AMS

Taskstream AMS Quick Start Guide: Navigating a Workspace

5.11.18

taskstream

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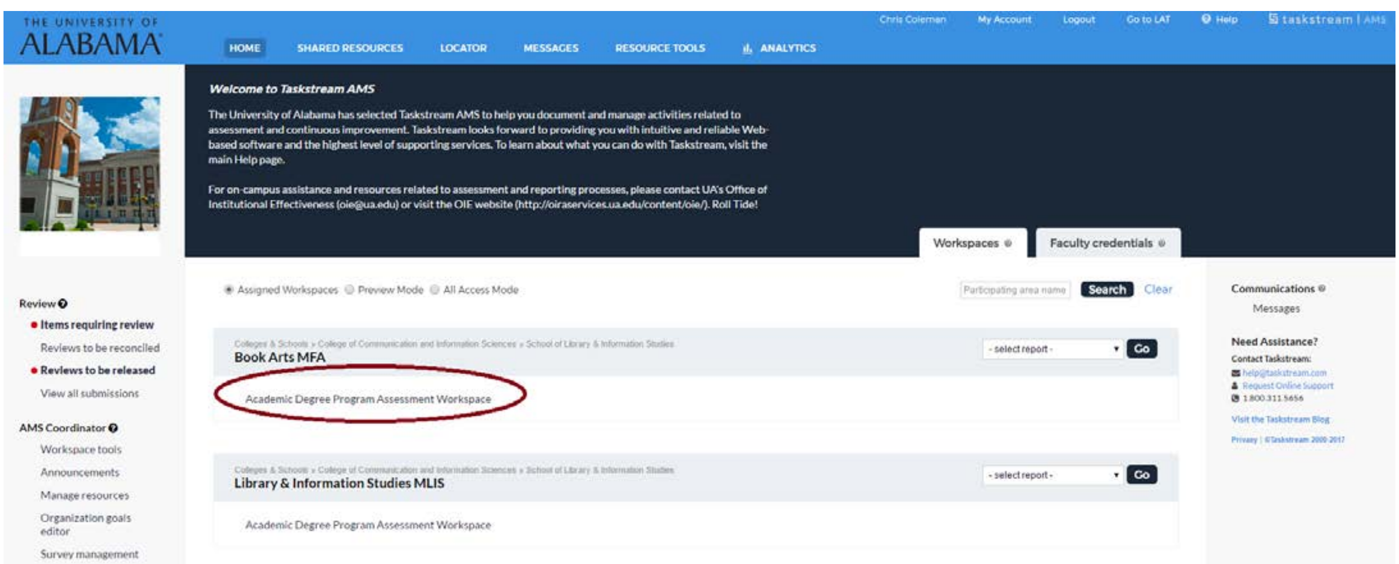
WHAT IS TASKSTREAM AMS?

Taskstream's Accountability Management System (AMS) is a web-based portal designed to help you manage and document processes for assessment and continuous improvement. The archiving capabilities of AMS save time by minimizing the repetition of work from year to year. For example, existing assessment plans can be rolled over and adapted for the next cycle, enabling you to demonstrate long-term progress more easily. Within the system, departments and programs are referred to as *participating areas*. Each participating area has been assigned to a *workspace*—that is, a template that provides data entry categories and structured prompts to guide the inclusion of important information. Depending on your role, you may have access to a single workspace or more than one. Although the workspaces may look slightly different from one another, they're all navigated the same way. This Guide will help you learn to navigate AMS workspaces. Other training resources, including videos and a schedule of hands-on training sessions, can be found on the OIE website.

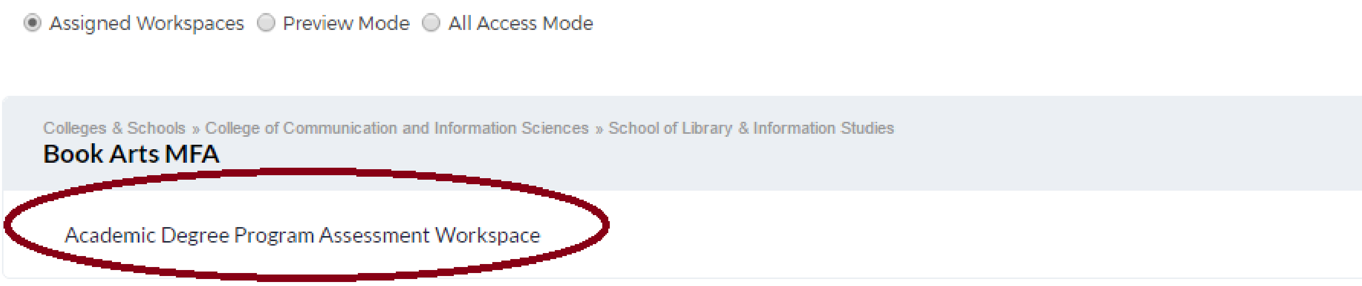
ACCESSING TASKSTREAM AMS

Enrolled users can access Taskstream through the UA home page (footer link), the myBama Employee tab (Taskstream channel), or this page. Clicking "Taskstream" will take you to a single sign-on (SSO) page where you should enter your bama ID and password. Once logged in, you'll see a welcome/home page (screenshot below; you may not have the gray menu on the left) that will include a list of any participating areas (departments or programs) to which you've been given access. To enter a workspace, click the workspace name directly below the program/department name (see screenshot). If you're unable to log in or don't see all the participating areas to which you need access, please contact oie@ua.edu. As "AMS Coordinators," members of UA's Office of Institutional Effectiveness (OIE) can enroll users and affiliate them with participating areas.

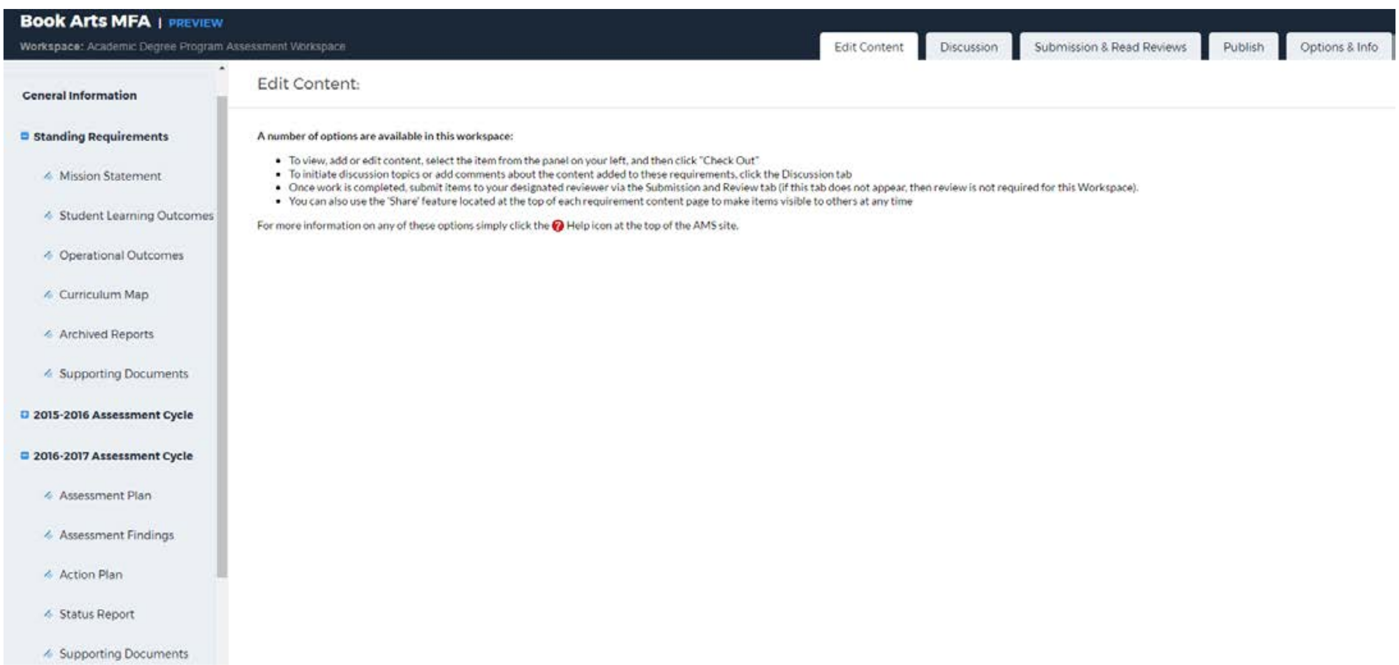


STANDING REQUIREMENTS

1. As noted above, you can access any workspace that's assigned to you from the AMS home page by clicking on the workspace link directly below the program/department name.



On the landing page, you'll see the structure of the workspace on the left side (vertical menu). There are also some tabs on the upper right (horizontal menu); most of your time will be spent in the "Edit Content" tab, which is the default landing area.

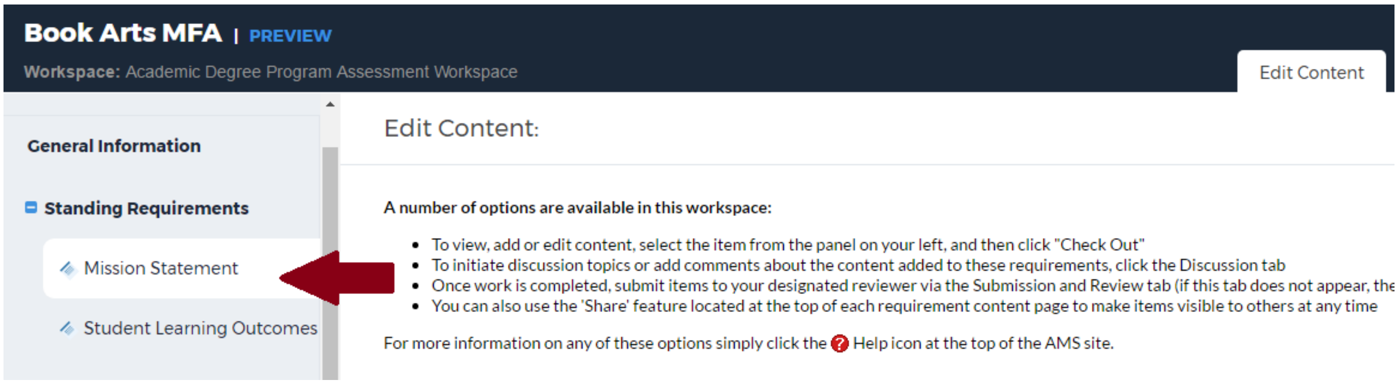


In the vertical menu, the **General Information** area is optional (you could use it to include a photo, text, a link to your departmental website, etc.). The **Standing Requirements** category contains assessment components that will remain relatively steady over time, whereas the **Assessment Cycle** will be completed anew each year. For example, the 2016-2017 Assessment Cycle is where you enter findings and action plans (retrospectively) from the 2016-17 year.

Please note that the above screenshot is an example; the workspace templates for your participating area(s) may have more or fewer "requirement" areas.

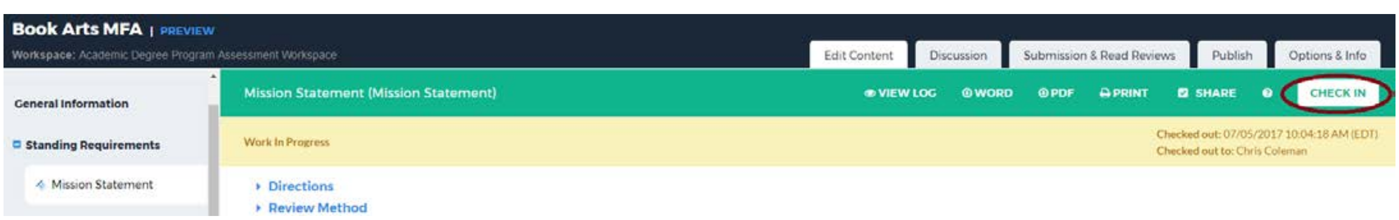
MISSION STATEMENT

The Mission Statement area is the first in the structure where data will need to be entered (your mission statement may already have been copied in by OIE). To begin working on it or any other area, please click the name in the vertical menu. The **Directions** for each area have been customized to reflect expectations and best practices at UA. You can show or hide the directions by clicking the small triangle to the left of the word.



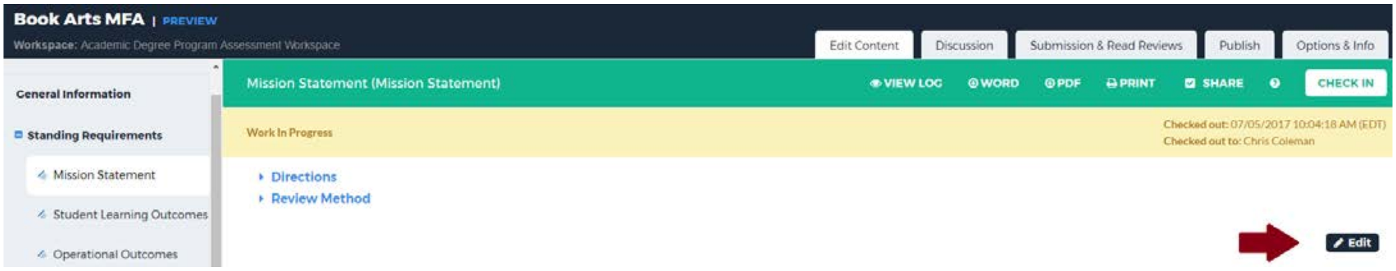
IMPORTANT: In the upper right-hand corner of any workspace area, you should see a green Check Out button. Please note that all areas in Taskstream's AMS system use a Check Out / Check In system (like libraries do). This feature ensures that multiple people cannot edit the same workspace area simultaneously. To edit or add data to any area (e.g., Mission Statement), you'll first need to "Check Out" that area.

Now the area is editable—notice that the background color in the Mission Statement header has changed from white to green. Once you're finished working in the area, you should save your work by clicking the Check In button (green text on white background).



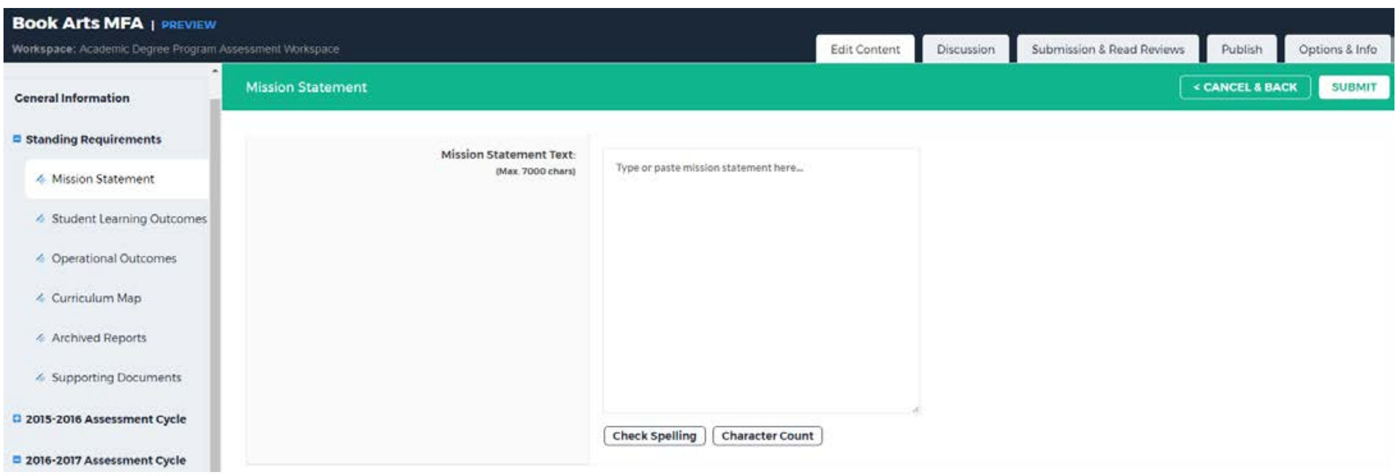
*Note: Clicking on **PREVIEW** next to the participating area name will open a new browser window so you can see how the published workspace will look.*

2. When you click the **Check Out** button, a black "Edit" button will appear on the far right. Click "Edit" to add your mission statement.

