

Faculty Beginner's Guide

Initial Preparation

This section provides information about getting started with TaskStream, including getting an account, scheduling a walkthrough and gaining access to the TS Coordinator tools.

TaskStream Basics

This section includes directions for logging in to TaskStream, navigating TaskStream, and managing your account information.

Student Preparation

This section includes information about the student account activation process and the Beginner's Guide for students.

Management of TaskStream: Using the TS Coordinator Tools

As a faculty member using TaskStream, you may decide to create your own TaskStream programs for your students. This section provides information about using the TS Coordinator tools to create/manage programs and distribute resources.

Faculty Folio Assessment Program Participation

This section includes details about accessing student work submissions for review and evaluation.

Additional Online Support (Help Index)

In addition to this guide, TaskStream provides an extensive collection of support materials. This section describes the resources that are available to you in the Help Index.

Initial Preparation

There are a few preparatory measures you can take to ensure your success with TaskStream. This guide is designed to help you have a productive and rewarding experience as you introduce your students to the TaskStream tools.

Get a TaskStream Account

In order to prepare to use TaskStream with your students, you will need to have an active account on TaskStream. Please contact your organization's TaskStream Coordinator to determine how to get your TaskStream account

Schedule a Walkthrough

While this is not essential, many faculty members find it helpful to have an experienced TaskStream user introduce the tools in a hands-on session. TaskStream's Mentoring Services offers telephone/Internet walkthroughs of TaskStream to interested faculty members. Walkthroughs are tailored to suit individual program requirements, therefore, it is necessary to schedule an appointment. A walkthrough will take approximately 30-60 minutes, depending on which areas of TaskStream are covered in the session.

Get Access to the TS Coordinator Tools

If you will be creating or managing any programs or performing any other management functions during your use of TaskStream, you will need access to the TS Coordinator tools. Once you are assigned TS Coordinator status, the TS Coordinator link will appear near the top of the left navigation bar in TaskStream. If you believe you need to be able to access the TS Coordinator tools, please contact your organization's TaskStream Coordinator to ask that they submit a request on your behalf.

For more information about the TS Coordinator tools, please refer to the "Management of TaskStream: Using the TS Coordinator Tools" section of this guide or visit the various TS Coordinator areas of the Help Index.

TaskStream Basics

TaskStream Technical Requirements

Since TaskStream is web-based, it requires that subscribers have a computer with an Internet connection and access to a supported web browser. TaskStream is designed for use with both 56K dial-up and broadband connections; however, because broadband operates at least 15x-50x faster than dial-up, broadband is the preferred connection type. Our current list of supported web browsers is shown below.

Supported Browsers

PC

Internet Explorer 5.0 and above
Netscape 6.2 and above
AOL 5.0 and above
FireFox 1.0

Mac

Internet Explorer 5.0 and above
Netscape 6.2 and above
AOL 5.0 and above
FireFox 1.0
Safari 1.0 and above

Optimal Browsers

PC

Internet Explorer 5.17 and above
Netscape 7.0 and above
AOL 9.0
FireFox 1.0

Mac

Internet Explorer 5.17 and above
Netscape 7.0 and above
AOL 5 and above (AOL 10.3 for OS X)
FireFox 1.0
Safari 1.2

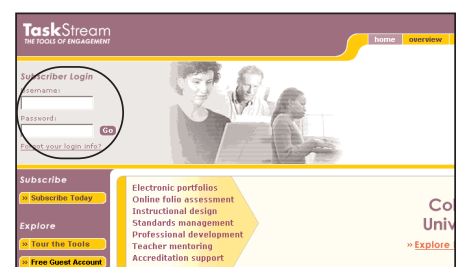
TaskStream requires certain web technologies that are generally enabled/supported by most browsers in the default setting. However, since these features are necessary for running TaskStream, it is important to be aware of them.

- 1) Your browser must have JavaScript enabled (also some security software must be configured to allow javascript as well).
- 2) Many of TaskStream's tools utilize pop-up windows. If you have a pop-up blocker installed, it must be properly configured to allow pop-ups in TaskStream or disabled while working in TaskStream.

Please refer to our Technical FAQ available from the Help Index for more information.

Logging In

To log in to TaskStream, enter **www.taskstream.com** into the Location or Address field of your web browser and press enter. The TaskStream login screen will appear. Enter your **Username** and **Password** in the Subscriber Login area and click the **Go** button.



Forgotten Password

If you forget your Username or Password, click the **Forgot your login info?** link, located under the Member Login area. Enter your first and last name, and either your e-mail address or username (or both). Then click the **Go** button.

If the information you have entered matches that in our database, you will get a message that your username and password have been sent to you via e-mail.

If the information you enter does not match our records, you will be asked to try again or contact Mentoring Services at 800-311-5656 or at help@taskstream.com.

