



TASKSTREAM QUICKSTART GUIDE FOR CAMPUS-WIDE STRATEGIC PLANNING

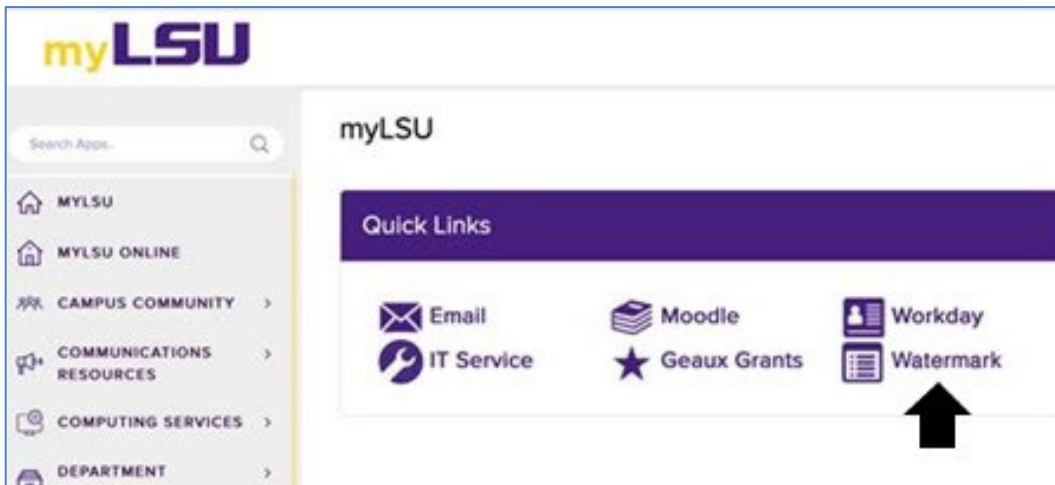
Revised:
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Sign In to Taskstream by Watermark

Watermark is LSU’s system of record to document institutional effectiveness. Taskstream by Watermark is the module used to meet the requirements for LSU’s campus-wide annual strategic planning and assessment process. This QuickStart Guide will walk you through accessing Taskstream and highlight the technical components to enter the required information. Additional resources are available via the Office of Institutional Effective website (www.lsu.edu/oie).

To access Taskstream, sign in to MyLSU and click the Watermark icon in the “Quick Links” panel or under “Planning Resources.”



LSU Taskstream Home Page

Select Taskstream AMS to enter the Strategic Plan Workspace for each unit in which you are affiliated.

To begin, click LSU’s current workspace for strategic planning, Strategic Plan Workspace 2017-, for the unit in which you wish to enter information. [NOTE: Do not use the “select report” drop-down box.]



Your Workspace [Strategic Plan Workspace 2017-]

You can see your workspace structure on the left-hand side of the page. This structure has been designed by LSU and contains several requirements related to the campus-wide strategic planning and assessment process.

The screenshot shows a vertical menu with the following items:

- General Information**
- Standing Requirements** (indicated by a black arrow pointing to it)
 - Strategic Plan
 - Mission Statement
 - Priority Outcomes
- 2021-2022 Planning Cycle** (indicated by a black arrow pointing to it)
 - Measures & Targets
 - Findings & Use of Findings
 - Action Plan (Optional)
 - Action Plan Status (Optional)
 - Strategic Planning Annual Report (SPAR) (Optional)
- 2020-2021 Planning Cycle**

Standing Requirements: This section contains information that will remain relatively stable over time.

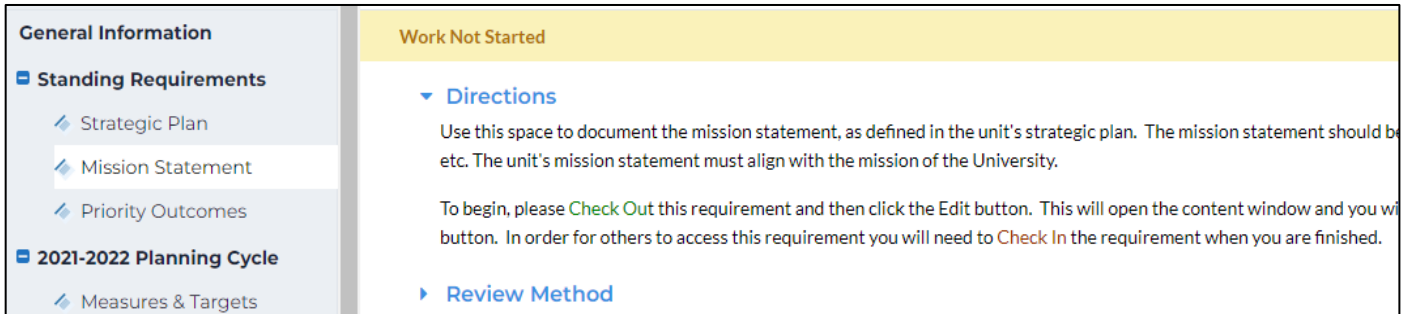
Planning Cycle: This section holds the information that is reported annually. A new planning cycle (e.g., 2021-22) is added each year to facilitate the upcoming reporting cycle.

NOTE: Multiple planning cycles will be active to allow completion and/or revisions to prior years. Please be sure that you are working in the intended planning cycle.

Entering Information

The first step to enter information into your workspace is selecting a requirement in which you would like to add content from the navigation panel on the left.

While this Guide will walk you through the technical components of adding content to your workspace, you will find additional “Directions” regarding the expectations for each requirement by selecting an area, such as “Mission Statement.”



The screenshot shows a sidebar on the left with a 'General Information' section. Under 'Standing Requirements', 'Mission Statement' is selected. Below that is the '2021-2022 Planning Cycle' section with 'Measures & Targets'. The main content area has a yellow header 'Work Not Started' and a 'Directions' section with the following text: 'Use this space to document the mission statement, as defined in the unit's strategic plan. The mission statement should be etc. The unit's mission statement must align with the mission of the University. To begin, please Check Out this requirement and then click the Edit button. This will open the content window and you will be able to enter content. In order for others to access this requirement you will need to Check In the requirement when you are finished.' There is also a 'Review Method' link.

When you are ready to enter content, click the “CHECK OUT” button in the upper right-hand corner of the page. CHECK OUT allows you to add or modify content. Others with access to the workspace will be unable to see the changes or make changes until you have checked it back in.



The toolbar contains several buttons: 'VIEW LOG' (with an eye icon), 'WORD' (with a document icon), 'PDF' (with a document icon), 'PRINT' (with a printer icon), 'SHARE' (with a square icon), and a prominent green 'CHECK OUT' button.

When you are finished entering information, click the “CHECK IN” button.

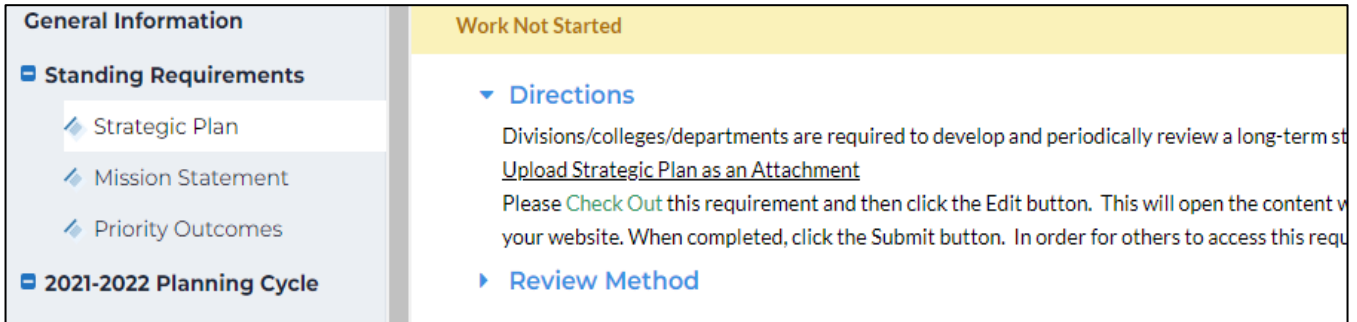
When you “CHECK IN” a requirement, you are given the option to enter comments into that requirement’s Revision History Log, which lets all users keep track of changes made to it. This step is optional. When you are finished, click Submit Comment.