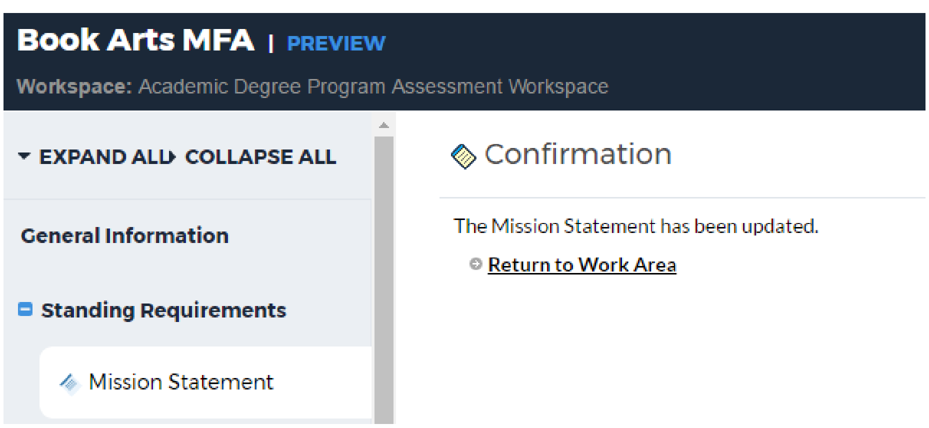


Note: If content has already been added to the area, you'll be able to add to and/or modify it.

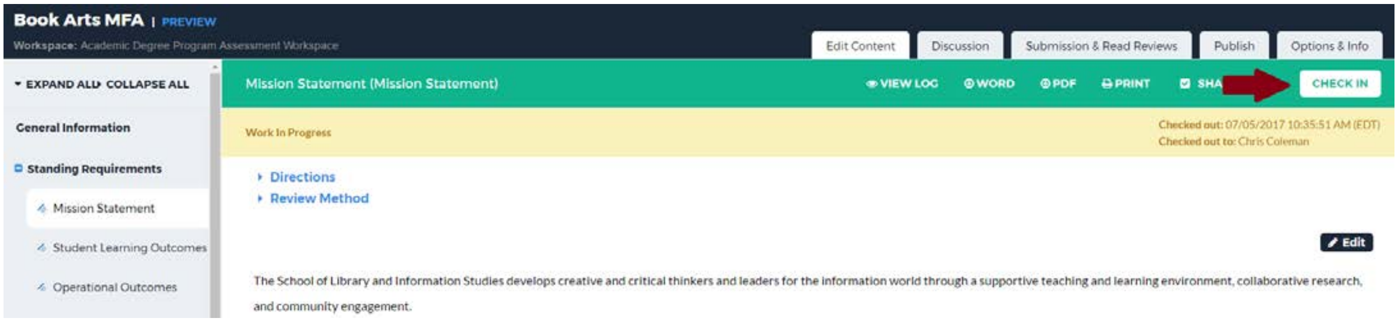
Once you've entered the appropriate mission statement, click the "Submit" button (upper right).



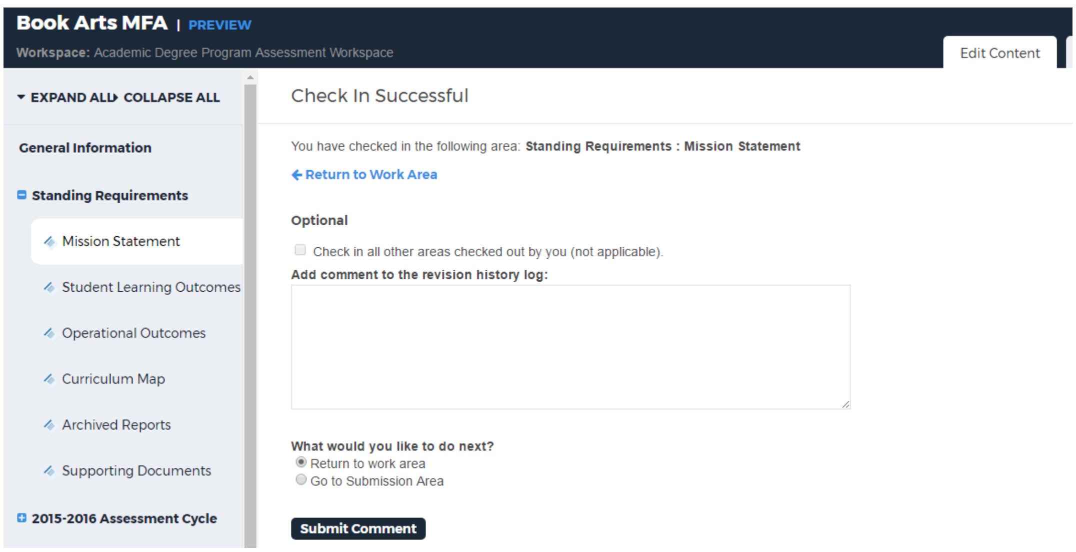
You'll then see a confirmation screen and be given the option to return to the work area (which is still checked out).



If you're satisfied with the way the mission statement looks, click the **Check In** button to save your changes.



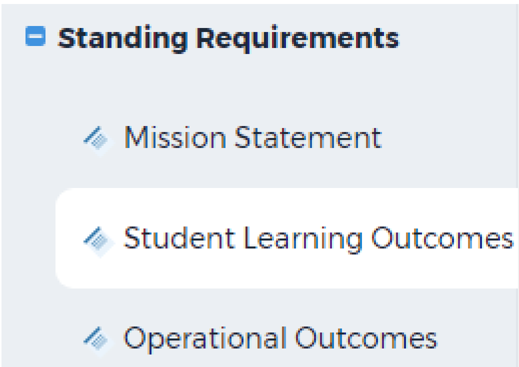
Return to the Mission Statement area by clicking **Return to Work Area**. Alternatively, you can click on another item in the vertical (left-hand) menu. Adding comments to the revision history log is optional; it may be good practice in cases where two or more people regularly update the same workspace.



STUDENT LEARNING OUTCOMES

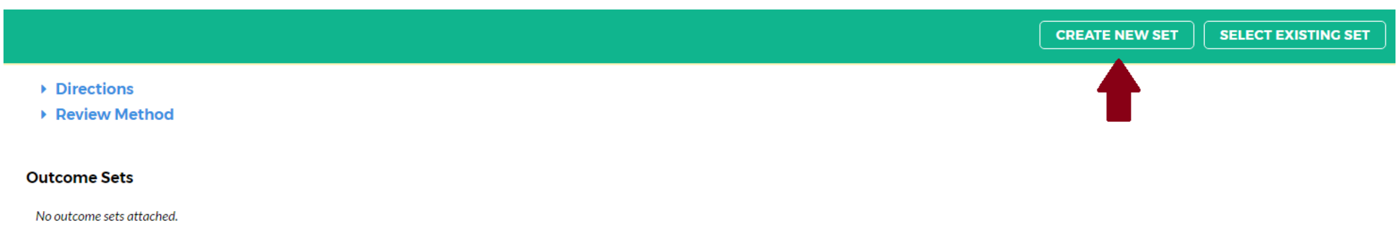
(Note: The process described below also applies to **Operational Outcomes**)

3. When you're ready to add Student Learning Outcomes, click on that name in the workspace structure/menu. Most units use 1-level outcomes, but there is a 2-level option if your outcomes are nested in broader goals/objectives (please contact OIE for help).

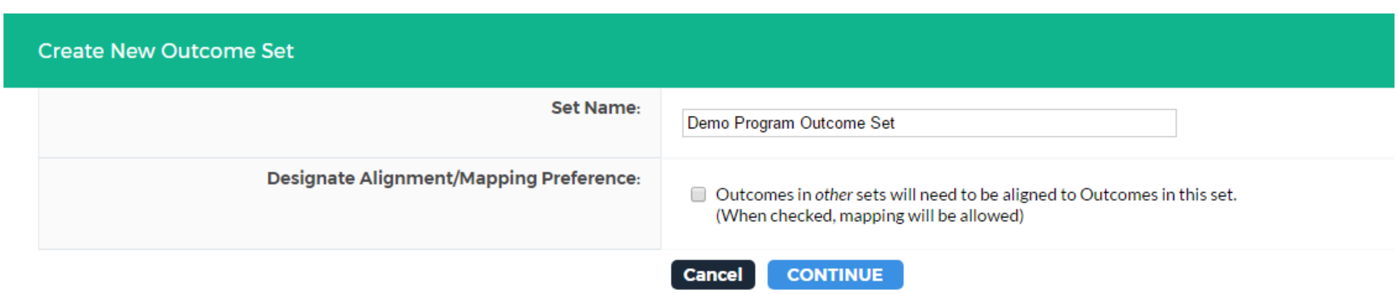


To begin, you should **Check Out** the area. Then you'll have the option of either creating a new outcome set or selecting an existing outcome set. Before creating a new outcome set, be sure to check whether your outcomes have already been entered (if so, you can still edit them).

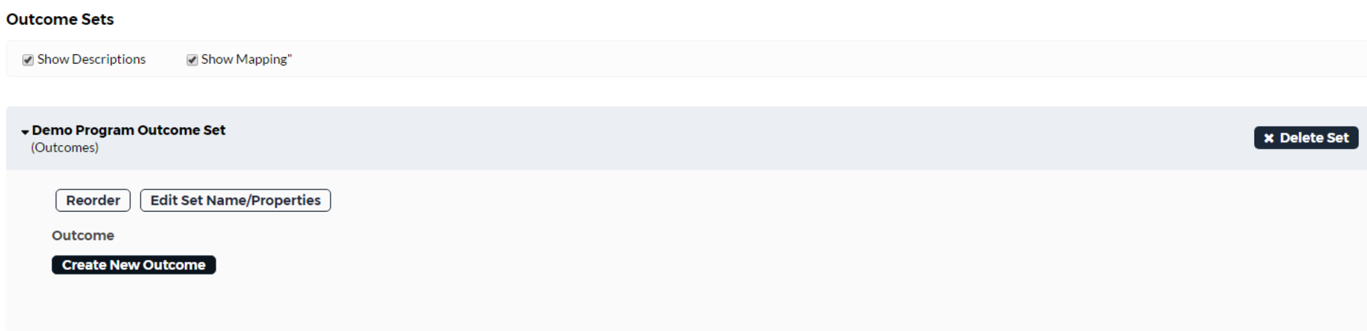
To create a new outcome set, start by clicking the **Create New Set** button.



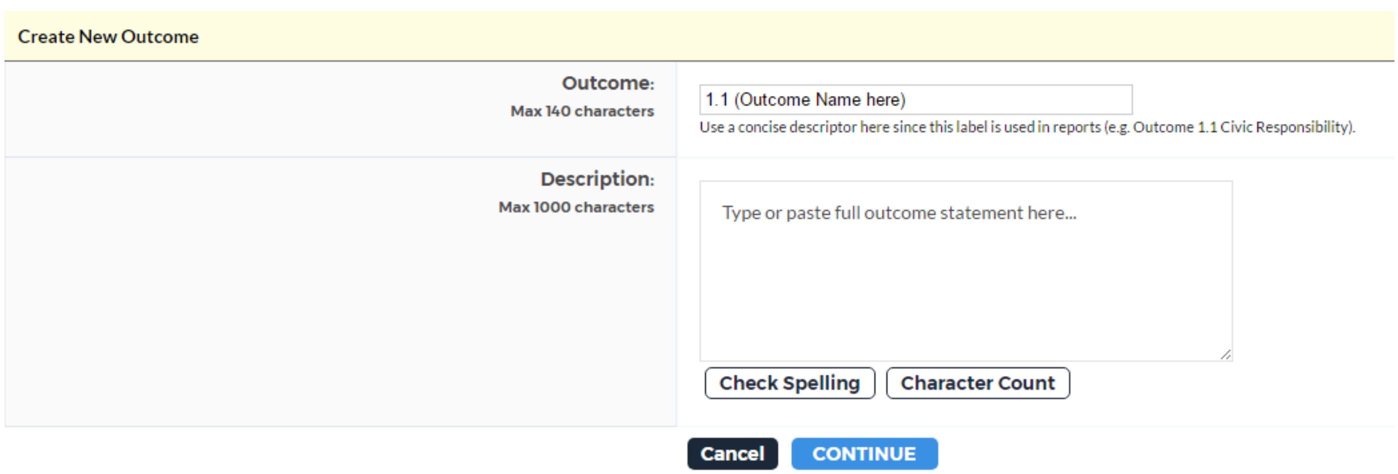
You can then title the outcome set (e.g., "Chemistry BS Student Learning Outcomes") and choose whether you want to allow other sets to be aligned to your outcome set (it's best to leave this checkbox blank). Then click **Continue**.



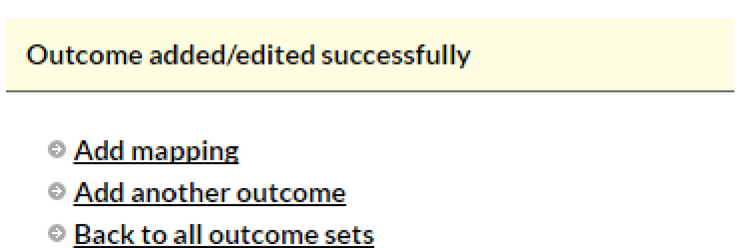
4. On the next screen, you can start entering Outcomes by clicking the "Create New Outcome" button. Note that you can also reorder your outcomes or edit the Outcome Set name by clicking the appropriate button.



