

Quick-Start Guide Folios & Webpages

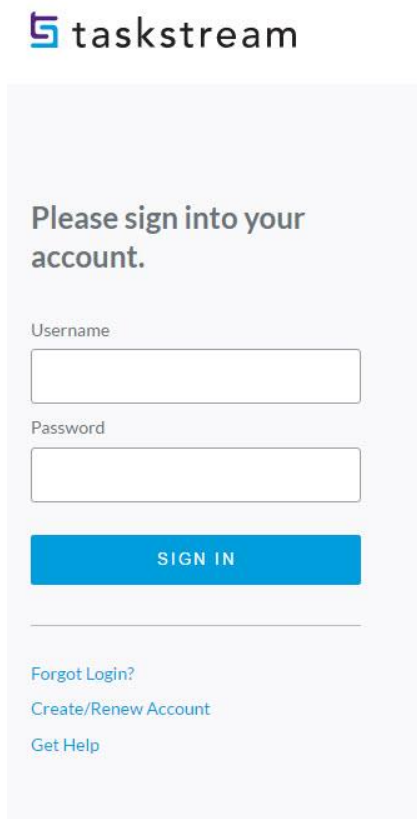


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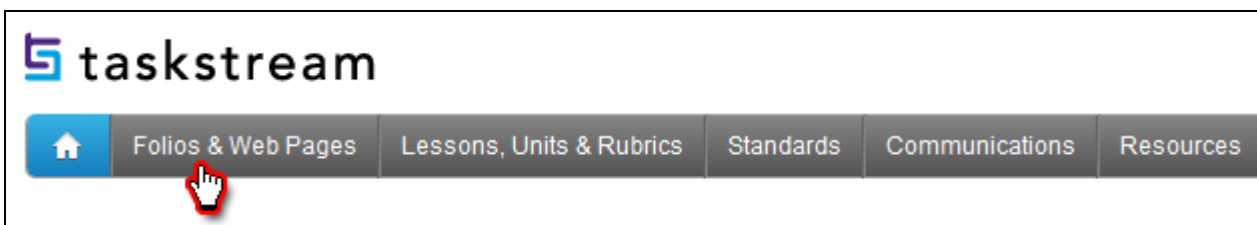
Access the Folios & Web Pages Area

Go to <https://login.taskstream.com> and log into Taskstream using your assigned username and password.



The image shows the Taskstream login page. At the top, there is the Taskstream logo. Below it, the text "Please sign into your account." is displayed. There are two input fields: "Username" and "Password". Below the password field is a blue "SIGN IN" button. At the bottom of the form, there are three links: "Forgot Login?", "Create/Renew Account", and "Get Help".

Click **Folio & Web Pages** from the top navigation bar.



Create a New Folio or Web Page

1. Enter a name in the **New Folio or Web Page Name** field.
2. (optional) Select the folder you would like to add your folio to.
3. Click the **Continue** button.

New Folio/Web Page Title:	<input type="text" value="My Class Portfolio"/>	<small>Maximum characters allowed: 100</small>
Add to Folder:	<input type="text" value="- Do Not Add to a Folder -"/>	<input type="button" value="Create New"/>

4. Select the **Template Category**.

Select Template	
Folios & Web Pages » Select Template	
Directions: Select a template to provide a starting point for your folio. You can always make edits to the structure from the "Edit Content" tab.	
New Folio/Web Page Name:	My Class Portfolio
Select Template Category:	<input type="radio"/> General Purpose Templates (created by Taskstream) <input type="radio"/> Custom Templates (designed by your learning community)
<input type="button" value="Cancel"/> <input type="button" value="Continue"/>	

5. Select the specific template you wish to use as a starting template.

6. Click the **Continue** button.

New Folio/Web Page Name:	My Class Portfolio
Select Template Category:	<input checked="" type="radio"/> General Purpose Templates (created by Taskstream) <input type="radio"/> Custom Templates (designed by your learning community)
Select General Purpose Template:	<input type="text" value="Class Portfolio"/> <input type="button" value="Preview"/>
<input type="button" value="Cancel"/> <input type="button" value="Continue"/>	

Customize the Appearance of your Folio or Web Page

1. Scroll up or down in the theme browsing window to see the themes that are available to you. *(options may vary depending on your organization's settings)*

All Themes

Browse the Taskstream Themes!