NOTE: All requirements in Taskstream utilize this CHECK OUT / CHECK IN functionality. When you log out of Taskstream or navigate to a different website, all workspace requirements will automatically check-in.

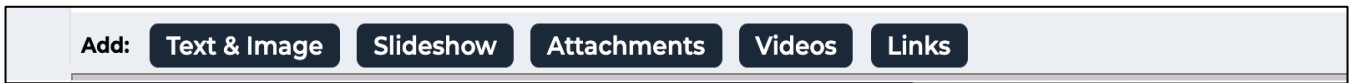
Standing Requirements

Strategic Plan

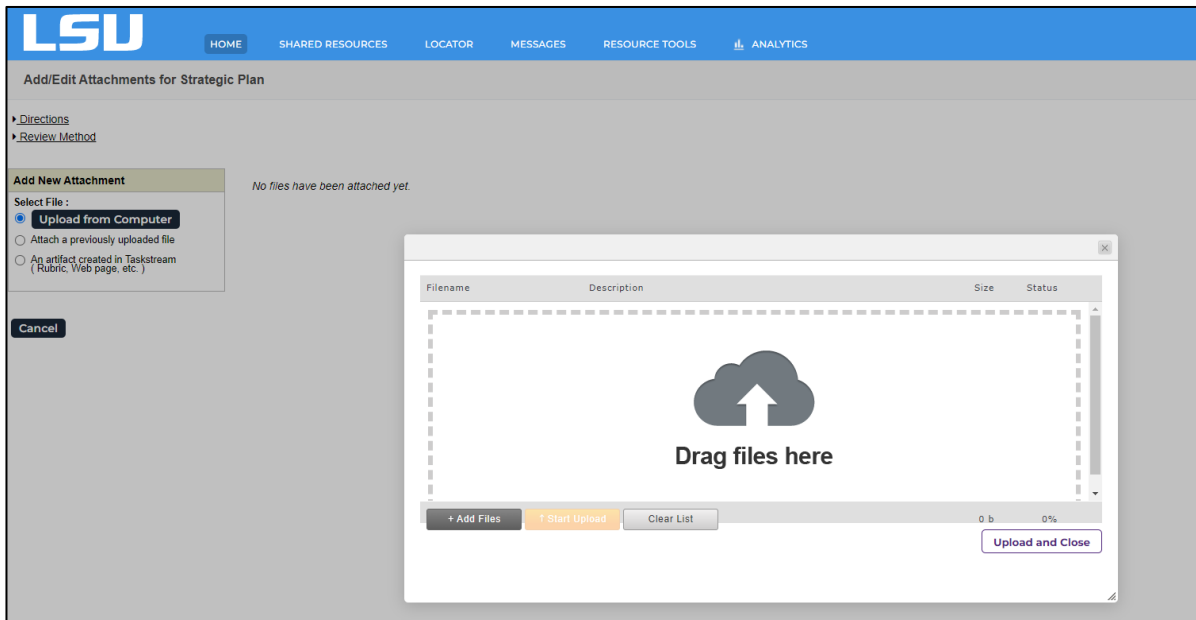
To upload the unit’s strategic plan, begin by clicking Strategic Plan under the Standing Requirements section on the left navigation panel. You will see directions provided.



Next, click “CHECK OUT.” You will see options across the bottom of the screen to assist in uploading the strategic plan. Choose “Attachments.”

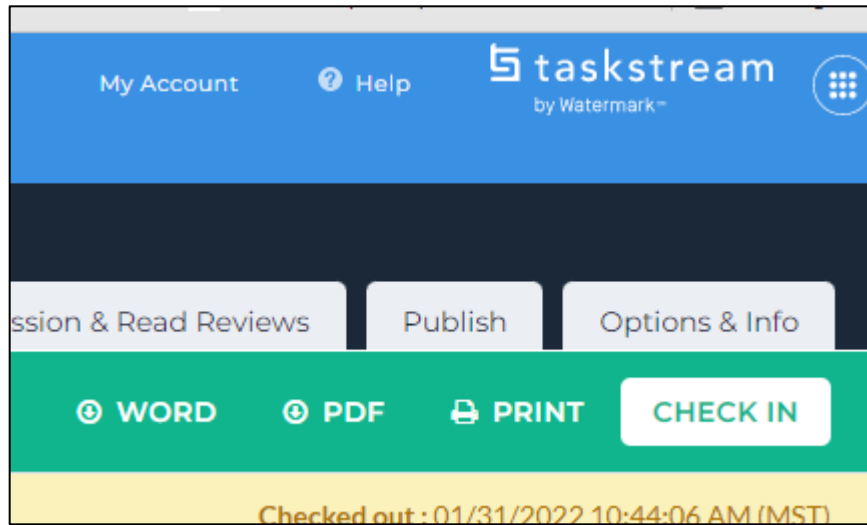


Select “Upload from Computer” from the left navigation panel, which will result in the screen below.



You may either choose your file via “+ Files” or drag and drop your document. When complete, click “Upload and Close” and then “Save and Return.”

To complete this section, click “CHECK IN” from the upper right.



Mission Statement

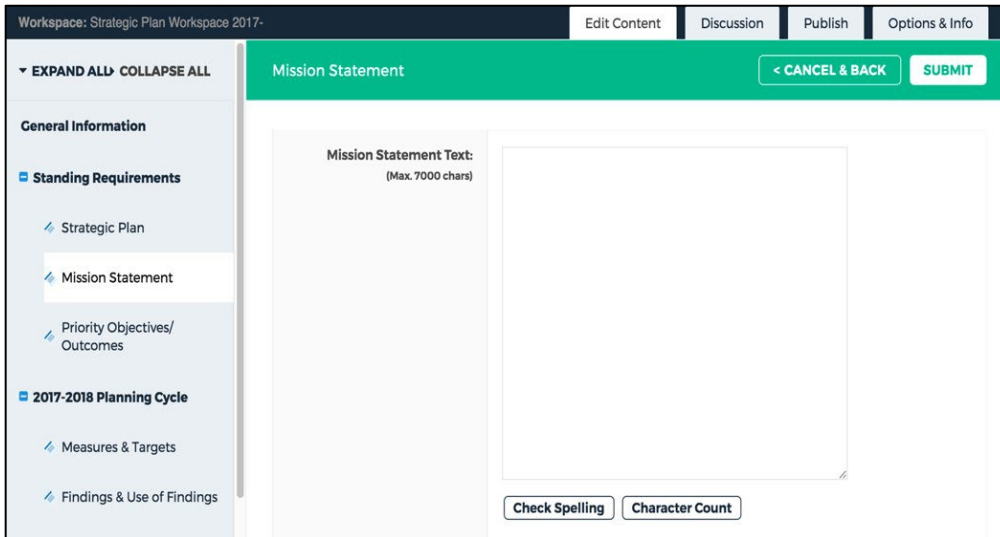
To enter the unit’s mission statement, begin by clicking “Mission Statement” under the Standing Requirements section on the left navigation panel. You will see directions provided. Please click “CHECK OUT.”

