TaskStream
Tools of Engagement

Communications

Communications

Message Center

The Message Center is an internal email program that allows you to send and receive messages from only TaskStream members. Consistent with most email applications, the Message Center allows you to compose, receive, read, store, reply to, and forward emails as well as to attach documents and create folders.

To access the Message Center, click the **Message Center** link on the left menu bar or on the home page.

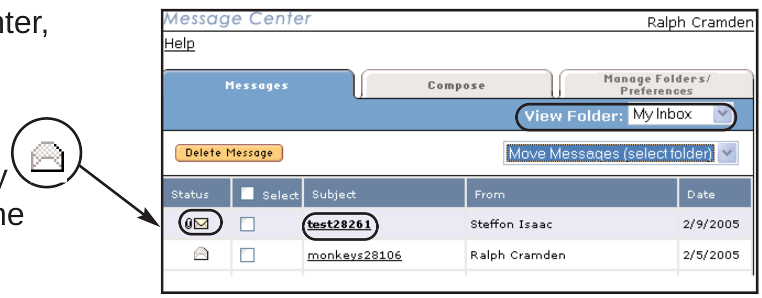
Note: When you have a new message, you will receive a notification on the upper right-hand side of your home page. Clicking the notification will take you directly to the Message Center.

Left Menu Bar

Home Page

Your Inbox

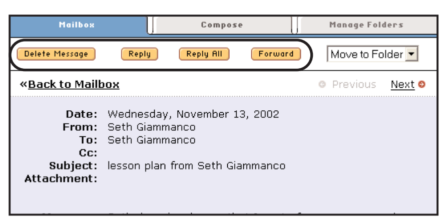
When you enter the Message Center, you will start in the **Messages** tab where all of the messages in your Inbox are displayed. New or unread messages are indicated by the “sealed envelope” symbol in the status column.



To view the messages in a different folder other than the Inbox, select the appropriate folder name from the **View Folder** pull-down menu.

Reading Messages

To read a message, click the **Subject** link of that message.

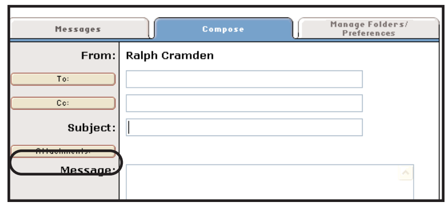


Once you have finished reading your message, you have a number of options. Click the **Delete**, **Reply**, **Reply All**, or **Forward** button located above the message as needed. Messages can also be filed away into folders, as described in the Organizing Your Messages section. If you choose to do nothing with the message, click the **Back to Mailbox** link.

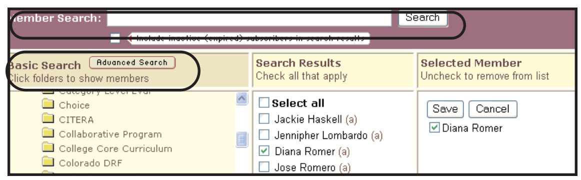
Copying an Attached Lesson, Unit, Rubric, Web Folio, or Web Page

When you receive a lesson, unit, rubric, web folio, or web page through the Message Center, you may be able to copy it into your own TaskStream account for editing. (The individual who sent you the email has the ability to disable this feature.) To copy the TaskStream work, click the link to the file, and then click the **Copy** button at the top of the lesson, unit, rubric, web folio, or web page. Copying TaskStream work also copies all of the attachments included within it. When you receive a folio or a web page, you may also be able to only copy the lessons, units, and rubrics within it.

Composing a Message



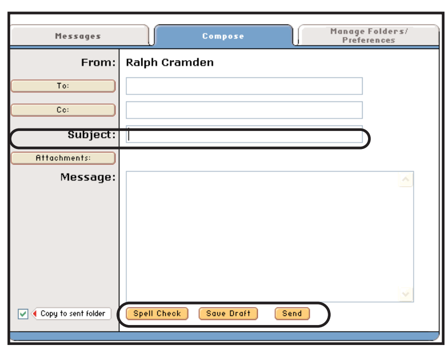
To compose a new message, click the **Compose** tab at the top of the Message Center. To address your new message, click the **To:** link to open the Member Locator. There are two ways to find TaskStream members to whom you wish to send a message.