Architect

Candy

Label

Reporter

Simple

Tailored

Classic - Basic

Classic - Decorative

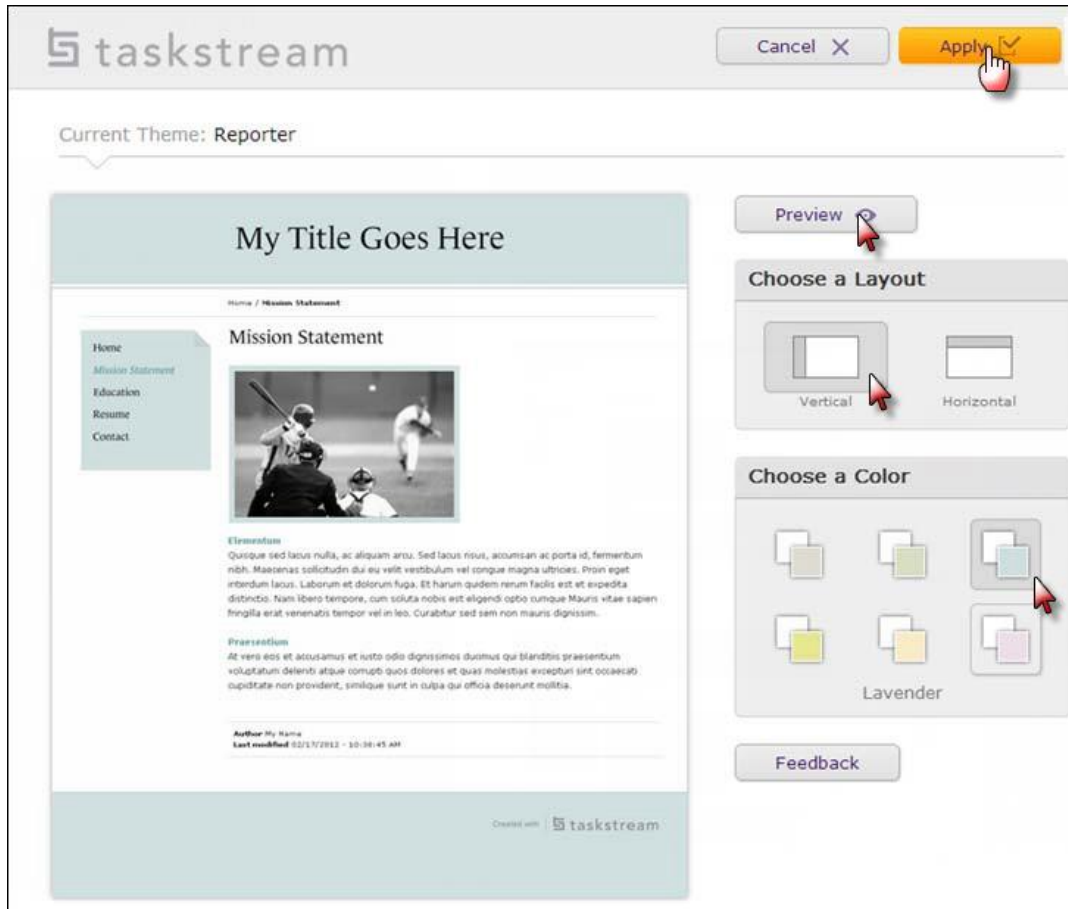
Classic - Elegant

Classic - Funky

Classic - Leaves

Classic - Notebook

2. Clicking on a theme will bring you to the customization page.



3. Choose a layout and a color for your folio.
4. Click the **Preview** button to see how your folio will look with this theme
5. After looking at the preview, close the pop-up window and either click **Apply** to choose the selected theme or click **Cancel** to return to the selection screen.
6. Once you are happy with your theme selections, it is time to customize the content of your portfolio.

Customize Portfolio Content

Your portfolio workspace is divided into two frames. In the left frame you can edit the page structure of your portfolio by using buttons at the top to **add**, **delete**, **move** and **copy** pages and sections.

In the right frame, you can add work to your folio or web page.

To add work, select a page or section from the left frame.

The screenshot displays the 'My Class Portfolio' workspace. At the top, it shows the template name 'Class Portfolio' and a 'Web View' button. Below this is a 'Select Page/Area to Edit:' panel with four buttons: 'Add Area', 'Delete Area', 'Move Area', and 'Copy Area'. A red circle highlights the 'Add Area' button. The main workspace is divided into two frames. The left frame shows a sidebar with 'My Class Portfolio' and four student entries: 'Student A', 'Student B', 'Student C', and 'Student D'. The right frame shows the 'Text and Image Section' content area, which contains the text: 'This portfolio highlights examples of exemplary work completed by students in "Your Name's" Class.' Below this is a section titled 'Additional Content Sections' with the text: 'No content sections. Click "Section" button to create a new content section on this page.' At the bottom of the workspace is an 'Add:' toolbar with buttons for 'Text & Image', 'Slideshow', 'Standards', 'Main Text', 'Attachments', 'Videos', 'Links', 'Reports', 'Sample Work', 'Embed Media', and 'Section'.

