets in other organizational areas** – sets created by individuals from other areas in your organization (e.g., faculty in other programs or departments) for which mapping have been enabled.

Click the Go button.

**Goals currently mapped to outcome '1'**

Create New Mapping

Nothing is mapped to this outcome.

NOTE: If you have selected the Outcome sets in other organizational areas option, an additional pull-down menu will appear with a list of other organizational areas. Select the appropriate area from the list and click the Go button.

Select a set from the list that appears.

You may preview the contents of the set by clicking on the View Set link. The outcomes in the set will appear in a new window.

Click the Continue button.

Select the box(es) next to the outcome(s) to which you want to map.

Click the Continue button.
To add additional mappings, remove a mapping, or map other outcomes in your set, click the Map link associated with your chosen outcome on the Outcome Sets screen.

Mapping changes immediately impact all instances of an Outcome Set.

To hide the mapping information from this screen, deselect the box next to Show Mappings.

**Edit Objectives and Outcomes**

To edit an objective or outcome, from the main Outcome Set page, click the Edit link associated with the item. The Edit Outcome page loads.

Objectives can only be edited or removed for 2-level outcomes sets. If Participating Areas are allowed to create single-level Outcome Sets, you do not have the ability to edit or remove the objective. For information about 2-level and single-level Outcome Sets, please refer to Create a New Outcome Set.

In the Edit Outcome page
1. (Optional) Enter an updated Outcome title (Maximum of 60 characters).
2. (Optional) Enter an updated Description (Maximum of 1000 characters).
   (Optional) To verify your entry for misspellings, click Spell Check.
   (Optional) To calculate a total count of all the characters used in your entry, click Character Count.
3. (Optional) Select an outcome status - Active OR Obsolete.
4. Select the Acknowledgement option to confirm your understanding that changes are immediately updated in LAT and affect all instances in which the outcome is attached to work in LAT.
   This option only appears when an outcome is attached to work in LAT. This option is directly correlated to the tip displayed at the top of the screen.
   The note reads: Please note that this outcome is currently mapped to other sets in AMS and attached to work in LAT.
   At this point, you can select to view the current mappings in AMS OR the list of LAT work that the outcome is attached to. Click on the appropriate link.
   In the latter case, an attachment pop-up window loads. The page displays a table of outcomes currently attached to work in LAT.
   The columns are as follows:
   - Item Name
   - Item Type
   - Where is item used
   - Creator
5. Click Update.
6. (Optional) To quit your action, click Cancel.

From the main Outcome Set page
To map an outcome to an Organization Goal Set, click the Map link associated with the outcome.
To remove/delete an outcome or objective, click the Remove/Delete link associated with the item.
Select an Existing Set

Outcome sets can be re-used an unlimited number of times, by any user in the Participating Area.

To select an outcomes set previously created by your Participating Area, click the Select Existing Set button.

Select from outcome sets

baby bumper

Accept and Return to Plan  Create New Outcome Set  Select Existing Set

Default Outcomes

Create New Objective  Reorder  Rename Set  Remove Set

Objective: 1 - Develop Critical Thinking Skills

Create New Outcome

Outcome: 1.1 Research Methods

This will take you to the Import Outcome Sets screen where you can choose from existing sets. Choose the set you want to import and then click the Continue button.

Import Outcome Set

Sets Available in My University:

- New Set
- One
- Outcome One (A)

Cancel  Continue

If you add additional outcomes or objectives to the existing set you selected or edit the included outcomes or objectives, you will be prompted to update the Outcome Set in other requirements in which it appears.

Select the other requirements which you want to update with the new outcomes and/or objectives, and then click the Update button.

To remove an outcome or objective from the current requirement, click the Remove link associated with the item you want to remove. This will only hide the item within the current requirement, and will not affect other requirements. No data will be deleted.

If there is no Remove link, then you are currently working on the only instance of the item. The Remove link will be replaced by a Delete link. Clicking this link will permanently delete the item.

For more information on updating and deleting outcomes, see the About Outcome Sets section of the Help Area.
Assessment Plan

About Assessment Plans

The assessment plan requirement allows Participating Areas to create and document assessment findings.

This format is pre-determined by the Workspace’s creator. Assessment plans will ALWAYS have an Assessment Plan requirement and an Assessment Findings requirement, used to document the results of assessment.

Planning Component

Assessment Plan requirements specify the format for you to follow when writing an assessment plan. This format is pre-determined by the Workspace’s creator. They will ALWAYS have a corresponding Assessment Findings requirement, used to document the results of assessment.

When you first open the requirement, it will be empty. You will have two options to get started with your Assessment Plan:

- Click the **Create New Assessment Plan** button. This will bring up a blank assessment plan, using the format specified by the Workspace’s creator. You can then complete the plan and submit it for review.
- Click the **Copy Existing Plan as Starting Point** button to import the contents of another assessment plan created by your Participating Area, which you can then edit. This can save you a significant amount of time and effort when fulfilling re-occurring assessment needs.
Each Assessment Plan requirement consists of multiple components, which each have their own directions and work to be attached. These components include:

**Mission Statement**

Here you can create, attach, or modify the Mission Statement for your Participating Area. This same Mission Statement is used in Mission Statement Requirements, and other Assessment Plans.

Click the **Edit** button to bring up the Mission Statement Text field where you can add or edit the mission statement.

**NOTE:** There is a 7000 character limit in the Mission Statement section.

If your Participating Area has already created a mission statement in any requirement in any Workspace, it will automatically appear in the Mission Statement Text field. If you want, you can edit this mission statement.
You can spell check or get a character count by clicking the appropriate button.

Once you have completed the mission statement, click the **Submit** button.

If the mission statement is currently being used in another requirement and you have made changes to it, you will be prompted to update it in every requirement where it is being used. Choose the requirements in which you would like the mission statement updated and then click the **Apply Changes** button.

This Mission Statement is associated with the requirements listed below.

**Check all areas to update (if any):**

**Annual Outcomes Assessment** (2009 Strategic Planning)
- Standing Requirements: Mission Statement
  Last modified 3/5/2008 1:02:46 PM

**Annual Outcomes Assessment** (2012 Strategic Planning)
- 2008-2009 Assessment Cycle: Assessment Plan
  Last modified 3/5/2008 5:02:49 PM

**Annual Outcomes Assessment** (ABET Accreditation)
- Standing Requirements: Mission Statement
  Last modified 3/5/2008 12:47:44 PM

**Annual Outcomes Assessment** (Institutional Outcomes Assessment)
- 2008-2009 Assessment Cycle: Assessment Plan
  Last modified 2/14/2008 3:17:51 PM
  Item is locked for review and cannot be updated at this time

In the areas where you elect not to update, members of your participating area will see a “Newer Version Exists” flag next to it in those other requirements, and can choose to update the mission statement later by clicking the **Update** link.
Outcomes and Measures

The outcomes and measures component of the assessment plan allows you to select individual outcomes, and define the measures you will use to assess them.

