### Taskstream Guide:
**Reviewing and Approving Budget Request**

<table>
<thead>
<tr>
<th><strong>Required Fields</strong></th>
<th><strong>Current Status</strong>: Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Budget Status</strong>:</td>
<td>Approved</td>
</tr>
<tr>
<td><strong>VP Feedback</strong>:</td>
<td>Enter Feedback Here</td>
</tr>
<tr>
<td><strong>VP Next Steps</strong>:</td>
<td>Enter Next Steps Here</td>
</tr>
</tbody>
</table>

[Image of form interface]
Accessing Taskstream AMS

Logging on to Taskstream:

Option 1: Inside Manhattan.edu Quick Links Icon

- Select > Quick Links on insidemanhattan.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

![Screen shot of AMS platform selection](image1.png)

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

**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, Associate Provost/VP, or Assistant Provost/VP to whom that unit, department, or program reports is 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.

Deans, VPs and AVP’s will have access to review and approve department or unit resource request and provide feedback and next steps.
Reviewing or Editing Resource Request

- Access any of your department or units participating areas workspace listed on your homepage.
- Select> Corresponding workspace Academic Assessment Committee>> (Academic) or Institutional Effectiveness Committee>> (Administrators)

After opening workspace:

- Select> 2017-2018 Assessment Cycle
- Select> 🌟 Resource Requests to view

- Select> ✨ Check Out button to enter workspace and edit resource request that might have been entered by department chair or administrator.
Approving Budget Resource Request

- Select Status Report tab listed below Resource Requests
- Select Check Out tab
- Select Action Statuses tab to begin updating status of Budget Requests

- Select Add Status button on right side below entered resource request
- Note: This button will appear under each individual action or resource request form. Approvals or updates can only be done one at a time.
After selecting the Add Status button form can be completed.

Complete status form by selecting the two dropdowns illustrated below and open text areas:

- **Current Status of Request (Required):** Not Started, In Progress, Completed, Not Implemented
- **Budget Status:** Approved, Pending Approval, Not Approved, Other

Two open text areas where comments communicating decisions to direct reports can be entered into the text areas titled VP Feedback and VP Next Steps.

Select the Submit button.
After selecting Submit, repeat steps above to add status to all budget request

Additionally, Attachments can be added to status report by selecting the button adjacent to “Substantiating Evidence: Add/Edit Attachments and Links”

To edit or delete a status form that was completed select Edit or Remove buttons on right hand side

Select Check In to save submitted status reports

Note: Status reports can only be reviewed, edit, or updated by Dean, Associate Provost/VP, or Assistant Provost/VP to whom that unit, department, or program reports. Due dates for entering budget request have no flexibility because of system constraints. Last minute request post due date that may need to be added on must be entered into the Dean’s, VP’s, AVP and or Directors individual assigned workspaces resource request area.
**Taskstream Support**

Taskstream AMS Training Dates:

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

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

**Training Locations:** TBD

- Please RSVP attendance to dmoreira01@manhattan.edu

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**For Taskstream support contact:**

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