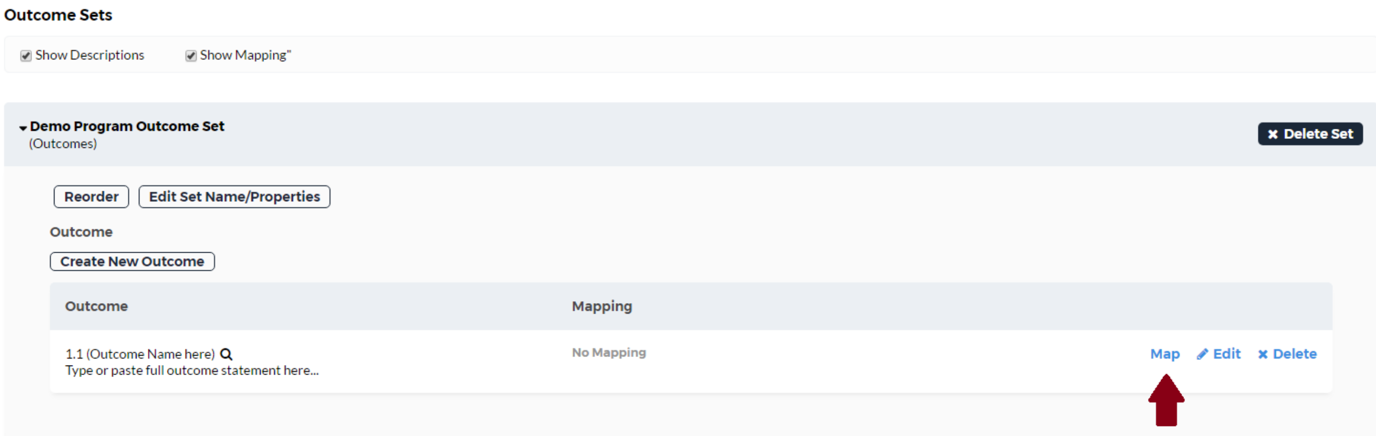
Enter a **concise** name for your Outcome (max. 140 characters; numbering optional) and then enter a more detailed outcome statement in the Description field. Click **Continue**.



You'll then see a confirmation screen and be given several options. Select "Back to all outcome sets."

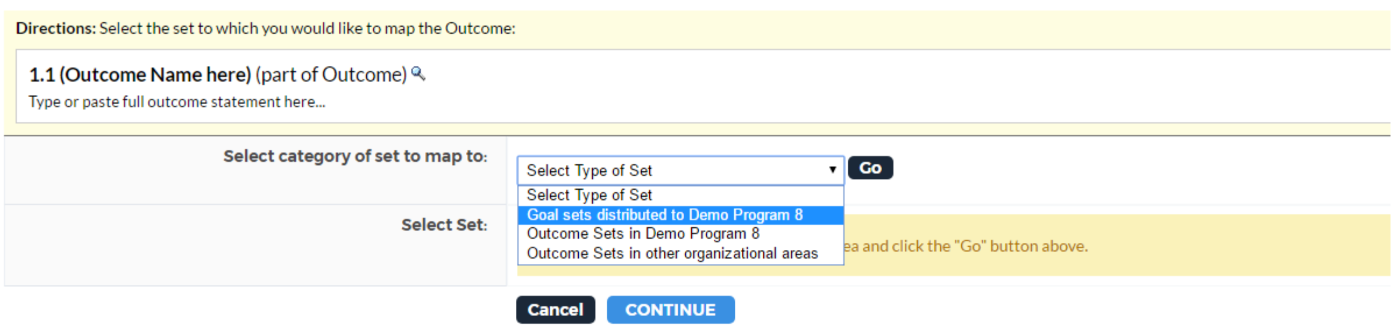


5. From this screen, you can continue to add outcomes by clicking the Create New Outcome button again. Another option is to map or align your outcomes to college-level goals, the university's strategic plan, or accrediting body standards/criteria. To do this, click **Map** (to the right of the outcome you wish to map).

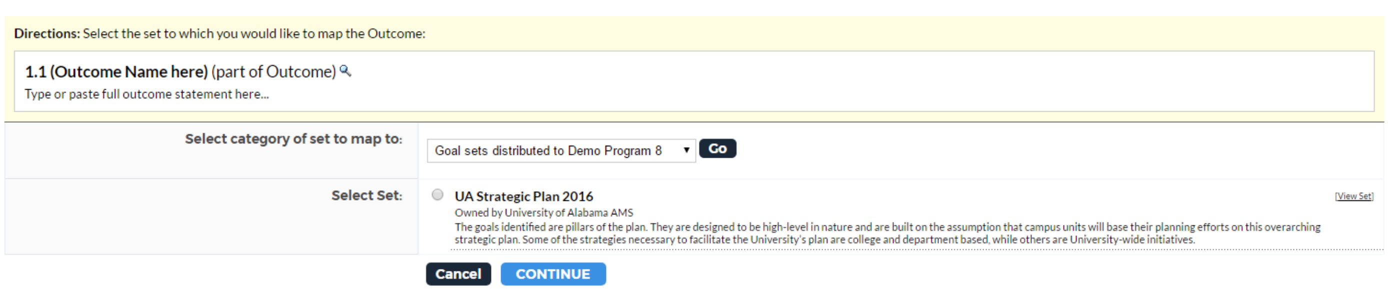


On the next screen, click the blue **Create New Mapping** button.

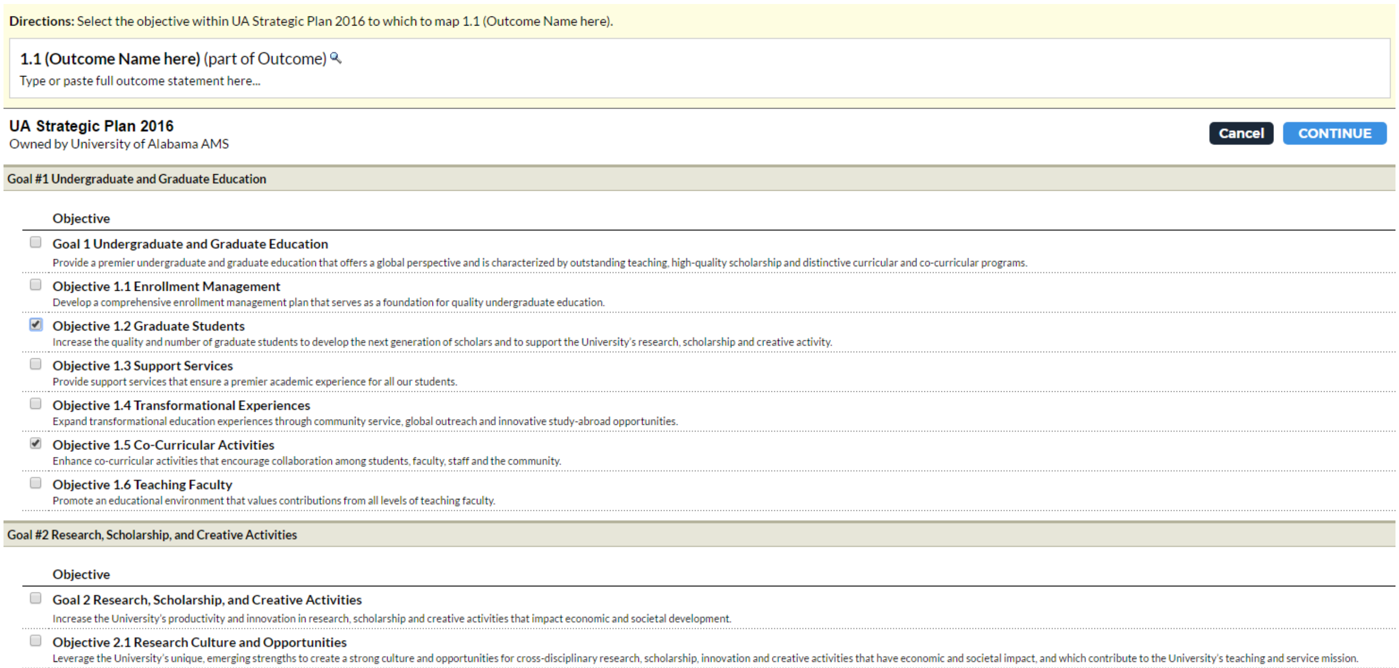
To align your outcomes with a specific goal set, you'll want to select the <u>category</u>: *Goal sets distributed to (Program Name)*.



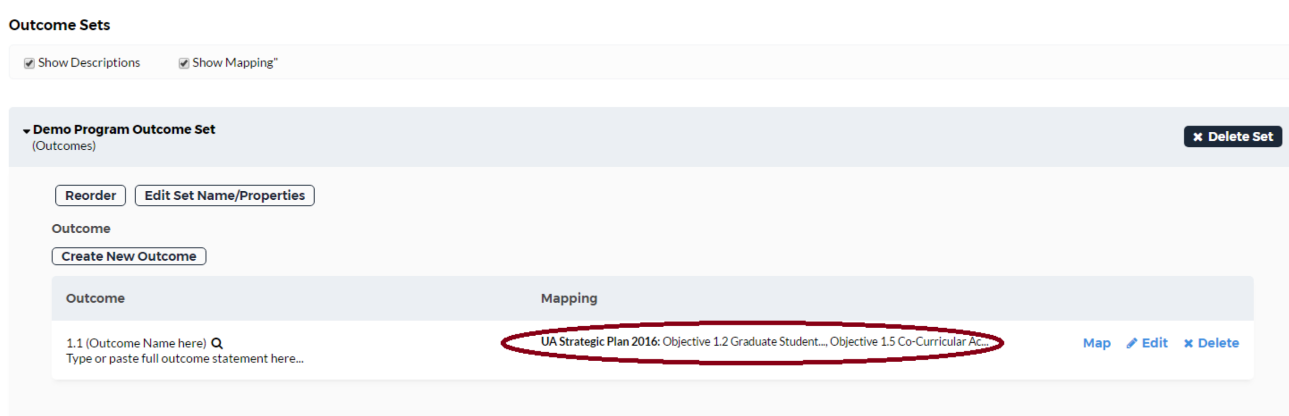
Select the appropriate set and click **Continue**. If you don't see the goal sets/accreditation standards you need, you can ask OIE to make them available to your participating area.



Next, select the particular objectives/standards that align with your outcome and click **Continue**.



You should now see the mappings that you just created. You can use the **Map** button to make changes or repeat the process for additional outcomes. An outcome can be mapped to multiple goal sets (e.g., the UA Strategic Plan plus a specialized accreditor's standards).

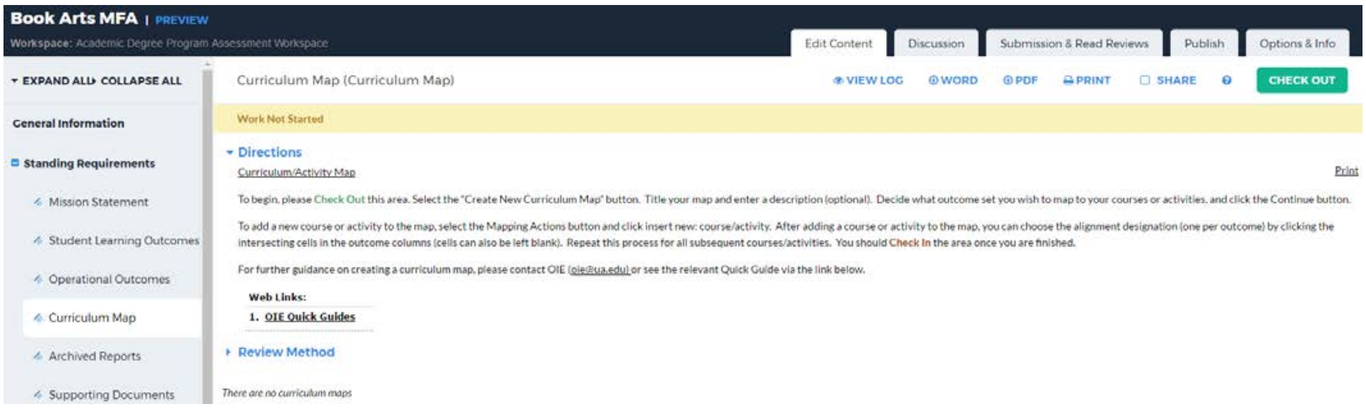


Operational Outcomes

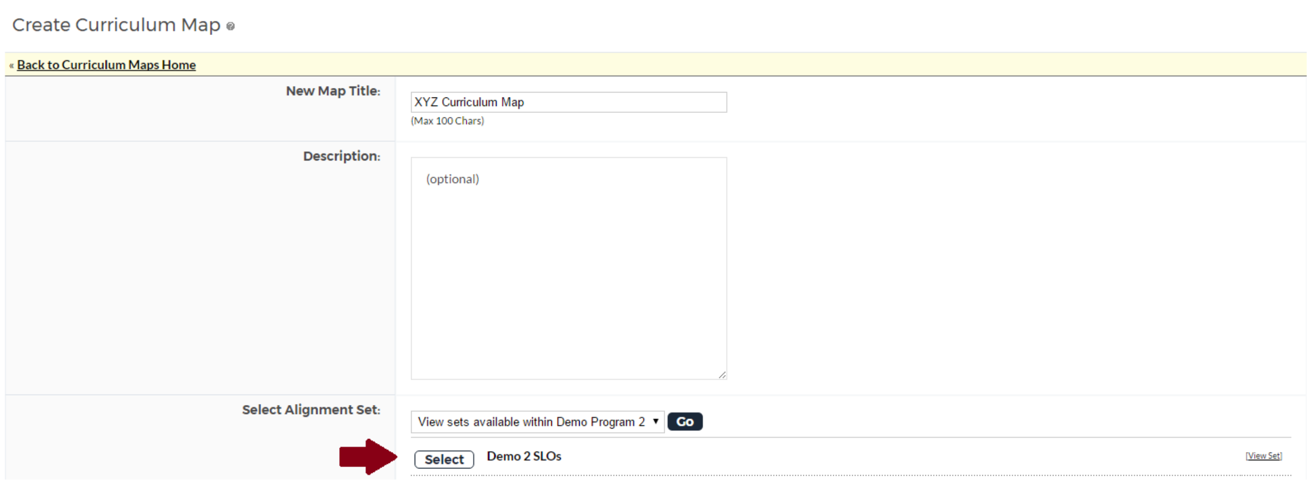
In the Operational Outcomes area, you'll be able to create operational/administrative outcomes. The navigation is the same as for Student Learning Outcomes. **NOTE**: In degree program workspaces, faculty most often focus on SLOs; operational outcomes (enrollment trends, faculty productivity, etc.) are usually addressed in department/college workspaces. SLOs are *required* for each degree program; operational outcomes are *optional*. Typically, non-instructional units (e.g., Human Resources) have operational outcomes rather than SLOs.

Curriculum Map / Activity Map

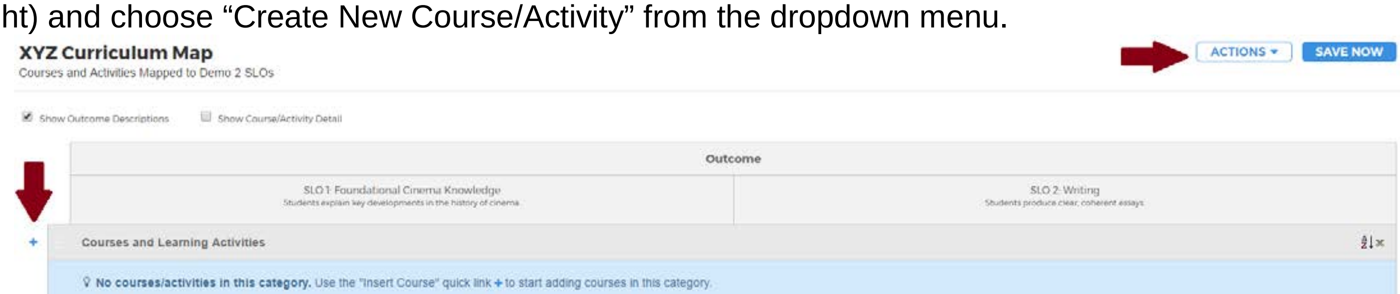
6. In the **Curriculum Map** area, you're able to create a grid that shows the connections between courses and program-level outcomes. Workspaces for support/administrative units contain an equivalent **Activity Map** area, where you can similarly depict the connections between outcomes and supporting activities. First, **Check Out** the area.