You can assign as many measures as needed to each selected outcome. For each measure, you can define:

- The measure’s title
- The type of measure (direct or indirect)
- The level that the measure occurs at (program, course, etc.)
- The details and description of the measure
- Acceptable performance targets for the current assessment
- Ideal performance targets that assessment and improvement should strive towards
Once the measure is created, you can also attach files that are relevant. For example, a rubric used to grade a paper or project.

**Select Outcomes and Create Measures**

For information about creating or selecting Outcome Sets, please refer to the ‘Create a New Outcome Set,’ ‘Edit Outcomes Set’ and ‘Select Existing Set’ sections of the Help Area.

Click the **Select Outcomes** button to begin.

Just as with Outcomes Requirements, you are able to select and edit existing Outcome Sets. In addition, depending on the setup of your Workspace, you can also be able to create new Outcome Sets directly in the Assessment Plan.

The Outcome Set(s) you created or selected will appear. Collapse or expand one Outcome Set at a time by clicking on the triangle to the left of the Outcome Set name. Alternatively, if you have multiple Outcome Sets in your Assessment Plan, collapse all or expand all at once by selecting the appropriate option located on the top right area of the outcomes and measures section.

To include an outcome in the assessment plan, you must check the box labeled “Include?”

When you are done selecting, outcomes click the **Accept and Return** button to save your changes and return to the Assessment Plan. The Outcome Set(s) will be displayed for the Assessment Plan. Collapse or expand one Outcome Set at a time by clicking on the triangle to the left of the Outcome Set name. Alternatively, if you have multiple Outcome Sets in your Assessment Plan, collapse all or expand all at once by selecting the appropriate option located on the top right area of the outcomes and measures section.

From the Assessment Plan, you can add measures to each outcome by clicking the **Add New Measure** button associated with each outcome.

You will be brought to the Enter New Measure screen, where you can enter the following information for your measure.
* Measure Title:  

* Measure type/method: - Select -

Measure level: - Select -

* Details:description:

* Acceptable Target:

* Ideal Target:

Please note that the AMS Coordinator who created the template may customize these options to suit your needs:

- **Measures Title** - Enter the name of the measure.
- **Measures Type/Method** - Specify whether the measure is a direct (exam, artifact, other) or indirect (survey results, focus group, other) method of assessment.
- **Measure Level** - Choose the level within the institutional hierarchy at which the measure is implemented (Course, Program, Institution, Other).
- **Details/Description** - Provide details about the measure.
- **Acceptable Target** - Indicate a reasonable expectation of measure results that indicates the level of performance your Participating Area believes should be met currently.
- **Ideal Target** - Indicate an ideal expectation of measure results that indicates the level of performance your Participating Area aspires to or would like to attain in the future, as a result of continuous improvement.
- **Implementation plan (timeline)** - Specify the timeline in which the measure should be completed.
- **Key Responsible Personnel** - Indicate who will be responsible for completing the measure.

After completing the measure information form, click the Submit button.

You can also copy an existing measure, by clicking the Import Measure button at the top of the Enter New Measure screen. By default, you will only see measures assigned to the current outcome. Select the “show all measures” box to display every measure your Participating Area has used.
To view the measure, click the View link associated with it. Select the measure you want to import and then click the Copy button. The Enter New Measure screen will contain the information from that measure. Make whatever changes are necessary.

After completing the measure information form, click the Submit button.

You will be returned to the assessment plan, where you can add supporting attachments to your measure. Click the Add/Edit Attachments & Links button associated with a measure to add or remove an attachment.

**Measure:** Measure One for Planning Group A  
Institution level; Indirect - Focus Group

- **Description:** This is for oversight use involving Planning Group 4

- **Acceptable Target:** An acceptable target for this Period will be to achieve level C-D detailed in document A.123

- **Ideal Target:** An ideal target for this Period will be to achieve level A-D detailed in document A.123

- **Supporting Attachments/Links:** [ADD/EDIT ATTACHMENTS & LINKS]

Learn more about how to add attachments and web links.

**Additional Components**

There may be additional components to the assessment plan. To add information to the additional components, click the Edit button. This will bring up a text field where you can include the requested information.

**Findings Component**

An Assessment Findings requirement is always paired with an Assessment Plan to provide you with a way to document the findings for each measure defined in the Assessment Plan.
As with the Assessment Plan, the Assessment findings will consist of multiple components.

**The Findings per Measure Component**

The outcomes and measures specified in your Assessment Plan are displayed on this screen. You will have an area to enter the findings for each measure in your Assessment Plan.

Collapse or expand one Outcome Set at a time by clicking on the triangle to the left of the Outcome Set name. Alternatively, if you have multiple Outcome Sets in your Assessment Plan, collapse all or expand all at once by selecting the appropriate option located on the top right area of the Findings per Measure section.

Click the **Add Findings** button associated with a measure to begin entering the findings for that measure.
The Assessment Findings form will provide a place for you to enter the findings.

Findings for Measure One for Planning Group A (Outcome 1)

Go to the mountain.

* Required Fields

* Summary of Findings:

* Recommendations:

* Reflections:

* Acceptable Target:

* Ideal Target:
The Findings form may include:

- **Summary of Findings** - Indicate the results of the information/data gathered from the measure.
- **Substantiating Evidence** - Upload files as evidence to the findings, such as a spreadsheet, a database containing test scores or survey results, or an example of actual student work.
- **Recommendations** - Enter suggestions and / or actions to be taken, based on the results of the assessment. This can include suggestions for improving performance on an outcome, or on revising or implementing the measure itself.
- **Reflections/NOTES** - Indicate additional comments members of your Participating Area want to add, regarding their experience in conducting the assessment.
- **Acceptable Target Achievements** - Specify whether the Acceptable Target defined in the assessment plan was Met, Not Met, or Exceeded.
- **Ideal Target Achievement** - Specify whether your Participating Area is Approaching, Moving Away from, or Exceeding the Ideal Target defined in the assessment plan.

After completing the Findings form, click the **Submit** button.

You can edit or remove findings at any time by clicking the **Edit or Remove** link associated with the findings you want to edit or remove.

