

Accessing the Academic Institutional Effectiveness System in TaskStream

Log into TaskStream at <http://www.taskstream.com>

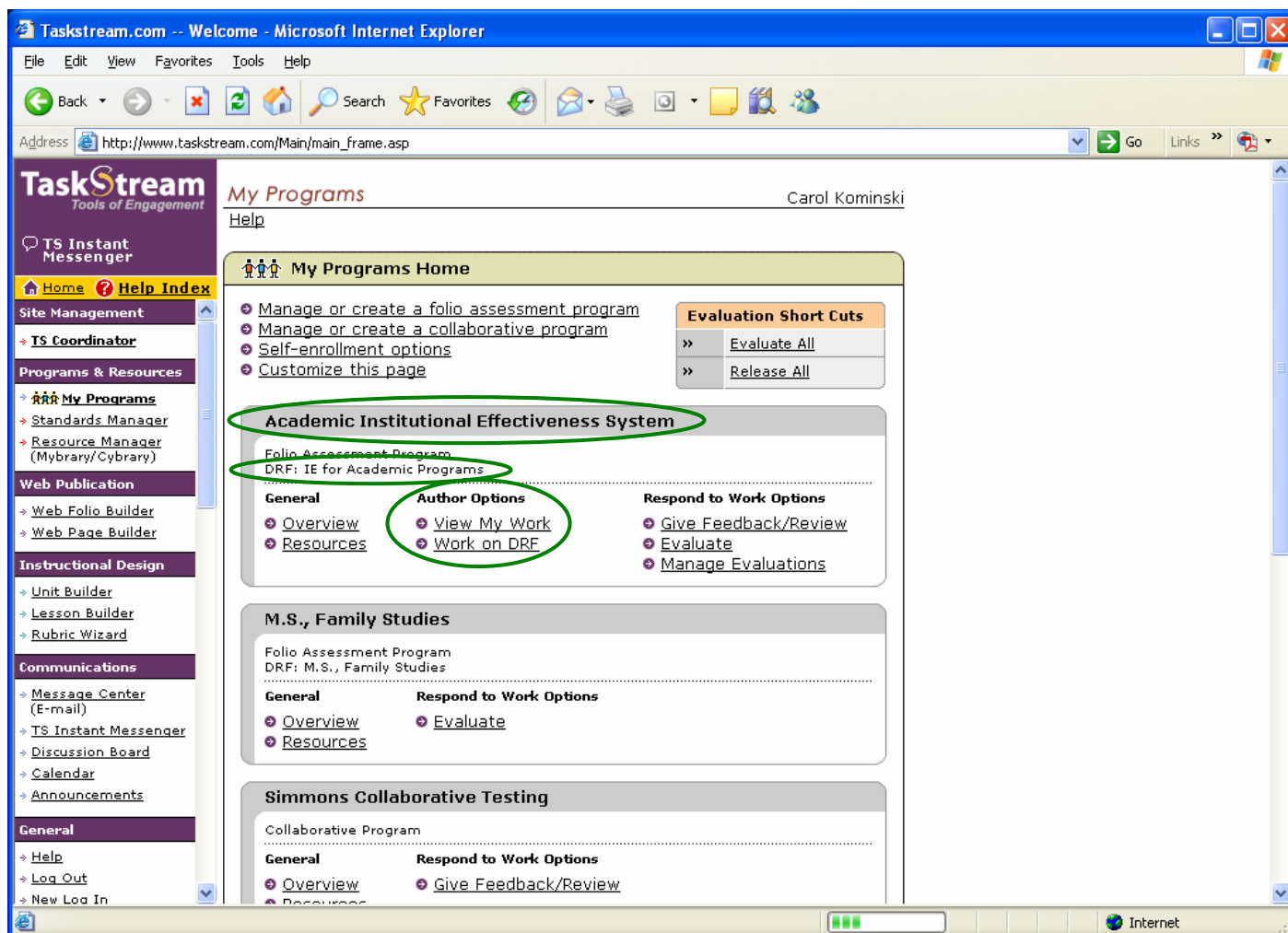
To access the Academic IE System, go to **“My Programs”**



“My Programs” is listed under “Programs and Resources” in two places:

Left column on your Home page (TaskStream screen that appears when you log in)
OR
Menu on left side of screen (near the top)

Entering the Program in the Academic IE System



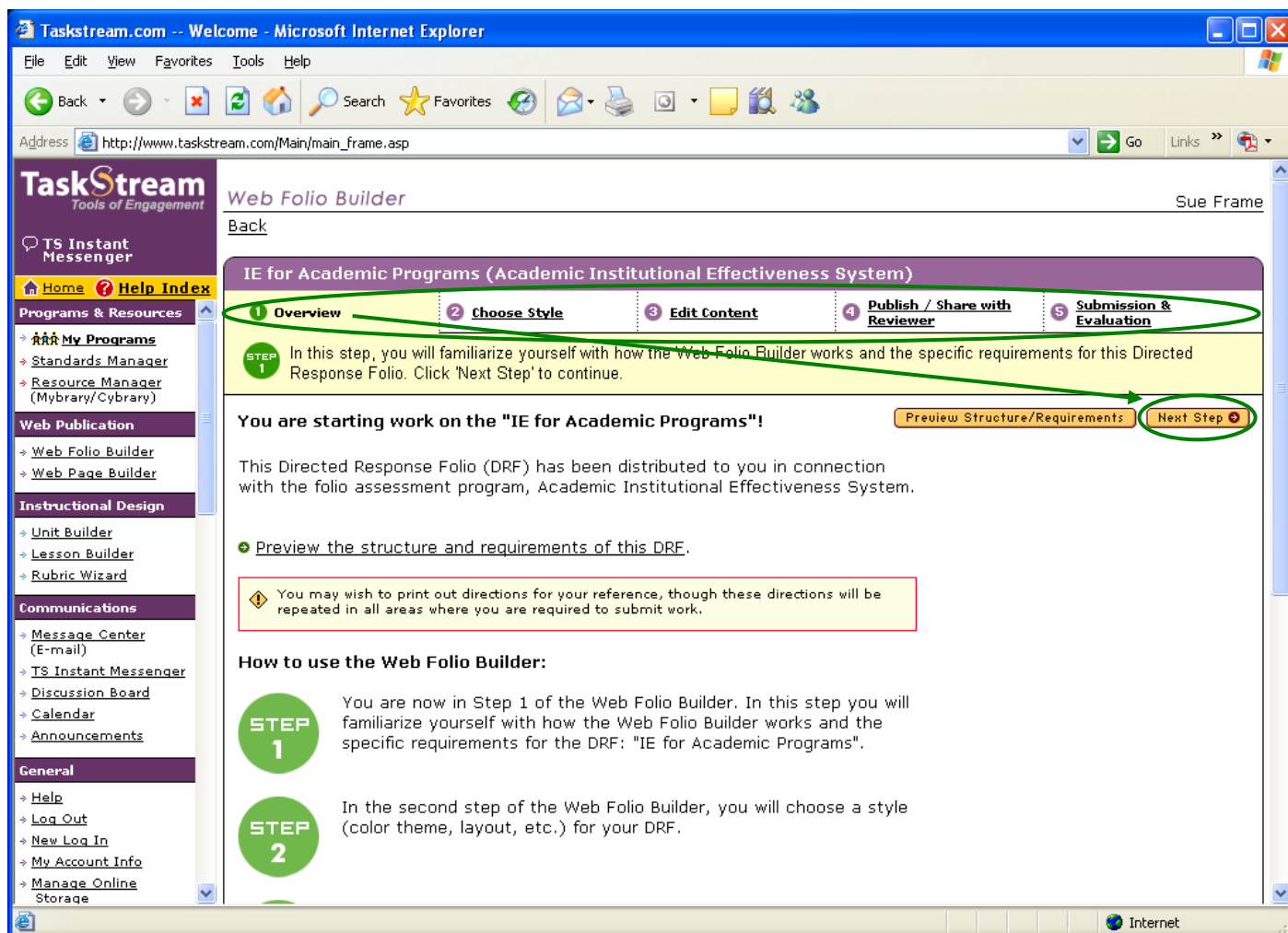
The Program list is alphabetical and displays all “Active” programs in which you are enrolled.