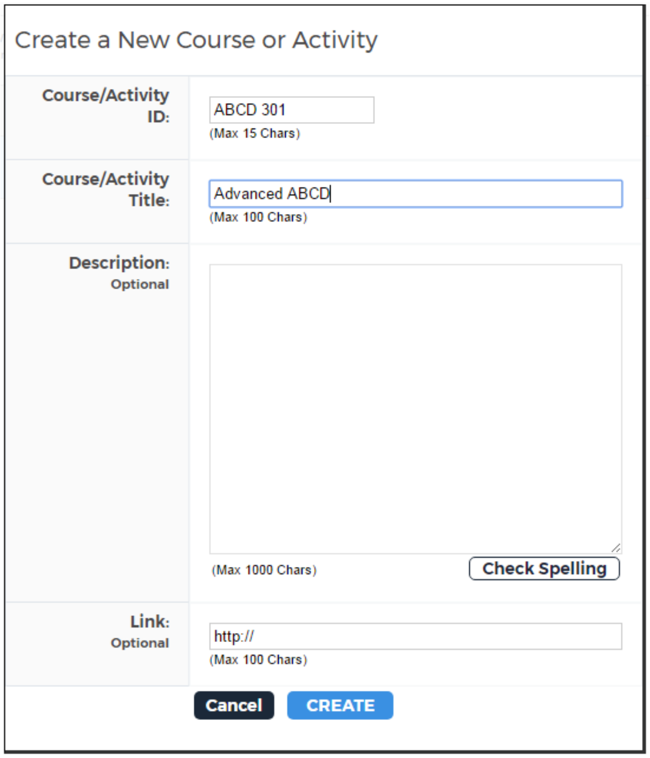
Next, click "Create New Curriculum Map" (black button). On the next screen, enter a title for the map and select an outcome set to use.



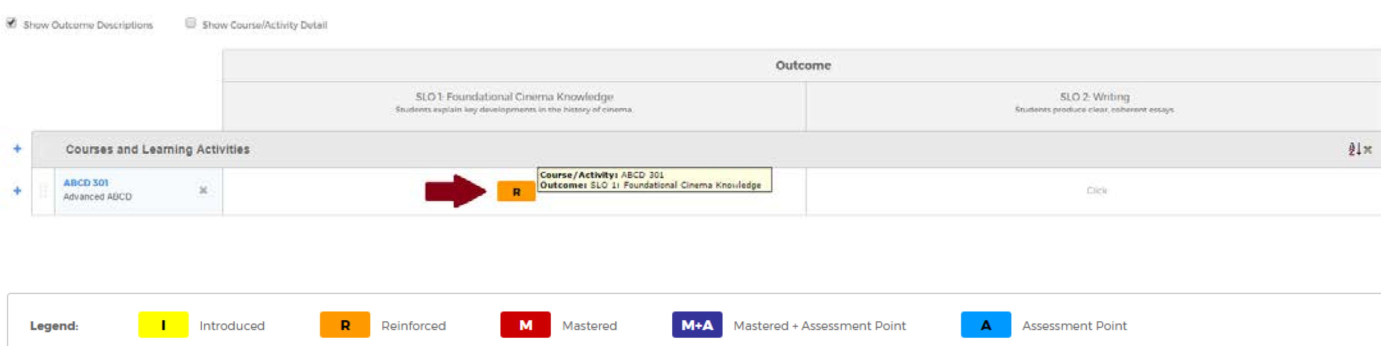
The map will open in a separate pop-up window with the outcomes along the top. To add a new row for a course/activity, click the blue "plus" sign on the left <u>or</u> click the **Actions** button (upper right) and choose "Create New Course/Activity" from the dropdown menu.



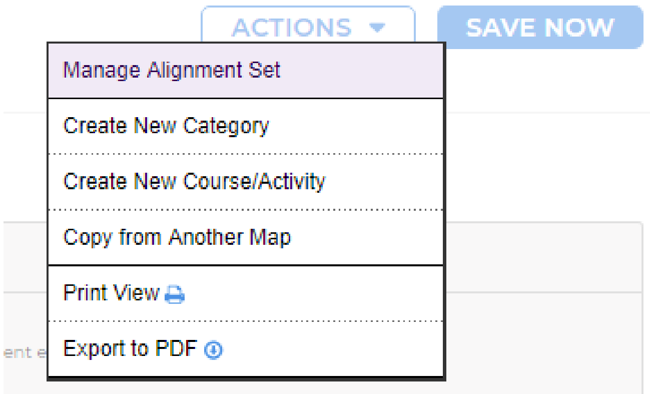
Add the course/activity ID (required field), the course/activity title (required field), and a description (optional). Then click the **Create** button. You can repeat this step for additional courses/activities.



You can then click on the cells in the map to specify if and to what degree each outcome is covered in each course. Repeated clicks on a cell will allow you to toggle through the coding options (see Legend at bottom). Cells can also be left empty, as individual courses/activities need not (and typically do not) address all of a program's outcomes. Note: The map legend is different for instructional and non-instructional workspaces.



In addition to adding a new course/activity to your map, you can do several other things by clicking the **Actions** drop-down button.



Manage Alignment Set allows you to modify which outcomes are included as column headers in the map. If you just added a new outcome to an existing set, for example, you may need to update your existing map by including a column for it.

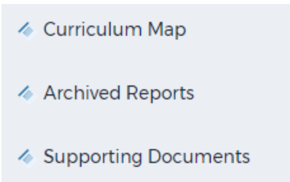
Create New Category allows you to add a header row—for example, if you want to distinguish between required courses and electives.

Copy from Another Map allows you to copy Course/Activity rows over from a map you previously created. This option is handy in a situation where your outcomes have completely changed (which means you need to make a new map) but your curriculum has not.

When you are finished working on your map, click **Save Now** and close the pop-up window to return to your workspace. Don't forget to **Check In** the Curriculum Map (or Activity Map) area before moving on.

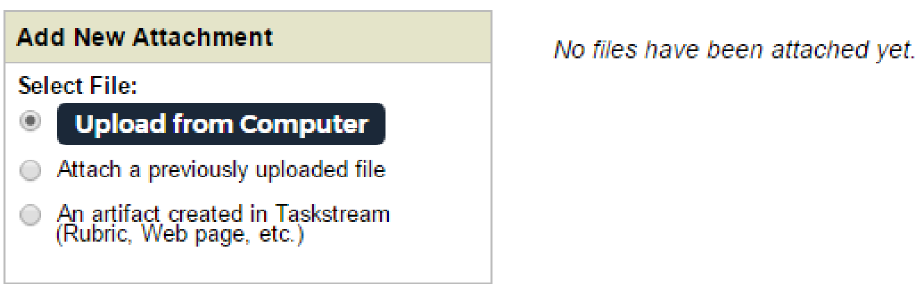
ARCHIVED REPORTS and SUPPORTING DOCUMENTS

In the Archived Reports area, you can attach or view reports containing Assessment content from previous years (OIE may have uploaded some historical documents from WEAVE there). The Supporting Documents area can be used to store documents (e.g., agendas; meeting minutes) that relate to assessment processes in a general way—as opposed to, say, a rubric or other file that can be attached to a specific Measure or Finding (see page 17 or 19).

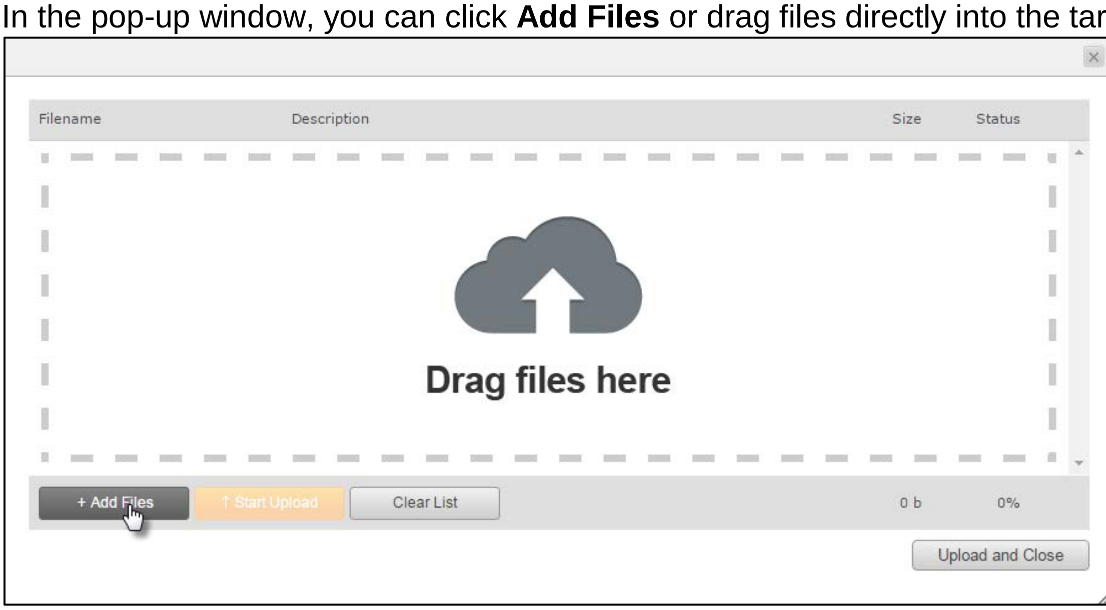


To upload content to either area, **Check Out** the area and click the **Attachments** button (or one of the other buttons, for various types of media) at the bottom of the screen.

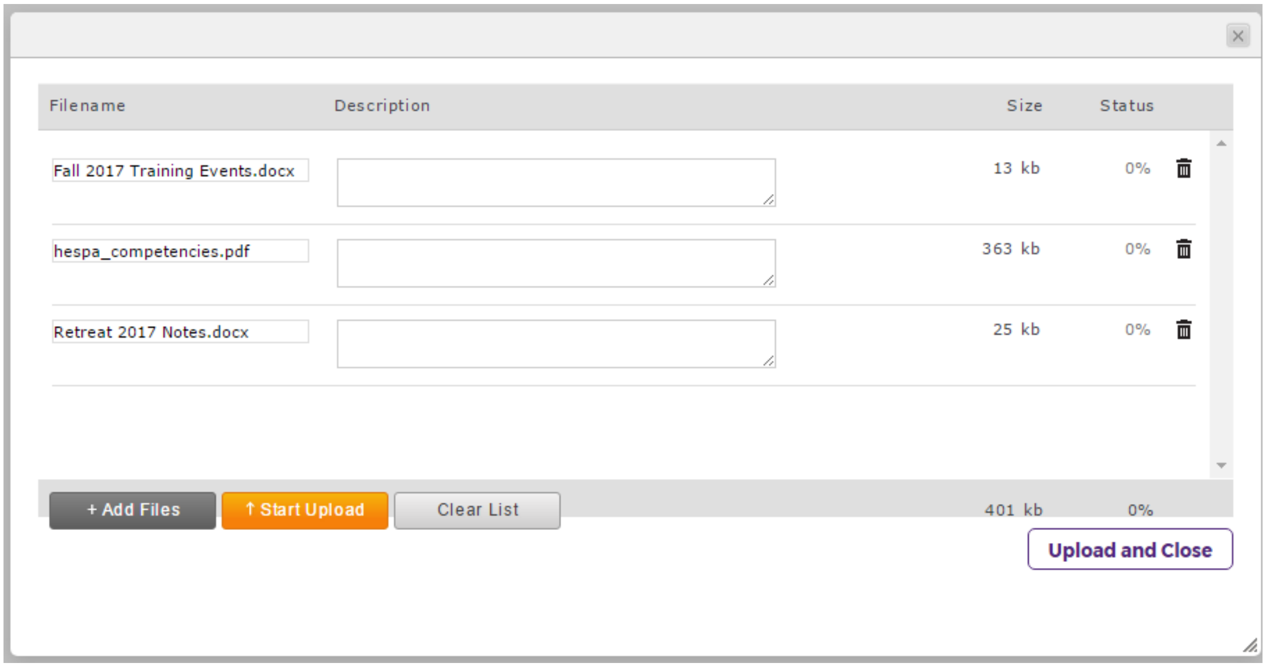
On the left side, click Upload from Computer.



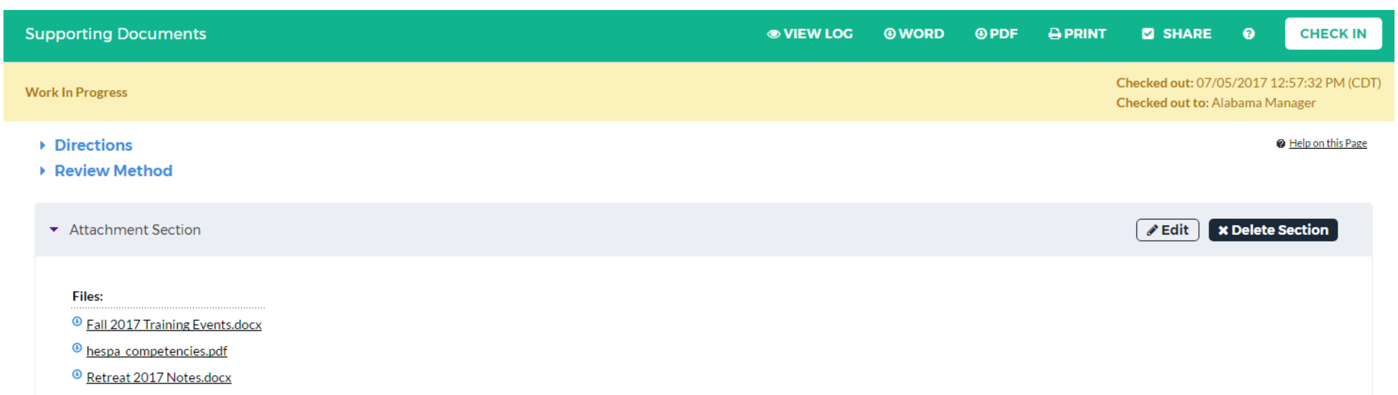
In the pop-up window, you can click **Add Files** or drag files directly into the target area.



Once the files are selected, click **Upload and Close**.



Next, click **Save and Return** on the right. The uploaded files (clickable file names) should now be visible under the Attachment Section. The Edit button will allow you to remove files and/or upload additional ones. Don't forget to **Check In** the area before moving on.