### Findings per Measure

**Set I**

**Objective I**

**Measure:** Measure One for Planning Group A

**Description:** This is for oversight use involving Planning Group 4

**Acceptable Target:** An acceptable target for this period will be to achieve level C-D detailed in document A.123

**Ideal Target:** An ideal target for this period will be to achieve level A-D detailed in document A.123

**Findings for Measure One for Planning Group A**

**Results:** Acceptable Target: Met; Ideal Target: Approaching

**Summary:** Overall, targets were met but not exceeded

**Recommendations:** It is recommended that more attention is paid to Step One

**Reflections:** Not enough focus has been exhibited

**Substantiating Evidence:** [Add/Edit Attachments & Links]

### Additional Components

There may be additional components to the assessment findings requirement. To add information to the additional components, click the **Edit** button. This will bring up a text field where you can include the requested information.

### Findings Associated to Action

Findings that have been associated to one or more actions display the list of actions in the **Findings are associated with the following actions** area.

Select the **Show full action details** checkbox, located in the top right of the Measures and Findings section, to view all of the details for the actions.

**NOTE:** Findings are associated to actions through the Operational Plan. Refer to the Operational Plan section for more details.
Include Report

If your institution uses the Learning Achievement Tools (LAT) by TaskStream for collecting assessment data, you are able to add saved reports as substantiating evidence to your Assessment Findings. Members of a Participating Area can add their own saved reports or reports that have been saved by others and made available to them.

NOTE: The AMS Coordinator who created the Workspace Template can choose whether or not attachments may be added to Assessment Findings. If your Coordinator has disabled this capability, you will not have the option to upload attachments.

To include a saved report to your Findings, click the Add/Edit Attachments & Links button next to “Substantiating Evidence.”

NOTE: This button will appear only after findings have been added for a measure. If no findings have been added, click the Add Findings button and complete the form.

Click the Reports tab in the Content Editor window that appears.

Select the saved report(s) that you want to add. To add a saved report, click the Select a Saved Report button.

A window displaying the names of the saved reports will appear. To view a report, click the name of the report. Click the Select button associated with the report title. At this time, several types of reports in LAT can be saved:

- Performance by DRF Category
- Performance by Standards
- Performance by Standards (Comparative Report)
- Performance by Rubric Criteria (Custom Report)
- Performance by Rubric Criteria (Comparative Report)
- Form-based Author Submission Results
- Form-based Evaluation Results
- Survey Reports

After selecting a report, you will be directed to the Attach Saved Report Preference screen where you can enter a name for the selected saved report, add description/notes about the report which you are trying to attach, along with other preference settings.

Attach Saved Report Preferences

Enter a report name and description for the report link. The data entered displays in the portfolio and on the web page. Make your selection from the following preference settings:

- **Author Anonymity** - controls whether Authors’ names are displayed on the attached saved report or appear encoded.
- **Evaluator Anonymity** - controls whether evaluators’ names are displayed or hidden on the attached saved report.
- **Access to Author work** - controls whether or not Authors’ work can be accessed by the user viewing the attached report.
- **Export to Excel** - controls whether the Export to Excel link appears on the saved attached report by the user viewing the attached report.

Click Apply Changes to attach the selected saved report with the selected preference settings.

NOTE: If you set the options to include Author anonymity and allow the viewing of Authors’ submissions, please remember that the Authors’ submissions can include identifying information. If you are trying to attach a saved survey report for a survey launch that has been set to confidential, you are not given a choice to select the anonymity option when attaching saved report; respondents’ names are encoded automatically.
Curriculum Plan

About Curriculum Maps

The Curriculum Map tool provides the ability to create and edit curriculum maps for your Participating Area. Curriculum maps can be used for several purposes:

- To start a discussion and share knowledge of curriculum among faculty
- To analyze and improve curriculum by looking for gap, overlap, or sequencing issues

A curriculum map consists of a table with two (2) axes: Learning outcomes by the courses or activities in the Program

The alignment of the outcomes and courses or activities is shown within the cells of the table.

<table>
<thead>
<tr>
<th>Mathematics</th>
<th>Standard 1: Knowledge of Mathematical Problem Solving</th>
</tr>
</thead>
<tbody>
<tr>
<td>MATH 301</td>
<td>Standard 1.1</td>
</tr>
<tr>
<td>History of Mathematics</td>
<td>Standard 1.2</td>
</tr>
<tr>
<td>MATH 226</td>
<td>Standard 1.3</td>
</tr>
<tr>
<td>Calculus I</td>
<td>Standard 1.4</td>
</tr>
<tr>
<td>MATH 227</td>
<td></td>
</tr>
<tr>
<td>Calculus II</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Standard 1.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDU 405</td>
<td>Standard 1.2</td>
</tr>
<tr>
<td>Measurement and Evaluation</td>
<td>Standard 1.3</td>
</tr>
<tr>
<td>EDU 426</td>
<td>Standard 1.4</td>
</tr>
<tr>
<td>Designing Instruction</td>
<td>Standard 1.5</td>
</tr>
</tbody>
</table>

**Legend:**
- **I** Introduced
- **P** Practiced
- **R** Reinforced

Dependent upon the requirement set up (as determined by the Workspace creator), the alignment is either displayed as a simple alignment checkmark or as varying intensity levels.

If the curriculum map requirement requires you to indicate the intensity level, the intensity level nomenclature (e.g., introduced, practiced, reinforced) is determined by the creator of the Workspace Template.

Various tasks that can be performed on curriculum maps:
- **Create Map**
- Create/Manage Curriculum Maps
- Curriculum Map Filters

*When you view a subset of a curriculum map, the choices listed on the Mapping Actions pull-down menu update to display Change Filter as your first option. When you click Change Filter, you navigate to the filter selection page.*

**Edit Map**
- About the Curriculum Map Interface
- Manage Alignment Set
- Create Course/Activity Categories
- Create Course/Activity
- Sort, Reorder and Delete Courses and Activities
Select Mapping Intensity
Import Courses or Activities
Print and Export Map

Create Curriculum Maps

The Curriculum Map requirement enables each Participating Area to create an unlimited number of maps.

1. Under the Content tab, click **Create New Curriculum Map**. Show Me

2. Enter a title for your map. Show Me

3. Enter a description for your map.

4. Select the outcome or goal alignment set to which to align your courses or activities.
   - If you want to select an Outcome Set created within your participating area, select **View sets available...** from the pull-down menu.
   - If you want to select an organizational goals set, select **Other sets distributed to...** from the pull-down menu.