The screenshot shows a sidebar on the left with a navigation menu. Under 'Standing Requirements', 'Mission Statement' is selected. The main content area has a yellow header 'Work Not Started'. Below it, a 'Directions' section contains text: 'Use this space to document the mission statement, as defined in the unit's strategic plan. The mission statement should be etc. The unit's mission statement must align with the mission of the University.' It also includes instructions: 'To begin, please Check Out this requirement and then click the Edit button. This will open the content window and you will button. In order for others to access this requirement you will need to Check In the requirement when you are finished.' A 'Review Method' link is also visible.

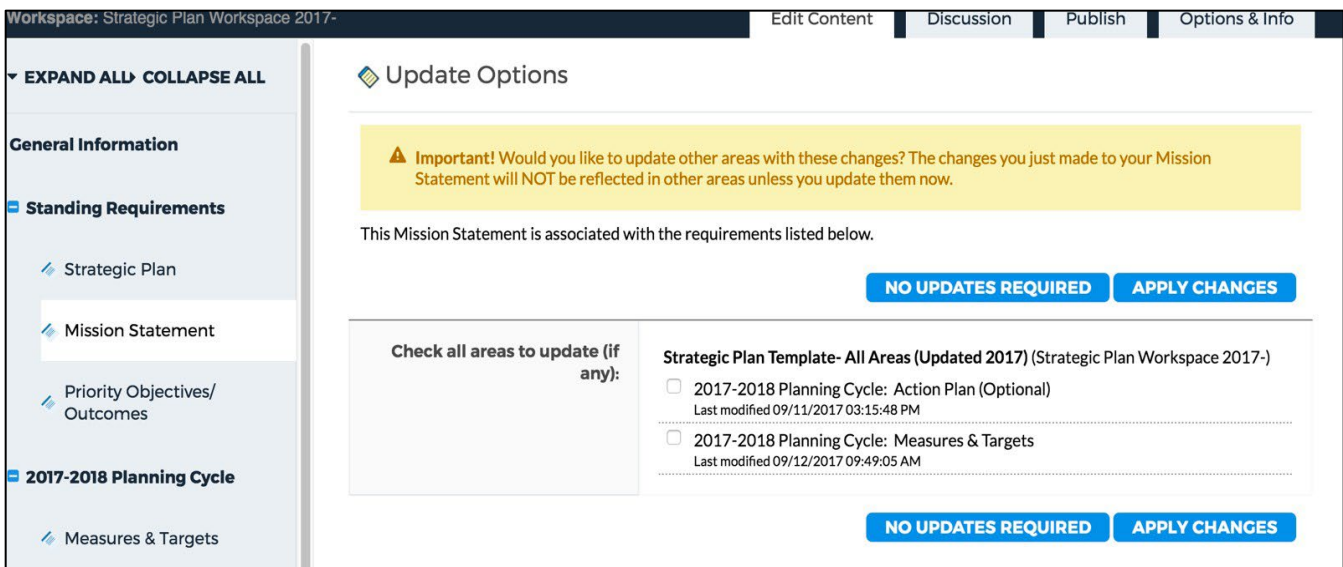
Next, click on the “Edit” button in the bottom right corner, which allows you to enter the mission statement or make any necessary revisions.

This screenshot shows the 'Edit Content' window. At the top, there are tabs for 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info'. Below the tabs, the title is 'Mission Statement (Mission Statement)'. A toolbar contains 'VIEW LOG', 'WORD', 'PDF', 'PRINT', 'SHARE', and a 'CHECK IN' button. A yellow banner at the top of the content area says 'Work Not Started' and includes 'Checked out : 01/31/2022 10:51:09 AM (MST)' and 'Checked out to : Claire Sassic Young'. The 'Directions' section is expanded, showing the same text as the previous screenshot. An 'Edit' button is located in the bottom right corner.

Enter the unit's mission statement into the box provided and then click "Submit" in the upper right.



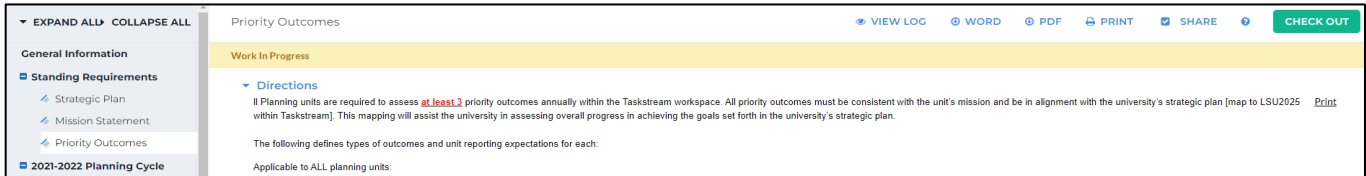
Next, the following screen will appear, please click "No Updates Required."



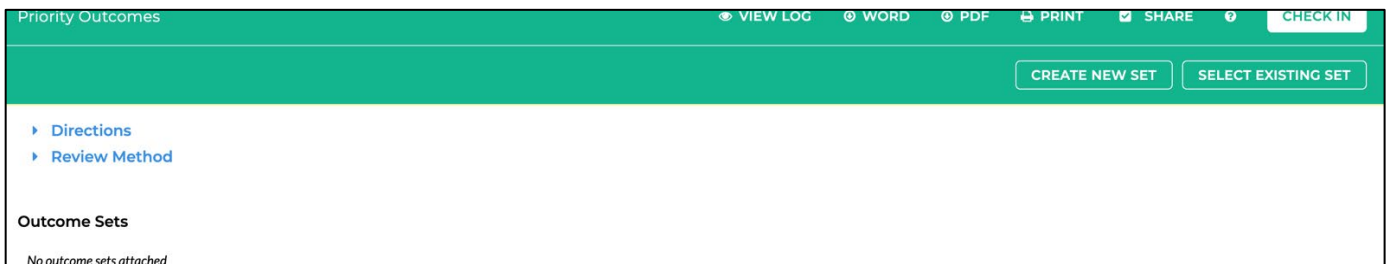
The screen will go back to the main mission statement section. "CHECK IN" to complete this section.

Priority Outcomes

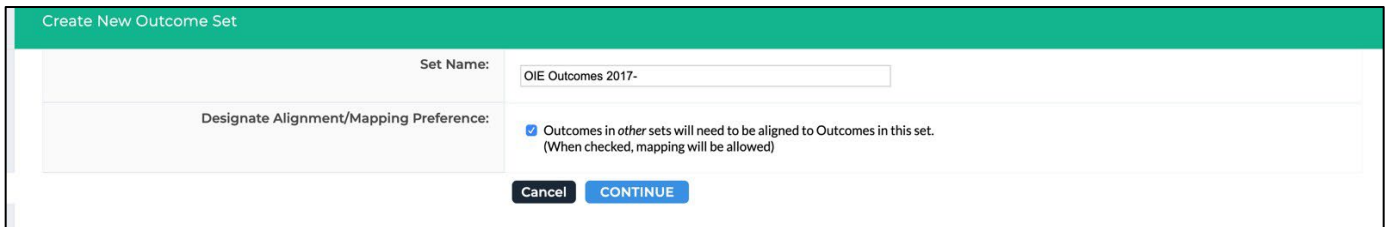
This requirement allows you to document the unit’s priority outcomes. To begin entering outcomes, click “Priority Outcomes” from the left navigation panel, then click “CHECK OUT” in the upper right-hand corner of the page.



Once you have clicked “CHECK OUT,” you may proceed as follows dependent on your needs: (1) establish a new outcome set OR (2) use an existing set of outcomes (which also allows the ability to revise, as needed).



(1) ESTABLISH A NEW SET of priority objectives/outcomes by clicking “Create New Set.”



Enter a title for your set. Click the box to designate alignment/mapping. Click “Continue.”