ANNUAL ASSESSMENT CYCLE REQUIREMENTS

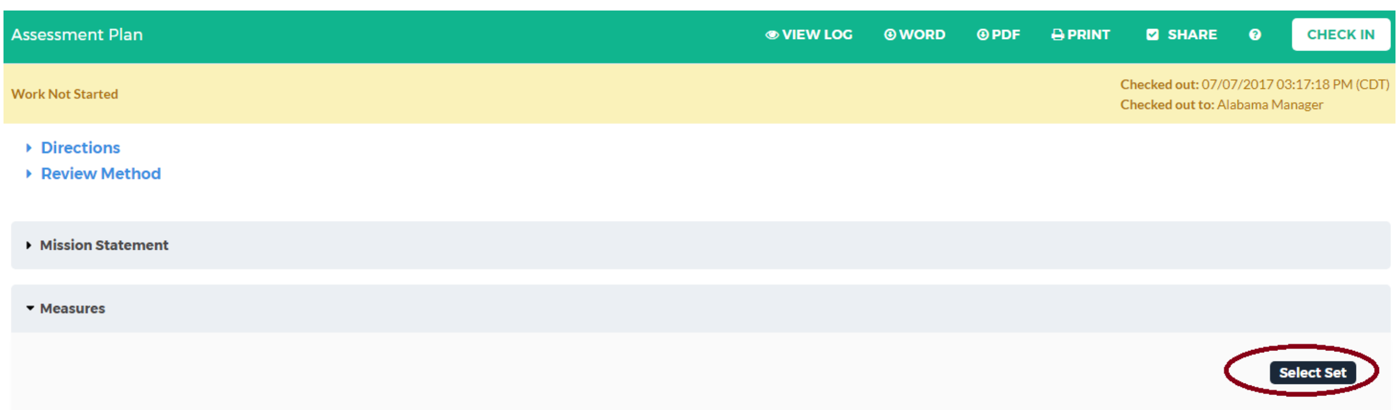
7. Now you may proceed to the year-specific assessment section (for example, **2015-2016 Assessment Cycle**) to enter your assessment data.

ASSESSMENT PLAN

To create an assessment plan that delineates the measures used to assess your outcomes, **Check Out** the Assessment Plan area under the appropriate cycle in the vertical menu. To input a brand-new plan, click **Create New Assessment Plan**. Alternatively, **if you already have an existing assessment plan in the workspace from a prior cycle**, you can roll it forward (and then edit it as needed) by choosing **Copy Existing Plan as Starting Point**.

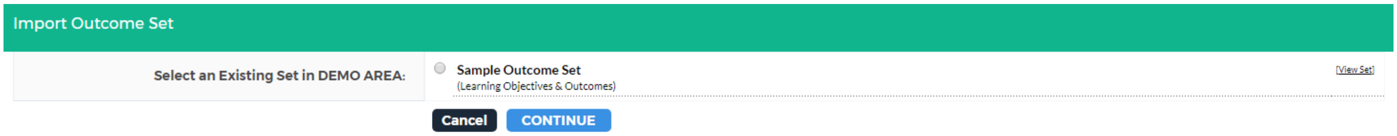
NOTE: If you unwittingly clicked “Create New Assessment Plan” at some point and the “Copy Existing Plan” button is no longer available, you can still roll previous measures forward, one outcome at a time, by **importing** them in Step 8 below.

If you’re creating a new plan, click **Select Set** (black button) on the right. This will allow you to choose the *outcome set* to which measures will be attached.

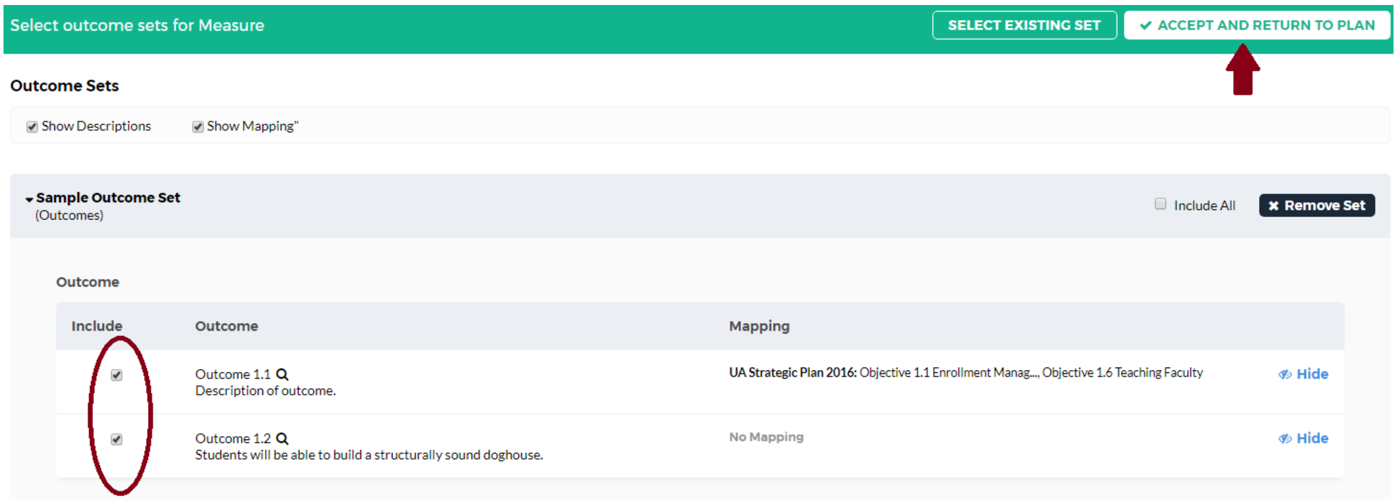


Click **Select Existing Set**.

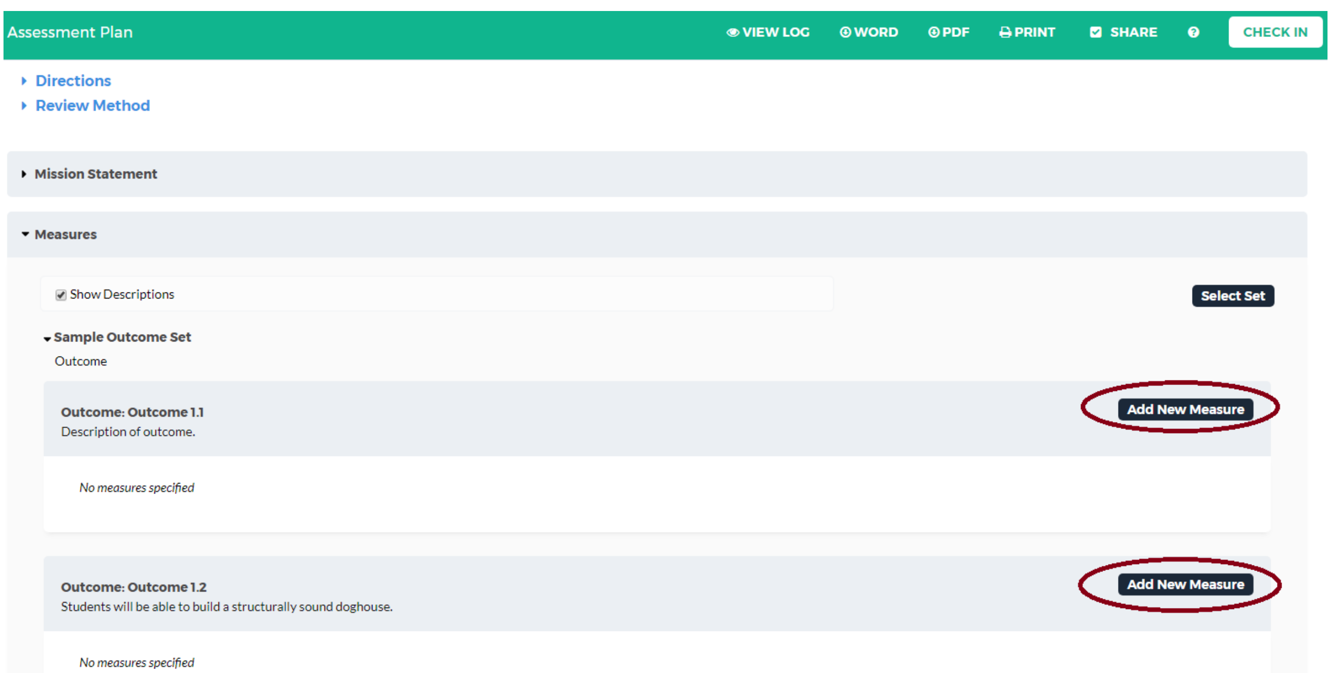
Select the outcome set you wish to assess, then click **Continue**.



Use the checkboxes to select the specific outcomes to include in the cycle's assessment plan, then click **Accept and Return to Plan**.

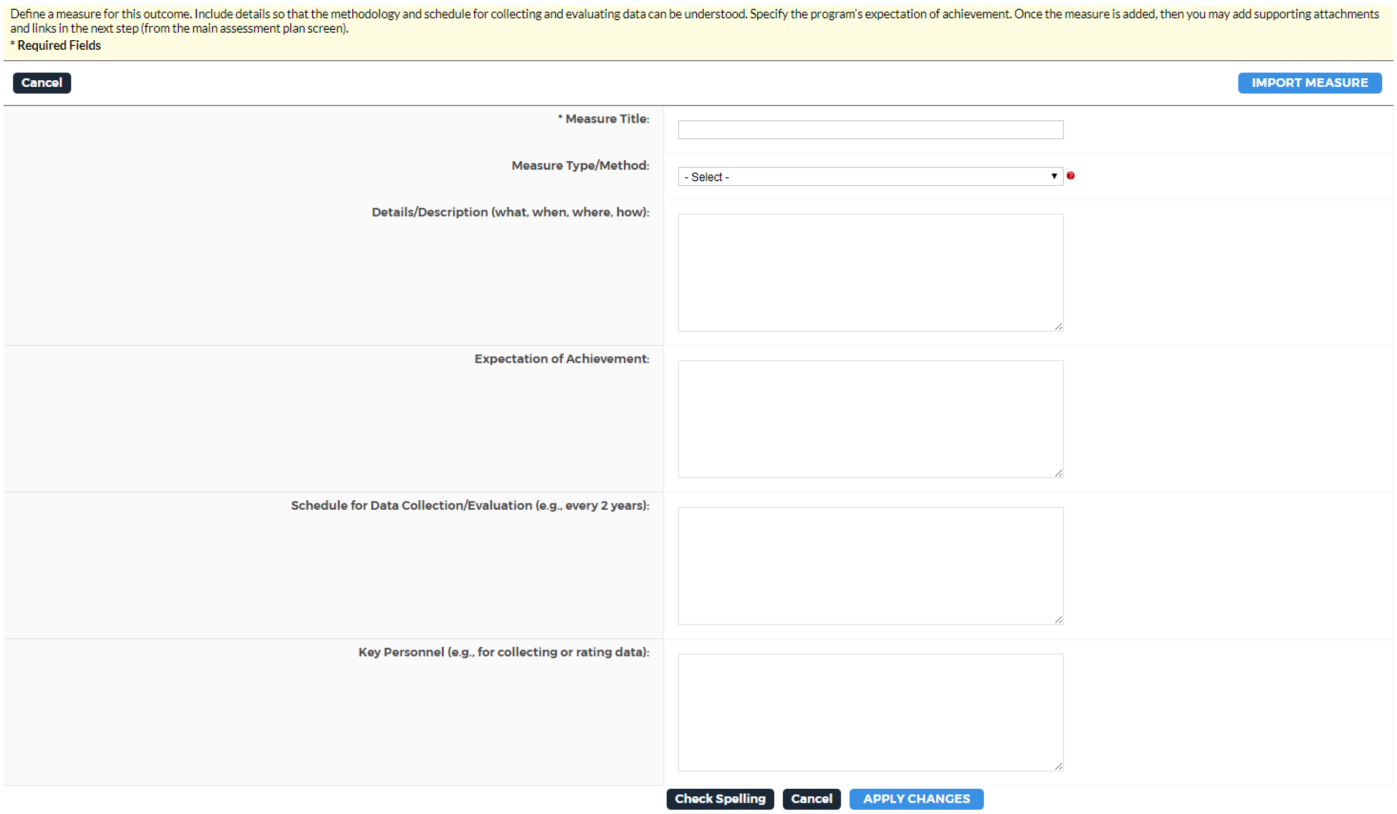


8. To add a measure to an outcome, click the appropriate **Add New Measure** button (measures must be added one at a time).



The details of your measures and methods can be typed/pasted in. Try to provide enough detail that a new assessment coordinator would understand when, where, and how to get the data. After you click **Apply Changes** (bottom of screen), you'll have the option to append attachments to the measure (e.g., if the measure is a survey, the items can be attached).

NOTE: The **Import Measure** button will allow you to pull in a measure description from either a prior cycle or the current cycle.


Define a measure for this outcome. Include details so that the methodology and schedule for collecting and evaluating data can be understood. Specify the program's expectation of achievement. Once the measure is added, then you may add supporting attachments and links in the next step (from the main assessment plan screen).
* Required Fields

Cancel   IMPORT MEASURE

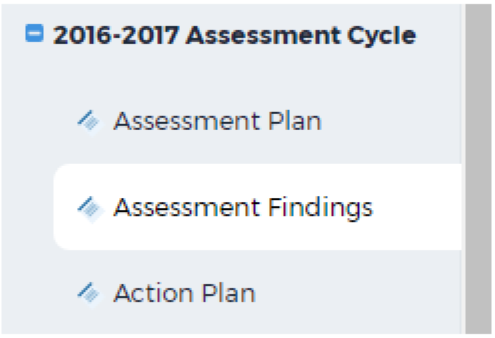
* Measure Title:
Measure Type/Method: - Select -
Details/Description (what, when, where, how):
Expectation of Achievement:
Schedule for Data Collection/Evaluation (e.g., every 2 years):
Key Personnel (e.g., for collecting or rating data):

Check Spelling   Cancel   APPLY CHANGES

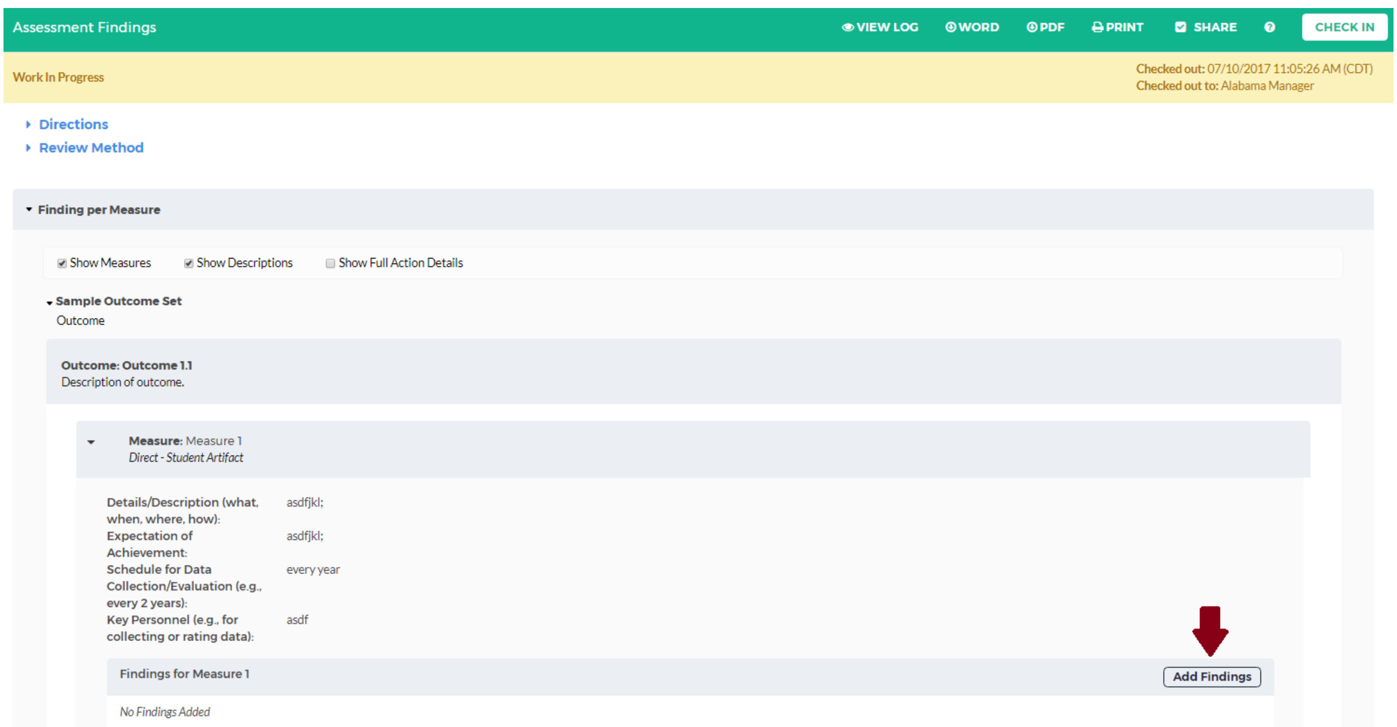
You can repeat step 8 as needed to add additional measures for this or other outcomes. Be sure to **Check In** the area after you've finished working in it.

