

## Taskstream Guide: Reviewing and Approving Budget Request

Enter information for each action defined in the operational plan.

**\* Required Fields**

<b>* Current Status:</b>	Completed ▼
<b>Budget Status:</b>	Approved ▼
<b>VP Feedback:</b>	<div>-Enter Feedback Here-</div>
<b>VP Next Steps:</b>	<div>-Enter Next Steps Here-</div>

Cancel

Check Spelling

Submit

# Accessing Taskstream AMS

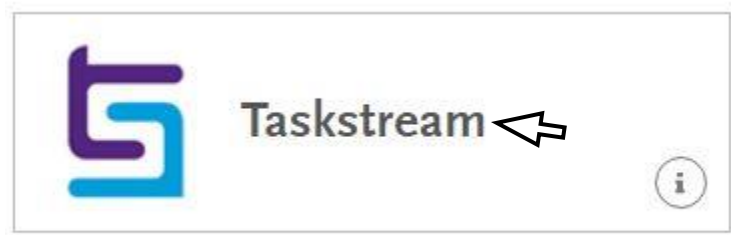
## Logging on to Taskstream:

### Option 1: Inside Manhattan.edu Quick Links Icon

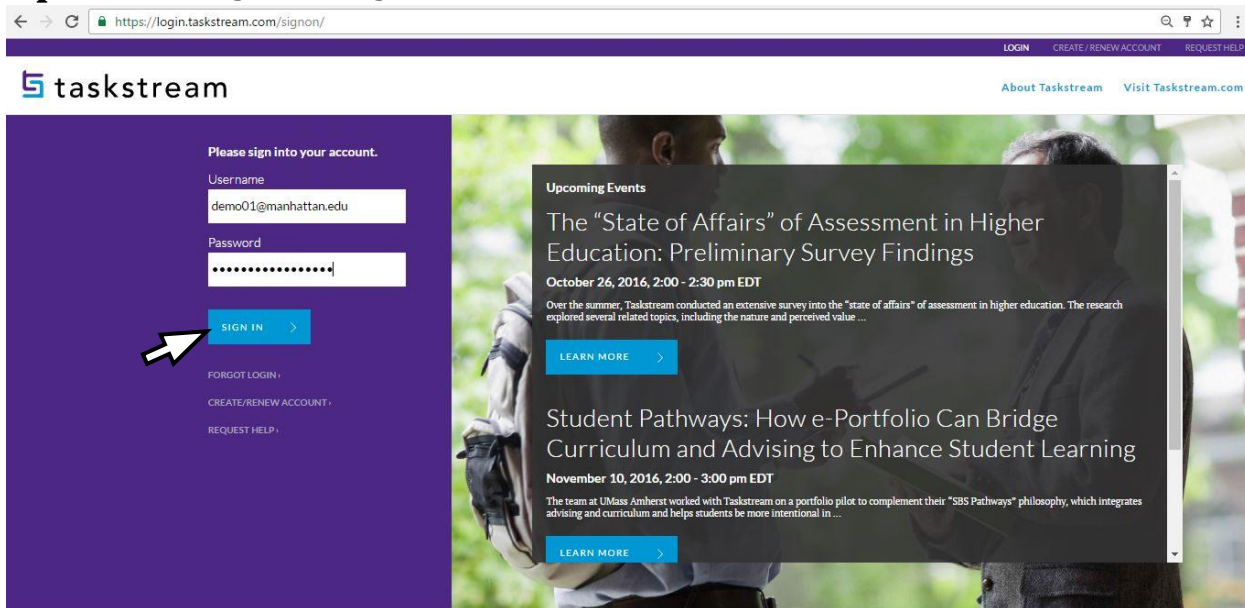
- **Select >** Quick Links on insidemanhattan.edu