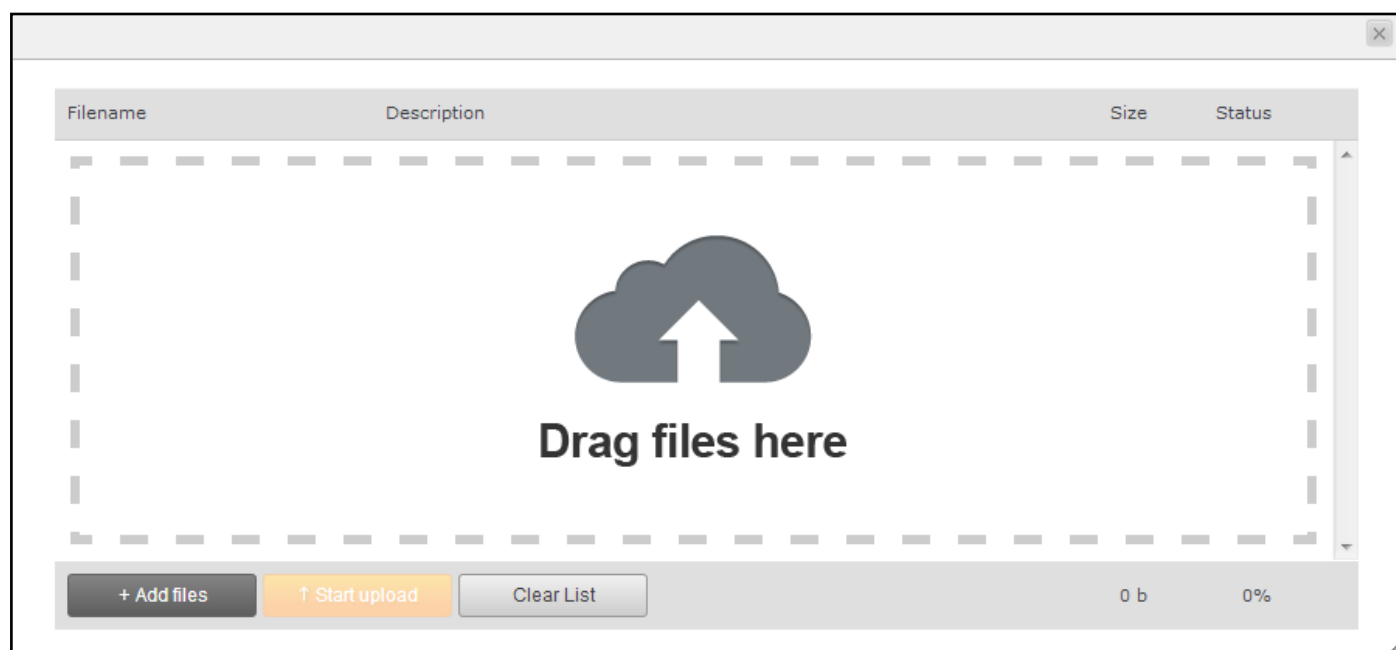
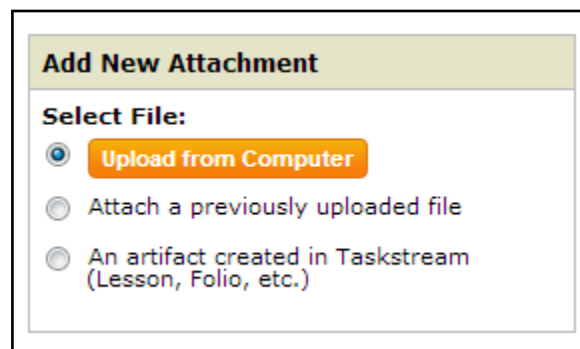
When the workspace area for that page opens, click the button corresponding to the type of content you wish to add from the bottom **Add** toolbar. You can choose to add **Text & Image**, **Slideshow**, **Main Text**, **Attachments**, **Standards**, **Videos**, **Links**, and/or **Embed Media**.

Adding Attachments

Step 1: Select the type of file you wish to add.

If you choose to add a file saved on your computer, select the *Upload from Computer* radio-button to find the file you want to attach.

A pop-up window will appear. You may drag your files into the indicated space, or click + Add Files.



Once you have chosen your file, click Start Upload. You may also add an optional description. When the file has uploaded, click the X to close the window.

If you choose to add a previously uploaded file, select the *Attach a previously uploaded file* radio-button, selecting the category of work and the specific work product where the file is attached.

If you choose to add work that you created in Taskstream, select the *An artifact created in Taskstream* radio-button. You will then be able to select the type of work to be added (web page, web folio, etc.), and the specific work you would like to attach.

Step 2: (Optional) Name the file.


Step 3: (Optional) Add a description of the file, if applicable.

Step 4: (Optional) Select the checkbox if you would like to specify standards that this attachment addresses.