Note that a person can be an Author (submitting a plan), a Reviewer (with optional commenting power), an Evaluator (scoring or otherwise assessing a plan), or a Manager (running the program, supervising evaluations, etc.).

The **Author Options** are to “View My Work” (already submitted) and “Work on DRF,” which means add or edit text to a Directed Response Folio.

Click on “Work on DRF” to start work on the IE for Academic Programs

First Screen of “Work on DRF” is Step 1 - Overview



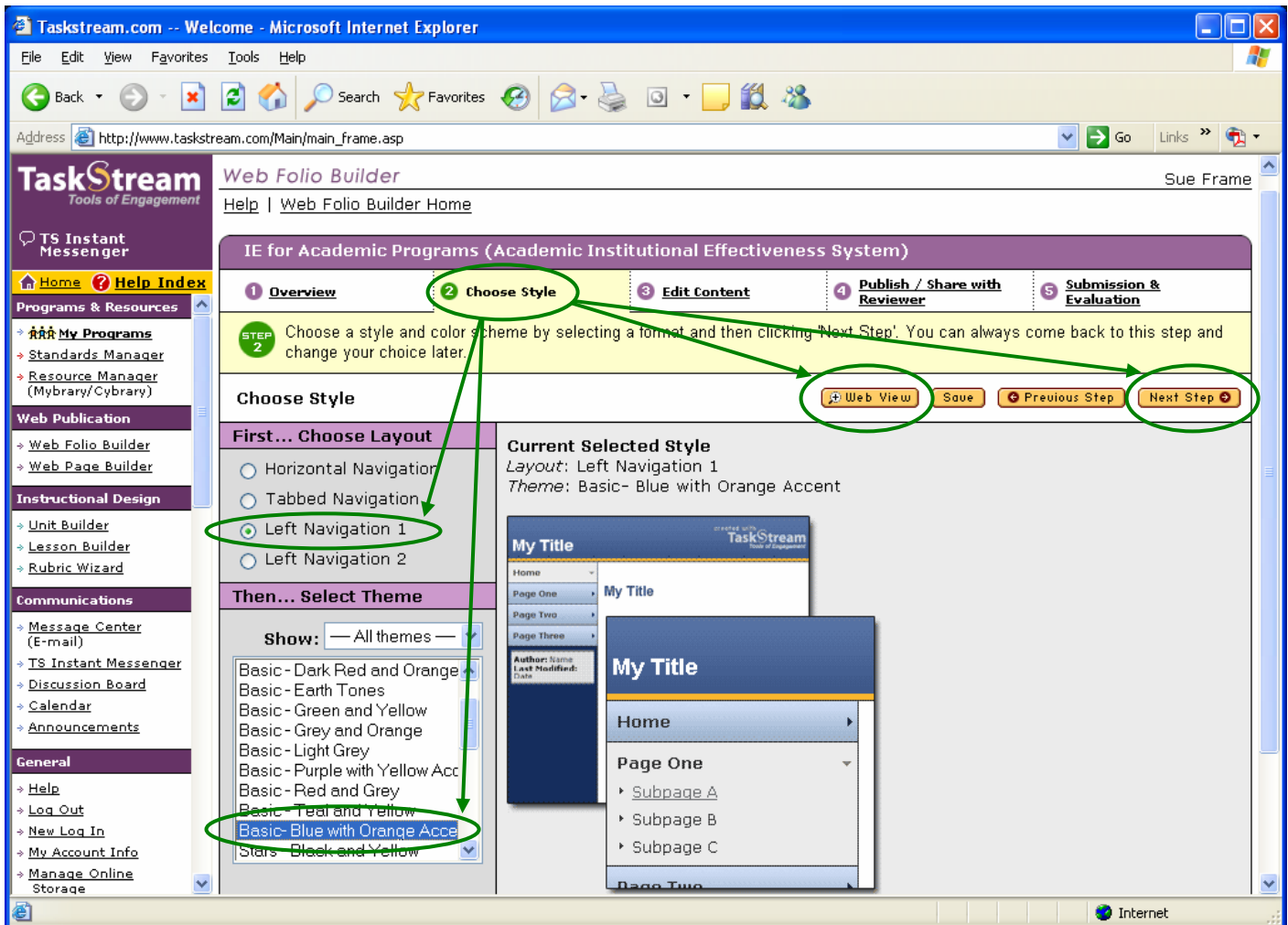
“Work on DRF” can be started, stopped, re-started, etc. All work is saved automatically in TaskStream, but a back-up copy of long submissions should be kept outside of the portfolio platform.

STEP 1

Throughout the program, an Author can follow the 5 numbered steps that are consistently displayed across the top of the program screen.

Alternatively, the Author can use the Next Step button to advance through the DRF.