Use the Member Search area to search by first, last, or full name.

All TaskStream members are organized into learning communities. The Member Locator area is a tool to browse through your community to find individuals by the area they are most closely associated with. To do this, click on the folder icons. When you click on a folder that has members associated with it, you will see their names listed in the search results column.

Once you have located a recipient using either of the above options, click the checkbox next to his or her name. That individual will automatically appear in the confirmed email recipients column. You can select as many recipients as you like. Click the **Save** button when finished.



You will return to the compose email form with the recipients' names listed after the "To:" link. After addressing your message, you can select individuals to whom you would like to send a carbon copy (CC:) of this message.

Next, type a subject for your message in the Subject field and finally compose your message in the Message text box. When you are finished, you can Spell Check your message, Send it, or if you want to save it to finish later, you can Save Draft.

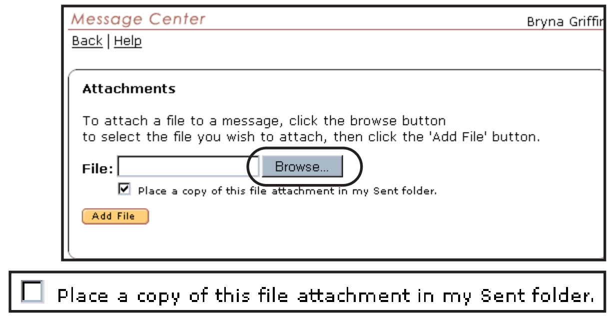
Note: Drafts are stored in the “Draft” *folder.*

Attaching a Document

To attach a document to your message, click the **Attachment** link.

Click the **Browse** button to locate the file you want to attach.

Note: To save file storage space (see Resource Management section of this guide), you may opt not to keep a copy of the attachment in your sent folder. Simply uncheck the box for this feature.



The browse button will open a Choose File window similar to a Save or Open File window. Now, you need to locate your file. When you find your file, highlight it by clicking its icon once. Then click the **Open** button to return to the message center window. Finally, click the **Add file** button.

Organizing Your Messages

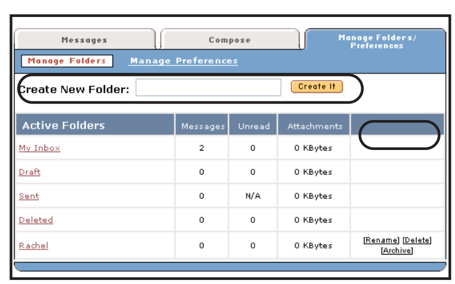
You can organize your messages by storing them in different folders.

Managing Your Folders

To manage your folders, click the **Manage Folders/Preferences** tab on the top of the Message Center page. This area includes information about your folders, including how many messages are in each folder and the total size of any attachments included in those messages.

To create a folder, enter a title into the text field and click the **Create It** button. Another page will open informing you that the folder was created.

Once you have created a folder you can rename or delete it by clicking the appropriate link located on the right hand side.



All custom folders can be easily archived from the Manage Folders area. To archive a folder, click the **Archive** link that corresponds with the folder you wish to archive.

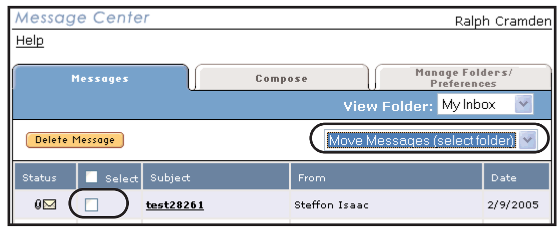
After you have chosen to archive folders, a second section will be added to the Manage Folders area that will enable you to view and manage your archived folders.

Archived folders can be reactivated at any time. To reactivate a folder, click the **Activate** link that corresponds with the folder you wish to reactivate.

Note: Once a folder is archived, it will not appear in the View Folder pull-down menu or the Move Messages (select folder) pull-down menu, unless you select the "Show archived folder" checkbox.