5. Click **Go**. The sets displayed below the field update to show all alignment sets relevant to the selection made.

6. Locate the set you want to use in your map and click the corresponding **Select** button. The curriculum map opens in a new window. You must close the Select Curriculum Map window to return to the main Workspace area. Show Me
7. *(Optional)* If you need to preview the set prior to your selection, click on the View Set link. A view of the set opens in a pop-up window.

**At this point**, in the Curriculum Map Workspace, click the Click here to Open Full Curriculum Map link to continue.

### Additional actions for Curriculum Maps

#### Rename
1. In the Edit Curriculum Map page, enter new title name.
2. Click Apply Changes.
3. *(Optional)* To quit your action, click Cancel.

#### Save As/Copy
1. In the Copy Curriculum page, enter a new map title and description.
2. Click Copy.
3. *(Optional)* To quit your action, click Cancel.

#### Delete
1. You are prompted with a message to verify the deletion of your curriculum map.
2. If you are sure, click OK.
3. *(Optional)* To quit your action, click Cancel.

#### Print View

#### PDF

#### Archive
1. You are prompted with a message to verify the archiving of your curriculum map. Archived curriculum maps are not available for review or in the At-A-Glance reports.
2. Click OK.
3. *(Optional)* To quit your action, click Cancel.

To update an archived curriculum map to visible, click Restore.

### Select Curriculum Map Filters

Due to the possible volume of courses and categories in a curriculum map, we provide the ability to filter Alignment sets and Courses/Activities.

*If there are more than 200 goals or outcomes sets OR over 200 courses, a message advises you to use the filter options to regulate the display of your curriculum map.*

When the page loads, all of the items that were selected during the management of the alignment set appear. *(If items have been excluded or removed, the filters page does not include those exclusions).*

*If there are less than 200 levels of Alignment Sets OR less than 200 courses,* you are able to access the Click here to Open Full Curriculum Map link. You have the option to view the entire curriculum map or filter out specific portions.

In the Or...Select a Subset of Curriculum Map area, you can filter by:
Alignment Set
1. Click on the Select Filter pull-down.
2. Select your alignment set filter. The options include:
   - Select all
   - Deselect all
   - Select courses that are aligned
   - Select courses that are NOT aligned
3. Click Apply.
4. You can select which Goals/Outcomes you want to include in this subsection of the curriculum map (if item is obsolete, the item is marked with an OBSOLETE tag, as well as a date and timestamp).

Using the checkbox:
If... Then...
you select a top level goal or outcome all courses (initiatives) are automatically selected.
you select a course (initiative) the top level goal is automatically selected.
you deselect a course (initiative) the top level goal is automatically deselected.

The # of aligned courses represents a count of courses (initiatives NOT goals) that have an intensity level designated for the item in the Alignment Set.

5. Click Open Curriculum Map. When a subset of the curriculum map is selected, this page only shows the portion of the curriculum map filtered out.

Courses/Activities
This filter option ONLY appears if at least one (1) course or category has been added to the curriculum map. You cannot delete all categories; the default category is always added.
1. Click on the Select Filter pull-down.
2. Select your alignment set filter. The options include:
   - Select all
   - Deselect all
   - Select courses that are aligned
   - Select courses that are NOT aligned
3. Click Apply.
4. You can select which Courses you want to include in this subsection of the curriculum map.

Using the checkbox:
If... Then...
you select a top level goal or outcome all courses (initiatives) are automatically selected.
you select a course (initiative) the top level category is automatically selected.
you deselect a course the top level category is NOT automatically deselected.

The # of aligned courses represents a count of courses (initiatives NOT goals) that have an intensity level designated for the item in the Alignment Set.

At this point, use Mapping Actions... to edit your map.

Edit Curriculum Map

About the Curriculum Map Interface

By default, the curriculum map displays:
the selected outcome or goal alignment set along the horizontal axis (if item is obsolete, the item is marked with an OBSOLETE tag, as well as a date and timestamp).

- a single category labeled Courses and Learning Activities along the vertical axis. Show Me

If an outcome is permanently hidden, you are advised of this on this main curriculum map page, ONLY when the full curriculum map is displayed.

The Mapping Actions button contains options for content addition and edit to the curriculum map.

Manage Alignment Set
Create Course/Activity Categories
Create Course/Activity
Copy from Another Map
Print and Export Map

If a curriculum map contains more than 30 items in an alignment set OR more than 50 courses, you need to select a subset of the curriculum map to edit. Only 50 items in an alignment set can be selected and displayed at any one time.

To save your curriculum map, click Save Now. The curriculum map automatically saves every five (5) seconds.
To select specific outcomes or goals you want to display in the curriculum map:

1. From the Mapping Actions... button, click Manage Alignment Set. Show Me

2. Select which Learning Objectives and Outcomes you want to display in your map. Show Me

3. (Optional) If you need to view details about an outcome mapping, click the magnifying glass. An Outcome Mapping window loads.

4. Click Return to Curriculum Map Workspace.

Create New Course/Activity Categories

Categories group courses and learning activities. By default, the curriculum map includes one (1) Course and Learning Activities category.

Create a new category

1. From the Mapping Actions... button, click Create New Category. Show Me
2. Enter Category Name. *(Maximum of 100 characters allowed)* Show Me

3. *(Optional)* Enter Description. *(Maximum of 500 characters allowed)*

4. *(Optional)* Use Spell Check to verify your description entry spelling.

5. Click Create.

6. *(Optional)* To quit your action, click Cancel.

---

**You cannot create and add more than 500 courses.**

---

**Edit a category**

1. To edit the name of your new category, click the category name link. Show Me

2. *(Optional)* Edit the name and add or edit the description.

3. *(Optional)* Use Spell Check to verify your description entry spelling.

4. Click Apply Changes.

5. *(Optional)* To quit your action, click Cancel.
If a curriculum map contains more than 30 items in an alignment set OR more than 200 courses, you need to select a subset of the curriculum map to edit.

Create New Course/Activity

1. There are two (2) primary ways to create a new course or activity:
   - Select Create New Course/Activity from the Mapping Actions menu
   - Click the Insert Course quick link. The link is represented by a small triangle, located to the left of the course/activity.