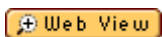
“Work on DRF” Step 2 – Choose Style



For Step 2, Choose Style of the DRF as:

Layout of **Left Navigation 1**

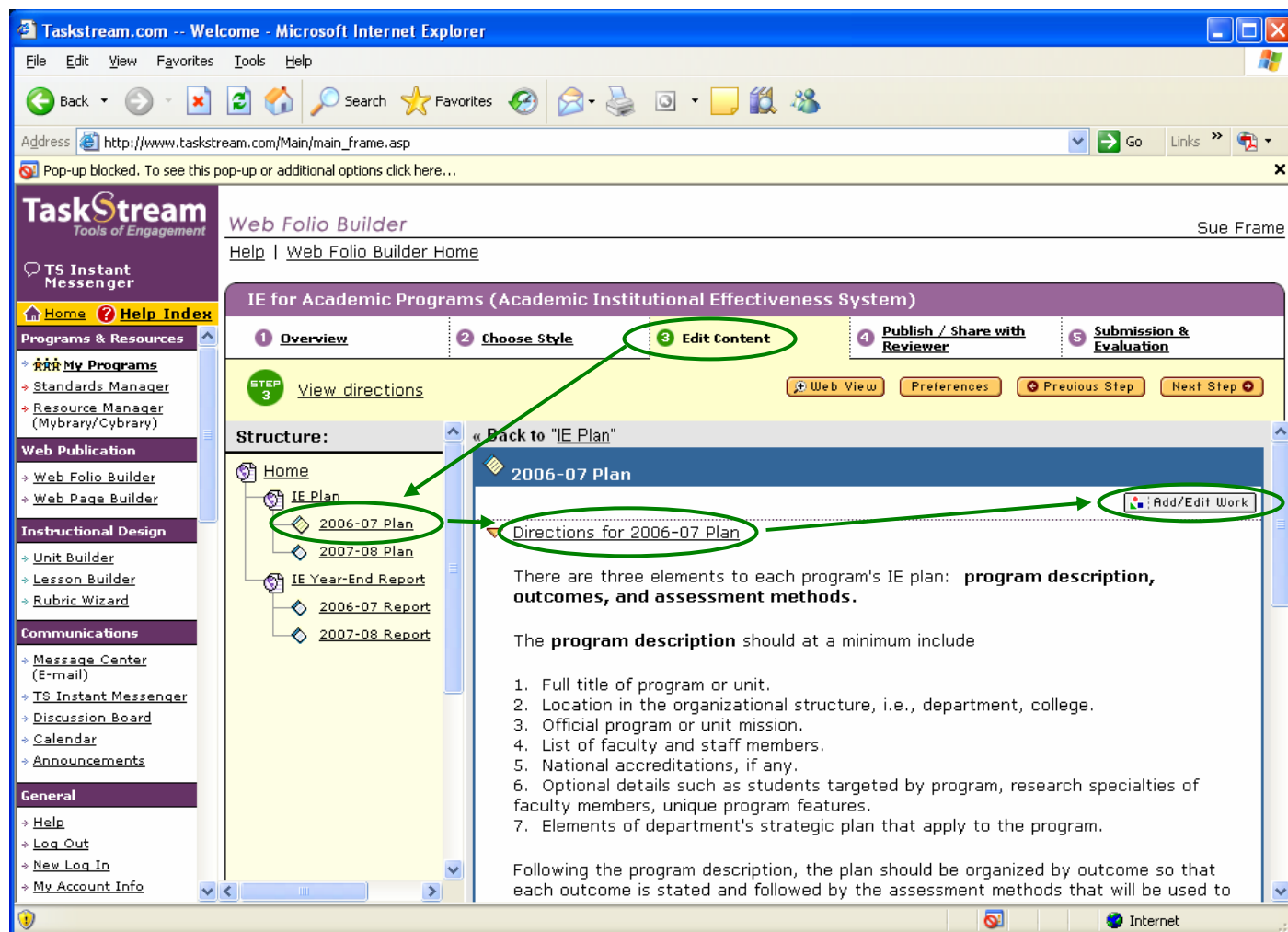
Theme of **Basic-Blue with Orange Accent**



At any time during the work on DRF, click on the Web View button to preview the program as it will appear in final form.

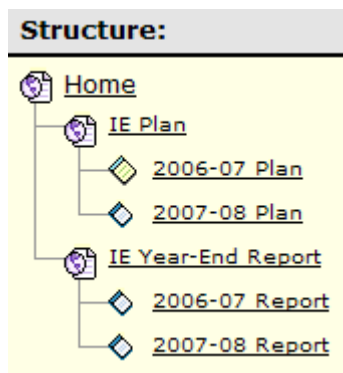
Advance to the next stage of work by clicking on the **Next Step** button.

“Work on DRF” Step 3 – Edit Content



In Step 3, the Author edits content (or uploads files) of the program. Work does not have to be completed in one sitting; this step can be returned to many times without repeating previous steps.

For the screen above, the Author would click on the **Add/Edit Work** button as often as needed.



Click on every line of the DRF Structure to access directions or explanation.

Authors' submission areas are the lines that have the icon of a writing tablet. In the Academic IE program, the submission areas are:

2006-07 Plan
2007-08 Plan
2006-07 Report
2007-08 Report

“Work on DRF” Step 3 – Edit Content

Taskstream.com -- Welcome - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.taskstream.com/Main/main_frame.asp

Pop-up blocked. To see this pop-up or additional options click here...

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Web Folio Builder Sue Frame

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IE for Academic Programs (Academic Institutional Effectiveness System)

1 Overview 2 Choose Style 3 Edit Content 4 Publish / Share with Reviewer 5 Submission & Evaluation

STEP 3 View directions Web View Preferences Previous Step Next Step

Structure:

- Home
- IE Plan
- 2006-07 Plan
- 2007-08 Plan
- IE Year-End Report
- 2006-07 Report
- 2007-08 Report

assess that outcome. A minimum of four distinct **outcomes** should be addressed. At least three outcomes should relate to learning and at least one outcome should be a strategic planning outcome.

Minimum requirements for **assessment methods** are as follows:

1. Each of the three learning outcomes should have at least one direct measure of knowledge or skills.
2. At least one learning outcome should have at least two measures of knowledge or skills. The second measure can be a direct or an indirect measure.
3. All administrative outcomes should be assessed using a measure directly related to the outcome.

More detail about these requirements with examples is contained in the attachment:
Overview of Academic IE Reporting for 2006-07.

File Attachments:

- 1. **Overview of Academic IE Reporting for 2006-07.doc**
- Evaluation Method

The screen above shows a file that the Author attached. (The process for editing text and adding attachments is detailed on pages 9-11 of this document.) Note that the tablet icon in the Structure of the screen above is highlighted.

