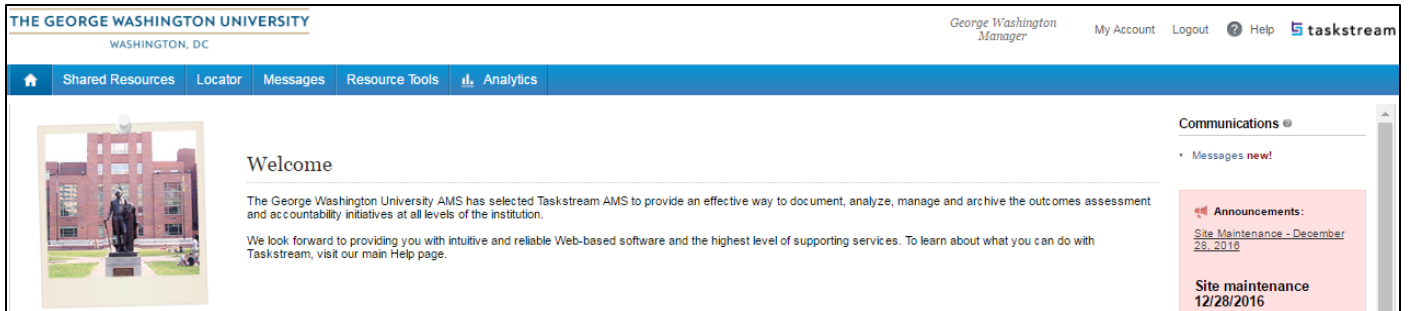


QuickStart Guide: Gen Ed Assessment Workspace

SIGNING IN

1. Once you sign into taskstream.com with your username and password, your homepage will resemble this image:

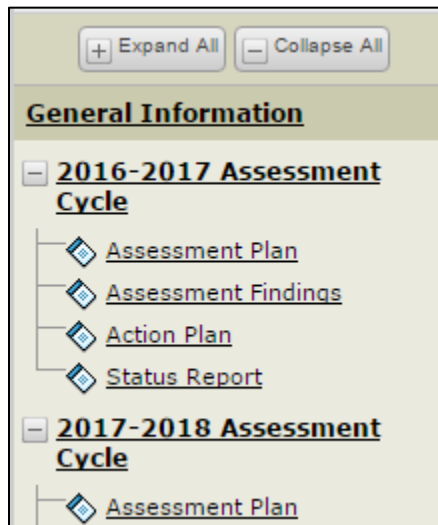


2. Scroll down your homepage and click on the workspace for **Gen Ed Assessment** under your course(s).



ASSESSMENT PLAN REQUIREMENT

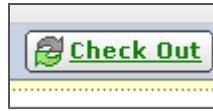
1. When you first open a workspace, you will see that workspace's structure tree on the left-hand side of the page.
 - a. Each link in the tree is called a **requirement**. **Requirements** are grouped into categories.



***Annual Assessment Cycles** will be completed anew each year.

2. Under the **2016-2017 Assessment Cycle** category in the structure tree, click on the **Assessment Plan** requirement to define the measures used to assess your general education objectives for that time period.

- a. To add/edit content to any requirement, you must click on the green **Check Out** button in the upper, right-hand corner.



- 3. Next, click on each **yellow drop down arrow** to expand the corresponding section and read/view the *Directions*, *Review Method*, and the option under the *Measures* bar. Then, hit the **Select Set** button under the Measures bar.

Assessment Plan

Work in Progress **Checked out: 12/21/2016 04:33:36 PM (EST)**
Checked out to: George Washington Manager

Directions

To begin, click the **Check Out** button on the upper right side of this requirement. [Print](#)

Select the "Create New Assessment Plan" button; then click "Select Outcomes"; and select the "Select Existing Set" button to access the general education goals and objective set. Select the set, and then click "Continue."

Next, check the boxes for the specific objectives you wish to assess by enabling the checkbox next to each one. Multiple goals can be selected for courses that meet more than one G-PAC requirement. Click "Accept and Return to Plan" and for each objective that was selected, you will see an "Add New Measure" button.

To add an assessment measure to an objective, click this button, complete the required fields and press the "Continue" button. Once a measure has been added you may add any attachments or weblinks to that measure.

Review Method

The Review method for this item has not been identified to our system.