Filing Your Messages Into a Folder

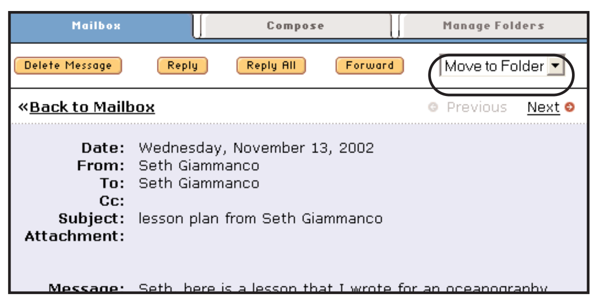
Select the message you want to file by clicking the checkbox in the Select column.



Then select the folder in which you will be filing the messages by choosing it from the **Move Messages (select folder)** pull-down menu. TaskStream will automatically move your message(s) and allow you to view the contents of that folder.

Filing Your Messages Into a Folder After Reading a Message

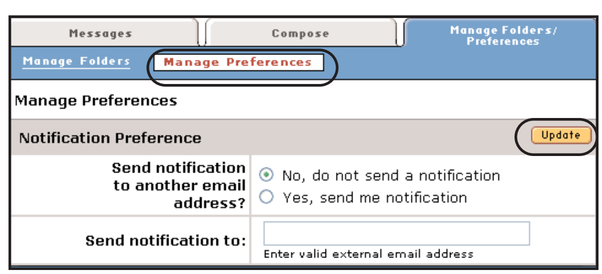
After you have read a message, you can file it in a folder of your choice by selecting the target folder from the **Move to Folder** pull-down menu.



Once you select the target folder, TaskStream will automatically move this message into the target folder and allow you to view the contents of that folder.

Changing Your Notification Preferences

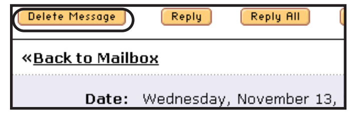
The **Manage Preferences** area can be accessed by clicking the **Manage Preferences** link on the **Manage Folders/Preferences** tab. You can change your notification preferences from this area. You can choose to receive an external notification email each time an email is sent to you through the TaskStream Message



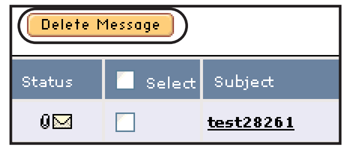
Center. This notification email will alert you to the fact that you have an unread email message in your Message Center. You will also be able to indicate the address to which you would like the notification emails sent.

Deleting Messages

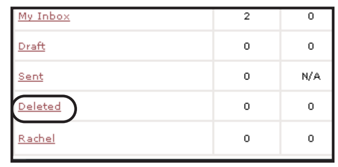
To delete a message after opening it, simply click the **Delete Message** button.



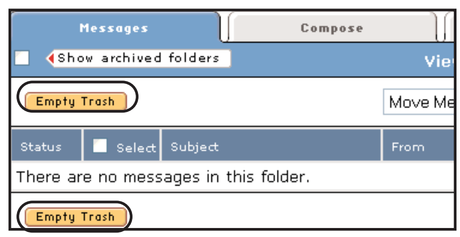
To delete a message or messages from the **Messages** tab, check the boxes next to each message to be deleted. Then click the **Delete Message** button.



To access your folder of deleted items, click the **Deleted** link on the main Manage Folders/Preferences page.



From the Deleted folder, you can click the **Empty Trash** button to permanently delete all items in the Deleted folder.



Discussion Board

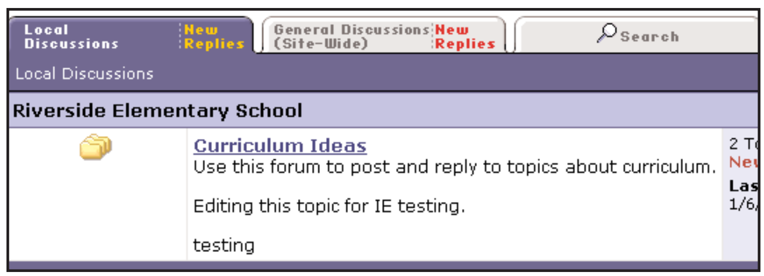
The Discussion Board supports online discussions on a wide array of topics. You can easily join discussions on posted topics to share your ideas, comments, and perspectives with your colleagues.