Navigating TaskStream

After you log in to TaskStream you will be taken to your **Home Page**.

Note: The first time you log in, you will be presented with the TaskStream End User Agreement. Once you accept the agreement, you will be asked to update some of your account information.

Navigation Bar

As you navigate the site, the navigation bar will always be present on the left side of your screen. This allows you to access any part of TaskStream at any time. The links on the navigation bar are divided into six sections:

- Site Management** (appears only for TS Coordinators)
- Programs & Resources**
- Web Publication**
- Instructional Design** (Teaching Productivity Tools)
- Communications**
- General**

You can always find the **Home** and **Help Index** links at the very top of the navigation menu. As you explore the site, keep in mind that you can always return to your **Home Page** by clicking the **Home** link.



The Home Page

Each of the five sections on your **Home Page** corresponds to a set of tools.

Programs

My Programs

Resources

Standards Manager

Cybrary

Mybrary

Web Publication

Web Folio Builder

Web Page Builder

Instructional Design

Unit Builder

Lesson Builder

Rubric Wizard

Communications

Message Center

TS Instant Messenger

Discussion Board

Calendar

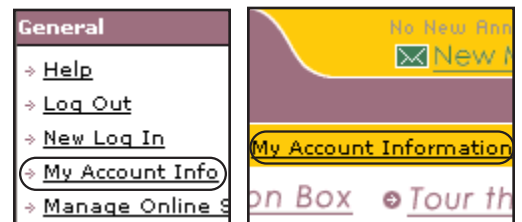
Announcements



Note: The Instructional Design tools will only appear if the Teaching Productivity Pack is enabled.

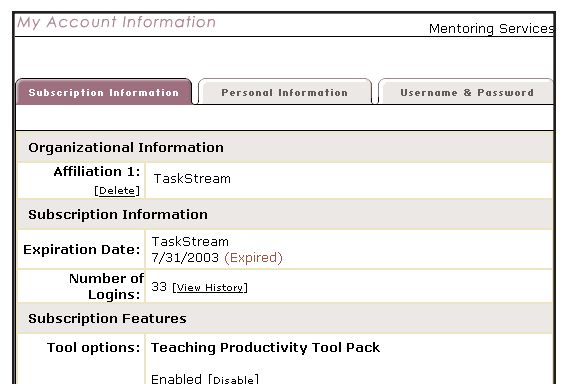
My Account Information

To access the *My Account Information* area of TaskStream, click either the **My Account Info** link from the Left Navigational bar or the **My Account Information** link from the home page.



The *My Account Information* page is organized into three separate tabbed sections.

The *Subscription Information* section contains information about the organization(s) with which the account is affiliated, the expiration date of the subscription, and the number of logins. The Teaching Productivity Tool Pack can be enabled or disabled from this area, as well.



The *Personal Information* section contains your personal information. You can change any of your personal information on this page by editing the information and then clicking the Update Account Information button.

The screenshot shows the 'My Account Information' page for 'Mentoring Services'. It features three tabs: 'Subscription Information', 'Personal Information' (which is selected), and 'Username & Password'. An 'Update Account Information' button is located at the top right. The 'Personal Information' section includes a 'Social Security Number' field, a checkbox labeled 'I am not a student' which is checked, and an 'Address Line 1' field.

The *Username & Password* section prompts you to enter your current password to access a form that enables you to change your password, password hint, username, and/or your email address.

The screenshot shows the 'My Account Information' page for 'Mentoring Services' with the 'Username & Password' tab selected. The page prompts the user to enter their current password to update their username, password, or e-mail address. It includes a 'Current Password' field and a 'Submit' button. A note at the bottom states: 'Note: To add or change contact information (address, phone number, etc.), click [update personal information](#).'

Student Preparation

In order to use TaskStream with your students, you must require that students register with TaskStream to obtain an active account. This portion of the guide helps you introduce your students to TaskStream by helping them subscribe to and become acquainted with the TaskStream tools.

Distribute Beginner's Guide

We suggest you print out the TaskStream Student Beginner's Guide and distribute it to your students. This document will guide students through the initial steps of getting started with TaskStream.

Activate Students Accounts

There are 3 options for activating student accounts.

1. The University prepays for the student accounts

When the institution chooses to pay for the student accounts, TaskStream provides a key code that can be distributed to students. Students will self-register directly on TaskStream using this assigned key code.

2. Students purchase their accounts online

Students purchase their own accounts directly on the TaskStream site using a credit card. When a student subscribes, they will receive a confirmation immediately.

3. Students purchase their accounts in the bookstore

TaskStream accounts can be made available to students through the bookstore. If you are interested in this option, please contact Mentoring Services for more information on ordering the accounts for your bookstore.