Measures

Select Set Show Descriptions

- 4. Choose **Select Existing Set** to pick your objective set from the **Outcomes/Learning Objectives** library.

Select from outcome sets

Accept and Return to Plan

Select Existing Set

No outcome sets attached.

Accept and Return to Plan

- 5. Click on the radio button next to "**GW- Gen Ed. (G-PAC) Objectives**" and hit the **Continue** button.

Import Outcome Set

Select an Existing Set in DEMO AREA:	<i>No Available Sets</i>
Copy an External Set:	<input checked="" type="radio"/> GW- Gen Ed. (G-PAC) Objectives <small>(Effective December 2016)</small>

Cancel

Continue

- 6. On you

the next page, will be able to choose which

objectives you would like to assess.

- a. Check the **Include All?** box toward the upper, left-side of the page (if you will assess all objectives).
- b. Otherwise, please select the checkboxes next to your preferred objectives in any categories (if you will assess a subset of the objectives).
- c. After you are finished, click on the **Accept and Return to Plan** button.

Select from outcome sets

Accept and Return to Plan Select Existing Set

Include All? **GW- Gen Ed. (G-PAC) Objectives (Copy 1)**
(Effective December 2016)

Delete Set

Critical thinking or analysis

Objective	Mapping
Include? <input checked="" type="checkbox"/> • Analyze and evaluate abstract information	No Mapping
Include? <input type="checkbox"/> • Understand and analyze scholarly literature and argument,	No Mapping

7. On the resulting page, you will be able to add a measure(s) to your objective(s), by clicking on the **Add New Measure** button, which will appear under each objective you selected.

▼ **GW- Gen Ed. (G-PAC) Objectives (Copy 1)**

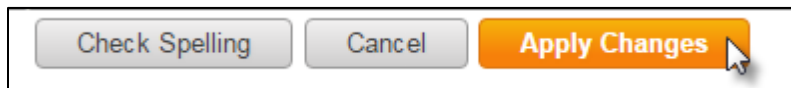
Critical thinking or analysis

• **Analyze and evaluate abstract information** *No measures specified*

Add New Measure

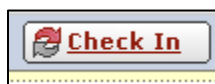
8. Clicking **Add New Measure** will redirect you to a data entry page, where the only required field is *** Measure Title**; however, multiple text boxes and drop-down menus allow you to create and explain a robust measure.
 - a. In addition, instructions for entering information can be found at the top of the page.

9. After you enter the information, hit the **Apply Changes** button at the bottom of the page.



10. Now, your measure will appear next to your objective in the work area for this requirement.
 - a. You may add multiple measures to any objective(s) by clicking on the **Add New Measure** button again.
 - b. You may also add attachments and/or links to a measure by clicking on the corresponding button.

11. When you finish entering your measures, check the **Assessment Plan** requirement back in by clicking on the red **Check In** button in the upper, right-hand corner of the page.



12. (Optional) In the **Add comment..** text box, feel free to enter a brief explanation of the edits you made to the requirement and click **Submit Comment**.

- a. Otherwise, simply click **Return to Work Area**.

Check In Successful

You have checked in the following area: **2016-2017 Assessment Cycle : Assessment Plan**

[Return to Work Area](#)

Optional

Check in all other areas checked out by you (not applicable).

Add comment to the revision history log:

I added one (1) new measure.

What would you like to do next?

Return to work area
 Go to Submission Area

Submit Comment

13. Once you return to the work area, you can view the requirement's check in/check out history and your comment, by click on the **Log** tab toward the top of the page and scrolling down to the bottom of the grid.
- a. Please note: if you forget to check a requirement back in, Taskstream (i.e. System Administrator) will automatically check it in when you log out or when you are timed out.

Content **Log**
Print PDF Export to Word

History/Comments for Assessment Plan
 Work Last Edited: 12/21/2016 03:52:53 PM (EST)

Directions: Below is a record of the review history for Assessment Plan

Show revision history

Date	Action	Name	Comments
11/16/2016 11:44 am (EST)	Checked Out	George Washington Manager	
11/16/2016 12:13 pm (EST)	Checked In	System Administrator	System auto check-in upon user leaving Taskstream website.

ASSESSMENT FINDINGS REQUIREMENT

1. Next, click on the **Assessment Findings** requirement from the same 2016-2017 category in the structure tree on the left-hand side of the page, and hit the **Check Out** button.
 - a. Once you have gathered your data, this requirement allows you to add findings to your measures.
 - b. *Directions, Review Method, etc.* can be found by clicking on the page's **yellow drop down arrows**.