2. Enter the Course/Activity ID. (Maximum of 15 characters allowed)  Show Me
3. Enter the Course/Activity Title. (Maximum of 100 characters allowed)
4. (Optional) Enter a Course/Activity Description. (Maximum of 500 characters allowed)
5. (Optional) Use Spell Check to double-check your description entry.
6. (Optional) Enter a web link to the course/activity. (Maximum of 100 characters allowed)
7. Click Create.
8. (Optional) To quit your action, click Cancel.
9. Your course or activity displays on the vertical axis. Show Me

---

**How to edit a course/activity**

1. Click the course/activity name link. The Edit Course/Activity window loads.
2. (Optional) Edit the name and add or edit the description.
3. (Optional) Use Spell Check to double-check your description entry.
4. Click Apply Changes. You return to the curriculum map Workspace.
5. (Optional) To quit your action, click Cancel.

---

*If a curriculum map contains more than 30 items in an alignment set OR more than 50 courses, you need to select a subset of the curriculum map to edit. Only 50 items in an alignment set can be selected and displayed at any one time.*
Sort, Reorder and Delete Courses and Activities

Sort an entire category

Watch Me

Click the icon on the far right of the screen. The courses and activities sort in alphabetical ascending order.

Reorder courses/activities

1. On the left side of the screen, use the arrows.
2. Click and hold the arrow icon.
3. Drag the item to the desired area within the curriculum map.
4. Release the course/activity in its new location.

Delete a category, course or activity

Click the X in the top right corner of the category row.

Select Mapping Intensity

The creator of the Workspace Template indicates the intensity levels (e.g., Introduced, Practiced, and Reinforced), associated with the curriculum map. A low-to-high scale is used to describe how strongly a course or other activities address a particular Outcome. In some cases, the curriculum map does not include intensity levels. Workspace Creators determine which intensity option to use during the setup of Curriculum Map requirements in a Workspace. They can select from intensity levels or checkmarks.

From the Map Levels prompt, you can either select: Show Me

- Do not use intensity levels, use simple checkmark for alignment
- Define intensity levels from which the map creator can select

If... Then...
- you select checkmarks click Save Changes.
- you select to define the intensity levels enter your terms and abbreviations. You can select to add additional mapping levels or use the Remove link to delete levels.

The legend (bottom of the map) indicates the intensity options available within the map.
Select the mapping intensity Watch Me

1. In the cell located at the intersection of the course/activity and the outcome or goal, click the **Click** button.
2. Continue to click until the correct intensity level is displayed. For this example, the defined pattern is: **I -> P -> R**.

**Import Courses or Activities**

You can import courses or activities from other curriculum maps created by your Participating Area.

To import a course or activity:

1. From the **Mapping Actions** menu, click **Copy from Another Map**.
2. From the **Copy from existing curriculum map** pull-down menu, select an existing curriculum map to import.
3. Click **Continue**.
4. *(Optional)* To quit your action, click **Cancel**.
5. Select category, courses, or activities, or all to import from the selected map *(in Step 2)*. If you select the top level, ALL sub-level selections are included. If you do not select the top-level, you have to select the sub-sections individually.
6. Click **Save and Return to Curriculum Map Workspace** to return to the curriculum map. The selections appear on the map Workspace.
7. *(Optional)* To quit your action, click **Cancel**.

You can edit the courses, activities, and categories imported into your curriculum map.

**Print and Export Map**

You can choose to print or export the curriculum map at any time.

**Print the curriculum map**

1. From the **Mapping Actions** menu, select the **Print View** option. Show Me

![Print View option](image)

2. A printable version of the curriculum map loads in a new window.
3. Click **File**.
4. Select **Print**.
Export the curriculum map as a PDF file

1. From the Mapping Actions menu, select the Export to PDF option. A PDF view loads in a new window. Show Me

2. Print or save the PDF, as needed.

The print view or export of a curriculum map prints ONLY the data displayed on the screen NOT the full curriculum map. If you print a large map, it could take awhile to load. For better performance, you should select to print a smaller subset.

Operational Plan

About Operational Plans

The Operational Plan requirement allows Participating Areas to create an operational plan and to report the statuses of actions taken.

Operational Plan requirements specify the format for you to follow when writing an operational plan. This format is predetermined by the Workspace’s creator. There will ALWAYS be a corresponding Status Report requirement used to document the status of each action.

When you first open the requirement, it will be empty. You will have two options to get started with your operational plan:

Click the Create New Operational Plan button.

This will bring up a blank operational plan, using the format specified by the Workspace’s creator. You can then complete the plan and submit it for review.
Click the **Copy Existing Plan as Starting Point** button to import the contents of another operational plan created by your Participating Area, which you can then edit.

**Add Operational Plans**

The Operational Plan requirement consists of multiple components. Each component has directions and work that can be attached.

These components include:
Mission Statement

Here you can create, attach, or modify the mission statement for your Participating Area. This same mission statement is used in Mission Statement requirements, assessment plans and other operational plans.

Click the **Edit** button to bring up the mission statement text field where you can add or edit the mission statement.

**NOTE:** There is a 7000 character limit in the mission statement section.

If your Participating Area has already created a mission statement in any requirement in any Workspace, it will automatically appear in the mission statement text field. If you do not have one, you can enter one here.

You can **Spell Check** or perform a **Character Count** by clicking the appropriate button.

Once you have completed the mission statement, click the **Submit** button.
Choose the requirements in which you would like the mission statement updated and then click the Apply Changes button.

**Actions**

The actions component of the operational plan allows you to select individual outcomes and define the actions you will take to address the outcomes. First, you must select outcomes.

Click the Select Outcomes button to begin.
Just as with Outcomes Requirements, you are able to select existing Outcome Sets. In addition, depending on the setup of your Workspace, you can also be able to create new Outcome Sets directly in the Operational Plan.

For information about creating or selecting Outcome Sets, please refer to the "Create a New Outcome Set," "Edit Outcomes Set" and "Select Existing Set" sections of the Help Area.

The Outcome Set(s) you create or select will appear in the select window.

Collapse or expand one Outcome Set at a time by clicking on the triangle to the left of the Outcome Set name. Alternatively, if you have multiple Outcome Sets in your Operational Plan, collapse all or expand all at once by selecting the appropriate option located on the top right area of the outcomes and action section.

To include an outcome in the operational plan, you must check the box labeled “Include?”

When you are done selecting outcomes click the **Accept and Return to Plan** button to save your changes and return to the operational plan.

The Outcome Set(s) will be displayed for the Operational Plan. Collapse or expand one Outcome Set at a time by clicking on the triangle to the left of the Outcome Set name. Alternatively, if you have multiple Outcome Sets in your Operational Plan, collapse all or expand all at once by selecting the appropriate option located on the top right area of the outcomes and actions section.
Second, from the operational plan, you can add actions to each outcome by clicking the **Add New Action** button associated with each outcome.