(2) USE AN EXISTING SET or revise an existing set, click “Select Existing Set.”

The screenshot shows the 'Priority Outcomes' interface. At the top, there is a green header with navigation links: VIEW LOG, WORD, PDF, PRINT, SHARE, and CHECK IN. Below the header, there are two buttons: 'CREATE NEW SET' and 'SELECT EXISTING SET'. Underneath, there are links for 'Directions' and 'Review Method'. The main section is titled 'Outcome Sets' and currently displays 'No outcome sets attached'.

Click on the radio button for the appropriate set and then click “Continue” at the bottom of the screen.

The screenshot shows the 'Import Outcome Set' dialog box. It has a green header with 'EXPAND ALL' and 'COLLAPSE ALL' options. The main area is titled 'Import Outcome Set' and contains the instruction 'Select an Existing Set in Institutional Effectiveness:'. There are two radio button options: 'Institutional Effectiveness Outcome Set (Learning Objectives & Outcomes)' and 'OIE 2017 - (Learning Objectives & Outcomes)'. The second option is selected. A yellow warning box below the second option states 'This set is already included in this requirement.' At the bottom, there are 'Cancel' and 'CONTINUE' buttons.

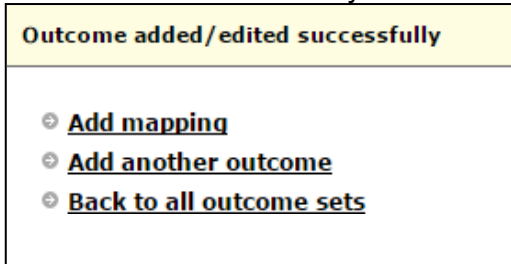
ADDING or REVISING OUTCOMES. To add, click “Create New Outcome.”

The screenshot shows the configuration screen for the 'Institutional Effectiveness Outcome Set'. It has a grey header with the set name and a 'Remove Set' button. Below the header, there are 'Reorder' and 'Edit Set Name/Properties' buttons. The main area is titled 'Outcome' and contains a 'Create New Outcome' button.

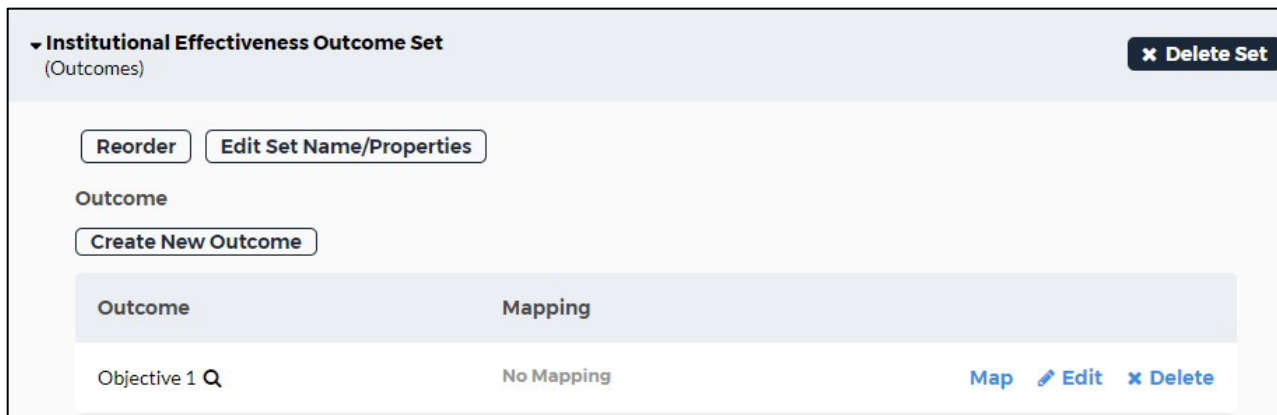
Enter a title. You may also enter a more in-depth description, if desired. Click “Continue” when finished.

The screenshot shows the 'Create New Outcome' form. It has a yellow header. The form is divided into two sections: 'Outcome: Max 140 characters' and 'Description: Max 1000 characters'. The 'Outcome' field contains the text 'Objective 1|'. Below the 'Outcome' field, there is a note: 'Use a concise descriptor here since this label is used in reports (e.g. Outcome 1.1 Civic Responsibility)'. The 'Description' field is a large text area. At the bottom of the form, there are 'Check Spelling' and 'Character Count' buttons. At the very bottom, there are 'Cancel' and 'CONTINUE' buttons.

The following window confirms that you have added a new outcome. You can then click “Add mapping” to map the outcome to an institution-wide goal (e.g., LSU2025), which is described in more detail in the next section. Or click “Add another outcome” to continue adding new outcomes. Or, you can click “Back to all outcome sets” to return to your outcomes page. Repeat these steps for all outcomes you wish to enter.



Mapping Outcomes to LSU2025




Mapping each outcome to the University’s strategic plan is a requirement that enables the assessment of campus-wide progress in meeting its priorities and the development of related reports. To map your outcome to the university’s strategic plan, click “Map” to the right of your outcome name.

Outcomes may be easily edited via the “Edit” button to the right of the listed outcome. If Mapping to LSU2025 was not completed when the outcome was created or revisions are needed, you may click on “Map” to complete this requirement at any time.

Once you have clicked on “Map” the following will appear. Click “Create New Mapping” to continue.



Use the first drop-down menu on this page to select “Goal sets distributed to [Name of Your Unit], then Click the “GO” button immediately to the right.

Select category of set to map to:	Select Type of Set	Go
Select Set:	<p> Please select a specific organization area and click the "Go" button above.</p>	
<p>Cancel CONTINUE</p>		




Next, click the radio button next to select set, “LSU2025” and click “Continue.”

Select category of set to map to:	Goal sets distributed to Institutional Effectiveness	Go
Select Set:	<p><input checked="" type="radio"/> LSU2025 [View Set]</p> <p>Owned by Louisiana State University: Baton Rouge For more information, see strategicplan.lsu.edu</p>	
<p>Cancel CONTINUE</p>		

Choose which of the LSU2025 strategies align with your outcomes (you may select more than one, if applicable) and then click “Continue.”

LSU2025
Advancing Arts and Culture
<p>Strategies</p> <p>Impact Economic Development</p> <p>Expand Community Involvement in Arts</p> <p>Promote Arts as Essential to Education</p> <p>Enhance Student Engagement in Arts</p> <p>Related Strategies: Advancing Arts & Culture</p>
Bridging the Coast, Energy, and Environment
<p>Strategies</p> <p>Solidify LSU as Leader in Coastal Knowledge</p> <p>Expand Energy Expertise and Resources</p> <p>Maximize Resources to Impact Environmental and Economic Security</p> <p>Related Strategies: Bridging the Coast, Energy & Environment</p>
Developing Leaders
<p>Strategies</p> <p>Revise General Education</p> <p>Develop Campus-wide Culture of Cross-Disciplinary Teaching and Research</p> <p>Attract Students Best Suited to Benefit from the LSU Experience</p> <p>Related Strategies: Developing Leaders</p>
Encouraging Career Excellence and Enrichment
<p>Strategies</p> <p>Related Strategies: Encouraging Career Excellence & Enrichment</p>
Establishing a Culture of Service and Operational Excellence
<p>Strategies</p> <p>Related Strategies: Establishing a Culture of Service & Operational Excellence</p>
Fostering Diversity, Inclusion & Multiculturalism
<p>Strategies</p> <p>Related Strategies: Fostering Diversity, Inclusion & Multiculturalism</p>
Fostering Research and Catalyzing Economic Development
<p>Strategies</p> <p>Grow Interdisciplinary Research</p> <p>Catalyze the Innovation Cycle</p> <p>Translate Innovation into Wealth Creation</p> <p>Related Strategies: Fostering Research & Catalyzing Economic Development</p>
Improving Health and Wellbeing
<p>Strategies</p> <p>Enhance Louisiana Health and Wellbeing</p> <p>Support LSU and Community Health</p> <p>Related Strategies: Improving Health and Wellbeing</p>
Supporting Student Success
<p>Strategies</p> <p>Related Strategies: Supporting Student Success</p>
Transforming Education
<p>Strategies</p> <p>Improve Pre-K-12 Education</p> <p>Advance Higher Education</p> <p>Enhance Continuing Education</p> <p>Related Strategies: Transforming Education</p>

You will now see the Outcome mapped as selected.
 Example of successfully mapping an outcome to LSU2025.