The screenshot shows the 'Assessment Findings' workspace. At the top, there are navigation buttons: 'Content', 'Log', 'Check Out', 'Share', 'Print', 'PDF', and 'Export to Word'. Below this is a header for 'Assessment Findings' with a 'Work not Started' indicator. The main content area is divided into sections: 'Directions' (with a 'Print' link), 'Review Method', and 'Finding per Measure'. The 'Finding per Measure' section is expanded to show 'GW- Gen Ed. (G-PAC) Objectives (Copy 1)' and 'Critical thinking or analysis'. A measure is selected: 'Measure: Final Essay for COURSE 101'.

2. After checking out the requirement, you will be able to add a findings to your measure(s), by clicking on the **Add Findings** button which will appear on the right-hand side of the page, below the measure.

This screenshot provides a detailed view of the 'Measure: Final Essay for COURSE 101'. It includes the following information:

- Details/Description of the Measure:** In the final written essay for this course, students must analyze and evaluate abstract information from various units studied during the semester.
- Acceptable Target (Optional):** 75% of students will receive a 3 or higher on a 4-point rubric.
- Course Section(s) (if applicable):**
- Timeline for the Measure (Optional):** Late Nov.: first drafts due. Early Dec.: final drafts due. Mid-Dec.: scoring completed. Early Jan.: assessment completed.
- Key/Responsible Personnel (Optional):** The TA's will score the essay, and the professor will assess the class' overall strengths and weaknesses based on various rubrics.

At the bottom, there is a section for 'Findings for Final Essay for COURSE 101' with an 'Add Findings' button.

3. You may then enter the details of your assessment findings into the data entry screen and hit **Submit**.

- a. Please note: the only required field is * **Summary of Findings**, but multiple fields are included to help you create a robust set of information.

Findings for Final Essay for COURSE 101	
Objective / Outcome: • Analyze and evaluate abstract information	
Please enter the findings for this measure.	
* Required Fields	
* Summary of Findings:	60% of students received a 3 or higher on the 4-point rubric: -10% received a 1 -30% received a 2 -30% received a 3 -30% received a 4
Recommendations (Optional):	Update the textbook, which is 5+ years old.
Reflections/Notes (Optional):	60% is the highest percentage of students to receive a 3 or higher over the last 4 years.
Acceptable Target Achievement (if target defined):	75% of students will receive a 3 or higher on a 4-point rubric. <input checked="" type="radio"/> Not Met <input type="radio"/> Met <input type="radio"/> Exceeded
<div style="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Check Spelling"/> <input type="button" value="Submit"/> </div>	

14. The resulting screen will resemble the image below. Your findings will appear next to your measure in the work area for this requirement.
- You may add multiple findings to any measure(s).
 - You may also add attachments and/or links to a finding by clicking on the corresponding button.

▼ GW- Gen Ed. (G-PAC) Objectives (Copy 1)