<table>
<thead>
<tr>
<th>Program Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training</strong></td>
</tr>
<tr>
<td>1.0 Train competent students in the profession of marriage and family therapy.</td>
</tr>
</tbody>
</table>

**Select Findings Supporting the Action**

If findings exist for the same outcome in an Assessment plan within this Workspace, you navigate to the *Select Findings that Support this Action* screen.

This screen displays all the findings that use the same outcome as the action within this Workspace. The findings are organized by assessment cycle/category. You can select one or more findings to associate to the Action. You can also choose to continue without selecting any findings.

Select the Show Full Findings Details checkbox to view all the details for the findings.

Check off the box that appears at the top of the screen indicating “do not show”, this allows you to skip this page when creating other actions. This preference is only active for the duration of the session.

Once you have completed your selections, click **Continue**.

This is the page where you can enter information related to your action. Please note that the AMS Coordinator who created the template can customize these options to suit your needs. The Action Information screen can include the following information:
Action Information for:
Outcome: PROG. TRAIN. 1.0 (Students will demonstrate thorough knowledge of at least 3 systemic models)

Define an action for this outcome by filling out the information below. Once this action is added, you may add supporting attachments and links in the next step (from the main action plan screen).

* Required Fields

Linked to Findings: View any findings selected to support this action.
NOTE: This section does not appear if the Workspace does not have at least one assessment plan requirement.

Action Item Title: Enter the name of the action.

* Action Item Title: Model testing

Action details: Provide details about the action.

Action details: Students will design and carry out an extensive testing plan for all models.

Implementation Plan (timeline): Indicate the timeline in which the action should occur.

Implementation Plan (timeline): Testing plan will be divided into stages and components based on model being examined (to be specified here at a later date).

Key/Responsible Personnel: Provide the names of the individual(s) who will be responsible for taking this action.

Key/Responsible Personnel: Students enrolled in the PROG. TRAIN. 1.0 program, with supervision by all appropriate faculty members.

Measures: Specify how you will determine whether the action is bringing about the desired result.

Measures: Number of faults found in preliminary product, number of faults found in shipped product, level of compliance with project standards.

Budget approval required? (describe): Provide details about necessary budget needed for the action.

Budget approval required? (describe): Funds are required for the software necessary to perform testing, rental of testing facilities, and salary of faculty members.
Budget request amount: Indicate the desired budget. This field requires a numerical response.

<table>
<thead>
<tr>
<th>Budget request amount:</th>
</tr>
</thead>
<tbody>
<tr>
<td>$68500</td>
</tr>
</tbody>
</table>

Priority level: Select the priority (low, medium, or high) of the item.

<table>
<thead>
<tr>
<th>Priority level:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medium</td>
</tr>
</tbody>
</table>

After completing the Action Information form, click the Submit button to return to the operational plan.

You can also copy an existing action by clicking the Import Action button at the top of the Action Information screen.

Action Information for:
Outcome: PROG. TRAIN. 1.0 (Students will demonstrate thorough knowledge of at least 3 systemic models)

Define an action for this outcome by filling out the information below. Once this action is added, then you may add supporting attachments and links in the next step (from the main action plan screen).

* Required Fields

Copy an existing Action for PROG. TRAIN. 1.0

<table>
<thead>
<tr>
<th>Cancel</th>
<th>Copy</th>
<th>Show actions for all outcomes</th>
</tr>
</thead>
</table>

By default, you will only see measures assigned to the current outcome. Check the "Show actions for all outcomes" box to display every action your participating area has specified.

To view an action, click the View link associated with it.
In order to copy an action, first select the action you want to import by clicking the bubble next to its name.

Next, click the **Copy** button.

The Action Information screen will contain the information from that action. Make whatever changes are necessary.

After completing the Action Information form, click the **Submit** button to return to the operational plan.

You will be returned to the operational plan, where you can add supporting attachments or web links to your action.
Click the **Add/Edit Attachments & Links** button associated with an action to add or remove an attachment.

For more information about adding attachments and web links, please refer to the "Add Attachments" and "Add Web Links" sections of the Help Area.

**Selected Findings**

The selected findings display below the action name of the operational plan.

Select the **Show full findings details** checkbox, located in the top right of the Actions section to view all the details for the findings.

**Add/Edit Findings**

After the action is created, if you need to add or remove findings linked to the action, click **Add/Edit Findings**. This navigates to the Select Findings that Support this Action screen where you can modify your findings selections.

**Additional Components**

If you need to add information to the additional components in an operational plan, click **Edit**. A text field appears where you can include the requested information.

**Add Status Reports**

A Status Report requirement is always paired with an Operational Plan requirement to provide you with a way to document the status of each action defined in the operational plan.

As with the operational plan, the status report will consist of multiple components.
Action Statuses Component

The outcomes and actions specified in your Operational Plan are displayed on this screen. You will have an area to enter the status reports for each action of your Operational Plan.

Collapse or expand one Outcome Set at a time by clicking on the triangle to the left of the Outcome Set name. Alternatively, if you have multiple Outcome Sets in your Operational Plan, collapse all or expand all at once by selecting the appropriate option located on the top right area of the action statuses section.

For each action specified in your operational plan, you will have an area to enter the status of each action.

Click the Add Status button associated with an action to begin entering the results for that action.
The Status Report form will provide a place for you to enter the status updates and/or results. Please note that the AMS Coordinator who created the template may customize these options to suit your needs.

The Status Report form may include the following information:

**Current Status:** Specify the status (not started, in progress, completed, or closed) of the action.

* Current Status: In Progress

**Budget Status:** Specify the status (approved, pending approval, not approved, or other) of the budget request.

**Budget Status:** Pending Approval

**Additional Information:** Provide details regarding the status of the action.

**Additional Information:** Approval request submitted on Friday the 22nd. Reply date should be no later than Wednesday the 27th.

**Next Steps:** Enter suggestions based on the results of the action.

**Next Steps:** While awaiting approval, continue working on other actions in the operational plan.
After completing the Status Report form, click the **Submit** button.

You will be returned to the status report, where you can add supporting attachments or web links to your status. Click the **Add/Edit Attachments & Links** button associated with an action to add or remove an attachment.

**Current Status:** In Progress

**Budget Status:** Pending Approval

**Additional information:** Approval request submitted on Friday the 22nd. Reply date should be no later than Wednesday the 27th.

**Next Steps:** While awaiting approval, continue working on other actions in operational plan.

**Substantiating Evidence:** Add/Edit Attachments & Links

For more information about adding attachments and web links, please refer to the “Add Attachments” and “Add Web Links” sections of the Help system.