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



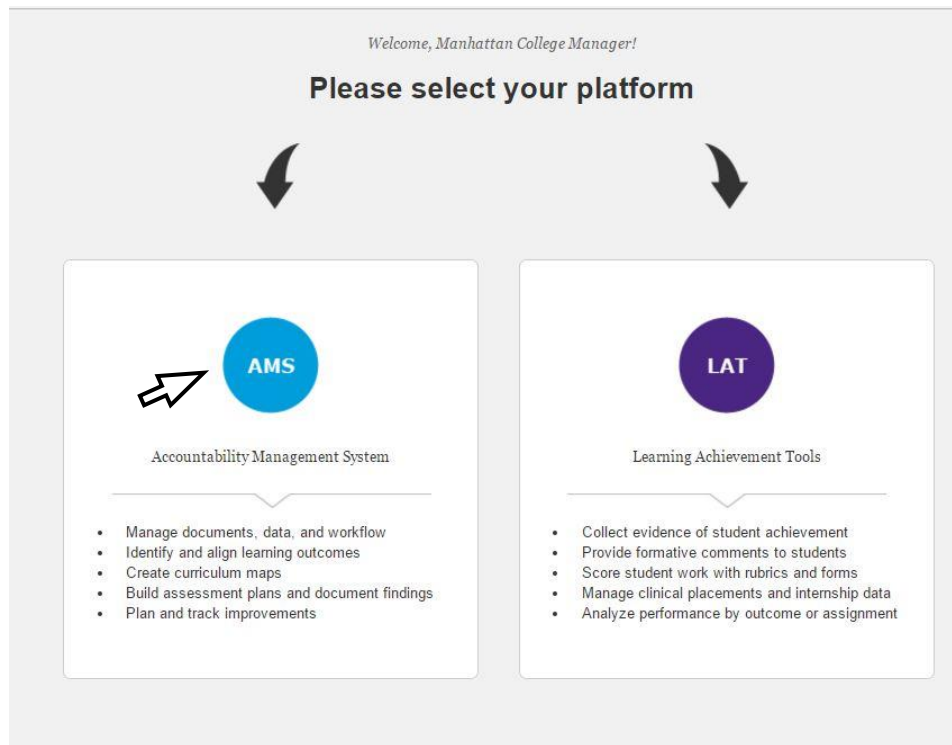
### Option 2: Log on through Taskstream Main Site



- **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

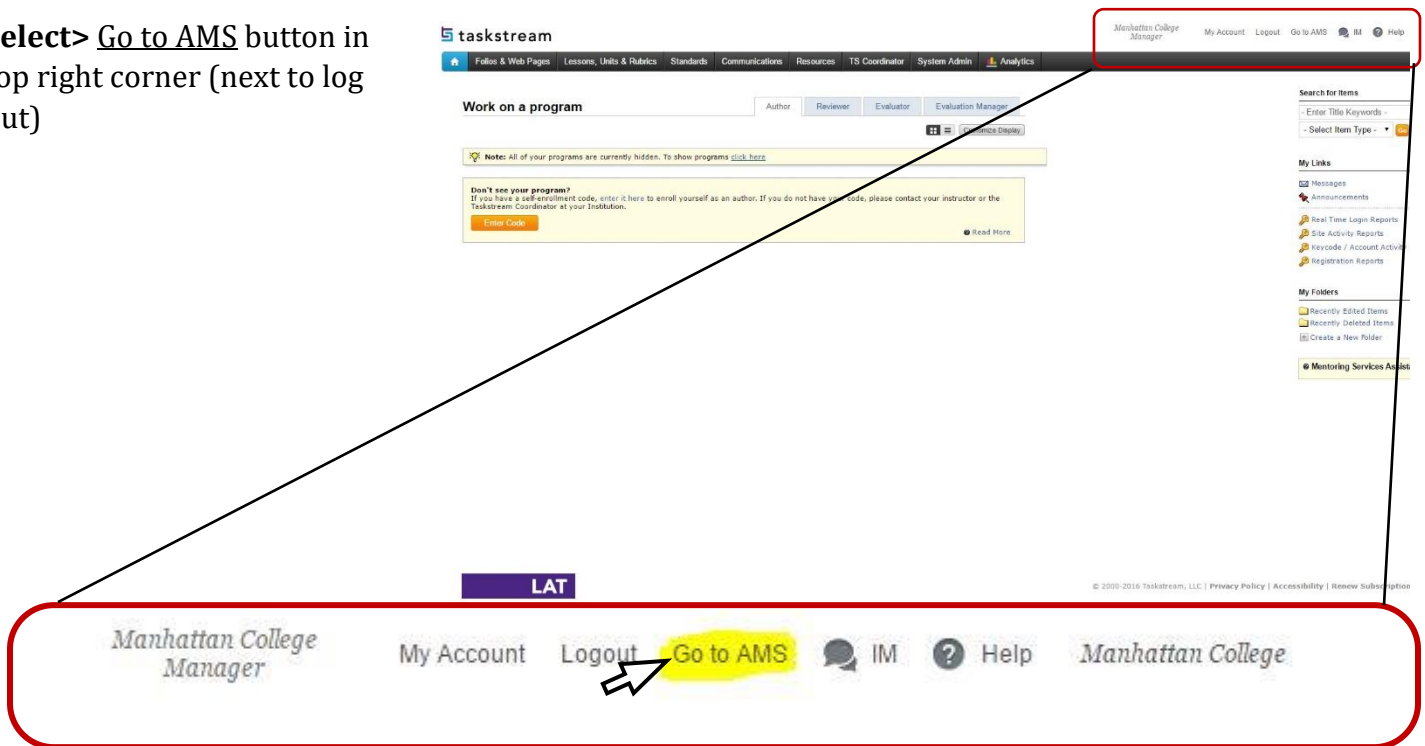
## Option 1: Select AMS platform upon Login