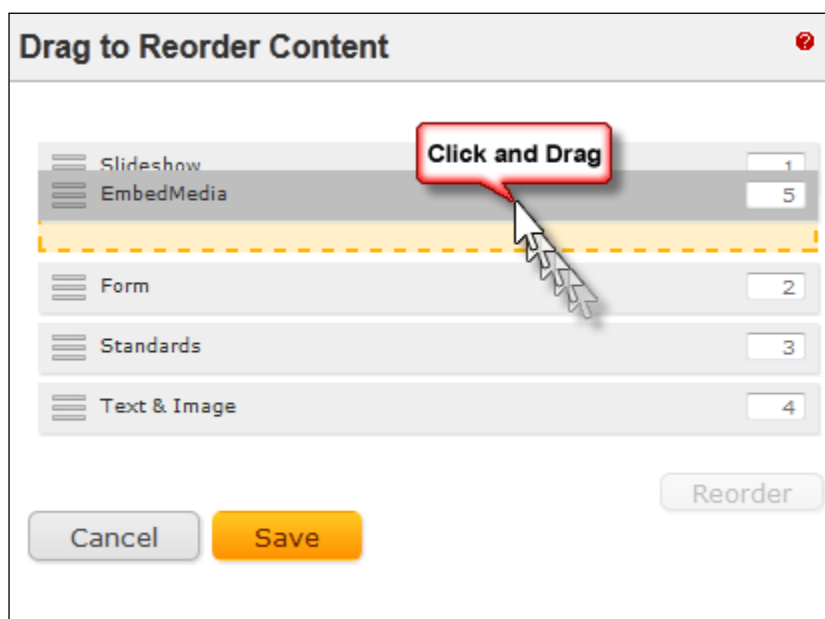
Step 5: Click the **Add File** button when finished.

Repeat steps 1-5 as necessary, then click **Save and Return**.

Change the Order of Your Content

 Once you have added at least two (2) content sections to any area, a **Reorder Content** button is displayed at the top of the right work panel. Use this button to reorganize the various types of content you have added.

1. Click **Reorder Content** in the right work panel.
2. In the *Drag to Reorder Content* pop-up box you will see the various content types that you have already added to the selected area. There are two approaches to Reorder Content:



Drag and drop content sections

- Select (click with mouse or, if using a touch-screen, tap) the row of the content type that you want to move.
- Drag that row through the list to the preferred new position. As you drag, an orange placeholder indicates the potential new positions in which the selected item might land.
- Release the “drag.” The row comes to rest in the last position held by the placeholder.
- Click the **Save** button.

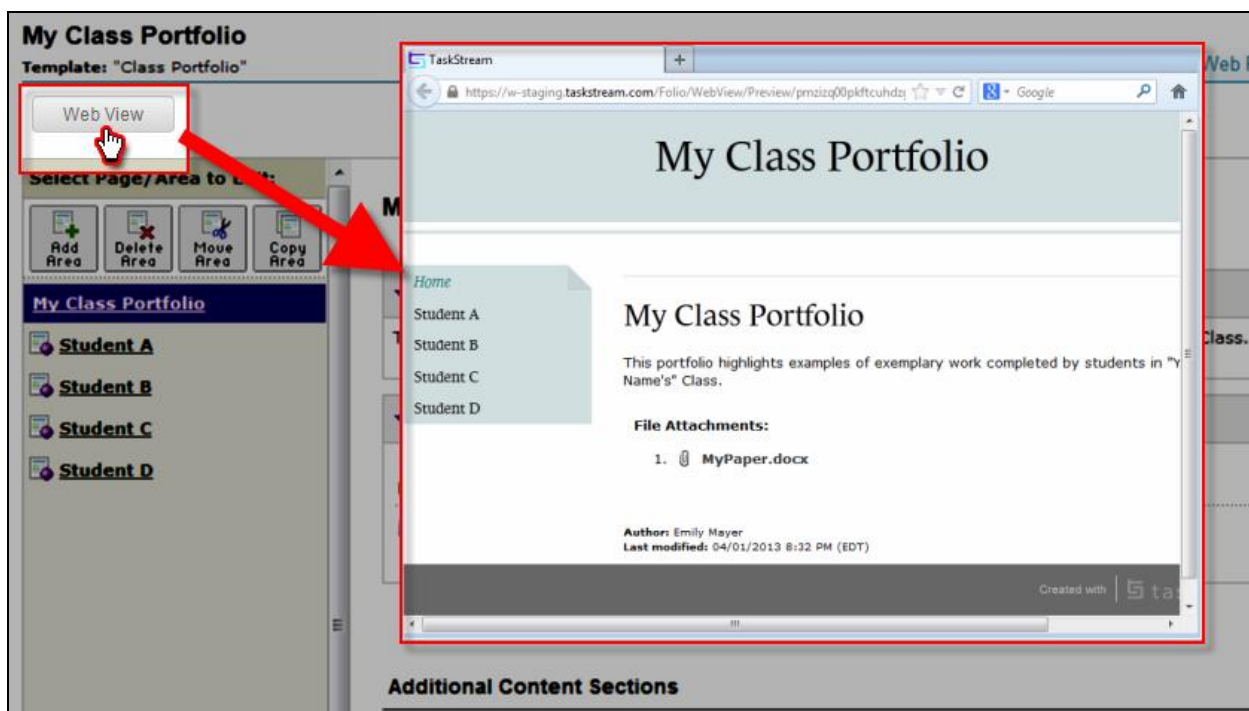
Manually re-number content type sections