ASSESSMENT FINDINGS

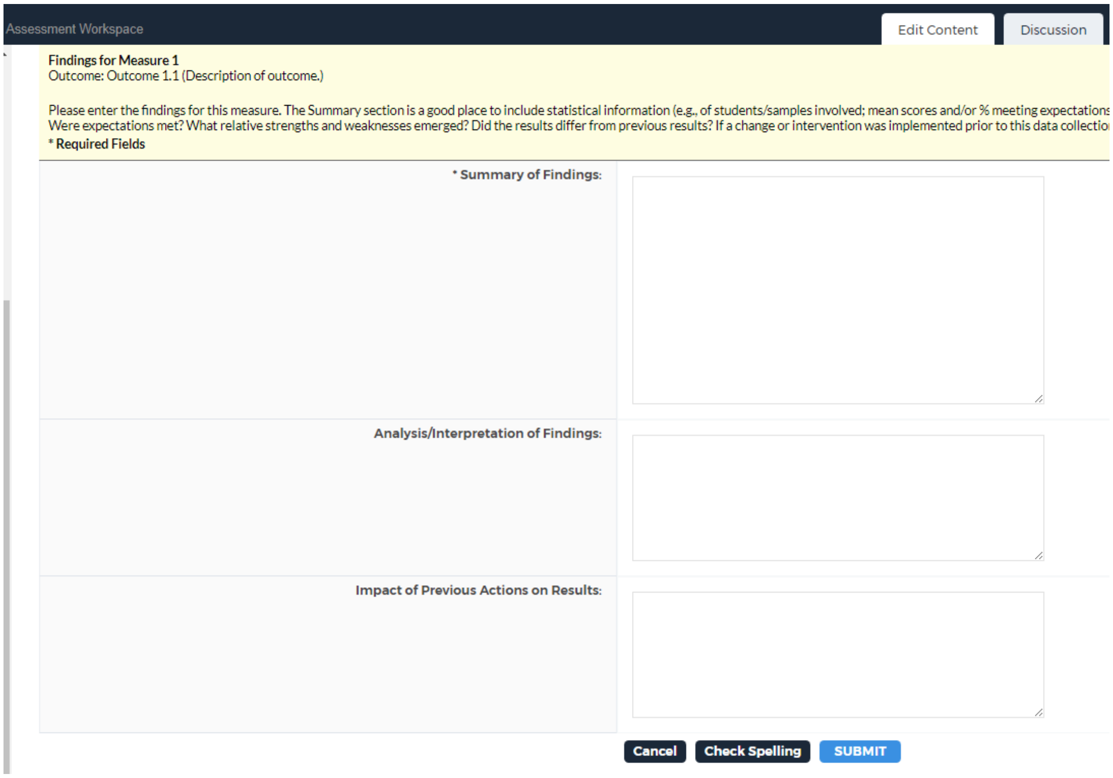
9. Once you've gathered your data, select the Assessment Findings area to add measure-specific results and interpretations for the pertinent cycle.



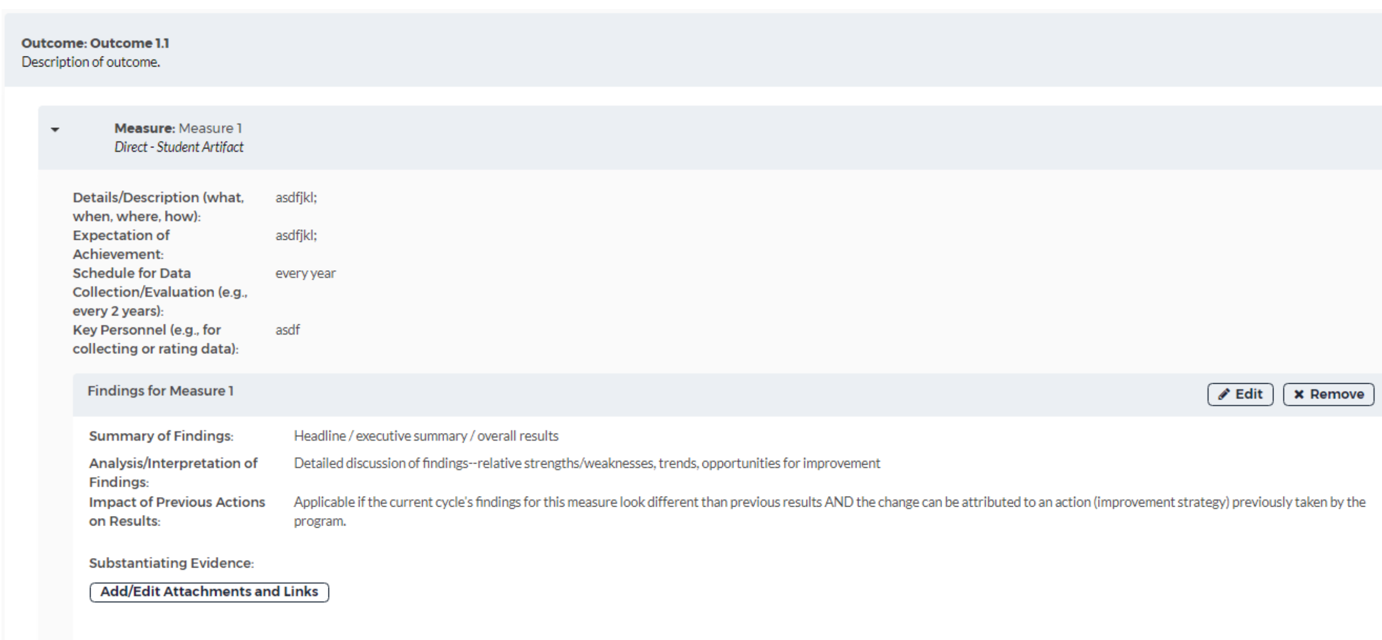
To add findings, **Check Out** the area, locate the appropriate Measure, and then click the **Add Findings** button.



You may then enter the details of your assessment findings into the data entry screen. The Summary of Findings area is for overall results (e.g., 85% of work samples met expectations), while the Analysis/Interpretation area should be used to drill down by identifying subskill strengths and weaknesses, describe error patterns, compare subgroups, etc. What do the results *mean* to your unit/program? Are there opportunities for improvement? **If** this year's results show the impact of a previously-implemented improvement strategy, you can document that under Impact of Previous Actions on Results (otherwise, that box can be left blank).

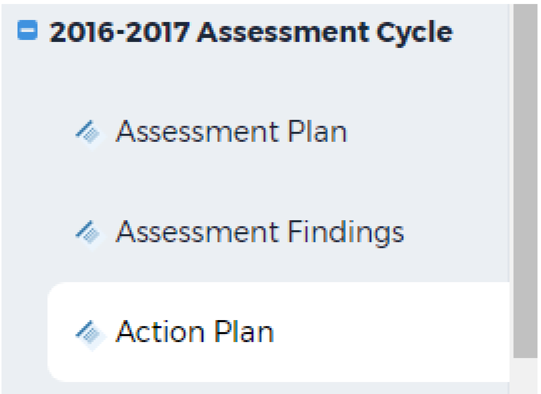


Once you've entered your Findings and Interpretations, click the **Submit** button. The resulting screen will allow you to make edits and/or attach substantiating evidence.



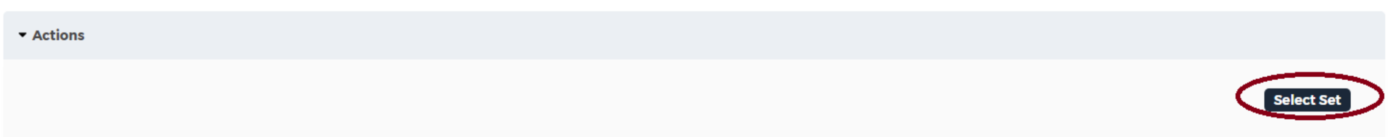
OPERATIONAL/ACTION PLAN

10. If you've identified one or more opportunities for improvement, **Check Out** the Action Plan area to detail your department's plans for making improvements.



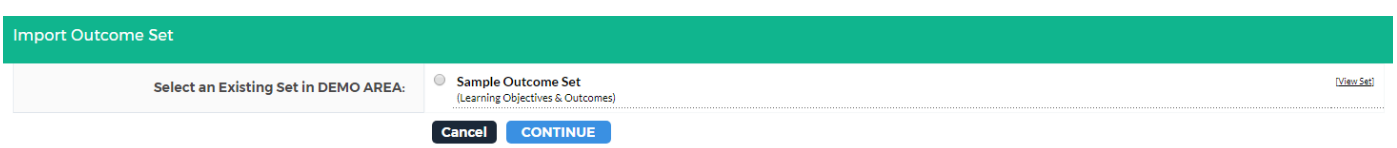
Next, click the **Create New Operational Plan** button. Alternatively, if you have an existing Action Plan in your workspace (from a prior cycle), you may wish to choose **Copy Existing Plan as Starting Point** instead.

On the next screen, click the **Select Set** button under the Actions bar.

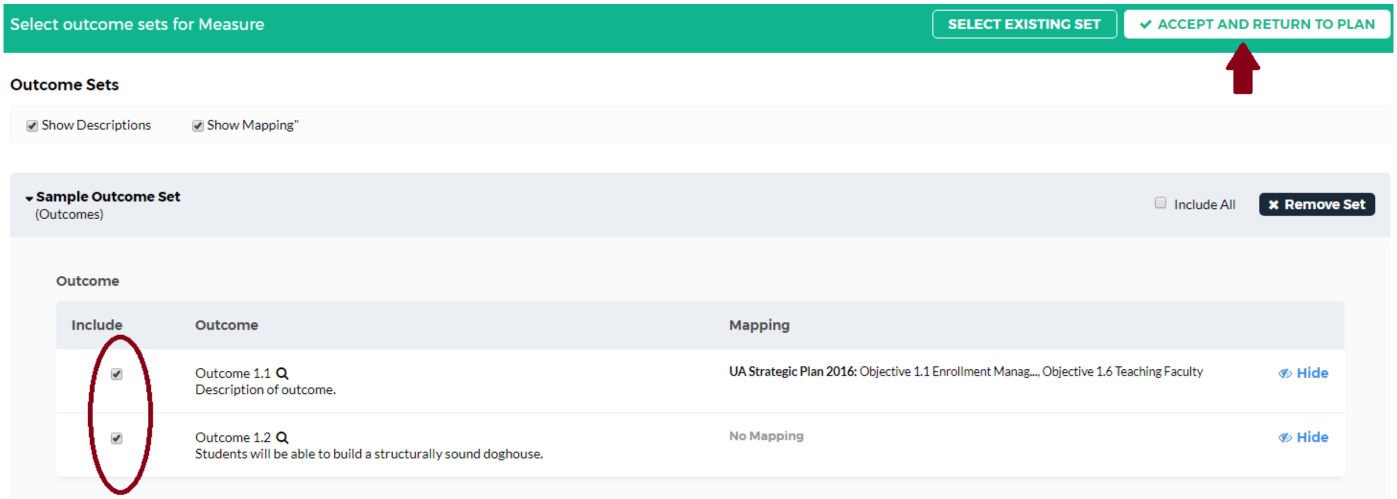


Click **Select Existing Set**.

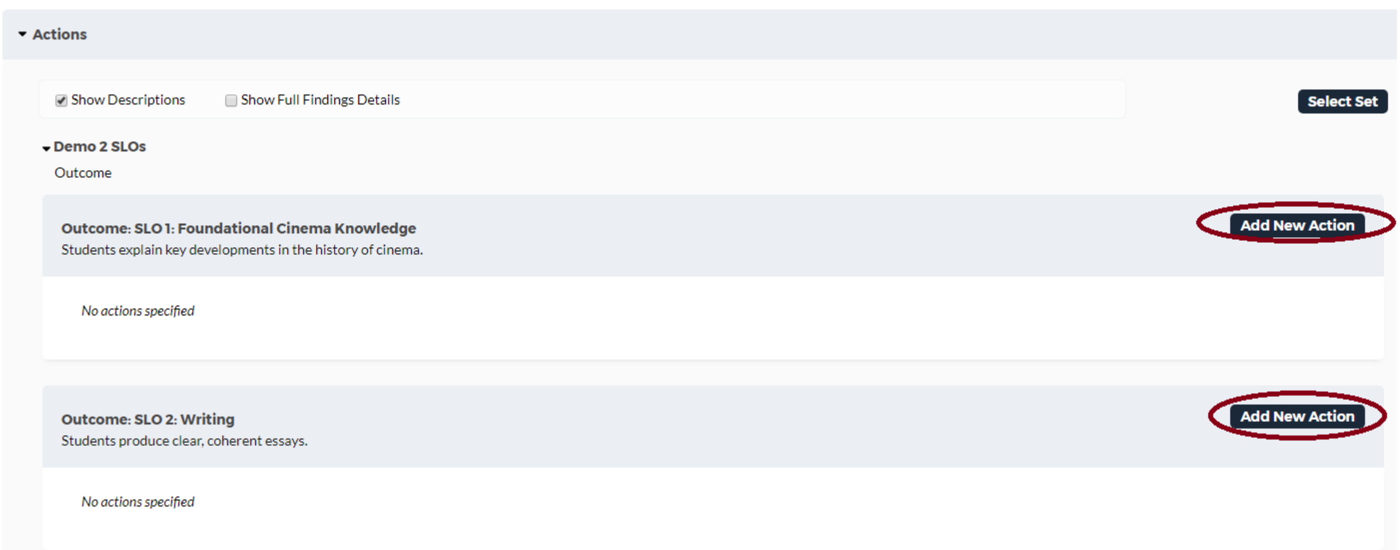
Select the pertinent outcome set, then click **Continue**.



