Taskstream Guide: Entering Administrative Goals
Accessing Taskstream AMS

Logging on to Taskstream:

Option 1: Inside Manhattan.edu Quick Links Icon

- Select > Quick Links on insidemanchester.edu

- Select> Taskstream Icon can be found at the bottom of page.

Option 2: Log on through Taskstream Main Site

- Enter> https://login.taskstream.com/signon/ in address bar
  - Username: Manhattan Email Address
  - Password: ****** (password created when Taskstream account was created)
  - *Select Forgot Login to reset password) Access Taskstream AMS
**Accessing AMS Platform**

**Option 1:** Select AMS platform upon Login

- Manage documents, data, and workflow
- Identify and align learning outcomes
- Create curriculum maps
- Build assessment plans and document findings
- Plan and track improvements

![Image of AMS and LAT platforms](image)

**Option 2:** Go to AMS from LAT

If you log in and arrive at the LAT platform as illustrated in screenshot below

**Select** > **Go to AMS** button in top right corner (next to log out)
You will arrive at the AMS Home page:

Welcome

Manhattan College AMS has selected Taskstream AMS to provide an effective way to document, analyze, manage and archive the outcomes assessment and accountability initiatives at all levels of the institution.

We look forward to providing you with intuitive and reliable Web-based software and the highest level of supporting services. To learn about what you can do with Taskstream, visit our main Help page.
Accessing AMS Workspaces

Each dean, department chair/program director or VP, AVP, or unit director of a department should be assigned to one of two workspaces for entering administrative goals.

- The Academic Assessment Committee Workspace template houses administrative goals, and operational plan, and resource request, past year’s annual reports.
  - Academic Assessment Committee >>
    - The Academic Assessment Committee Workspace is assigned to Academic Deans and Chairs of Academic Departments.
  - Institutional Effectiveness Committee >>
    - The Institutional Effectiveness Committee workspace is assigned to administrative unit directors, AVPs and VPs.

- To add, view, or edit administrative goals select your assigned assessment committee workspace. This will be either Academic Assessment Committee or Institutional Effectiveness Committee workspaces.
**Administrative Goals**

**Entering Administrative Goals**

The workspace template is organized with a taskbar on the left hand side. It is also divided into subcategories. The workspace template editing area is located adjacent to the taskbar on the right.

To begin:

- Select > **2017-2018 Assessment Cycle**
  - Select> **Edit Work** adjacent to Administrative Goals
  - Or Select> **Administrative Goals** listed under **2017-2018 Assessment Cycle**
Creating a New Goal Set

- Select > button to begin entering program administrative goals into the workspace

- Select > Create New Set after selecting > button at the top right side of workspace area

  - **Set Name**: Enter (XXX Department Administrative Goals Set 2017-2018)
  - **Designate Alignment/ Mapping Preference**: Select ☑ next to Goals in other sets will need to be aligned to Goals in this set. (When checked, mapping will be allowed)
  - Select > Continue
Create New Goal

- Select the Create New Goal button
- Goal: Enter Administrative Goal
- Description: Enter goal and description optional, then select Continue
Options after entering goal

Goal added/edited successfully

- Add mapping
- Add another goal
- Back to all goal sets

- Select> Add another goal to enter additional goals
- Repeat steps above until all goals are entered
- Once all goals have been entered select> Back to all goal sets

Copying Goals from previous year

- Select> Select Existing Set

Import Goal Set

- Import Goal Set: Select goal set from previous year

- Select> Continue
**Mapping Goals to Strategic Plan**

Items to note when mapping to the strategic plan

- Select **only one Strategic Plan Goal** that aligns to your administrative goal
  - Preferably, **select one 3 digit goal e.g. 1.1.1.**
  - If a 3 digit goal **does not** align to your goal, **select one 2 digit key strategy e.g. 1.1** that aligns to your goal.
  - After all administrative goals have been entered **select > [Map] button** adjacent to each goals to map to MC Strategic Plan
  - **Note:** ***Goals can only be mapped one at a time***

- After selecting [Map] > **Select > Create New Mapping** button

**Directions:** Manage mapping for goals:

- **Demo Department Example Goal** (part of Goal)
  - Hire new faculty to increase course offerings. Provide courses and programs that encourage lifelong learning and are Evaluate and update courses and programs, in response to identified needs.

*Create New Mapping*

Nothing is mapped to this goal.

- **Select category of set to map to:** Dropdown > [Goal sets distributed to your department]
- **Select > Go button**

**Directions:** Select the set to which you would like to map the Goal:

1. Students will be able to analyze and interpret texts within the contexts they are written (Example Only) (part of Goal)
Select Set > A Strategic Plan for MC, 2011-25 Phase II 2015-20
Select > Continue

Final entry of administrative goals should reflect screenshot below:

- Select one goal that aligns to administrative goal
- After selection is made, Select > Continue to return to Goal set
Repeat steps above to continue mapping goals to MC Strategic Plan by selecting the [MAP] button adjacent to each goal.

Once complete, select the Check In button top right of workspace.