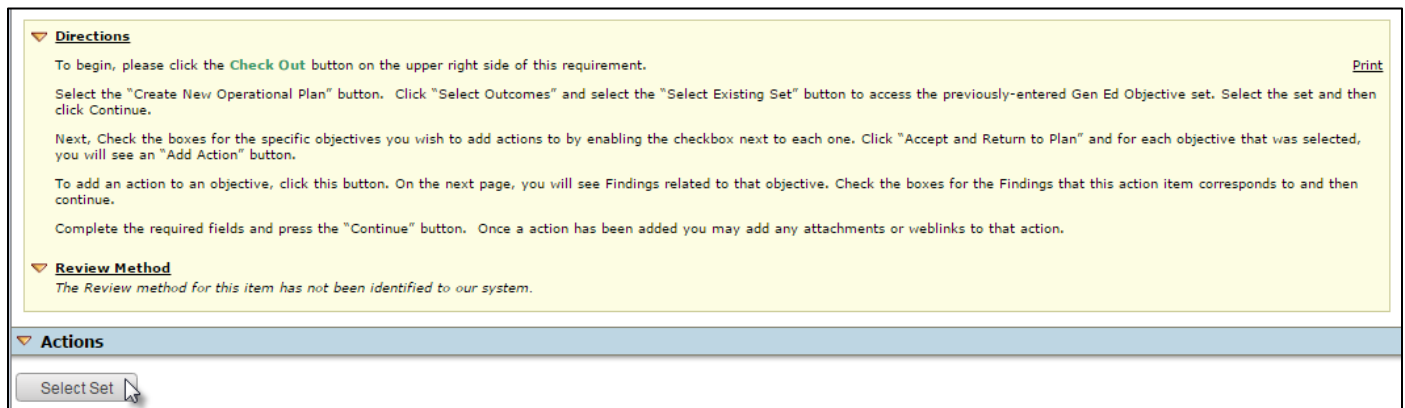
Critical thinking or analysis

- Analyze and evaluate abstract information
 - ▼ **Measure:** Final Essay for COURSE 101
Course level: Direct - Student Artifact
 - Details/Description of the Measure:** In the final written essay for this course, students must analyze and evaluate abstract information from various units studied during the semester.
 - Acceptable Target (Optional):** 75% of students will receive a 3 or higher on a 4-point rubric.
 - Course Section(s) (if applicable):**
 - Timeline for the Measure (Optional):** Late Nov.: first drafts due.
Early Dec.: final drafts due.
Mid-Dec.: scoring completed.
Early Jan.: assessment completed.
 - Key/Responsible Personnel (Optional):** The TA's will score the essay, and the professor will assess the class' overall strengths and weaknesses based on various rubrics.
 - Findings for Final Essay for COURSE 101**
 - Summary of Findings:** 60% of students received a 3 or higher on the 4-point rubric:
-10% received a 1
-30% received a 2
-30% received a 3
-30% received a 4
 - Results:** Acceptable Target Achievement (if target defined): Not Met
 - Recommendations (Optional):** Update the textbook, which is 5+ years old.
 - Reflections/Notes (Optional):** 60% is the highest percentage of students to receive a 3 or higher over the last 4 years.
 - Substantiating Evidence:**

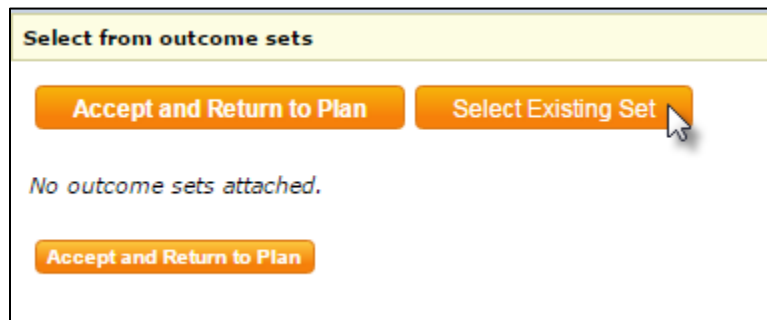
- 15. When you finish entering your findings, check the **Assessment Findings** requirement back in by clicking on the red **Check In** button in the upper, right-hand corner of the page.
 - a. Remember, you may leave an optional comment in the log for this requirement.

OPERATIONAL PLAN

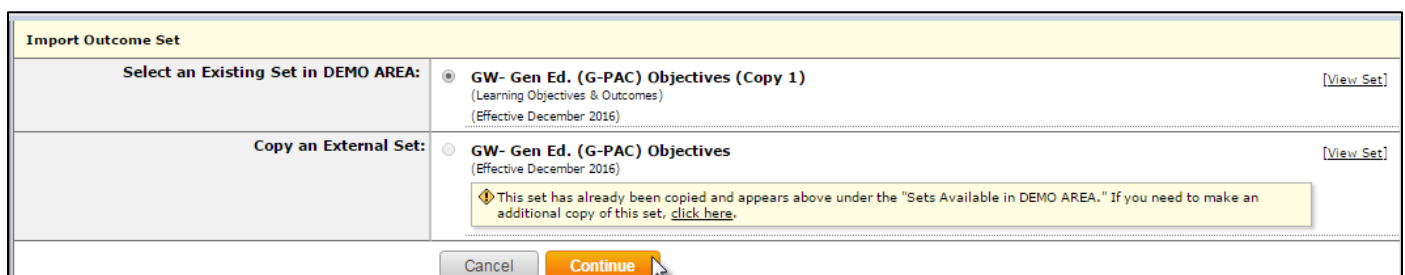
- 1. At this time, click on the **Action Plan** requirement from the same category in the tree structure on the left-hand side of the page, hit the **Check Out** button, and then click on the **Select Set** button under the *Actions* bar.
 - a. Now that you've inputted your data/findings, you can operationalize your next steps in an action plan.
 - b. *Directions, Review Method, etc.* can be found by clicking on the **yellow drop down arrows** on the page.