“Work on DRF” Step 3 – Edit Content

The screenshot shows the Taskstream Web Folio Builder interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: http://www.taskstream.com/Main/main_frame.asp. The page title is "Taskstream.com -- Welcome - Microsoft Internet Explorer".

The interface includes a sidebar on the left with the Taskstream logo and navigation links: Home, Help, Index, Programs & Resources, Web Publication, Instructional Design, Communications, and General. The main content area is titled "Web Folio Builder" and "Sue Frame".

The main content area displays the "IE for Academic Programs (Academic Institutional Effectiveness System)" interface. It features a progress bar with five steps: 1. Overview, 2. Choose Style, 3. Edit Content (current step), 4. Publish / Share with Reviewer, and 5. Submission & Evaluation. Below the progress bar, there are buttons for "Web View", "Preferences", "Previous Step", and "Next Step".

The "Edit Content" step shows a "Structure" pane on the left with a tree view of the folio content. The "2006-07 Plan" is selected and highlighted with a green circle. The main content area displays the "File Attachments" section, which includes a link to "1. Overview of Academic IE Reporting for 2006-07.doc". Below this, the "Evaluation Method" section states: "A rubric is used in this evaluation. Name of rubric: Master Rubric to Evaluate Academic Assessment Plans. Final scoring method: Evaluator enters score between 0 and 30 points." A green arrow points from the "2006-07 Plan" in the Structure pane to the "View rubric" link in the Evaluation Method section.

The screen above displays a link to explanation of how the 2006-07 Plan will be evaluated.

Click on **[View rubric]** for a new window to open with the Master Rubric.

“Work on DRF” Step 3 – Edit Content

http://rubric.taskstream.com - TaskStream Rubric - Microsoft Internet Explorer

File Edit View Favorites Tools Help

created with TaskStream Tools of Engagement

Master Rubric to Evaluate Academic Assessment Plans

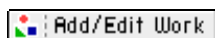
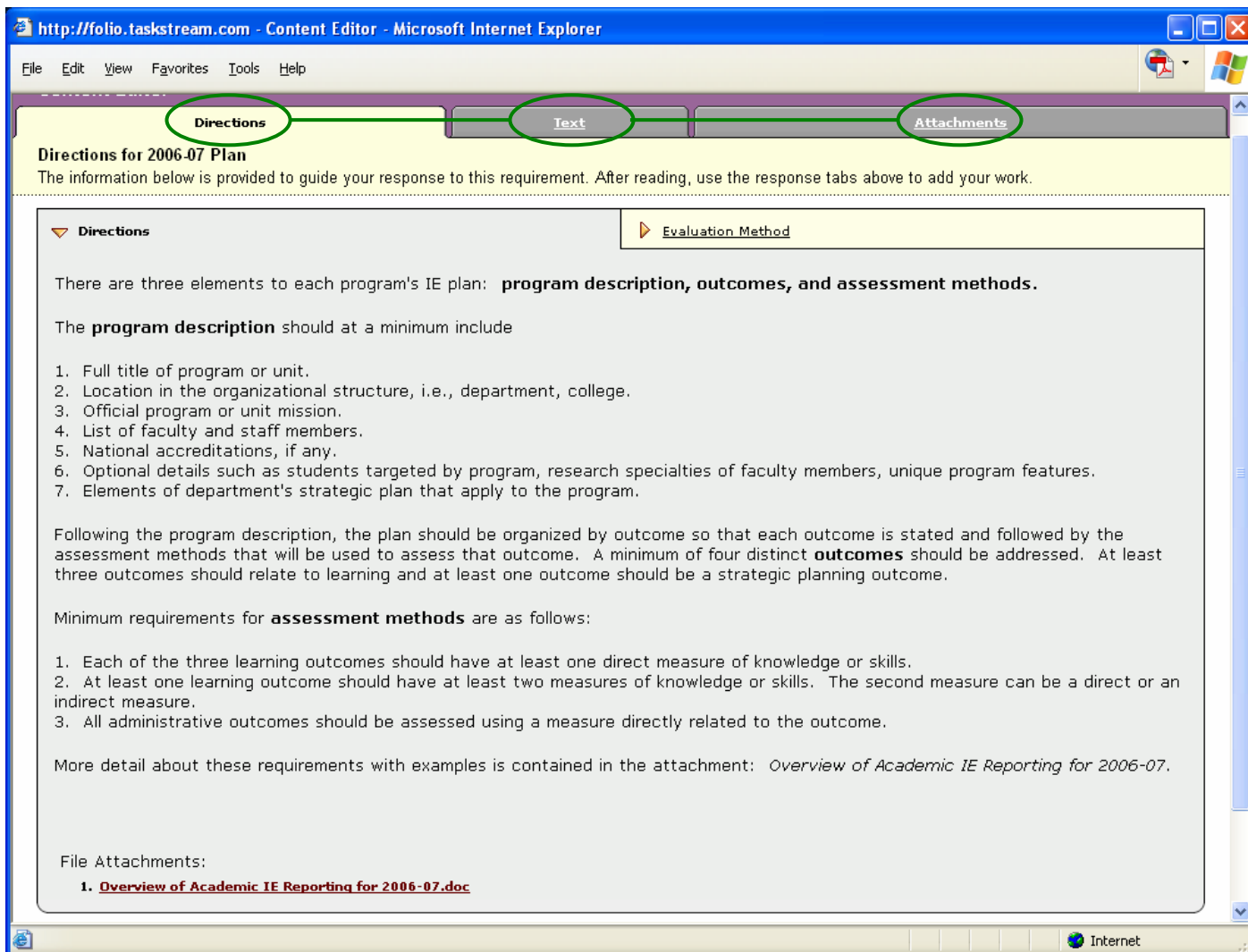
Levels:	A Model for Others	Acceptable	Needs some modification	Unacceptable	Score
Criteria:	value: 4	value: 3	value: 2	value: 1	
Program Description page is complete and provides a comprehensive view of the program's goals and other relevant details.	Program description has all required elements and does an especially effective job of describing its mission, its students, and other relevant aspects of the program.	Program has adequately supplied information about all required elements.	Program description is incomplete or unclear in some areas.	Program description is missing or lacks critical information in most areas.	
Program has at least three learning outcomes statements.	N/A	Program has at least three learning outcomes statements.	Program has two or fewer learning outcomes statements.	Program has one or no learning outcomes statements.	
Program has at least one administrative outcome statement taken from its strategic plan.	N/A	Program has at least one administrative outcome statement taken from its strategic plan.	Program has one administrative outcome statement but it does not appear that this statement came from the unit's strategic plan.	Program lacks an administrative outcome statement or administrative outcome statement refers to a process, not an outcome.	
Learning outcomes statements are clearly stated and focused.	Learning outcome statements are particularly well-expressed and focused so that they could serve as a model for programs in similar fields.	Outcome statements are clear and focused on a specific skill or knowledge.	One or two learning outcome statements are unclearly stated and/or refer to multiple areas of knowledge or skills.	All outcomes statements are unclear and/or focused on multiple outcomes.	
Learning outcome #1: Assessment methodology clearly stated and directly related to knowledge or skill described in outcome.	Assessment methodology employs at least two direct measures or one direct and one indirect measure of student learning. Both methodologies are clearly stated. Both assess knowledge or skills related to the stated outcome.	Assessment method(s) are clearly stated and directly measure knowledge or skills related to stated outcome.	Assessment method(s) measure knowledge or skills directly but are not described clearly or completely and/or do not relate to stated outcome.	Assessment method(s) do not assess knowledge or skills directly, are inappropriate to outcome, or are not clearly explained.	
Learning Outcome #2: Assessment methodology clearly stated and directly related to knowledge or skill described in outcome.	Assessment methodology employs at least two direct measures or one direct and one indirect measure of student learning. Both methodologies are clearly stated. Both assess knowledge or skills related to the stated outcome.	Assessment method(s) are clearly stated and directly measure knowledge or skills related to stated outcome.	Assessment method(s) measure knowledge or skills directly but are not described clearly or completely and/or do not relate to stated outcome.	Assessment method(s) do not assess knowledge or skills directly, are inappropriate to outcome, or are not clearly explained.	
Learning outcome #3: Assessment methodology clearly stated and directly related to knowledge or skill described in outcome.	Assessment methodology employs at least two direct measures or one direct and one indirect measure of student learning. Both methodologies are clearly stated. Both assess knowledge or skills related to the stated outcome.	Assessment method(s) are clearly stated and directly measure knowledge or skills related to stated outcome.	Assessment method(s) measure knowledge or skills directly but are not described clearly or completely and/or do not relate to stated outcome.	Assessment method(s) do not assess knowledge or skills directly, are inappropriate to outcome, or are not clearly explained.	
Administrative Outcome #1:	Assessment methodology employs at least two distinct measures directly related to	Each assessment method is clearly stated and directly	Assessment methods described are unclear or unrelated to	Assessment methods are missing, unclear, or do not	