## 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:

**MyOrganization**

Manhattan College  
Manager

My Account   Logout   Go to LAT

 Shared Resources    Locator   Messages   Resource Tools    Analytics



## 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.

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Review ⓘ

- Items requiring review (!)
- Reviews to be reconciled
- Reviews to be released
- View all submissions

Workspaces ⓘ

Faculty credentials ⓘ

☒ Assigned Workspaces   ☐ Preview Mode   ☐ All Access Mode

Academic

- select report - ▼

Go

- Academic Assessment Committee >>
- Institutional Effectiveness Committee >>
- Program Learning Goals Assessment Plan >>

AMS Coordinator ⓘ

- Workspace tools
- Announcements
- Manage resources
- Organization goals editor

# 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.

Academic

- select report -

Go

Academic Assessment Committee >>

• Institutional Effectiveness Committee >>

*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.

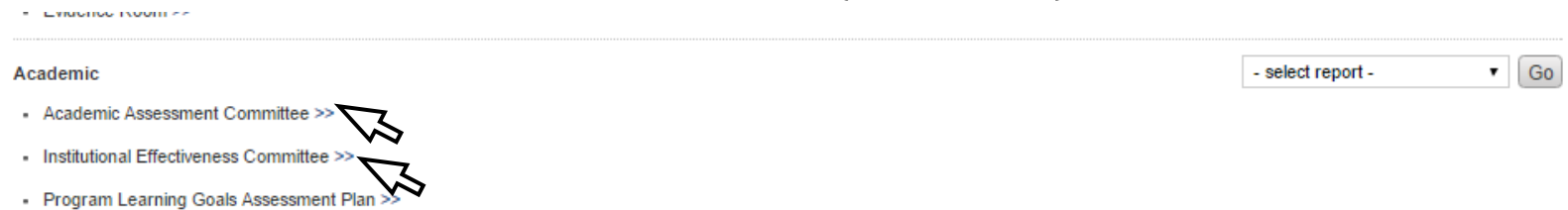
- **Institutional Effectiveness Committee >>**

- 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.

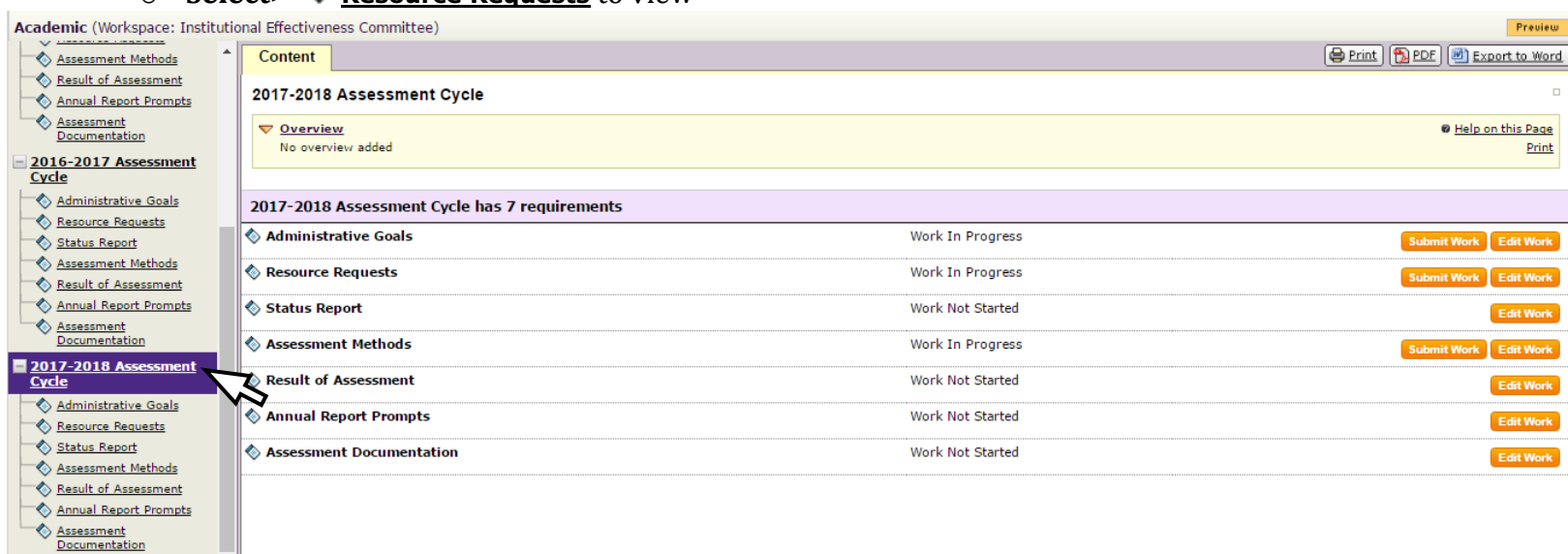
## Reviewing or Editing Resource Request