Select Return to Work Area to view goals that have been entered.
Resource Requests

Entering Resource Requests

- Select > Resource Requests listed under 2017-2018 Assessment Cycle

Creating a New Operational Plan

- Select > Check Out button to begin entering program administrative goals into the workspace
- Select > Create New Operational Plan after selecting Check Out button at the top right side of workspace area

- Actions tab will appear after selecting Create New Operational Plan
Selecting a set:
- You may choose to Select> Create New Set of goals to tie to resource request
- Or-
- Select> Select Existing Set to choose from administrative goals already entered

Import Goal Set: Select most recent goal set
- Select Goals that align to resource request(s) by clicking check boxes adjacent to Goal

Select> Accept and Return to Plan
Goal will appear in workspace area

- **Select** Add New Action button beneath goal selected to add resource request
- Complete resource request form as illustrated below

- **Select** Apply Changes
- ***Note: Do not*** enter $ symbol, commas, or decimals in **Budget request amount**. It will be entered once you select apply changes
To edit a resource request form select > Edit Button on right side of form.

To add another resource request to goal select > Add New Action Button listed under goal.

To delete Resource Request select > Remove Button on right side of form.

To add Supporting Attachment to request select > Add/Edit Attachments and Links.

- Repeat steps above to continue adding resource request to selected goals by selecting [Add New Action] button below to each goal.
- Once complete select > Check In button top right of workspace.
- Select > Return to Work Area to view resource request(s) entered.

***Note: Please review information below before submitting resource request

**Categories of Requests for Additional Funding:**

If a department’s anticipated 2017-18 Budget includes a request for additional funding over and above the current 2016-17 allocations, then these requests must be entered into Taskstream along with the Annual Goals for 2017-18, according to these categories:

- **Personnel:** additional funding for new personnel/positions, additional salary adjustments for current personnel above the College-wide percentage raise, and any additional budget requests for graduate assistants and/or student workers.
  - For personnel related requests address the following fields when completing the resource justification and description areas of request form in Taskstream:
    - Is this an adjustment/promotion or a request for a new position?
    - Dollar amount (delta only if adj/promotion)
    - Reason for the request, with backup data (e.g. CUPA salary info)
    - If appropriate upload documentation: Old job description, new job description, and data table if appropriate
    - After VP approval, email HR so they are aware of the request as a backup
• **Capital/One-Time Expenses**: additional funding for new capital expenses, for renovations as well as for replacement of equipment, and/or one-time expenses over existing budget.

• **New program initiatives**: additional funding for new program operations (including requests for publications and/or other marketing initiatives) over current operating budget. Be sure to include a source of funding/revenue, if applicable.

• **Contractual/Legal requirements**: additional funding required to meet contractual agreements (such as rate increases) and/or legal requirements or is otherwise unavoidable in order to maintain existing programs and levels of service. Please note that in the “Justification” field in Taskstream, an explanation is required to be entered and any supporting documents should be uploaded into Taskstream as well.

**Only focus on 2017-18 Requests:**

Budget Managers should **not** enter in Taskstream budget requests for subsequent years (i.e., for 2018-19 or thereafter, only for additional funds requested for 2017-18).

***For more Information regarding budget request please reference budget memo.*
Assessment Methods

Entering Assessment Methods

Select> Assessment Methods on left hand side, listed under 2017-2018 Assessment Cycle

Creating a New Assessment Plan

Select> button to begin entering assessment methods into the workspace

Select> Create New Assessment Plan

-Or- Select> Copy Existing Plan> This will copy assessment plan entered from a previous year
Create New Plan

- Select > Select Set

Selecting a set:

- You may choose to create a new set of goals to tie to resource request or
- Select > Select Existing Set to choose from administrative goals already entered and Continue
Select> Accept and Return to Plan

- Goals will appear in workspace area
- Select> Add New Measure button beneath goal selected to add measure

Complete Assessment Methods Form
Select> Apply Changes when completed
To edit assessment measure form select Edit button.
To add an additional assessment measure to goal select Add New Measure Button.
To delete an assessment measure select Remove Button next to form on right hand side.
  o Repeat steps above to continue adding assessment measures to selected goals by selecting [Add New Measure] button below to each goal.
  o Once complete select Check In button top right of workspace.
  o Return to Work Area to view assessment methods entered.
**Taskstream Support**

Taskstream AMS Training Dates:

**January**
- 4th, Wednesday 12pm-1pm, *DLS 314*
- 5th, Thursday 12pm-1pm, *DLS 314*
- 11th, Wednesday 12pm-1pm, *DLS 314*
- 12th, Thursday 12pm-1pm, *DLS 314*
- 18th, Wednesday 12pm-1pm, *DLS 314*
- 19th, Thursday 12pm-1pm, *RLC 104*
- 25th, Wednesday 12pm-1pm, *DLS 314*
- 26th, Thursday 12pm-1pm, *RLC 104*

**February**
- 1st, Wednesday 12pm-1pm, *TBD*
- 2nd, Thursday 12pm-1pm, *TBD*

- Please RSVP attendance to [dmoreira01@manhattan.edu](mailto:dmoreira01@manhattan.edu)

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**For Taskstream support contact:**

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