Use the checkboxes to select the specific outcomes to include in the cycle's assessment plan, then click **Accept and Return to Plan**.

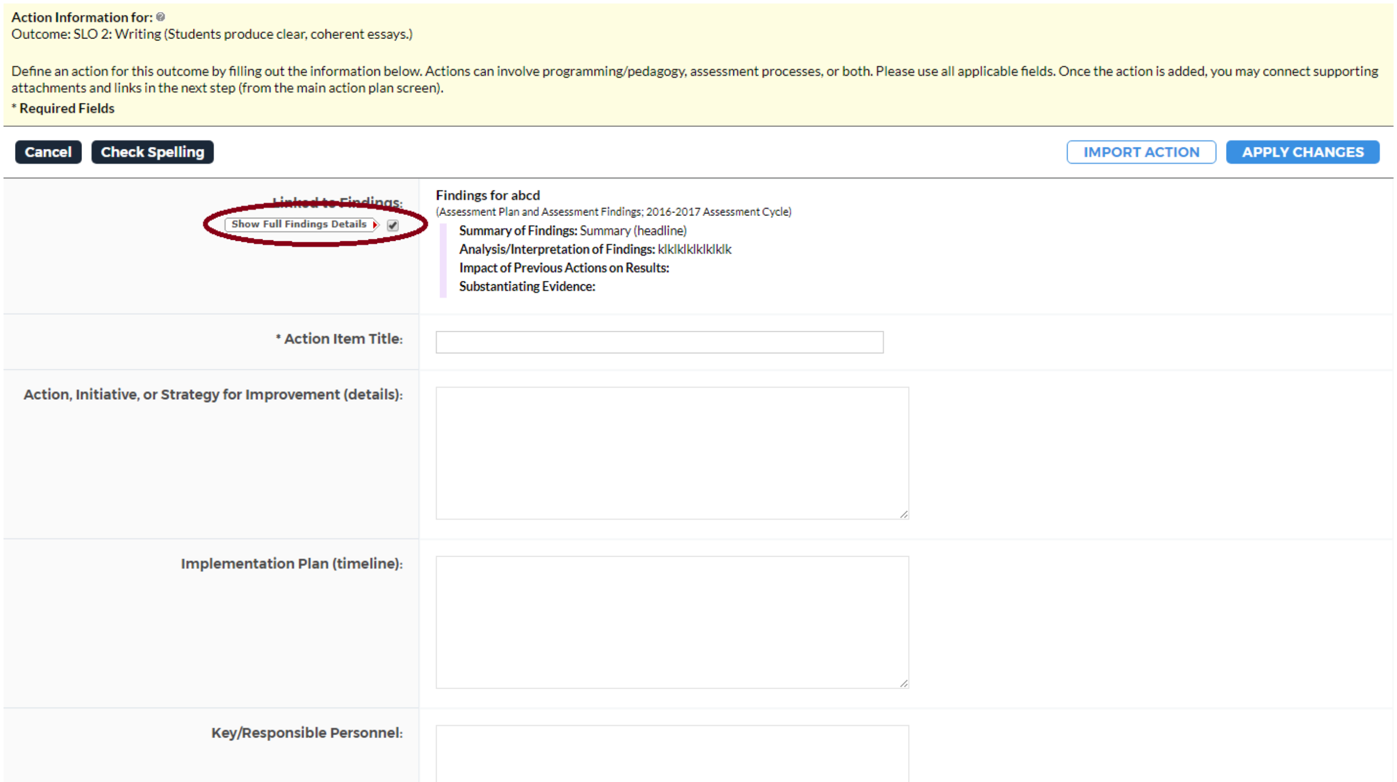


You can now add an action plan for a particular outcome by clicking the **Add New Action** button (action plans must be added or imported one at a time).



You may wish to include the **Findings for Measure** to provide context/support for the action plan you're about to describe (i.e., the Findings will reappear in this part of your report).

You can now add details about the plan (all fields but Title are optional). Alternatively, you can **Import** a previously-added action plan and edit it as needed. Click **Show Full Findings Details** to make visible the measure-specific findings that inspired this action plan.

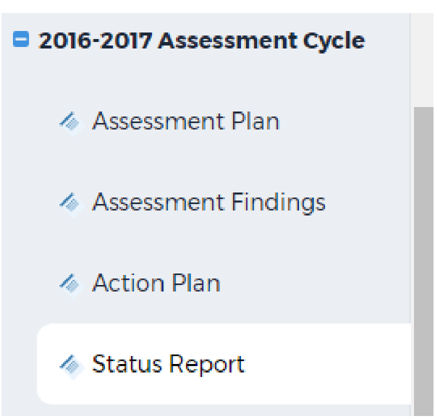


Click **Apply Changes** when the plan details are complete. You can repeat the **Add New Action** process for each additional action you want to create.

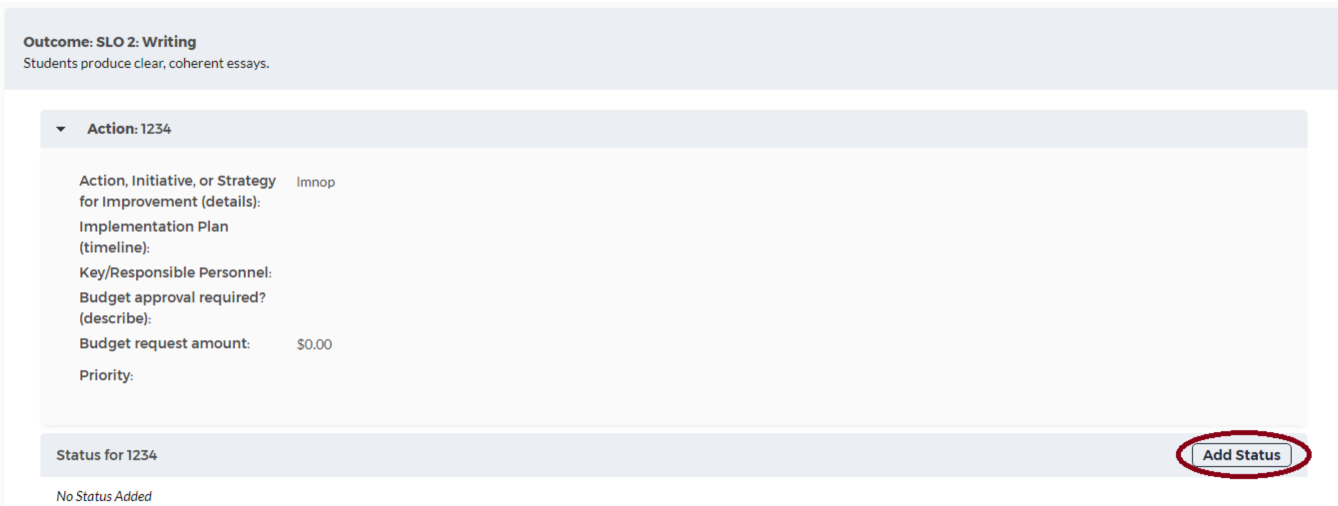
Be sure to click the **Check In** button, which will allow your peers to access/modify the area.

STATUS REPORT

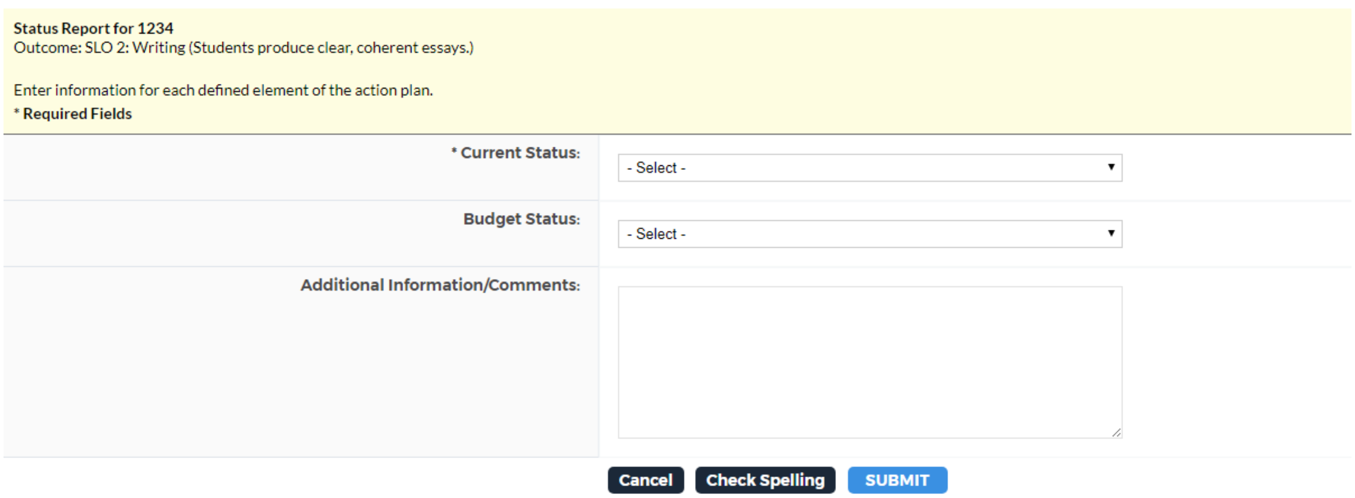
11. To update the status of an action plan, select the Status Report area.



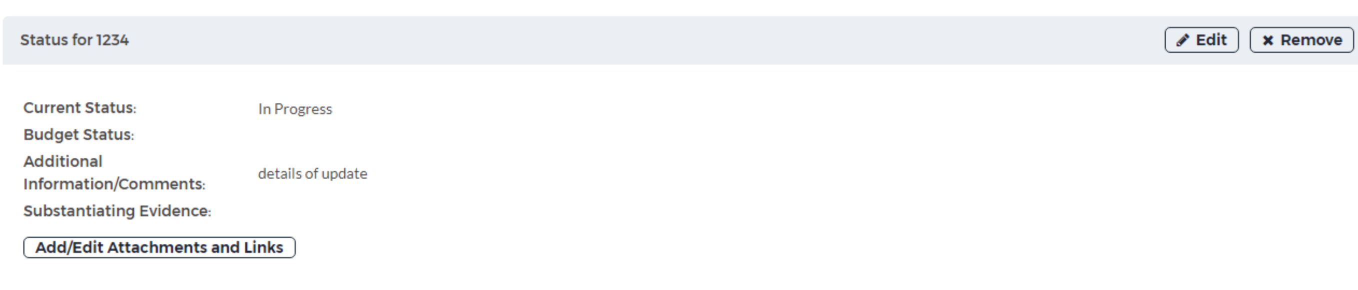
Check Out the area and then click the **Add Status** button for the pertinent action.



You can then add the Status Report for the action and click Submit.



After clicking the **Submit** button, you'll have the option to attach documentation or links.



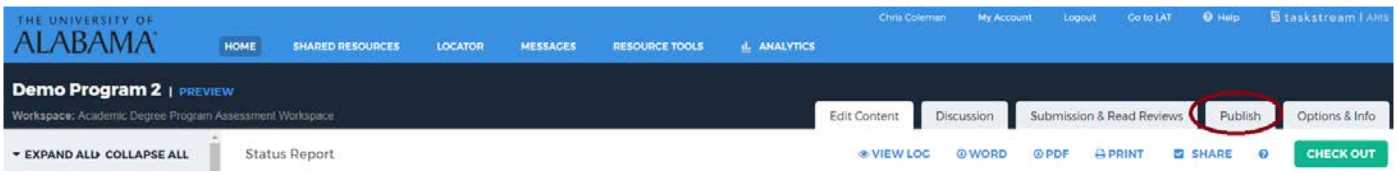
Repeat the above steps as needed. Be sure to click the **Check In** button when you're finished.

SUBMITTING WORK

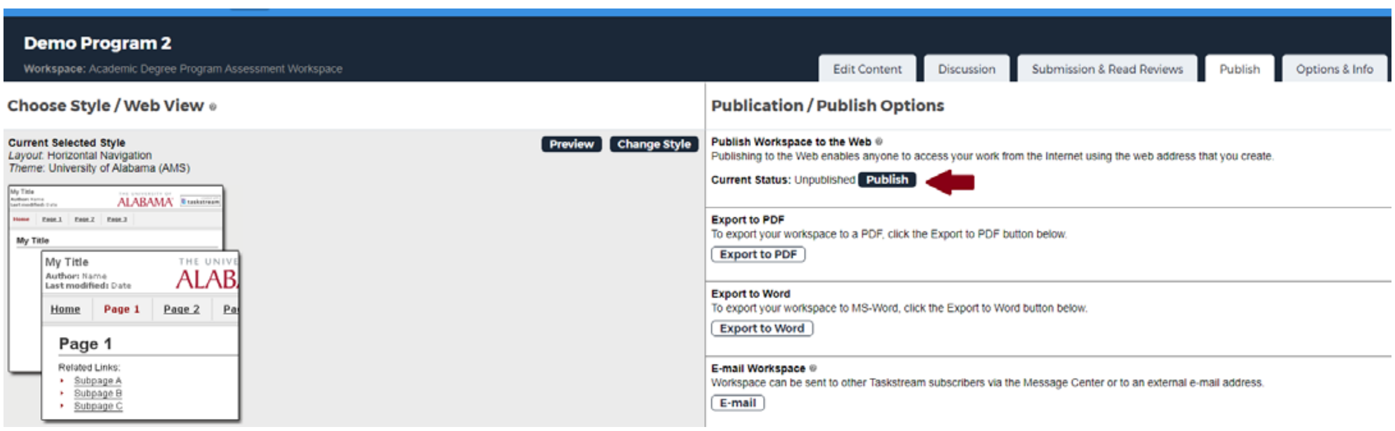
As part of The University of Alabama's ongoing continuous improvement process, you'll be submitting your work in order to receive feedback. Specifically, you'll submit a link to the published version of your workspace once a year. The submission process involves **three** short steps:

1) publish workspace;
2) share URL;
3) click Submit Work button.

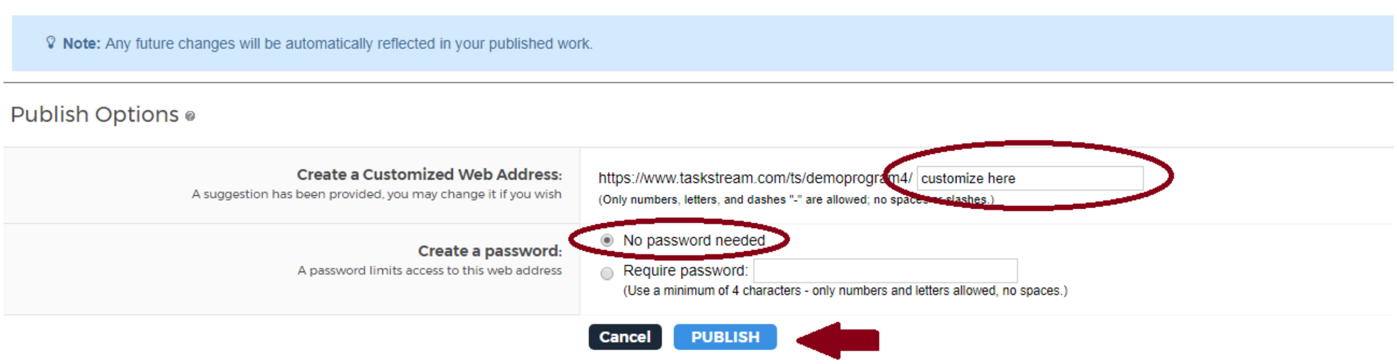
Step 1: When your report is ready to be submitted, go to the Publish tab (horizontal menu).