- 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)

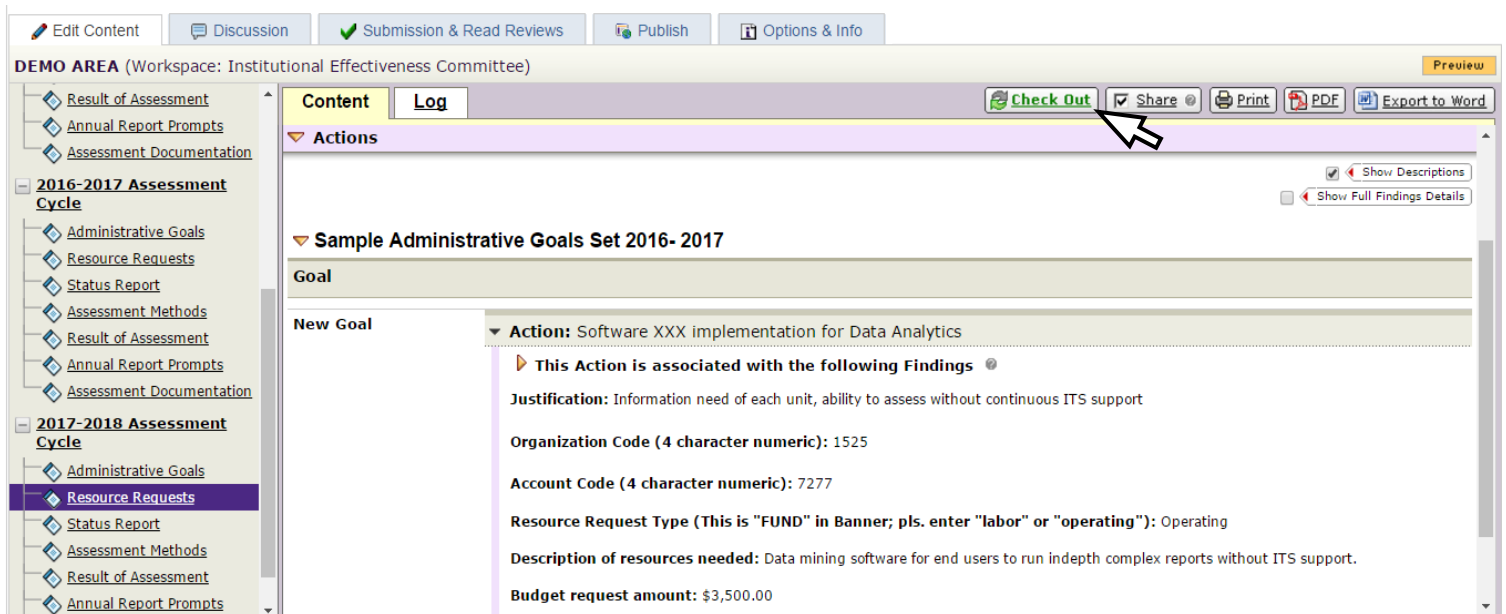


### After opening workspace:




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






- **Select>**  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**
- Select> **Action Statuses** tab to begin updating status of Budget Requests

Academic (Workspace: Institutional Effectiveness Committee)

Content Log   

**Status Report** Work not Started Checked out: 12 Checked out to:

**Directions**  
No directions specified.  
**Review Method**

**Action Statuses** 


**Status Summary**

**Summary of Next Steps**

**2016-2017 Assessment Cycle**

- Administrative Goals
- Resource Requests
- Assessment Methods
- Result of Assessment
- Annual Report Prompts
- Assessment Documentation






**2017-2018 Assessment Cycle**

- Administrative Goals
- Resource Requests
- Status Report** 
- Assessment Methods
- Result of Assessment
- Annual Report Prompts
- Assessment Documentation

- 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.