Done Internet

Evaluation rubrics are typically shared with Authors, although placement may vary. In the IE programs, rubrics are linked on the pages where submissions are made (either text edited on screen or files uploaded as attachments).

Other programs may embed rubrics in a Resource folio or an instruction set designed as a Web Page. Rubrics can be created “from scratch” or they can be adapted from existing, published rubrics residing in TaskStream.

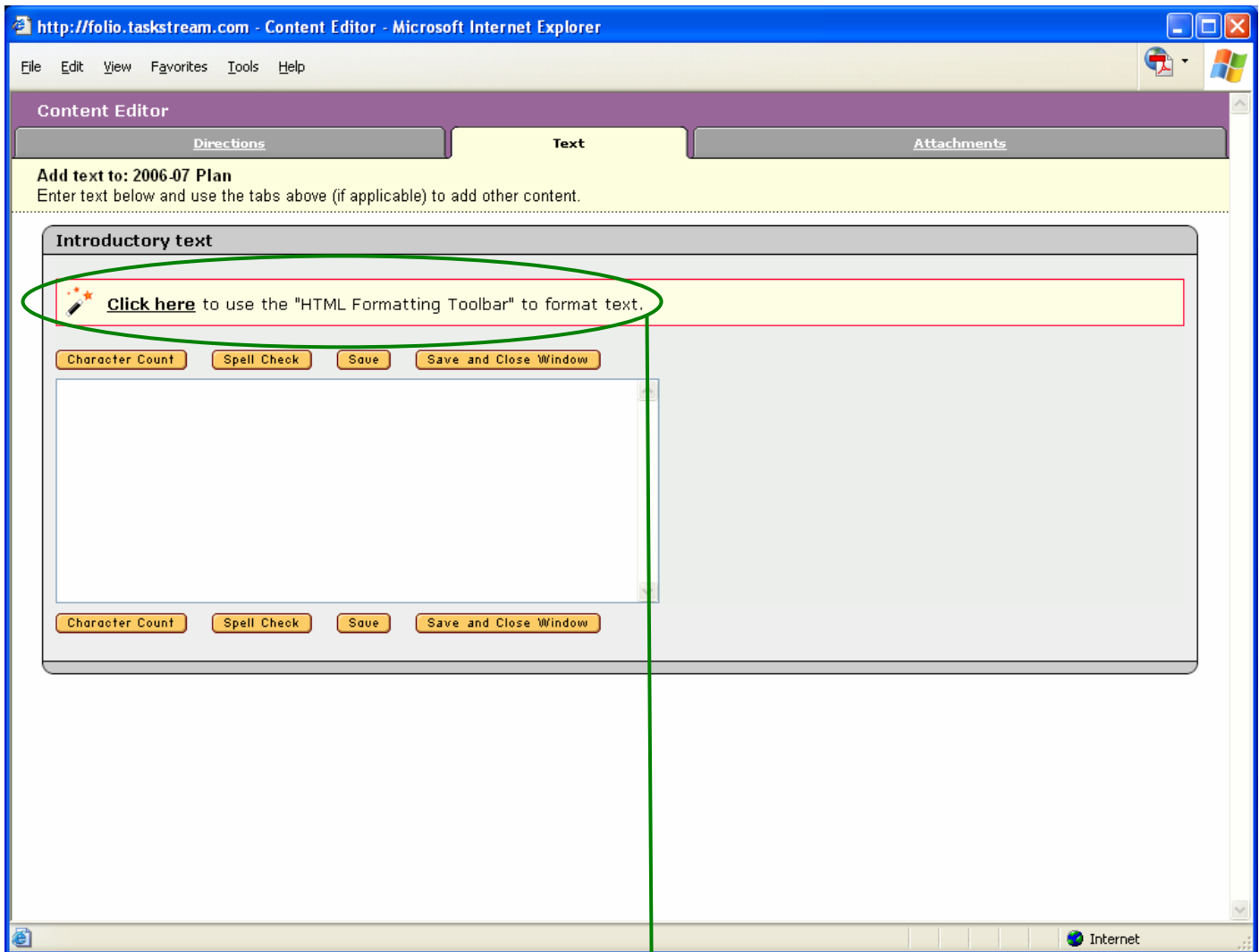
“Work on DRF” Step 3 – Edit Content



Click on **Add/Edit Work** to call up the work area for editing submissions to the DRF. Such a work area is shown in the above screen with 3 tabs: Directions, Text, Attachments. These are the only choices for this submission point (2006-07 Plan).