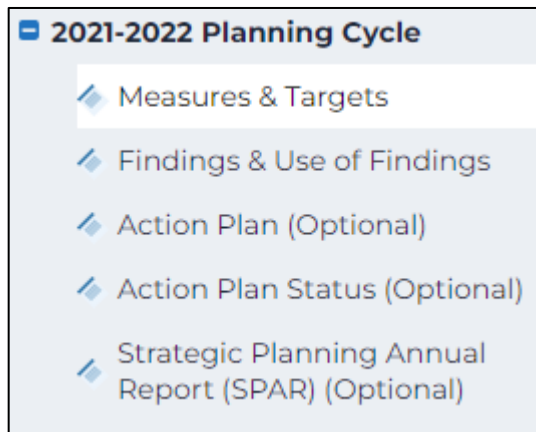
Outcome	Mapping
Objective 1 	LSU2025: Advance Higher Education, Enhance Continuing Education Map  Edit  Delete

Repeat these steps for all outcomes. When finished making changes to your Outcomes requirement, click “CHECK IN” in the upper right-hand corner of the page.

Planning Cycle: Measures & Targets

The first step in the annual Planning Cycle is to enter (or review from prior year) the Measures and Targets for each priority outcome. To begin working in this requirement, click “Measures and Targets” and then “CHECK OUT.”

NOTE: Please be sure you are entering information into the intended planning cycle (e.g., 2021-22).



The first time that this requirement is checked out, you will see two buttons: “Create New Assessment Plan” and “Copy Existing Plan as Starting Point” at the bottom of your screen.



If you are planning to continue from a previous cycle, you can click “Copy Existing Plan as Starting Point” to make an editable copy of a previous year’s plan. To create a new plan, click “Create New Assessment Plan.”

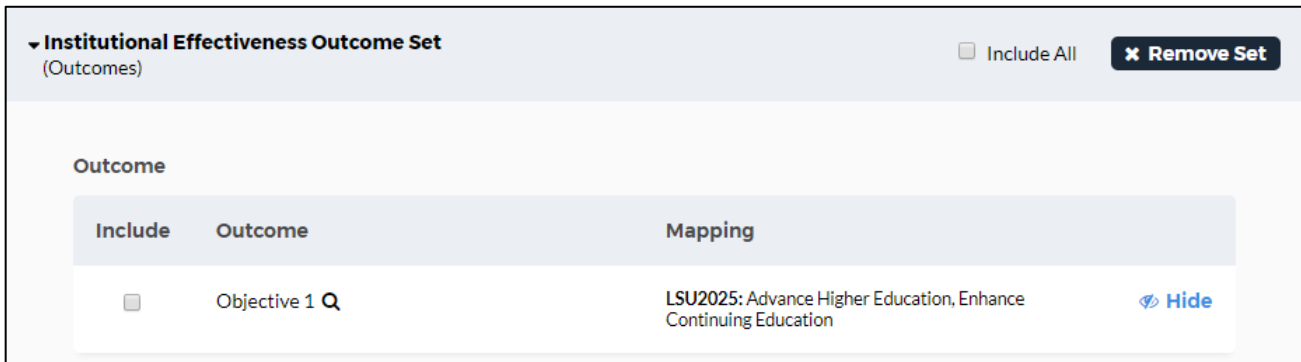
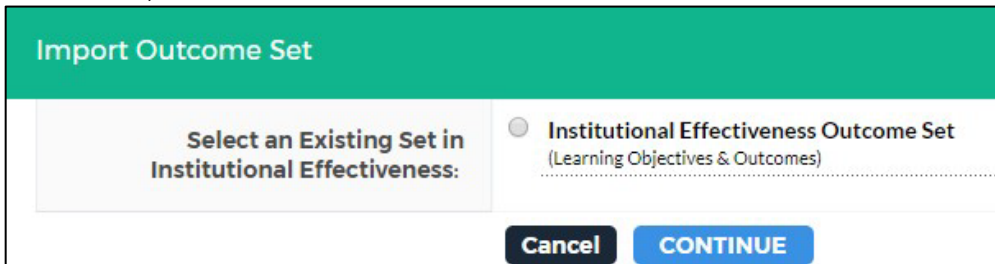


Then, click “Select Set” to choose an Outcome Set to assess this cycle.



Next, click “Select Existing Set” in the upper right-hand corner of the page.

Select an Outcome Set you wish to assess during the given planning cycle by clicking the radio button next to its name, then click “Continue.”



Check the boxes next to the outcomes you wish to assess and then click “Accept and Return to Plan” in the upper right-hand corner of the page.



To add a measure to an outcome, click “Add New Measure” to the right of the intended outcome.

Then, add the details of your Measure in the appropriate fields. The required fields include Measure Title, Details/Description, and Target. The other fields are optional.

Measure Information for:
Outcome: test 1

Define a measure for this objective/outcome. Required fields: title, details/description, and target. Once this measure is added, then you may add supporting attachments and links as desired.

*** Required Fields**

Cancel

* Measure Title:	<input type="text"/>
Details/Description:	<input type="text"/>
Target:	<input type="text"/>
Timeline:	<input type="text"/>
Key/Responsible Personnel:	<input type="text"/>

Check Spelling **Cancel** **APPLY CHANGES**

Click “Apply Changes” when you are finished. The newly added measure will now appear within your outcome.



You may include additional information related to your measure by clicking “Add/Edit Attachments and Links.”



In the window that opens, you can either click “Browse” to search for a file on your computer to upload or the “Web Links” tab to include a hyperlink to an online resource.

Content Editor
Attachments
Web Links
Reports

Add file attachments to Measure: Survey (English Comp)

Click the 'Browse' button to select a file that you want to attach, then click 'Add File'. When done, add more resources or close window.

New File

My Previously Uploaded Files

My Taskstream Work

Name File:

Select File:

No file chosen

Describe File:
(Optional)

Repeat these steps to add other measures to this or other outcomes, then click “CHECK IN” in the upper right-hand corner of the page and document your changes in the Revision History Log.

Planning Cycle: Findings & Use of Findings

Once you have gathered the findings/results for the measures in a given cycle, the information should be entered into the “Findings and Use of Findings” section.

To begin working in this requirement, click “Findings and Use of Findings” from the navigation panel on the left, then click “CHECK OUT” in the upper right-hand corner of the page.

NOTE: Please be sure you are entering information into the intended planning cycle (e.g., 2021-22).



Next, locate the measure you wish to add findings/results and click “Add Findings.”



Add the details of both your FINDINGS and USE of FINDINGS.

IMPORTANT- Please clearly articulate the Use of Findings by addressing questions such as:

- What actions have you taken or planned to make improvements based on this finding?
- What have you learned from assessing this measure and how will this information be used?
- Did the results yield the desired target, why or why not? What actions may need to happen to achieve the goal or to strive for continued improvement?
- Are there opportunities for improvement?

Click "Submit" when complete.