To access the Discussion Board, click the **Discussion Board** link from the left menu bar or from the home page.

Left Menu Bar

Home Page

The Discussion Board is organized into discussion threads that have several structural levels. The organizational structure follows the following format:
Category---Forum ---Topic---Reply



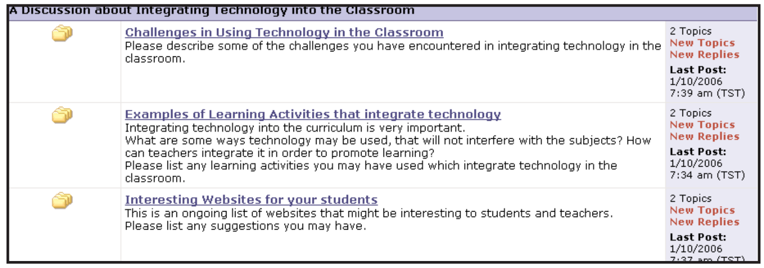
The Discussion Board is divided into three areas accessible by one of three tabs. The Local Discussions area includes organization-wide and program-specific discussions in your learning community. The General Discussions (Site-Wide) area is open to all TaskStream users. The Search area allows you to perform keyword searches of any discussions accessible to you. The Local Discussions area, the General Discussions (Site-Wide) area and the Search areas can be accessed by clicking the first, second, or third tab respectively.

Working in the Local and General Discussion Areas

The main pages of both the Local and General Discussion areas include an alphabetical list of all categories that have been created within the discussion area. The categories each contain a list of forums that are included within the category and brief descriptions of each forum's purpose.

Note: Forums are created by TS Coordinators. If you would like to see new forums added to the Local Discussions area, please contact a TS Coordinator for your organization.

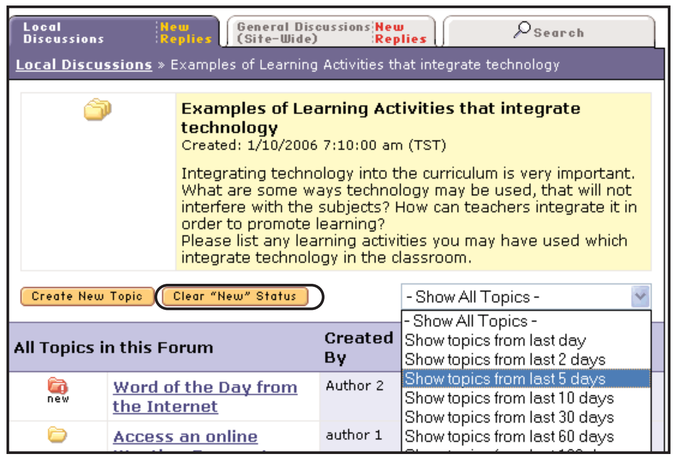
Each forum's activity status is visible to the right of its title. The forum's activity status notes the total number of topics included in the forum, shows an indication in red if new topics and/or replies have been posted in the forum and shows the date and time of the forum's most recent activity.



Click an underlined forum title to enter that forum and view its specific topics. The resulting page will display posted topics. You can filter the topic results using the drop-down box located on the right side of the screen.

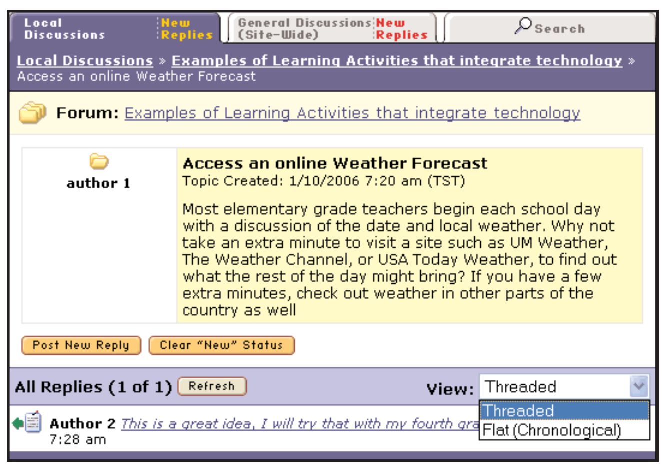
Within each forum, the **Clear New Status** button enables you to remove all of the new status icons from all topics within the forum regardless of whether you have actually viewed the new topics or replies.