In another program, additional choices might be available: Image, Standards, Video, Web Links. These options would appear as tabs across the top.

“Work on DRF” Step 3 – Edit Content



A good first step to using the Text box for editing:

Click on **Click here**

This action will create a toolbar in the text editor for
boldface, *italic*, underscoring, etc.

“Work on DRF” Step 3 – Edit Content

http://folio.taskstream.com - Content Editor - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Content Editor

Directions Text **Attachments**

Add file attachments to: 2006-07 Plan
Click the 'Browse' button to select a file that you want to attach, then click 'Add File'. When done, add more resources or close window.

New File My Previously Uploaded Files My TaskStream Work

Attachments

1. Name file

2. Select file

3. Describe file (optional)

4. Standards (optional)

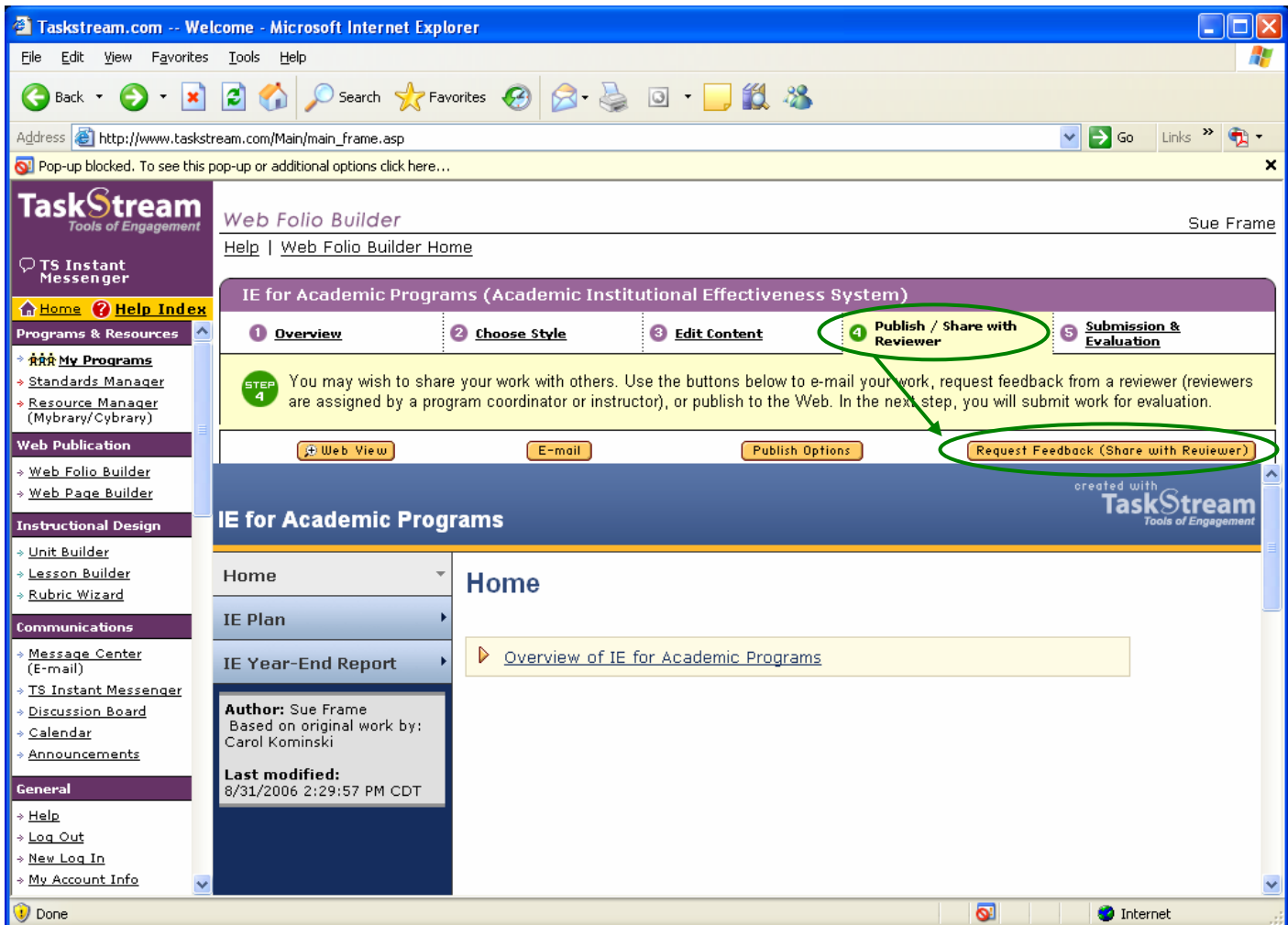
☒ Do not show standards that this artifact addresses

☐ Attach standards that this artifact addresses
(You will select standards after clicking 'Add File')

Final actions for attachments

[Spell Check works only for the text typed in TaskStream, not for the attachments.]

“Work on DRF” Step 4 – Publish / Share with Reviewer



In Step 4, the Author can share work with Reviewers. The purpose may be to simply allow reading of the plan or it may be to generate a preliminary assessment by a reviewer. The Author has control of who sees the DRF at this stage of the process (detailed on page 14 of this document).

Request Feedback (Share with Reviewer)

Click on **Request Feedback** for dialog screens about sharing the DRF with one or more reviewers. Note that the review process does not guarantee that feedback will be provided; commenting is optional by both Author and Reviewer.

E-mail

Publish Options

Other publishing options are available but they are not recommended for IE plans while under development.

“Work on DRF” Step 4 – Publish / Share with Reviewer

Process for sharing DRF work with a Reviewer

Request Feedback (Share with Reviewer)

http://folio.taskstream.com - TaskStream Entry Pop-up - Microsoft Internet Explorer

Request Feedback/Share with Reviewer Close Window

Where would you like feedback?