Findings for test1
Outcome: test 1

Please enter the summary of findings, including whether the target was achieved, and how the findings will be used.
*** Required Fields**

* Summary of Findings:	<input type="text"/>
Use of Findings:	<input type="text"/>

Your newly added Findings and Use of Findings will now appear within your measure.

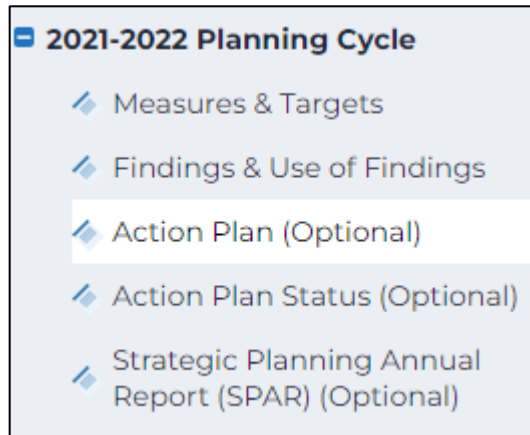
You may include additional information related to your measure by clicking "Add/Edit Attachments and Links."



Repeat these steps to add Findings and Use of Findings for all of the other measures, then click "CHECK IN" in the upper right-hand corner of the page and document your changes in the Revision History Log.

Optional: Action Plan

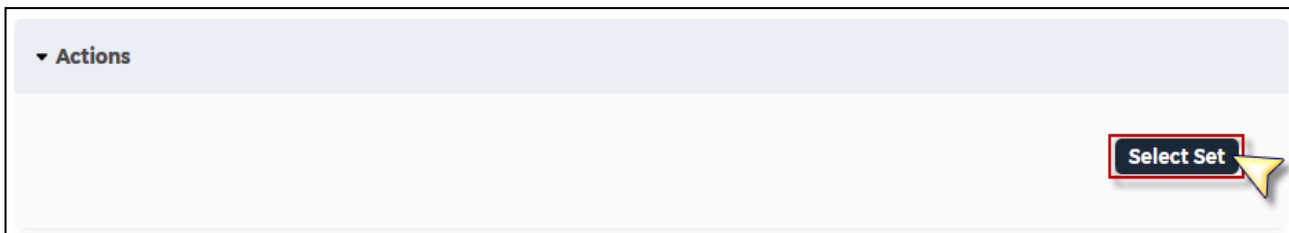
You may use this space (1) to document specific strategies/actions related to your stated objectives to track progress and/or (2) to document your follow-up actions for continuous improvement. Completion of this section is optional. However, it is provided for those wishing to further utilize Taskstream to assist with planning efforts for their unit. To begin working in this requirement, click “Action Plan” from the workspace structure on the left, then click “CHECK OUT” in the upper right-hand corner of the page.



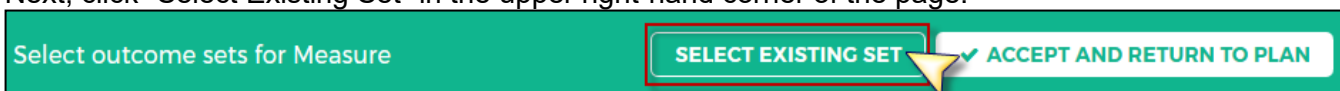
The first time that this requirement is checked out, you will see two buttons, “Create New Operation Plan” and “Copy Existing Plan as Starting Point.” In future cycles, you can click “Copy Existing Plan as Starting Point” to make an editable copy of a previous year’s plan, but to create one from scratch, click “Create New Operational Plan.”



Then click “Select Set” to choose an Outcome Set that will drive your actions.



Next, click “Select Existing Set” in the upper right-hand corner of the page.



Select an Outcome Set that will drive your actions by clicking the radio button next to its name, then click “Continue.”

Import Outcome Set

Select an Existing Set in Institutional Effectiveness:

Institutional Effectiveness Outcome Set
(Learning Objectives & Outcomes)

Cancel
CONTINUE

Check the boxes next to the outcomes that are driving our actions, then click “Accept and Return to Plan” in the upper right-hand corner of the page.

▼ **Institutional Effectiveness Outcome Set**
(Outcomes)

Include All
 ✕ Remove Set

Outcome

Include	Outcome	Mapping	
<input type="checkbox"/>	Objective 1 Q	LSU2025: Advance Higher Education, Enhance Continuing Education	Hide

To add an action to an outcome, click “Add New Action” to the right of that outcome.

Outcome: Objective 1
Add New Action

Then add the details of your action in the appropriate response elements.

Action Information for: @ Goal: test 1	
Define an action for this goal by filling out the information below. Once this action is added, then you may add supporting attachments and links in the next step (from the main action plan screen). * Required Fields	
Cancel Check Spelling	
Linked to Findings:	No Findings have been created on this workspace using the same Goal as this Action.
* Action Item Title:	<input type="text"/>
Action details:	<input type="text"/>
Implementation Plan (timeline):	<input type="text"/>
Key/Responsible Personnel:	<input type="text"/>
Measures:	<input type="text"/>
Budget approval required? (describe):	<input type="text"/>
Budget request amount:	\$ <input type="text"/>
Priority level:	- Select -
Cancel Check Spelling	

Click “Apply Changes” when you are finished. Your newly added action will now appear within your outcome.



You may include additional information related to your action by clicking “Add/Edit Attachments and Links.”



Content Editor Attachments **Web Links** Reports

Add file attachments to Action: Sample Action (Sample SLO/AUO #1)

Click the 'Browse' button to select a file that you want to attach, then click 'Add File'. When done, add more resources or close window.

New File | My Previously Uploaded Files | My Taskstream Work

Name File:

Select File: No file selected.

Describe File: (Optional)

In the window that opens, you can either click “Browse” to search through your computer for a document to upload, or the “Web Links” tab to include a link to another online resource.

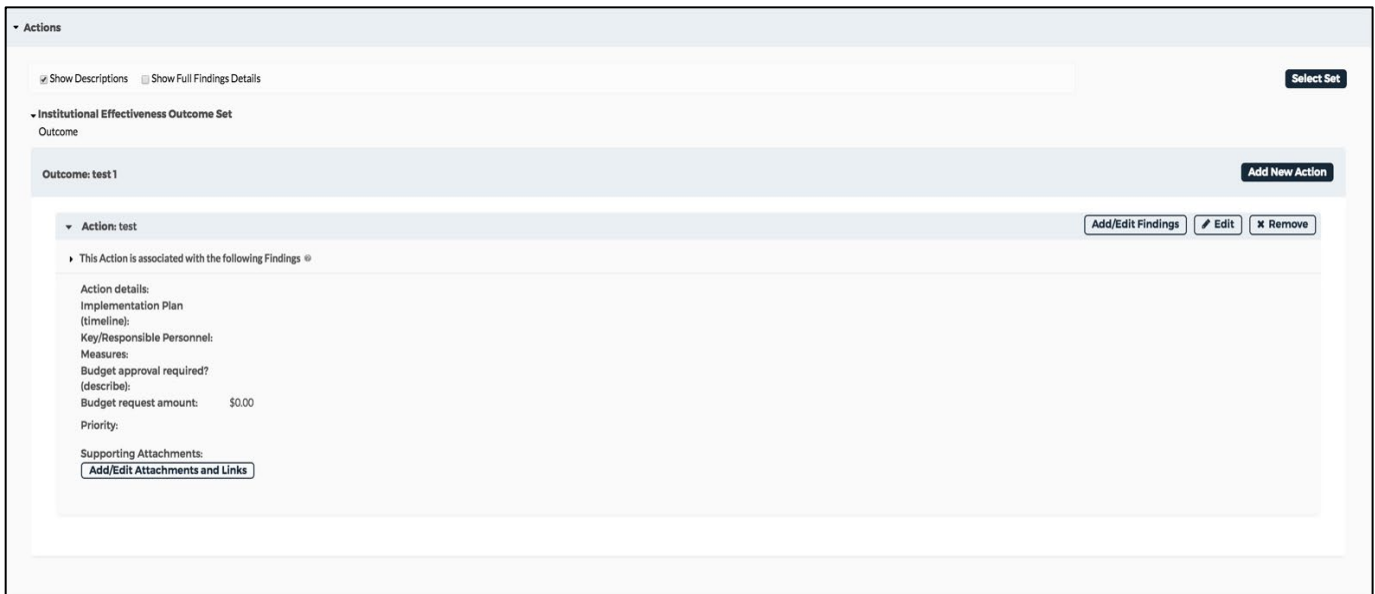
Repeat these steps to add other actions to this or other outcomes, then click “CHECK IN” in the upper right-hand corner of the page and document your changes in the Revision History Log.