Note: The usernames and passwords selected by students allow the students to access TaskStream, but will not give them the ability to share their work with reviewers or evaluators. In order to share work, students must be enrolled into programs. The instructor for the course (or a faculty or staff member assigned by the organization) typically creates these programs using the TS Coordinator.

Management of TaskStream: Using the TS Coordinator Tools

The TS Coordinator tools are a set of features that provide you with the ability to set-up new programs, disseminate resources to participants, design customized templates for web folios and web pages; and manage communications by setting up discussion board threads and posting announcements.

Programs in TaskStream

TaskStream offers two program types: Collaborative Programs and Folio Assessment Programs. This section provides a brief explanation of each program type.

Collaborative Programs

The Collaborative Program makes it easy for program participants to share work created with the Instructional Design and Web Publication tools for feedback and review. Two roles drive the collaborative process: Author and Reviewer. Authors create work and initiate the review process by sharing work with selected reviewers. Reviewers comment on work shared by authors.

This program type is most often used to create a collaborative environment as program participants create and review TaskStream lessons, units, web pages, and web folios.

For more information about setting up a Collaborative Program, please access the Collaborative Program Management Help area of the Help Index by selecting Program Mgmt: Collaborative from the TS Coordinator tools pull-down menu on the main page of the Help Index.

Folio Assessment System

The Folio Assessment System is an assessment management system used for tracking the progress of participants as they demonstrate proficiency across pre-defined requirements. The central submission and tracking system in a Folio Assessment Program is the Directed Response Folio template. Through this program, authors can share work for review, and they can submit work for evaluation. Program Managers can generate reports that aggregate the assessment data and control the processing of evaluations. The reviewer role is optional in this program type.

Directed Response Folios may be assessed by rubric, pass/fail, or meets

requirements/does not meet requirements. Reports can be generated on program participants in the areas of performance, program activity, and standards usage. For more information about using the Folio Assessment System, please access the Folio Assessment System Help area of the Help Index by selecting Program Mgmt: Folio Assessment System from the TS Coordinator tools pull-down menu on the main page of the Help Index.

What Type of Program is Best For You?

If you are interested in a performance assessment system that will provide you with the ability to score work submissions, then the folio assessment program would work well for you. This program type allows you to create a folio template (the Directed Response Folio) which includes directions, expectations and assessments. This template, which serves as a work submission area, can be distributed to students through the folio assessment program. Once students begin adding work to the DRF, they can share it for review or submit it for evaluation. An evaluator may score the DRF according to the established scoring system. Reports can be generated based on student portfolio performance, the amount of work completed within the portfolio, and the standards addressed in the portfolio.

If you are more interested in the formative assessment of lessons, units, web folios, and web pages, then you may want to create a collaborative program. The collaborative program is ideal for setting up a review process using the commenting and request feedback functionality. Work shared with reviewers in a collaborative program will not be evaluated through the TaskStream system in a quantitative or summative way.

Create Templates, Share Resources, Post Discussions and Announcements

As a TS Coordinator, you may create web folio and web page templates for use by your students. When your students create a new web folio or web page, they may select the template that you have shared with them. You are also able to create and distribute completed web folios or web pages that contain resource information. For more information about creating and distributing templates and resources, please access the Curriculum/Resource Management Help area of the Help Index by selecting Curriculum and Resource Management from the TS Coordinator tools pull-down menu on the main page of the Help Index.

You may also post discussions, announcements, and calendar items for your students. For more information on all of these administrative functions, please access the Communication Management Help area of the Help Index by selecting Communication

Management from the TS Coordinator tools pull-down menu on the main page of the Help Index.

Faculty Folio Assessment Program Participation

Faculty generally participate in programs as Reviewers and/or Evaluators. For more information about participating in Collaborative and Folio Assessment Programs, please access the My Programs Help area of the Help Index by selecting My Programs from the Programs and Resources pull-down menu on the main page of the Help Index.

Review your Students' Work (Requests for Feedback)

If you have created a Collaborative Program or a Folio Assessment Program with reviewers, you will need to use the My Programs area to access your students' shared work. Click the Review/Give Feedback link in your My Programs area to access the TaskStream work for which your students have requested feedback.

For more information about the Reviewer role in a Collaborative Program, please access the Collaborative Programs: Reviewer Help area by clicking the Reviewer Role: Responding to Work link that is located in the Collaborative Programs section of the My Programs Help area.

For more information about the Reviewer role in a Folio Assessment Program, please access the Folio Assessment: Reviewer/Evaluator Help area by clicking the Rev./Evaluator Role: Responding/Evaluating Work link that is located in the Folio Assessment Programs section of the My Programs Help area.

Evaluate your Students' Directed Response Folios

If you are an evaluator in a Folio Assessment Program, you will need to evaluate work submitted through Directed Response Folios(DRF). Click the Evaluate link in your My Programs area to access the TaskStream work your students have submitted for evaluation.