- 2. Click the **Select Existing Set** button.



- 3. Select the radio button for the **Existing Set** you wish to assess, "**GW- Gen Ed. (G-PAC) Objectives (Copy 1)**," and click the **Continue** button.



4. Select the objectives you wish to assess and then click the **Accept and Return to Plan** button.
 - a. * **Make sure to select the same objectives you chose in the Assessment Plan requirement above.** *

Select from outcome sets

Show Descriptions
 Show Mapping

Include All? **GW- Gen Ed. (G-PAC) Objectives (Copy 1)** (Learning Objectives & Outcomes)
 (Effective December 2016)

Critical thinking or analysis [Hide]

Objective	Mapping
<input checked="" type="checkbox"/> • Analyze and evaluate abstract information	No Mapping [Hide]
<input type="checkbox"/> • Understand and analyze scholarly literature and argument,	No Mapping [Hide]

5. You may now add an action to each applicable objective by clicking on the **Add New Action** button.

GW- Gen Ed. (G-PAC) Objectives (Copy 1)

Critical thinking or analysis

• Analyze and evaluate abstract information *No actions specified*

6. You may wish to link your new action to the **Findings for Measure** (for this objective) by selecting that checkbox and clicking **Continue**.
 - a. Otherwise, your action will be linked to the objective (instead of specific findings).

2016-2017 Assessment Cycle: Assessment Plan & Assessment Findings

Findings for Measure: Final Essay for COURSE 101

Summary of Findings: 60% of students received a 3 or higher on the 4-point rubric:
 -10% received a 1
 -30% received a 2
 -30% received a 3
 -30% received a 4

7. You may now populate the action fields with your data on the data entry page.
 - a. You will need to check the box for **Show Full Findings Details**.
 - b. The only required field is * **Action Item Detail**, but adding more info will create a more robust plan.
 - c. Click **Apply Changes** when you are finished adding your data.

Linked to Findings: **Show Full Findings Details**

Findings for Final Essay for COURSE 101
 (Assessment Plan and Assessment Findings / 2016-2017 Assessment Cycle)

Summary of Findings: 60% of students received a 3 or higher on the 4-point rubric:
 -10% received a 1
 -30% received a 2
 -30% received a 3
 -30% received a 4

Acceptable Target Achievement (if target defined): Not Met
Recommendations (Optional): Update the textbook, which is 5+ years old.
Reflections/Notes (Optional): 60% is the highest percentage of students to receive a 3 or higher over the last 4 years.
Substantiating Evidence:

* **Action Item Title:**

Action details:

Gen Ed Assessment Workspace

8. The resulting screen will resemble the image below. Your action will appear next to your objective in the work area for this requirement.
 - a. You may add multiple actions to any objective(s) by clicking the **Add New Action** button again.
 - b. You may also add attachments and/or links to an action by clicking on the corresponding button.

The screenshot shows a workspace for 'GW- Gen Ed. (G-PAC) Objectives (Copy 1)'. Under the category 'Critical thinking or analysis', there is an objective 'Analyze and evaluate abstract information'. An action is listed: 'Action: Purchase New Textbooks for COURSE 101'. The action details state: 'Form a committee to suggest new textbook titles to the chair of the department. The chair will choose the new title, and request budget approval. Once approval is granted, the bookstore will purchase the new title and syllabi will be updated.' There are buttons for 'Add/Edit Findings', 'Edit', and 'Remove'. A note indicates 'This Action is associated with the following Findings'. There is also a button for 'Supporting Attachments: Add/Edit Attachments and Links'.

9. When you finish entering your actions, check the **Action Plan** requirement back in by clicking on the red **Check In** button in the upper, right-hand corner of the page.
 - b. Remember, you may leave an optional comment in the log for this requirement.

STATUS REPORT (OPTIONAL)

1. Finally, select the **Status Report (Optional)** requirement from the same category in the structure tree on the left-hand side of the page, hit the **Check Out** button, and click on the **Add Status** button under the *Action Statuses* bar.
 - a. Now that you inputted your actions, you can report on the status(es) of those actions here.
 - b. *Directions, Review Method, etc.* can be found by clicking on the **yellow drop down arrows** on the page.