Click an underlined topic title to view the topic.



There are two views available for the topics: the flat (chronological) view and the threaded view. Use the View pull-down menu to change the way the discussion topics are being viewed.

Depending on the view selected, the directions for posting within the Discussion Board area differ. Please refer to the section of the guide that corresponds to your selected view.

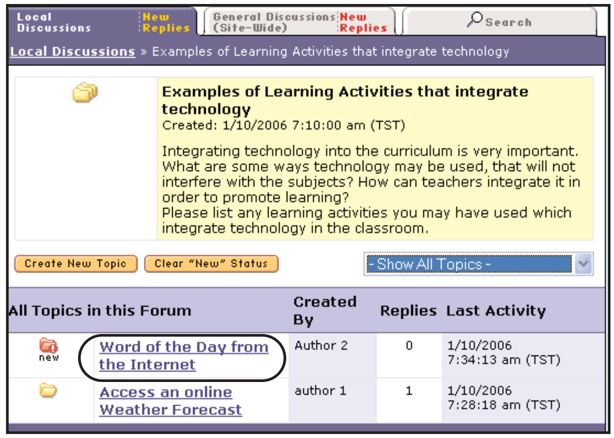


The Flat (Chronological) View

The flat (chronological) view displays all the replies to the topic in chronological order. The oldest reply will be at the top of the list and the most recent reply will be at the bottom of the list.

Opening an Existing Discussion Topic

Click an individual topic title to read the initial posting as well as the posted replies to this topic.

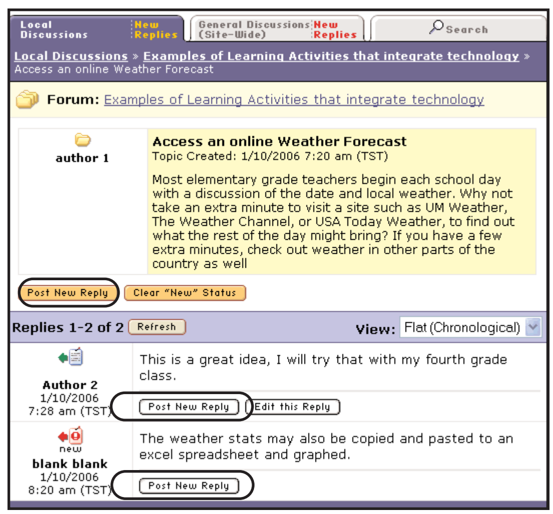


Participating in a Discussion (Post Reply)

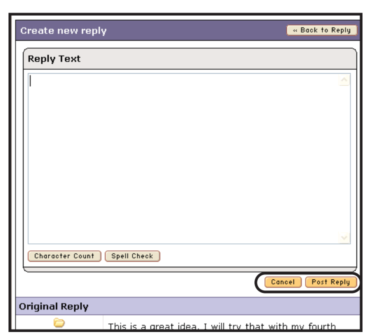
To participate in a discussion, click a **Post New Reply** button to open the Post Reply form.

Clicking the yellow **Post New Reply** button that is located directly under the topic will register your reply directly under the topic.

Clicking the gray **Post New Reply** button that is located under an existing reply will register your reply as a response to that existing reply. Posting a reply in this manner will cause your reply to appear under the reply to which you are responding when the topic is viewed through the Threaded view.



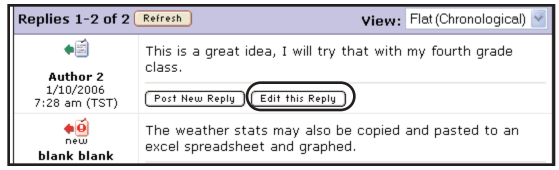
In the Post Reply form, type in your response in the Message field. A Spell Check is available to assist you in checking your text for spelling errors.