- Type new position numbers in the text boxes that display to the far right of every content type on this list.
- (Optional) Preview your new display order by clicking the **Reorder** button that appears below the column of text boxes. The new order is applied immediately: any numbering conflicts are automatically resolved, and rows automatically shift position according to their new numbers.

- If your manual entry includes duplicate numbers, for example if two rows are marked as “3”, the reorder function will automatically resolve these conflicts.
- Click the **Save** button.

Previewing Your Folio or Webpage

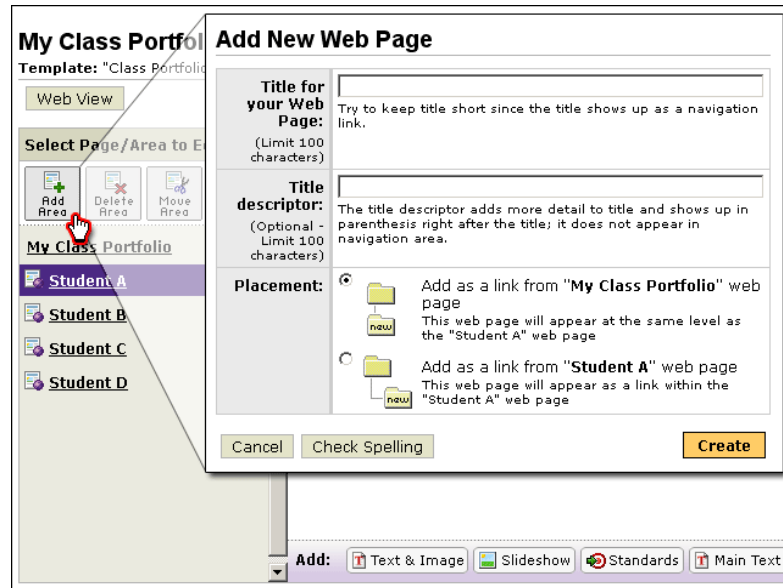
You can preview your folio or web page at any point of the creation and editing process by clicking the **Web View** button. The web view will open in a new window, giving you an idea of how your folio or web page will appear once emailed, published to the web, or saved offline.



Altering the Structure of the Folio or Web Page

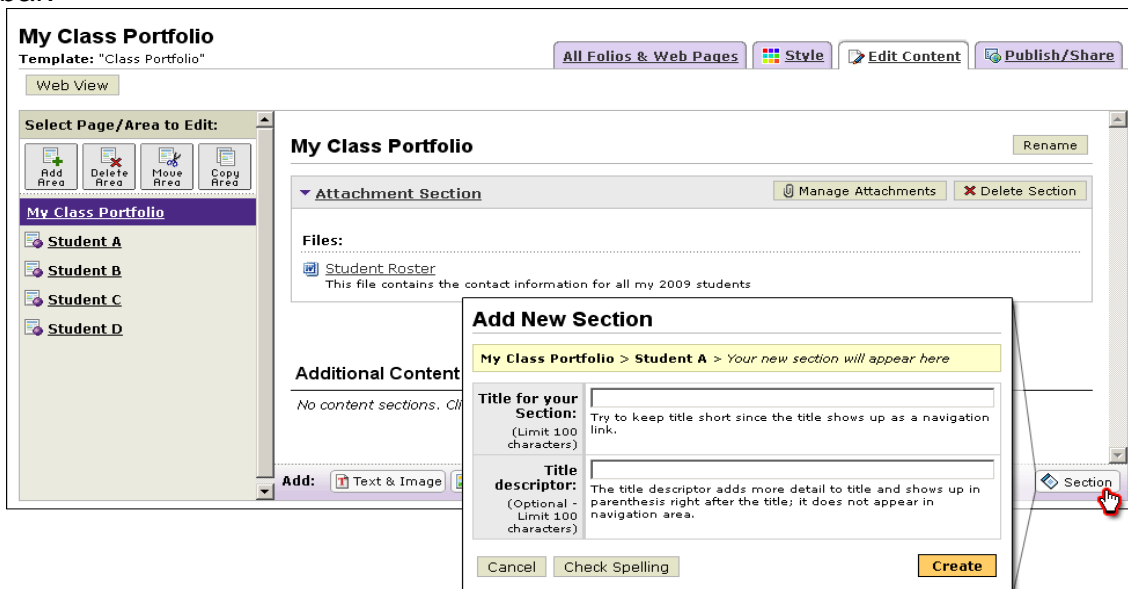
Adding a New Page

To add a new page to your folio or web page, select an existing main page or a sub-page by clicking the title from the left frame, and then click the **Add Area** button from the top of the left frame.