The screenshot shows the 'Status Report (Optional)' page. It includes a 'Work not Started' indicator and 'Checked out: 12/21/2016 06:06:48 PM (EST)' by 'George Washington Manager'. There are sections for 'Directions' (explaining how to check out and add status reports) and 'Review Method' (noting it has not been identified). The 'Action Statuses' section shows the same objective and action as the previous screenshot, but with an 'Add Status' button and a 'Status for Purchase New Textbooks for COURSE 101' field. The current status is 'No Status Added'. There are also 'Show Actions' and 'Show Descriptions' checkboxes.

2. Choose an option from the **Current Status** drop-down menu (the mandatory field for this page) and click **Submit**.
 - a. You may also type future plans into the **Next Steps** text box (optional).

Gen Ed Assessment Workspace

Status Report for Purchase New Textbooks for COURSE 101
Objective / Outcome: • Analyze and evaluate abstract information

Enter information for each action defined in the operational plan.
*** Required Fields**

* Current Status:	In Progress
Next Steps:	Chair has received the committee's suggestions, and is currently deciding on the final title. She will update the committee and bookstore by the end of the month.

Cancel Check Spelling Submit

- The resulting screen will resemble the image below. Your status will appear next to your action in the work area for this requirement.
 - You may also add attachments and/or links to a status by clicking on the corresponding button.

▼ **Action Statuses**

Show Actions Show Descriptions

▼ **GW- Gen Ed. (G-PAC) Objectives (Copy 1)**

Critical thinking or analysis

- **Analyze and evaluate abstract information**
 - ▼ **Action: Purchase New Textbooks for COURSE 101**

Action details: Form a committee to suggest new textbook titles to the chair of the department. The chair will choose the new title, and request budget approval. Once approval is granted, the bookstore will purchase the new title and syllabi will be updated.

Status for Purchase New Textbooks for COURSE 101 Edit Remove

Current Status: In Progress

Next Steps: Chair has received the committee's suggestions, and is currently deciding on the final title. She will update the committee and bookstore by the end of the month.

Substantiating Evidence: Add/Edit Attachments and Links

- Repeat these steps for each subsequent **Action**.
- At the bottom of the **Status Report**, add a **Status Summary** (an aggregate summary of all your statuses) by clicking the **Edit** button.

▼ **Status Summary**

No text specified

Edit

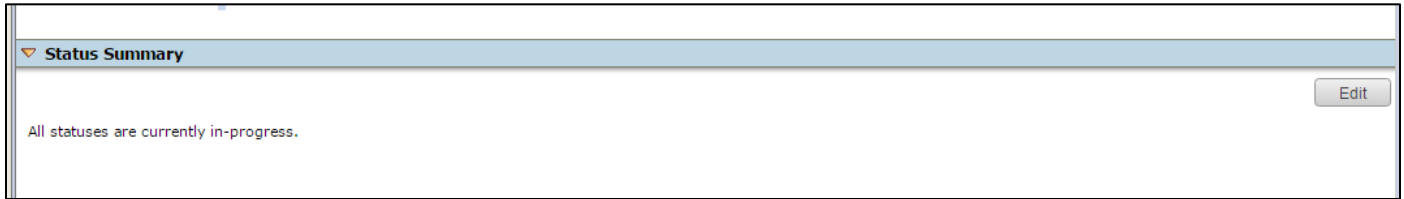
- Type your summary into the **Text** box.

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

Text: All statuses are currently in-progress.