Optional: Action Plan Status

To document the Status of each of your actions, you may select the Action Plan Status Report requirement from the workspace structure. To begin working in this requirement, click its name from the workspace structure on the left, then click “CHECK OUT” in the upper right-hand corner of the page.



Next, locate the measure you have findings for and click “Add Status” within it.

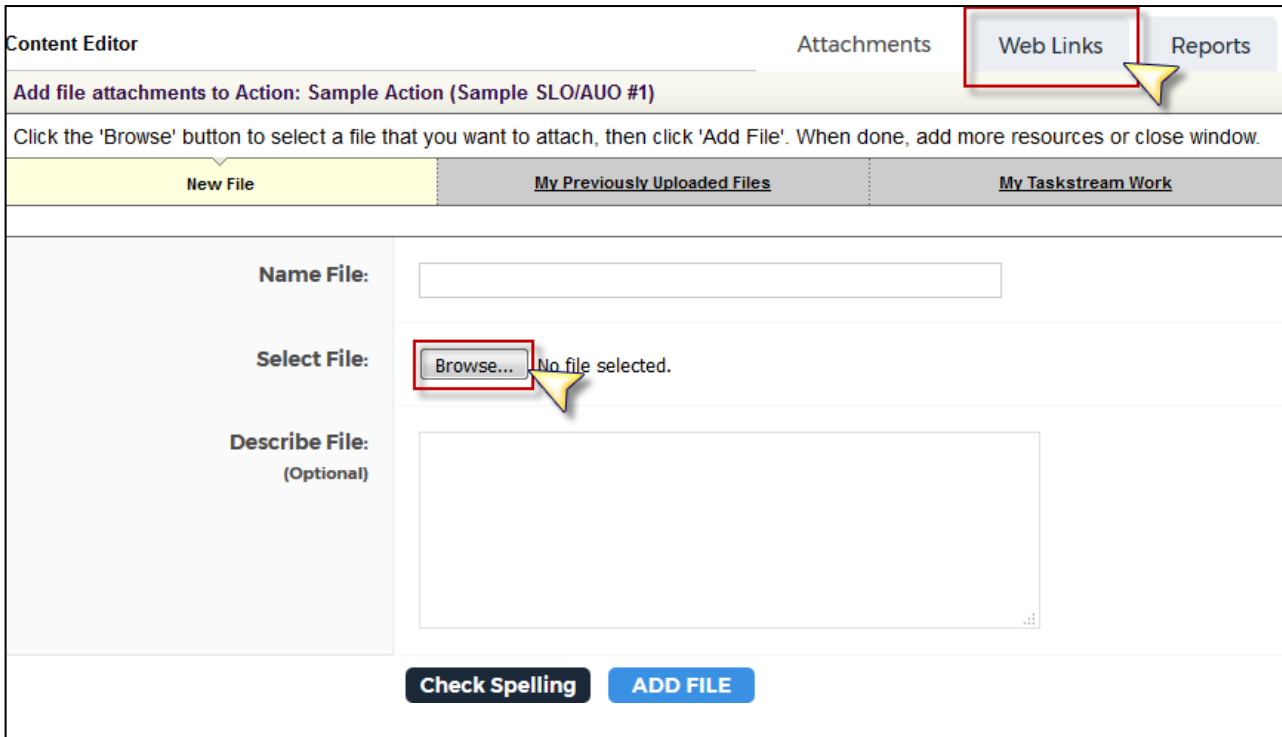


Then, add the details of your action’s progress in the appropriate response elements on the following page. Click “Submit” when you are finished. Your newly added status will now appear within your action.

You may include additional information related to your action status by clicking “Add/Edit Attachments and Links.”



In the window that opens, you can either click “Browse” to search through your computer for a document to upload, or the “Web Links” tab to include a link to another online resource.



Repeat these steps to update the status of this or other actions, then click “CHECK IN” in the upper right-hand corner of the page and document your changes in the Revision History Log.

Optional: Strategic Planning Annual Report (SPAR)

Effective 2020-21, the Strategic Planning Annual Report (SPAR) is optional. Units may choose to continue to use this workspace as a checkpoint of status and in conjunction with faculty and staff performance evaluations. The SPAR is uploaded as an attachment within Taskstream.

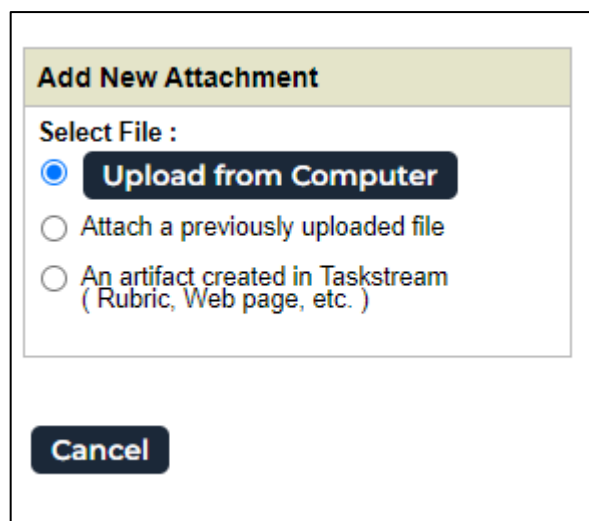
To begin working in this requirement, click “Strategic Planning Annual Report” from the navigation panel on the left and then click “CHECK OUT” in the upper right-hand corner of the page.