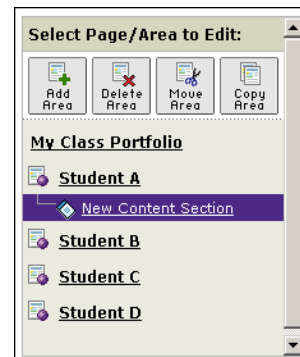


Adding a New Content Section

To add a new content section to your folio or web page, click the **Section** button from the bottom **Add** toolbar.

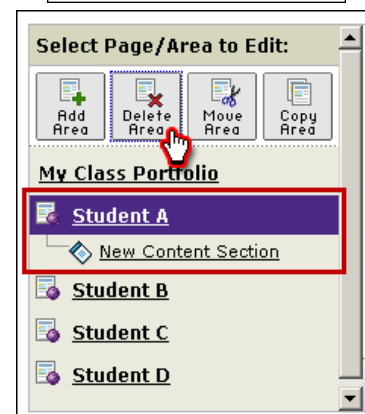


You should now see the new section appear in the portfolio structure in the left frame, designated with a diamond-like icon.



Deleting a Page or Section

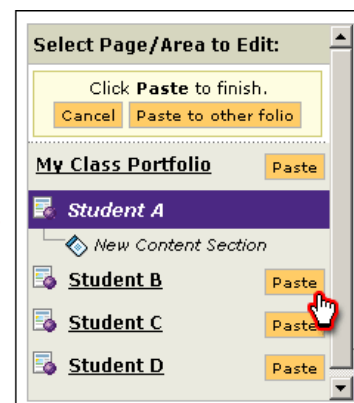
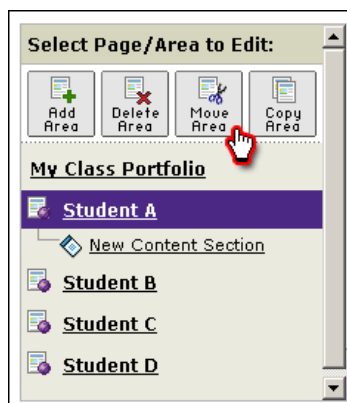
To delete a page or section of your web folio, click to select the item from the left frame, and then click the **Delete Area** button from the top of the left frame. This will delete the page or section, *all content it contains, and any linked pages or sections.*



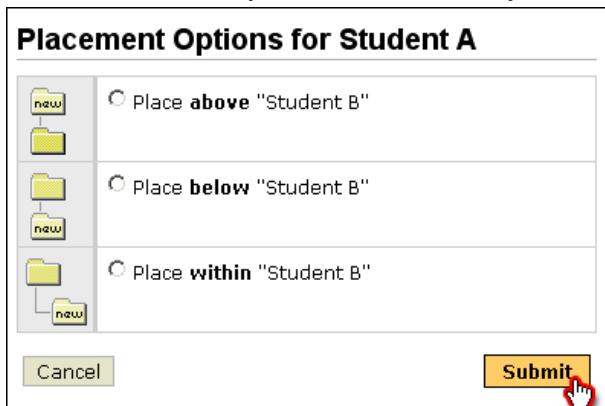
Moving a Page or Section

To move a page or section, click to select the item that you want to move. Then click the **Move Area** button from the top of the left frame.

A **Cancel** button and a **Paste to other folio** button will appear at the top of the left frame, and a list of the pages and sections within the current portfolio will be displayed with **Paste** buttons appearing next to each one.

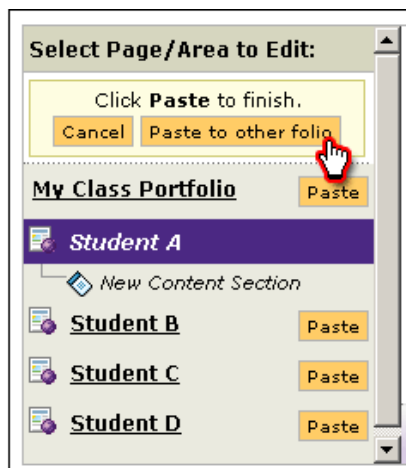
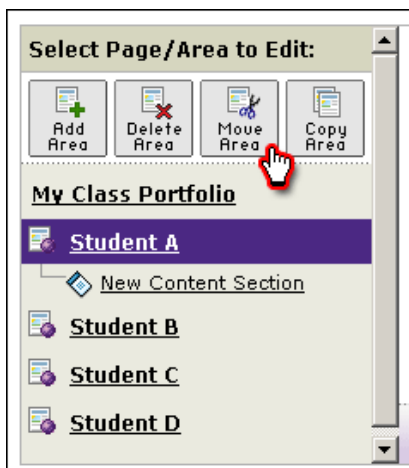


To paste the page or section within the current folio, click the **Paste** button next to the page or section to which you want to move your selection.