Cancel Check Spelling Submit

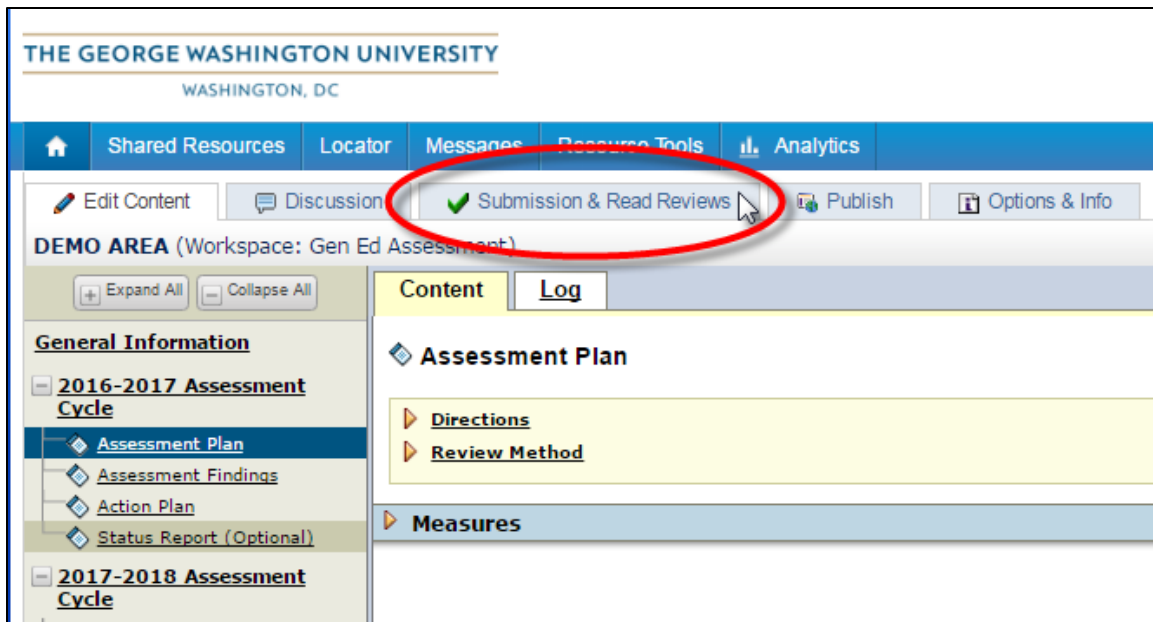
7. The resulting screen will resemble the image below:



- 8. Be sure to click the **Check In** button to allow your peers the ability to modify the requirement (i.e. to allow them to update the statuses as time progresses).
 - a. Remember, you may leave an optional comment in the log for this requirement.

SUBMISSION & READ REVIEWS TAB

- 1. After you finish entering data into your requirements, your school may ask you to submit your work for review.
 - a. To do this, click on any requirement (no need to check it out), and then choose the **Submission & Read Reviews** tab at the top of your workspace.



Gen Ed Assessment Workspace

2. The resulting page will display a grid.
 - a. If your school requires you to submit a specific requirement (all of which will be listed in the first column), a corresponding **Submit Work** button will appear in the **Actions** column for that requirement.

The screenshot shows the 'Scores/Results Summary' page in the Gen Ed Assessment Workspace. The page has a navigation bar with 'Shared Resources', 'Locator', 'Messages', 'Resource Tools', and 'Analytics'. Below the navigation bar are tabs for 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info'. The main content area is titled 'DEMO AREA (Workspace: Gen Ed Assessment)' and 'Scores/Results Summary'. It features a table with columns for 'Area', 'Status', 'Actions', 'Results', and 'History'. The table is organized into three assessment cycles: 2016-2017, 2017-2018, and 2018-2019. Each cycle lists requirements such as 'Assessment Plan', 'Assessment Findings', 'Action Plan', and 'Status Report (Optional)'. The 2016-2017 cycle shows 'In Progress' status for the first three requirements, with 'Edit Work' and 'Submit Work' buttons in the Actions column. The 2017-2018 and 2018-2019 cycles show 'Edit Work' buttons. A summary bar at the bottom indicates 'SUMMARY: 0 areas reviewed'.

Area	Status	Actions	Results	History
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 (Optional)		Edit Work		
2017-2018 Assessment Cycle				
Assessment Plan		Edit Work		
Assessment Findings		Edit Work		
Action Plan		Edit Work		
Status Report (Optional)		Edit Work		
2018-2019 Assessment Cycle				
Assessment Plan		Edit Work		
Assessment Findings		Edit Work		
Action Plan		Edit Work		
Status Report (Optional)		Edit Work		
SUMMARY: 0 areas reviewed				

3. When you are ready, click the **Submit** button for the requirement you wish to submit.
 - a. The page below will appear → enter comments for the evaluator (optional) and select **Yes – Submit My Work**.