☐ Entire folio

☒ Specific areas of the folio
(you will be able to select areas on the next screen)

Cancel Continue

Authors have control over what to share, when. In other programs, Authors might be asked to share the entire folio if the portfolio has many sub-sections. Thus, the Author is spared the tedium of making sure that every evidence is submitted for Reviewers.

http://folio.taskstream.com - TaskStream Entry Pop-up - Microsoft Internet Explorer

Request Feedback/Share with Reviewer Close Window

Select the area(s) that you would like feedback on. In the next step you will select who to request feedback from.

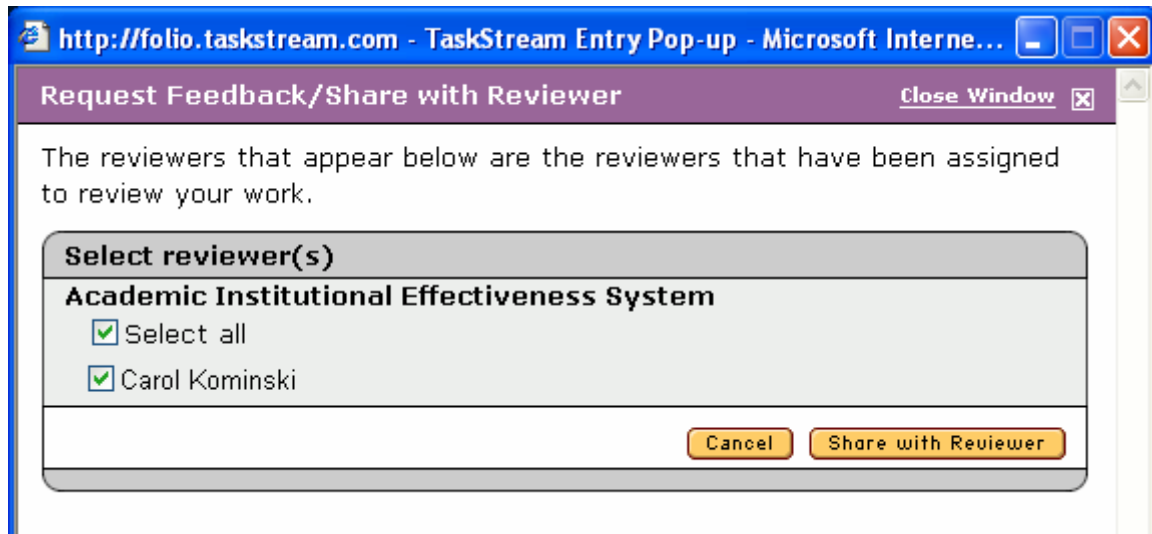
Select items you would like feedback on (check all that apply)

Cancel Continue

- ☐ Home
 - ☐ IE Plan
 - ☒ 2006-07 Plan
 - ☐ 2007-08 Plan
 - ☐ IE Year-End Report
 - ☐ 2006-07 Report
 - ☐ 2007-08 Report

Cancel Continue

If “Specific areas” were checked, the Author would then use checkboxes to determine which areas would be visible to Reviewers.



For the IE programs, Authors should checkmark "Select all" reviewers.

“Work on DRF” Step 5 – Submission & Evaluation

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Web Folio Builder
Sue Frame

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IE for Academic Programs (Academic Institutional Effectiveness System)

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STEP 5 Submit completed work for evaluation by clicking the 'Submit' or 'Re-submit' button (this button only appears if work has been started). All results will be posted under "Evaluation Outcome" column.

Evaluation Summary [Print View]
0 out of 4 evaluations complete

Description	Status	Submit Work	Evaluation outcome
IE Plan			
2006-07 Plan	In Progress	Submit	
2007-08 Plan			
IE Year-End Report			
2006-07 Report			
2007-08 Report			

This **Evaluation Summary** page allows the Author to track the number of evaluations that have been completed. Programs may assign 2, 3, 4, or more evaluators for any part of a portfolio.

Authors control when to submit work for evaluation. When works are still **In Progress**, evaluators see only the hourglass icon (displayed in screen above). When the Author clicks **Submit**, the work is then visible to evaluators.

“Work on DRF” Step 5 – Submission & Evaluation

The screenshot shows a web browser window with the address bar displaying "http://folio.taskstream.com - TaskStream Entry Pop-up - Microsoft Inter...". The main content area is titled "Submit for Evaluation" and includes a "Close Window" button. A yellow warning box at the top states: "Submitting for evaluation will 'lock' your work so that no further editing will be possible." Below this, a message reads: "You are submitting 2006-07 Plan (of IE Plan) for the program 'Academic Institutional Effectiveness System'." There are two sets of buttons: "Cancel", "Spell Check", and "Submit for Evaluation". The first set is above a text input field labeled "Add comment for evaluator (optional)". The second set is below the text input field. The browser's status bar at the bottom shows "Done" and "Internet".

Submit for Evaluation [Close Window](#)

Submitting for evaluation will "lock" your work so that no further editing will be possible.

You are submitting 2006-07 Plan (of IE Plan) for the program "Academic Institutional Effectiveness System".

[Cancel](#) [Spell Check](#) [Submit for Evaluation](#)