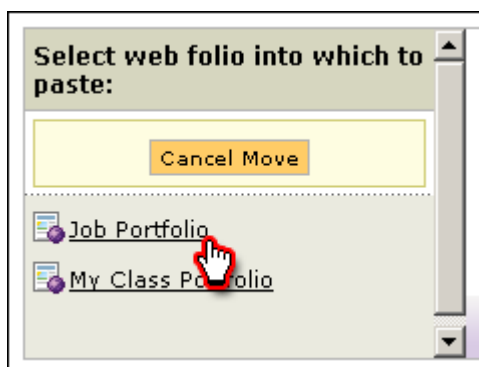


The Placement Options window will appear, displaying the various location options for pasting the selected item.

Select the location, and click the **Submit** button. The item will be moved to the location that you selected.



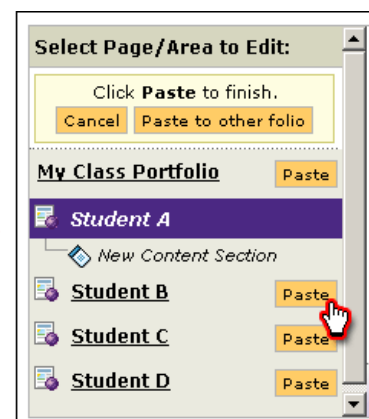
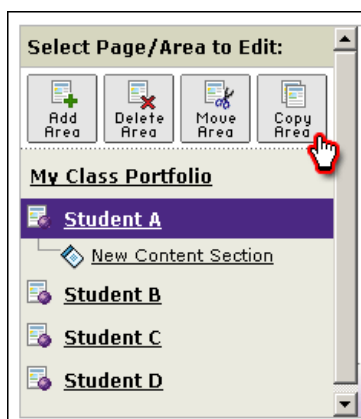
To paste the page or section to another existing portfolio, click the **Paste to other folio** button.



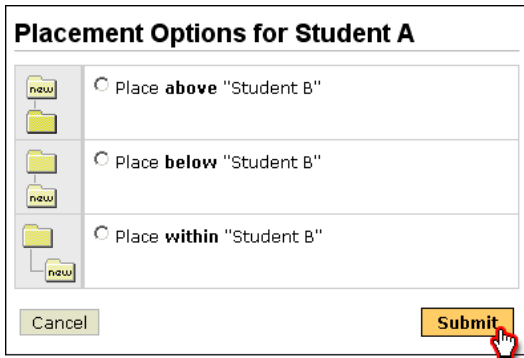
A list of all your existing portfolios will appear. Select the one to which you want to move your selection, and paste your selection as described above.

Copying a Page or Section

To copy a page or section, click to select the item that you want to copy, and then click the **Copy Area** button at the top of the left frame. Once again, a **Cancel** button and a **Paste to other folio** button will appear at the top of the left frame, and a list of the pages and sections within the current portfolio will be displayed with **Paste** buttons appearing next to each one.

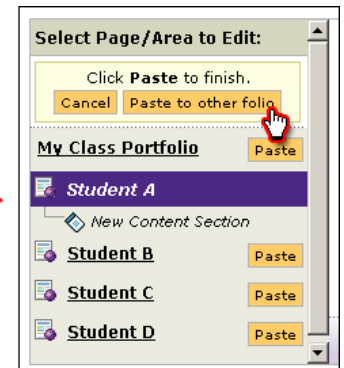
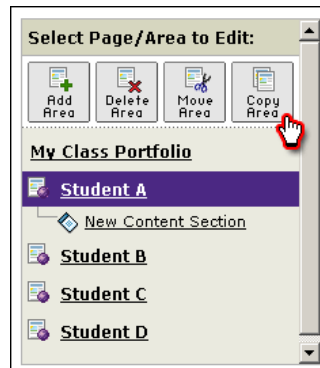


To paste the page or section within the current folio, click the **Paste** button next to the page or section to which you want to move your selection.