You can edit or remove status sections at any time by clicking the **Edit or Remove** link associated with the status you want to edit or remove.

**Additional Components**

There may be additional components to the Status Report requirement, such as a "Status Summary" field or a "Summary of Next Steps" field. Click **Edit** to add information to the additional components area (e.g., Status Summary).
A text field appears where you can include the requested information.

**Directions:** Enter a summary of progress on all of the actions outlined in operational plan.

**Text:**

Summary will updated here as project moves forward.

After including the requested information, click **Submit**.

**Discussion**

The Discussion tab provides an online discussion board for you to openly discuss the work being done for a requirement, with other members of your Participating Area. Both users with View only access, and users with View/Edit access can participate in the Discussion tab. Remember, ONLY members of your Participating Area will have access to this tab.

Each requirement has its own Discussion area. Once you have selected the Discussion tab, select a requirement to access the discussion area for it.
If you have view only access, the Discussion area provides a great way for you to give feedback or make suggestions regarding the content being added to a requirement.

The other method available to access the Comments area is to click the View or Add Comments link associated with a Workspace on the AMS Home page. This will navigate you directly to the Discussion tab for that Workspace.

### Creating Topics

To add a new discussion topic to a requirement, click the Create New Topic button at the top of the forum page.

### Discussion Topics for Standing Requirements: Outcomes

<table>
<thead>
<tr>
<th>Topic</th>
<th>Created By</th>
<th>Replies</th>
<th>Last Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Our Outcome</td>
<td>Steve Smith</td>
<td>0</td>
<td>3/6/2008 10:57:52 AM</td>
</tr>
</tbody>
</table>

Create New Topic

Enter the name of the topic you want to add in the subject field.
Add the description of the topic to the text field.

Clicking the **Spell Check** button at the bottom of the page will open the spell checking feature in a pop-up window; Spell Check searches the subject and body of your entry and recommends replacements for misspellings.

Clicking the **Character Count** button enables you to track the number of characters in your entry. The character limit for topic entries is 7000 characters.

This is placeholder text for your template. To add content to the body, replace this text. To add a header or footer, click the **Header** or **Footer** button on the toolbar.

The heading in this template is a special field for topic titles, so generally you do not need to edit it.

**Viewing Topics**

To read a topic, and all replies to it, click its title.

**Discussion Topics for 2009-2010 Assessment Cycle: Status Update** (Status Update)

<table>
<thead>
<tr>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status Report for March 2008</strong></td>
</tr>
<tr>
<td><strong>New Topic!</strong></td>
</tr>
</tbody>
</table>

To edit a topic you created, click the **Edit this Topic** button located under the topic.

**Discussion Topics for 2009-2010 Assessment Cycle: Status Update**

<table>
<thead>
<tr>
<th>View Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Posted By:</strong> Steve Smith</td>
</tr>
<tr>
<td><strong>Status Report for March 2008</strong></td>
</tr>
<tr>
<td><strong>Topic Created:</strong> 3/6/2008 11:13:49 AM</td>
</tr>
</tbody>
</table>

You can participate in a discussion by posting replies.

While viewing a topic, click the **Post New Reply** button to open the Post Reply form.

**Discussion Topics for 2009-2010 Assessment Cycle: Status Update**

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In the Post Reply form, type in your response in the Body field.
Click the **Spell Check** button to scan your text for spelling errors.

Clicking the **Character Count** button enables you to track the number of characters in your entry. The character limit for reply entries is 7000 characters.

## Submit & Read Reviews

The Submission & Read Reviews tab will only be available if the Workspace creator has specified review for at least one requirement.

The AMS Coordinator who created the Workspace may choose to assign review methods to requirements. This means that when you have finished working on a requirement, you will need to submit it to a Reviewer. The Reviewer will read your work, and provide feedback, using the method prescribed by the Coordinator.

Once work has started on a requirement where submission is required, there will be a **Submit** button associated with that requirement.

**NOTE:** If a due date was assigned for a category or requirement, the due date will be listed directly above the **Submit** button.

When you and the members of your Participating Area have decided that the requirement is ready for review, click the **Submit** button to submit the requirement.

**NOTE:** The **Submit** button may be disabled if the due date has past and the Workspace Manager(s) has indicated that you are not able to submit work after the due date.

Once a requirement is submitted, it will be locked. Locked requirements cannot be edited by any member of the Participating Area.

If you need to edit a locked requirement, you will first need to cancel the submission. You will be able to cancel the work submission up until a Reviewer begins reviewing the requirement by clicking the **Cancel** link, next to the requirement on the Submission tab.

**NOTE:** If a Reviewer has already accessed the work you submitted, the **Cancel** link will not appear.

Once the review has been completed and sent back to you, you will see the review results in the Review Outcome column. Click the **View Report** link next to a reviewed requirement to access the corresponding Review Report.

The Review Report will tell you when the review took place and the overall score or result, along with the Reviewer’s comments and suggestions.

If a rubric was used to review the work, click the **See Calculation** link to view the calculations for the rubric score.

The calculation details contain the rubric criteria, scores, and weighted scores *(if applicable)*. If rubric weighting is off, this area will only contain the rubric criteria and the scores.
Publish

About the Workspace Publish Tab

The Publish tab for a Workspace allows Participating Area members with View & Edit access to the Workspace to publish the Workspace as a website, export the Workspace to PDF or to email a link for accessing a "published" view of the Workspace to others.

Individuals with the ability to publish are also able to select a visual theme and navigation layout for presenting the Workspace to others online or via email.

Links can be emailed using the internal Message Center within AMS (i.e., to other AMS users at your organization) or to external email addresses.

Publish a Workspace to the Web

Individuals with View & Edit access to a Workspace in AMS have the ability to publish the Workspace to the web or email a link for accessing the Workspace. Links can be emailed to other users within AMS or even individuals who do not have accounts in AMS.

To publish a Workspace for which you have View & Edit access, access the Workspace from the homepage and click the Publish tab.

To publish the Workspace to the web, click the Publish button.

On the next screen you will be able to customize the web address and create a password to limit access to your published Workspace, if you want.

After you have selected whether or not to require a password to access the published Workspace, click the Publish button.

Export a Workspace to PDF

Individuals with View & Edit access to a Workspace in AMS have the ability to export the Workspace to PDF format.

To export the Workspace to PDF, click the Export to PDF button on the Publish tab of the Workspace.