Edit Content Discussion Submission & Read Reviews Publish Options & Info

Academic (Workspace: Institutional Effectiveness Committee) Preview

Content Log     

**Action Statuses** Show Actions Show Descriptions

**Demo Department's Administrative Goal Set 2017-2018**

**Goal**

**Demo Department Example 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.

**Action: Resource Request Demo**

**Justification:**

**Organization Code (4 character numeric):** ###



**Account Code (4 character numeric):** ###

**Resource Request Type (This is "FUND" in Banner; pls. enter "labor" or "operating"):**

**Description of resources needed:**

**Budget request amount:** \$100.00

**Priority:**

**Status for Resource Request Demo**  

No Status Added

**Status Summary**

**Summary of Next Steps**

**2016-2017 Assessment Cycle**

- Administrative Goals
- Resource Requests
- Assessment Methods
- Result of Assessment
- Annual Report Prompts
- Assessment Documentation

**2017-2018 Assessment Cycle**

- Administrative Goals
- Resource Requests
- Status Report**
- Assessment Methods
- Result of Assessment
- Annual Report Prompts
- Assessment Documentation

- After selecting > **Add Status** button form can be completed

[Edit Content](#)
[Discussion](#)
[Submission & Read Reviews](#)
[Publish](#)
[Options & Info](#)

**DEMO AREA** (Workspace: Institutional Effectiveness Committee)

**Cycle**

- Administrative Goals
- Resource Requests
- Assessment Methods
- Result of Assessment
- Annual Report Prompts
- Assessment Documentation
- 2016-2017 Assessment Cycle**
  - Administrative Goals
  - Resource Requests
  - Status Report**
  - Assessment Methods
  - Result of Assessment
  - Annual Report Prompts
  - Assessment Documentation
- 2017-2018 Assessment Cycle
  - Administrative Goals
  - Resource Requests
  - Status Report
  - Assessment Methods
  - Result of Assessment
  - Annual Report Prompts
  - Assessment Documentation

**Status Report for Software XXX implementation for Data Analytics**  
Goal: New Goal

Enter information for each action defined in the operational plan.

**\* Required Fields**

<b>* Current Status:</b>	- Select -
<b>Budget Status:</b>	- Select -
<b>VP Feedback:</b>	
<b>VP Next Steps:</b>	

[Cancel](#)
[Check Spelling](#)
[Submit](#)

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*

Enter information for each action defined in the operational plan.

**\* Required Fields**

<b>* Current Status:</b>	Completed
<b>Budget Status:</b>	Approved
<b>VP Feedback:</b>	-Enter Feedback Here-
<b>VP Next Steps:</b>	-Enter Next Steps Here-

[Cancel](#)
[Check Spelling](#)
[Submit](#)

- 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 > **Submit** button



After **selecting** > **Submit**, repeat steps above to add status to all budget request

Content Log Check In Share Print PDF Export to Word

New Goal

**Action:** Software XXX implementation for Data Analytics

**Justification:** Information need of each unit, ability to assess without continuous ITS support

**Organization Code (4 character numeric):** 1525

**Account Code (4 character numeric):** 7277

**Resource Request Type (This is "FUND" in Banner; pls. enter "labor" or "operating"):** Operating

**Description of resources needed:** Data mining software for end users to run indepth complex reports without ITS support.

**Budget request amount:** \$3,500.00

**Priority:** High

**Status** for Software XXX implementation for Data Analytics Edit Remove

**Current Status:** Completed

**Budget Status:** Approved

**VP Feedback:** -Enter Feedback Here-

**VP Next Steps:** -Enter Next Steps Here-

**Substantiating Evidence:** Add/Edit Attachments and Links

- 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.

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## **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](mailto:dmoreira01@manhattan.edu)

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**For Taskstream support contact:**

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**Office:** DLS 206c