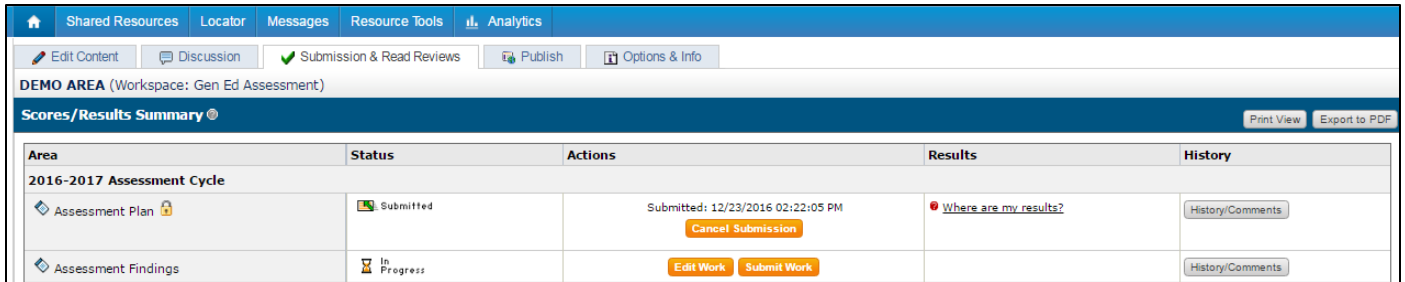
The screenshot shows a browser window titled 'Submit Work for Review - Google Chrome'. The URL is 'https://stg-folio.taskstream.com/Folio/submission_start.asp?qyz=jmaL9GeYVvKZfB2ZSkJ&folder_id=phzkhqcz0'. The page has a blue header with the text 'Are you sure you want to submit Assessment Plan (of 2016-2017 Assessment Cycle) for Review?'. Below the header, it says 'Your work will be locked and no further edits will be possible.' There is a section for 'Add optional comments for your reviewer' with a text input field. At the bottom, there are three buttons: 'Cancel', 'Check Spelling', and 'Yes - Submit My Work'.

4. Your confirmation page will resemble the picture below, and you have the option of printing the confirmation.

The screenshot shows a browser window titled 'Confirmation - Google Chrome'. The URL is 'https://stg-folio.taskstream.com/Folio/submission_confirm.asp?qyz=jmaL9GeYVvKZfB2ZSkJ&folder_id=phzkhq'. The page has a blue header with the text 'You have successfully submitted "Assessment Plan"'. Below the header, it says 'Submitted: 12/23/2016 02:22:05 PM'. At the bottom, there are two buttons: 'Close Window' and 'Print this Confirmation'.

Gen Ed Assessment Workspace

5. Once you submit, you must click the **Cancel Submission** button if you need to edit your work further.
 - a. You may **Cancel Submission** before your evaluator views it for the first time
 - b. When the evaluator views the work, it will be locked (no edits will be allowed).



The screenshot shows the 'Scores/Results Summary' page in the Gen Ed Assessment Workspace. The page has a navigation bar with 'Shared Resources', 'Locator', 'Messages', 'Resource Tools', and 'Analytics'. Below the navigation bar are buttons for 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info'. The main content area is titled 'DEMO AREA (Workspace: Gen Ed Assessment)' and 'Scores/Results Summary'. It features a table with columns for 'Area', 'Status', 'Actions', 'Results', and 'History'. The table lists two assessment cycles: '2016-2017 Assessment Cycle' and '2017-2018 Assessment Cycle'. The first cycle is 'Submitted' and the second is 'In Progress'. The 'Submitted' cycle has a 'Cancel Submission' button, and the 'In Progress' cycle has 'Edit Work' and 'Submit Work' buttons. The 'Results' column for the 'Submitted' cycle contains a link 'Where are my results?' and the 'History' column contains a 'History/Comments' button.

Area	Status	Actions	Results	History
2016-2017 Assessment Cycle				
Assessment Plan	Submitted	Submitted: 12/23/2016 02:22:05 PM Cancel Submission	Where are my results?	History/Comments
Assessment Findings	In Progress	Edit Work Submit Work		History/Comments

REPEATING THE CYCLE

1. After you complete a requirement, you can always edit it by clicking on the requirement's name in the structure tree and checking it out again.
2. After you complete one assessment cycle, you can repeat the steps in the next cycle when you are ready to begin documenting information for that time period.

TASKSTREAM'S MENTORING SERVICES

If you require technical assistance with entering data in your workspace or for login/other issues, you can contact Taskstream's Mentoring Services Support Desk at 800-311-5656 and press 1 for support or send an email to help@taskstream.com.