On the next screen you will be able to customize the title page and select whether or not you want to include Table of Contents and Appendix for attachments. After you have made your selections, click the Continue button to generate the PDF file.

E-mail a Workspace

Individuals with View & Edit access to a Workspace in AMS have the ability to email a link for accessing the Workspace. Links can be emailed to other users within AMS or even individuals who do not have accounts in AMS.

To email a link for accessing the Workspace, click the Email button on the Publish tab of the Workspace.

On the next screen you will be able to select recipients for the email either using TaskStream’s Message Center (for sending the link to other TaskStream subscribers at your organization) or by typing in external email addresses.
For more information about selecting recipients using the Message Center, please refer to the "Select Recipients" section of the Help Area, located under "Communications > Messages."

You can personalize the subject and body of the email that is sent. By default, the subject for the message will be “Shared TaskStream Work” and the message field will be blank.

In the "Message Properties" area, you can:

- Modify your email address *(this field will be populated automatically with the email address associated with your account)*
- Choose to have a copy of the email sent to you by checking the box next to this preference *(it is checked by default)*
- Customize the web address that others will use to access your published Workspace *(please see the note below)*
- Choose whether or not a password should be required to access the published Workspace and to set the password if you choose to restrict access *(please see the note below)*

NOTE: Workspaces must be published in order to email a link for accessing it. If the Workspace has not been published yet, emailing it from this screen will publish the Workspace and email the link in one step.

When you have made all of your changes and indicated your preferences, click the Send button to email the link to your published Workspace.

**Choose Style / Web View**

Individuals with View & Edit access to a Workspace in AMS have the ability to publish the Workspace to the web or email a link for accessing the Workspace.

Prior to publishing a Workspace, you may want to change the layout of your published website, based on your organization’s custom theme.

To change the layout, click the Change Style button.

Choose a layout on the next screen and click the Save button to save your changes.

Clicking the Web View button on either the main Publish page or the Choose Style page will open a new window with a preview of the published Workspace with the selected layout.

**Options & Info**

The Options and Info area contains information about the Workspace:
- the Participating Area and its description
- the last date the Workspace Template was modified by the Workspace creator
- the Workspace Managers and Reviewers
- the members of your Participating Area with their granted level of access
- the Manage Outcome Set Availability in LAT grid with Outcome Set names, availability status, and distribution in LAT.

- This section ONLY appears when:
  - the preference for Participating Areas make Outcome Sets available in LAT is set to YES
- The preference for participating areas make Outcome Sets available in LAT is currently set for No but was set to Yes at one point in time. During that time, the Participating Area created Outcome Sets that are currently available in LAT.

**Manage Outcome Set Availability**
Outcome Set Name
This column displays all the Outcome Sets CREATED by this Participating Area (any of the members).

Already Available in LAT?
This column displays whether the outcome set is available in LAT. There are three (3) possible options:

1. **Yes** - the outcome is already available/visible in LAT
2. **No** - the Outcome Set is not available/visible in LAT; there are two (2) reasons for this:
   - the Participating Area has never made it available to LAT AND the Outcome Set was once available in LAT but later made unavailable
   - Outcome set does not have any outcomes created and therefore cannot be made available in LAT

Make Available in LAT
Appears when the Already Available in LAT displays NO. If you click the make available link the process of making Outcome Sets available in LAT begins.

Cases are:
- **The outcome has never been available in LAT before.**
- **The Outcome Set was once available but then made unavailable.**

When you click on the link, the system navigates to the Distribution page.

Make Unavailable in LAT
Appears when the Already Available in LAT displays Yes. Click the link to validate if any outcomes in the Outcome Set are attached to work in LAT.

If you click **OK**, then the set is no longer available in LAT
- Outcomes, in this set, that are currently attached to work in LAT remain attached.
- You can not see the Outcome Set available for mapping in LAT. In other words, the Outcome Set will NOT be listed in the Standards page.

If you click **Cancel**, then you quit your action and nothing changes.

Distribution in LAT
Displays the distribution for each Outcome Set. There are three (3) possible options:

1. **Blank** - Can occur under two (2) circumstances:
   - If the Outcome Set has never been made available in LAT
   - If the Outcome Set was available at one point but not available any longer. In this case, the original distribution is not displayed on the screen but it is NOT deleted from the record. When you make it available again the latest distribution appears on the Distribution page.
2. **Full** - If the Outcome Set is available in LAT and distribution to the entire organization is selected.
3. **Partial** - If the Outcome Set has been made available in LAT and distribution to some nodes in the organization is selected.

When you click **View/Edit**, the system navigates to the Distribution page.

When you click **View**, the system navigates to a non-editable Distribution view. The distribution view is ONLY seen when the preference is set to No but an Outcome Set is still available to LAT.

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*With the exception of the Workspace Preferences, the information available on the Options & Info tab of the Workspace is also accessible via the Roles tab in the My Account area. BUT the ability to manage outcomes is not available in the My Account area.*

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**Outcome Set Distribution**

In the Identify Distribution in LAT area, select which Organizational Areas have access to this Outcome Set when it is active. You can only choose Organizational areas within your Administrative Domain.

1. Select from two (2) options: Distribute to entire organization OR Select Individual Area

   This option allows everyone in the LAT OA to view/select the Outcome Sets in the Standards page. New nodes added to the structure also have the Outcome Set distributed to them.
   
   This displays the entire OA structure. You can select one (1) or more nodes. Only users in the node(s) can view/select the Outcome Sets displayed in the Standards page. Outcome Sets are visible throughout the system where standards are shown and work can be attached.

   **If...**
   
   **Then...**
If... | Then...
---|---
the Outcome Set is being made available for the first time | by default, all of the checkboxes are NOT selected.
the Outcome Set is being made available again *(not the first time)* | the prior distribution is visible here. The checkboxes for the prior distribution are checked.
a new node is selected | the subscribers in this node see and are able to attach outcomes in this set to work in LAT.
user no longer wants to distribute to a node and deselects the checkbox | the subscribers in that node are no longer able to see/select the Outcome Set in the Standards page. Outcome Sets are visible throughout the system where standards are shown and work can be attached. However, the outcomes remain attached to the work they are currently associated with.

2. Click **Apply Changes**. The system navigates to the Options & Info tab page.

   The following actions take place:
   - A copy of the latest version of this Outcome Set is made available in LAT.
   - Email notification is sent to the Workspace Managers. This email notification is only sent when the Outcome Set is made available in LAT and NOT when the distribution is changed.
   - Options cannot be edited in LAT, ONLY in AMS.

3. *(Optional)* To quit your action, click **Cancel**.