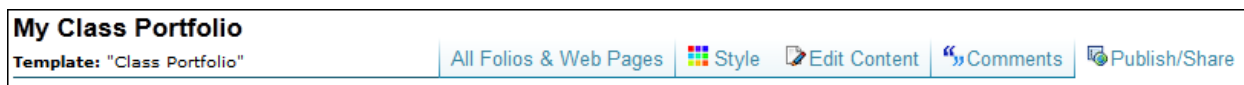
The Placement Options window will appear, displaying the various location options for pasting the selected item. Select the location, and click the **Submit** button. The item will be moved to the location that you selected.

To paste the page or section to another existing portfolio, click the **Paste to other folio** button. A list of all your existing portfolios will appear. Select the one to which you want to move your selection, and paste your selection as described above.



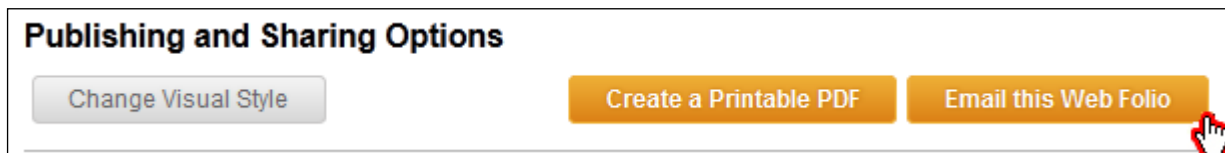
Sharing Your Folio or Webpage

Go to the Publish/Share tab.



Email your Folio or Webpage

Click **Email this Web Folio**.

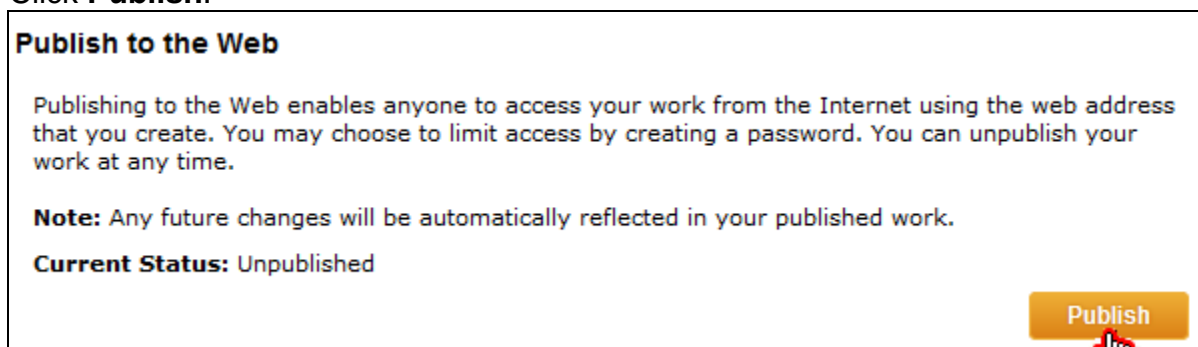


Click the Select Recipients button to choose the Taskstream user(s) to whom you would like to email your portfolio.

- You can send a view-only copy.
- You can select the option to **Allow recipient(s) to make an editable copy of this presentation folio. All associated Taskstream work will be copied, editable copies as well.** This will allow the recipient the ability to make a copy of the portfolio.
- You can select the option to **Allow recipient(s) to make an editable copy of the Taskstream work contained within the presentation folio.** They will not be able to copy the whole folio.

Publish your Folio or Webpage

1. Click **Publish**.



2. If you would like to change the web address, make those changes in the first box.
3. You then have the option to require a password.
4. Click **Publish**.

The screenshot shows a dialog box titled 'Publish Options'. It has two main sections. The first section is 'Create a Customized Web Address:' with a text input field containing 'https://staging.taskstream.com/ts/wadler/MyClassPortfolio'. Below the input field is a note: '(Only numbers, letters, and dashes "-" are allowed; no spaces or slashes.)'. The second section is 'Create a password:' with two radio button options: 'No password needed' (unselected) and 'Require password:' (selected). Below the 'Require password:' option is a text input field containing 'TYPE PASSWORD HERE'. At the bottom are 'Cancel' and 'Publish' buttons.





5. The next screen will confirm that your publication was successful.
6. If you would also like to publish to social media sites, click on the appropriate **Share** button. You will be brought to the associated site's login screen to enter your information and proceed through their site.


Publication Successful

My Class Portfolio has been published successfully.

Address: <https://www.taskstream.com/ts/wadler/MyClassPortfolio>

Password: No password specified

 Share  Share  Share  Share

 Write this web address (URL) down for future reference or [e-mail this web address](#) to yourself or friends. You can continue to edit your work by going back to the Work tab. Edits will be automatically reflected in your published work.

[Edit Web Address](#)

[Back to Options Screen](#)

If you have any additional questions or comments, please do not hesitate to contact Mentoring Services at help@Taskstream.com or at 800-311-5656, press 1 for support.