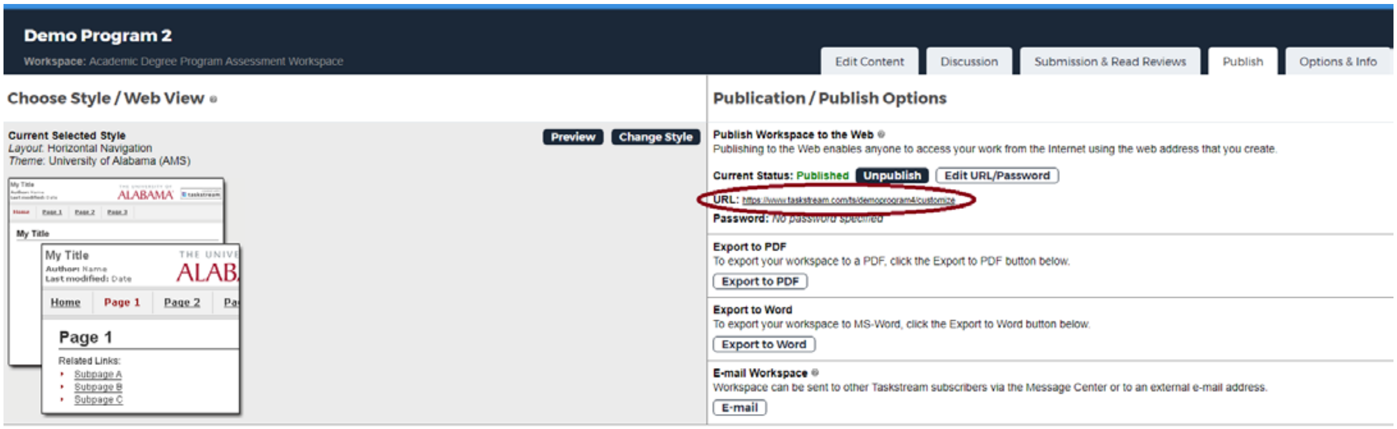
On the next page, click the **Publish** button.



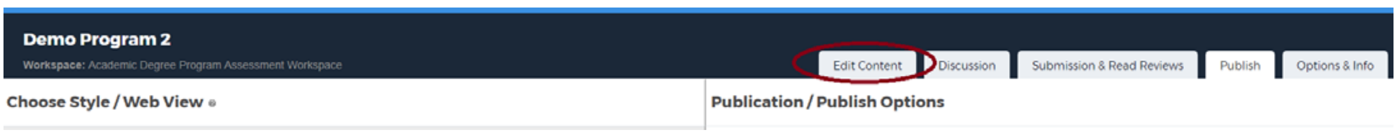
Customize the URL if desired, and choose whether you wish to password-protect the link (please select "No" unless you have discussed this with OIE beforehand). Click **Publish**.



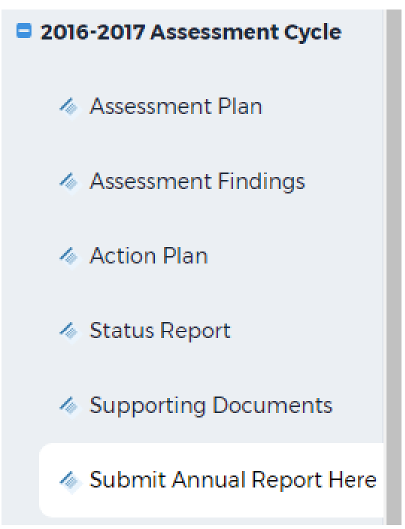
Step 2: Copy the URL for the workspace. You can always find the address under the Publish tab.



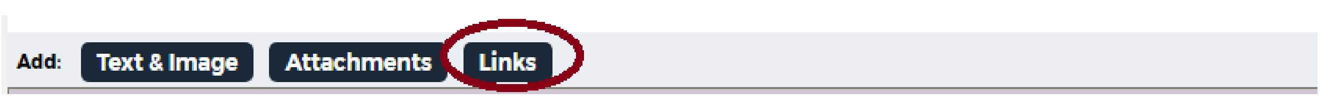
Next, go back to the Edit Content tab (horizontal menu).



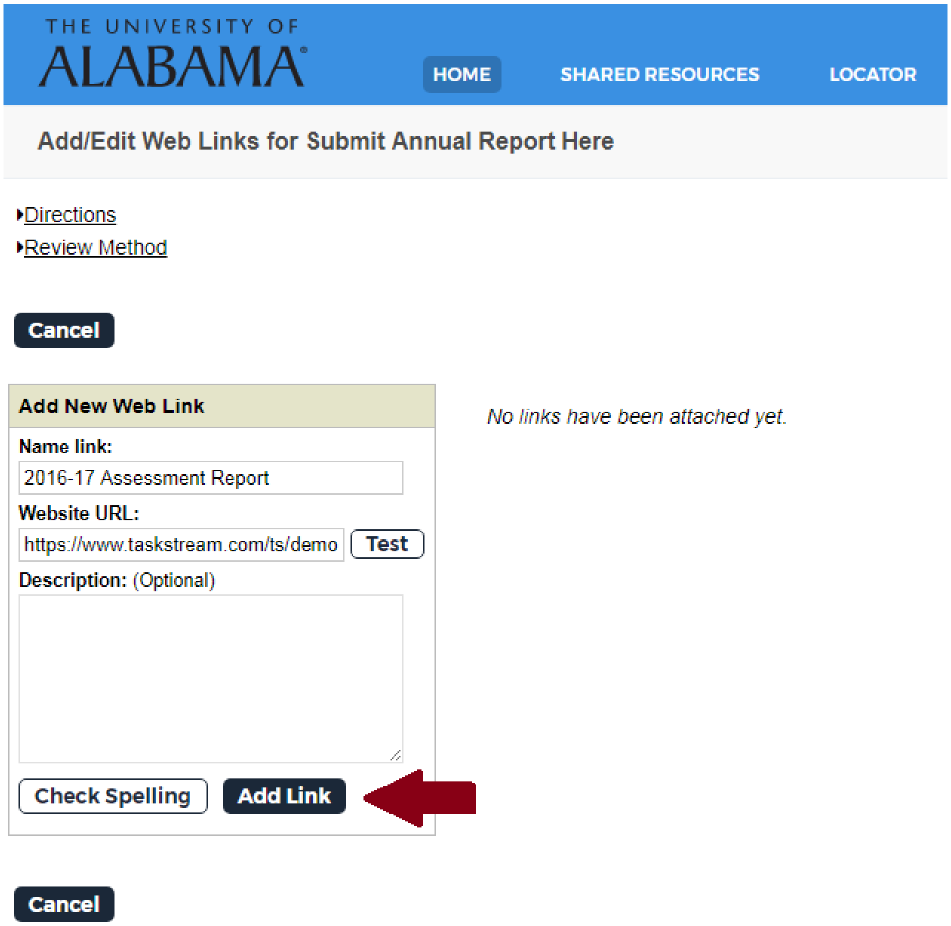
Under the relevant Assessment Cycle, go to the Submit Annual Report Here. **Check Out** the area.



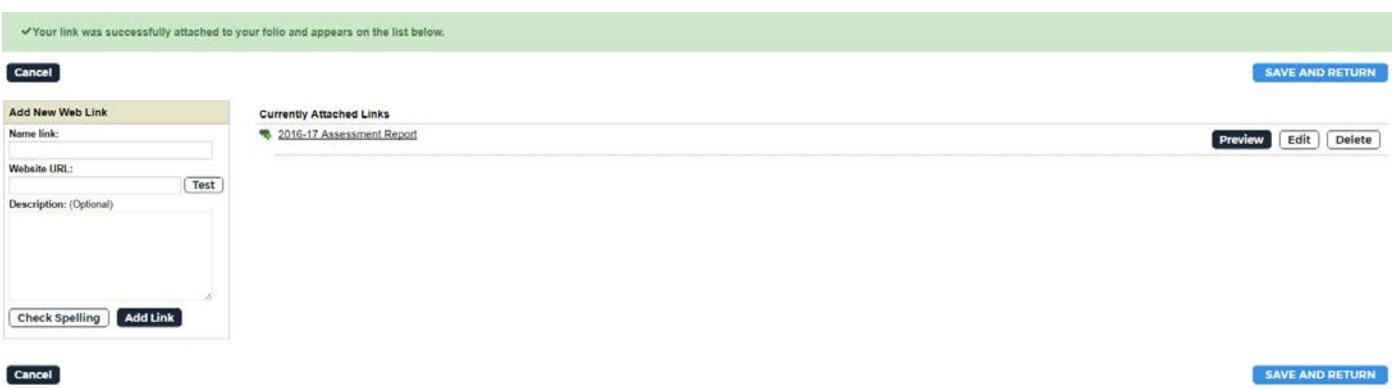
At the bottom of the screen, click the **Links** button.



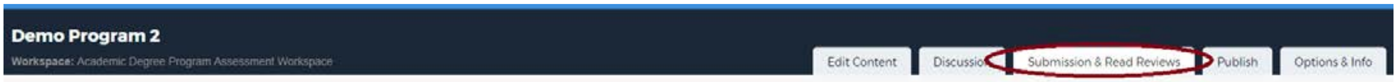
On the left side, paste the copied link under Website URL. Type a name for the link (e.g., 2016-17 Assessment Report). Click **Add Link**.



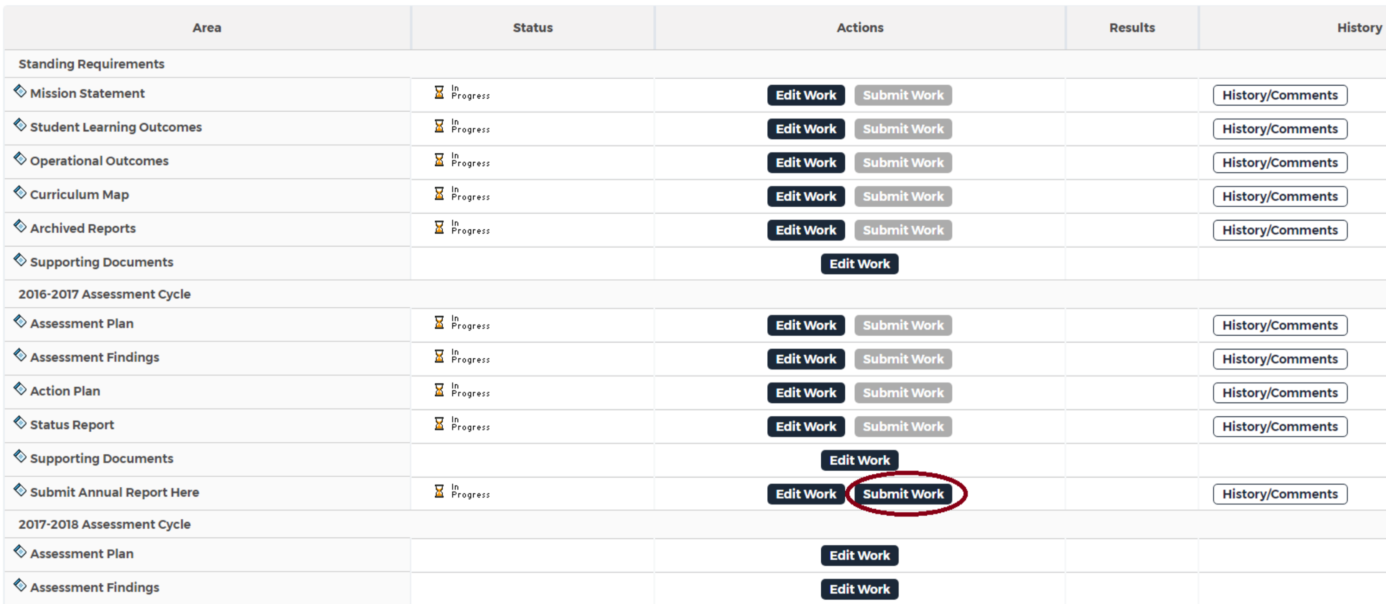
Once the link is added, click **Save and Return** on the right.



Step 3 (You're almost done!): At the top, go the Submission & Read Reviews tab.



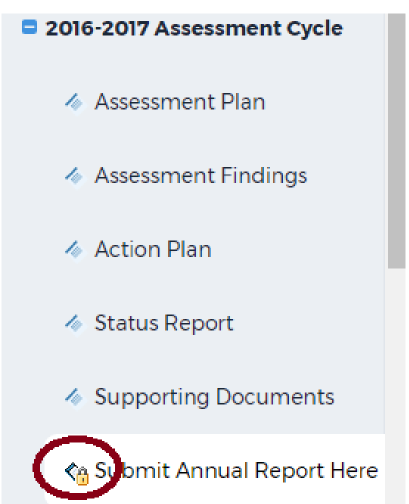
Find the Submit Annual Report Here row for the pertinent assessment cycle (e.g., 2016-17); then click the **Submit Work** button with respect to that requirement. If the button is grayed out, double-check your work from Steps 1 and 2.



Area	Status	Actions	Results	History
Standing Requirements				
Mission Statement	In Progress	Edit Work Submit Work		History/Comments
Student Learning Outcomes	In Progress	Edit Work Submit Work		History/Comments
Operational Outcomes	In Progress	Edit Work Submit Work		History/Comments
Curriculum Map	In Progress	Edit Work Submit Work		History/Comments
Archived Reports	In Progress	Edit Work Submit Work		History/Comments
Supporting Documents		Edit Work		
2016-2017 Assessment Cycle				
Assessment Plan	In Progress	Edit Work Submit Work		History/Comments
Assessment Findings	In Progress	Edit Work Submit Work		History/Comments
Action Plan	In Progress	Edit Work Submit Work		History/Comments
Status Report	In Progress	Edit Work Submit Work		History/Comments
Supporting Documents		Edit Work		
Submit Annual Report Here	In Progress	Edit Work Submit Work		History/Comments
2017-2018 Assessment Cycle				
Assessment Plan		Edit Work		
Assessment Findings		Edit Work		

Note that when feedback on your work is available (which might take several weeks), you'll return to the Submission & Read Reviews tab (same row) to view the Results Report.

The "locked" icon is one way to be sure your assessment report was successfully submitted:



GETTING HELP

If you require assistance navigating Taskstream AMS or entering data, you can contact Taskstream at 800-311-5656 or send an email to either help@taskstream.com or support@watermarkinsights.com.

For assistance related to your assessment process, please contact oie@ua.edu or visit the OIE web page: http://oiraservices.ua.edu/content/oie/.