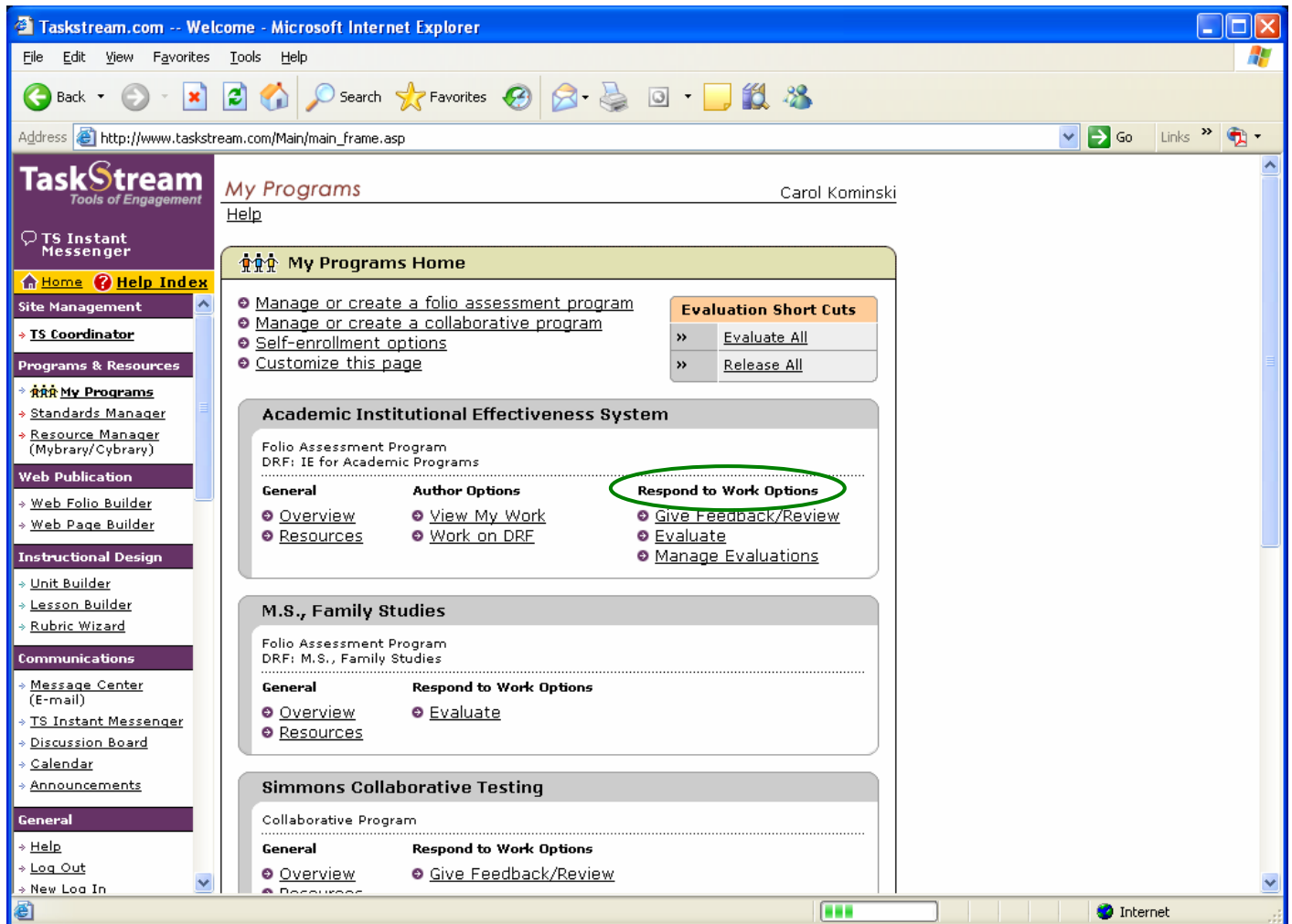
Add comment for evaluator (optional)

[Cancel](#) [Spell Check](#) [Submit for Evaluation](#)

Done Internet

Comments are not required by Authors upon submission for evaluation. When they are entered in this dialog box, they become part of the permanent record of the IE plan.

Entering the Evaluation Area in the Academic IE System



Assuming a program was set up to allow reviewing, the options on the My Program page might include Give Feedback / Review and Evaluate. Individuals may have Reviewing rights or Evaluating rights or both. The ability to Manage Evaluations is typically limited to the person who created the DRF.

Evaluators should be aware that if they open a submission to evaluate it, they "lock it" and the Author cannot access the work until the evaluation is released. The locking also affects other evaluators: no one else can evaluate the work until the first evaluator finishes scoring. Then, the work is automatically released for another evaluator's access but still keeps the work locked from the Author.

Using the Evaluation Grid in the Academic IE System

The screenshot shows the TaskStream Academic Institutional Effectiveness System interface. The top navigation bar includes tabs for Overview, Program Resources, My Work, and Respond to Work. The main content area displays the Evaluation Grid for IE for Academic Programs. The grid shows two plans: 2006-07 Plan and 2007-08 Plan. The 2006-07 Plan has a score of 24.00 and 1 of 2 evaluations completed. The 2007-08 Plan has 0 of 2 evaluations completed. A yellow 'Evaluate' button is visible for the 2007-08 Plan. Green arrows point to the evaluation status for each plan.

In the Evaluation Grid, TaskStream displays scores as they are recorded (through online evaluation) and also keeps track of how many evaluations have been completed.

The left arrow indicates that 1 of 2 evaluations is completed for the 2006-07 Plan.

The right arrow indicates that 0 of 2 evaluations has been done for the 2007-08 Plan.

The yellow button "Evaluate" is available if the user (in this case, Carol Kominski) is eligible to serve as an evaluator on this program.

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Overview Program Resources My Work Respond to Work

Respond to Work Home » Search Criteria » Evaluation Grid

IE for Academic Programs Print View/Export Table Release Selected Evaluations

Work In Progress Submitted Needs Revision Resubmitted Evaluation In Progress More Evaluations Required

Ready for Reconciliation Reconciliation In Progress Reconciled/Evaluated Evaluation Released

Select what to show...

show full descriptors

show release features

Release Author

Sue Frame

Release Author

Brenda Grossie

Release Author

Carol Kominski

IE Plan

2006-07 Plan Select all for release

0 of 2 evals done

Score=24.00 [View/edit]

1 of 2 evals done

work not started

2007-08 Plan Select all for release

work not started

[History]

0 of 2 evals done

Submitter: 8/31/06

work not started

Release All

Sue Frame

Release All

Brenda Grossie

Release All

Carol Kominski

The hour glass symbol indicates that the Author is working on the 2006-07 Plan.

Work has been submitted and there is a History that can be read.

Date	Action	Comments
8/31/2006 10:21 am (CDT)	Submitted	
8/31/2006 10:48 am (CDT)	Needs Revision	
8/31/2006 11:02 am (CDT)	Resubmitted	
8/31/2006 3:06 pm (CDT)	Needs Revision	<p>You need to be more explicit regarding assessment methodology. For example, for several outcomes you mention that you are using a rubric. It would be helpful for you to spell out the criteria to be used in the rubric, to indicate what is the range of ratings, etc.</p> <p>You also need to tie your administrative outcome to your strategic plan.</p>

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STEP 5 Submit completed work for evaluation by clicking the 'Submit' or 'Re-submit' button (this button only appears if work has been started). All results will be posted under "Evaluation Outcome" column.

Evaluation Summary [Print View]
0 out of 4 evaluations complete

Description	Status	Submit Work	Evaluation outcome
IE Plan			
2006-07 Plan	Needs Revision [History/Comments]	Re-submit	
2007-08 Plan	Submitted [History/Comments]	Submitted: 8/31/2006 [Cancel]	
IE Year-End Report			
2006-07 Report			
2007-08 Report			

Once submitted, the Author's work is "locked" and cannot be edited until released by the evaluator.

The Author's 2006-07 Plan has been deemed to need revision. The Author is alerted by the red ink of [History/Comments] and the button to click to **Re-submit** the revised document.