Click the **Post Reply** button to submit your response.

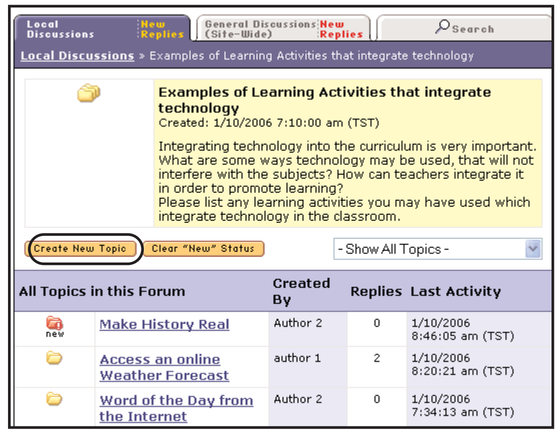
Editing a Reply

To edit a reply that you have previously posted, click the **Edit this Reply** button that is located under each of your posted replies.



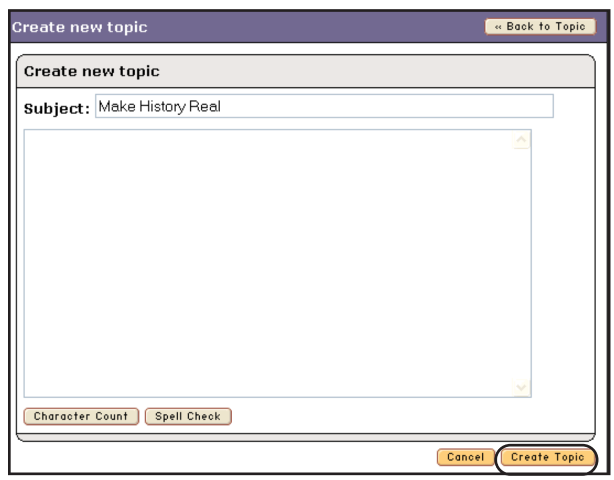
Starting a Discussion Topic

To add a new topic to a forum, click the **Create New Topic** button at the top of the forum page.



Enter the name of the topic you wish to add in the subject field. Add the description of the topic to the text field.

Clicking the **Spell Check** button at the bottom of the page will open the spell-checking feature in a pop-up window; Spell Check searches the subject and body of your entry and recommends replacements for misspellings.



Clicking the **Character Count** button allows you to track the number of characters in your entry. The character limit for topic entries is 7000 characters.

Click the **Create Topic** button when you are ready to post your topic. You will then return to the forum's topic list, and your topic will appear with a new status icon at the top of the topic list.

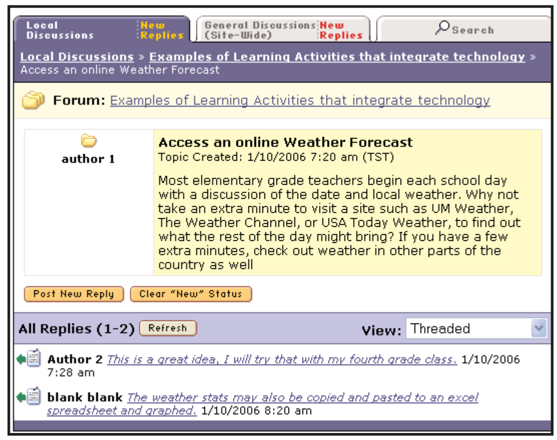
The Threaded View

The threaded view of the discussion board gives individuals the opportunity to reply to existing replies within the topic. These replies are then displayed in a leveled view that makes it apparent which replies address the main topic and which replies are in response to existing replies.

Opening and Viewing an Existing Discussion Topic

Click an individual topic title to read the initial posting as well as the posted replies to this topic.