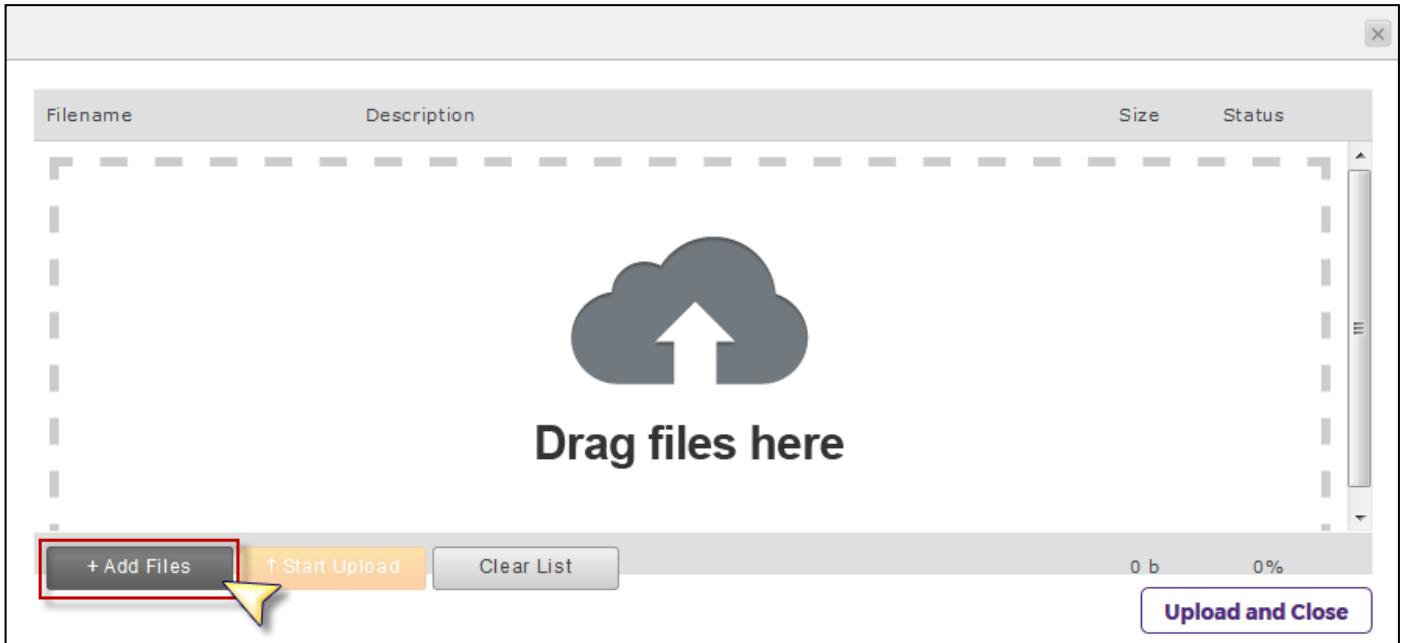
And “Add” toolbar will appear at the bottom of the page, indicating the types of content that can be included. Most frequently, “Attachments” will be utilized to upload the SPAR (e.g., pdf).



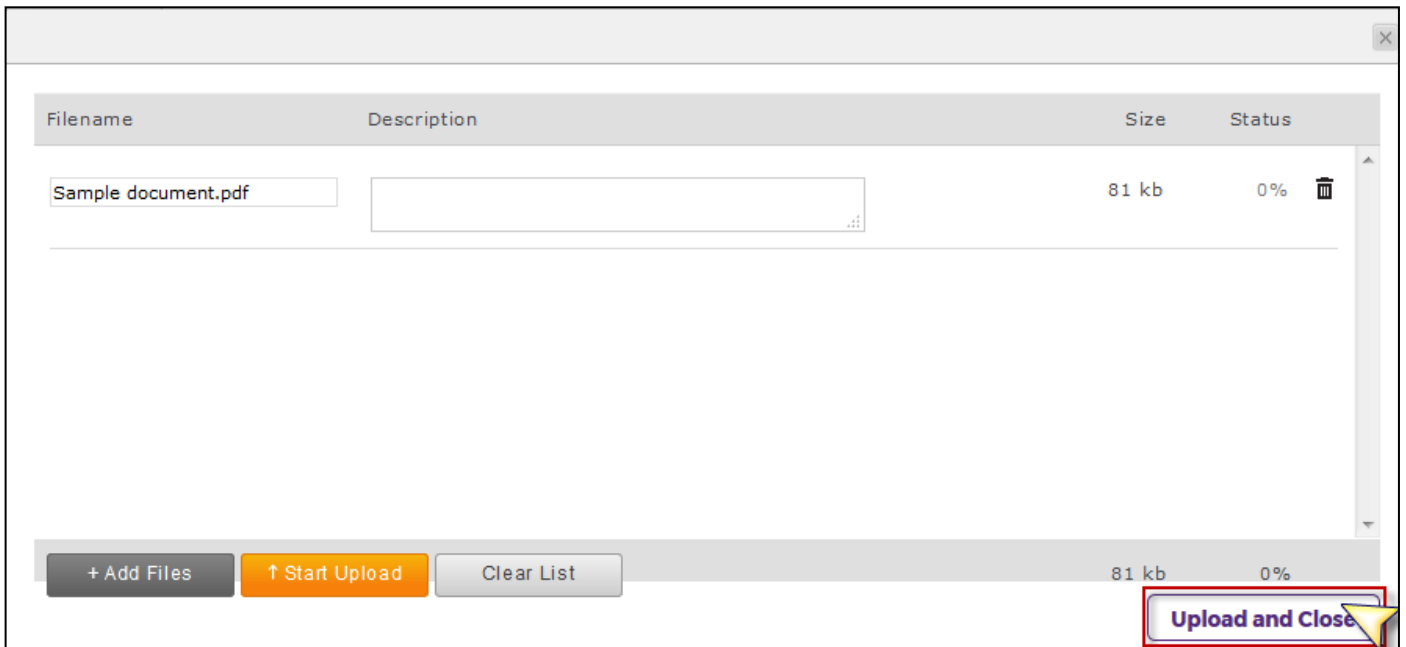
After click “Attachments,” the following page will provide an opportunity to indicate “Upload from Computer” in the “Add New Attachment” box on the left:



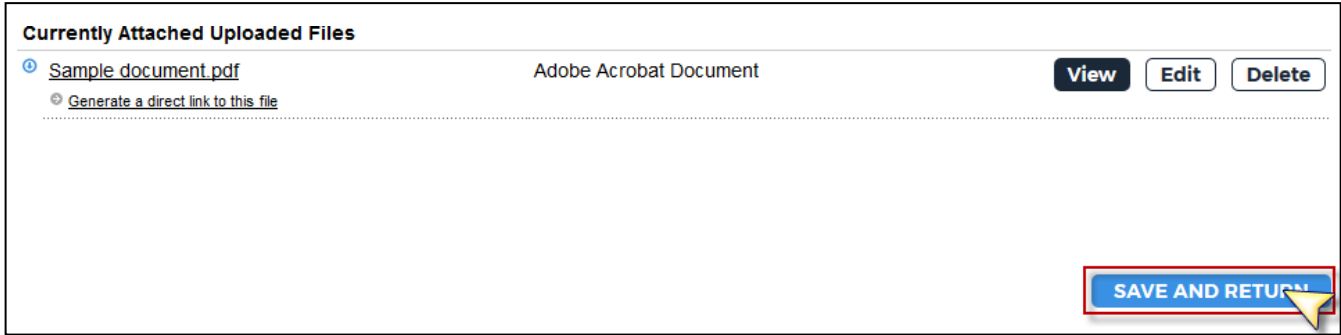
You may then either drag your file(s) directly into the window that opens, or you can click “Add Files” to search through your computer for file(s) to upload.



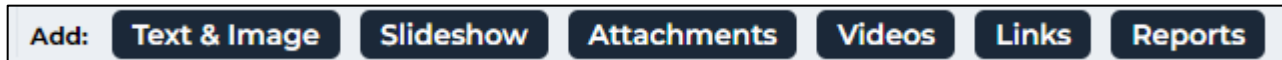
Once you have selected your file(s), click “Upload and Close.”



You will then see your uploaded file(s) appear in the middle of the page. Click “Save and Return.”



If you would like to link to websites outside of AMS, click “Links.”



On the following page, enter a Name for your link, its URL, and an optional Description, then click “Add Link.”

A screenshot of a form titled "Add New Web Link" with a light green header. The form contains three input fields: "Name link :", "Website URL :", and "Description : (Optional)". The "Website URL" field has a "Test" button to its right. At the bottom of the form are three buttons: "Check Spelling", "Add Link", and "Cancel".

Once you see all of the links you would like to add, click “Save and Return.”

When completed, click “CHECK IN” in the upper right-hand corner of the page.

Additional Resources

Additional resources, including the Campus-wide Strategic Planning Guidelines, are available via the Office of Institutional Effectiveness website (www.lsu.edu/oie).

Questions? Technical Assistance?

If you have any questions or need any assistance, please contact Tara Rose at trose@lsu.edu.