For more information about the Evaluator role in a Folio Assessment Program, please access the Folio Assessment: Reviewer/Evaluator Help area by clicking the Rev./Evaluator Role: Responding/Evaluating Work link that is located in the Folio Assessment Programs section of the My Programs Help area.

Additional Online Support (Help Index)

The Help Index contains a collection of resources designed to support your use of TaskStream. Through the Help Index, you are able to access online help pages, downloadable site guides, FAQs, and other valuable resources. These help resources are organized by tool and/or area of the TaskStream site.

Accessing Resources in the Help Index

The Help Index contains several different types of help resources. The *Tool Help Pages* section contains pull-down menus from which help pages for specific areas of the site can be accessed.

The *Programs and Resources* pull-down menu provides access to the following help pages:

- My Programs
- Standards Manager
- Cybrary *
- Mybrary

The *Tools* pull-down menu provides access to the following help pages:

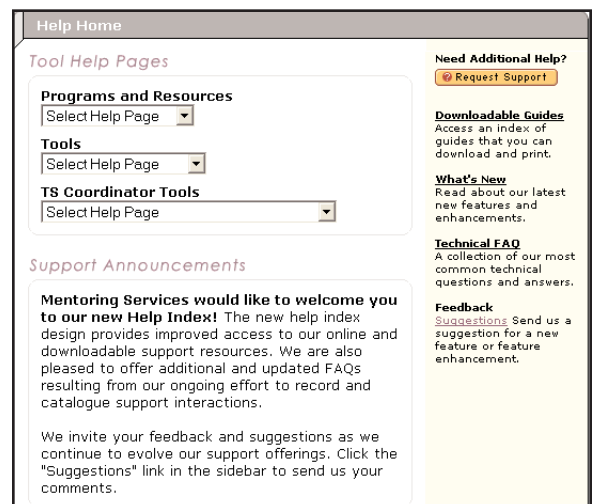
- Web Folio Builder
- Web Page Builder
- Unit Builder *
- Lesson Builder *
- Rubric Wizard *
- Message Center
- TS Instant Messenger
- Discussion Board
- Calendar
- Announcements

The *TS Coordinator Tools* pull-down menu provides access to the following help pages:

- Curriculum and Resource Management **
- Account Management **
- Communication Management **
- Program Management: Folio Assessment System **
- Program Management: Collaborative **

* These options appear when the Teaching Productivity Pack is enabled.

** These options appear when a subscriber has the TS Coordinator privilege.



Many of our help pages include FAQs, links to more specific help pages, and links to PDF help guides that can be saved to your computer and/or printed out for reference.

The screenshot shows the 'Web Folio Builder Help' page. It features a navigation bar with 'Help Home > Web Folio Builder Help'. The main content area includes an introductory paragraph about the Web Folio Builder, a list of 11 FAQs, and a section for 'Web Folio Builder Help Pages' with a link to 'Selecting a Template'. On the right side, there are sections for 'Need Additional Help?' with a 'Request Support' button, 'Downloadable Guides' (a PDF of the Web Folio Builder), and a 'Feedback' section with a 'Suggestions' button.

Accessing Help for Program Participants

To access help relating to TaskStream programs, select the **My Programs** option in the *Programs and Resources* pull-down from the Help Home page.

General program information is presented at the top of the page with specific help for Collaborative Programs and Folio Assessment Programs appearing if you scroll down the page.

Click any of the role-specific links to access FAQs, additional help pages, and downloadable resources for the particular role.

Depending upon what types of work you will produce and use in a program environment, you may want to refer to specific tool help resources. For example, if you need to create a Web Page, you may want to refer to the Web Page Builder help area for more information.

*Note: If you are unsure of the type of TaskStream program you are participating in and what your role is click the **My Programs** link in the left-hand navigation menu and review the Overview page of the relevant program.*

The screenshot shows the 'My Programs Help' page. It features a navigation bar with 'Help Home > My Programs Help'. The main content area includes an introductory paragraph about the My Programs area, a list of 3 FAQs, and a section for 'My Programs Help Pages' with links to 'My Programs Home', 'Collaborative Programs', and 'Folio Assessment Programs'. On the right side, there are sections for 'Need Additional Help?' with a 'Request Support' button, and a 'Feedback' section with a 'Suggestions' button.

There are two sources of support that are generally available to you. You have the support provided by TaskStream and that which is provided by the organization you are participating in. To receive the fastest and most effective support, you will want to direct your inquiries to the most appropriate source. TaskStream's materials and resources are designed to address any technical and feature inquiries you might have to support your use of our tools. How an organization employs these flexible tools is up to the local administrators and/or faculty. If you have any questions about, content, assignments, goals, or activities as they relate to your work in a particular organization, we encourage you to contact a local program coordinator (instructor, professor, colleague, and/or administrator) for help.