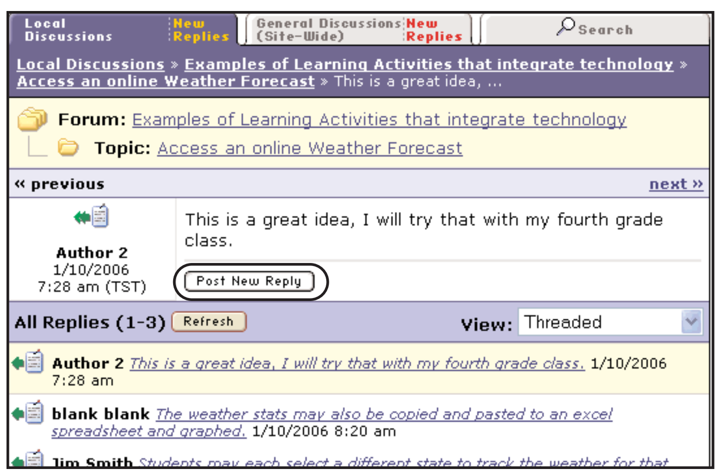
Within each topic, a list of all replies is posted. A preview for each reply follows the name of the individual who posted the reply. To view a reply in its entirety, click the preview text of the reply. The entire reply will then appear in the top area of the screen. The reply you selected will be highlighted in the thread itself.



Participating in a Discussion (Post Reply)

You can choose to post a reply to a topic directly by clicking the yellow **Post New Reply** button located under the description of the topic. Replies posted in this manner will appear at the first level of replies.

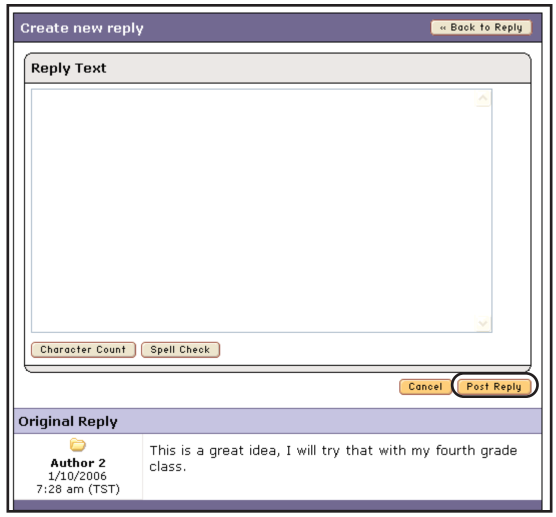
To post a reply to an existing reply, click the reply to which you want to respond and then click the gray **Post New Reply** button that appears under the full text of the reply.



Clicking the **Post New Reply** button from any area of the topic will yield the Post Reply form.

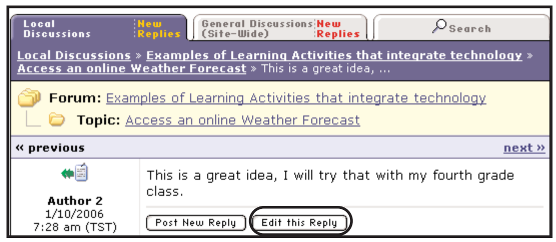
In the Post Reply form, type in your response in the Message field. A Spell Check is available to assist you in checking your text for spelling errors.

Click the **Post Reply** button to submit your response.



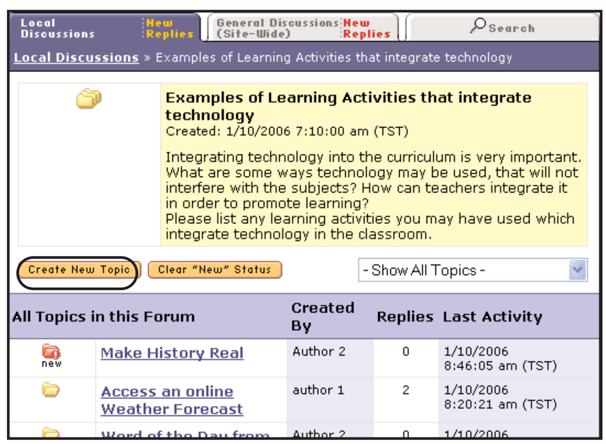
Editing a Reply

To edit a reply that you have previously posted, click the reply you wish to edit and then click the **Edit this Reply** button that appears under the full text of the reply.



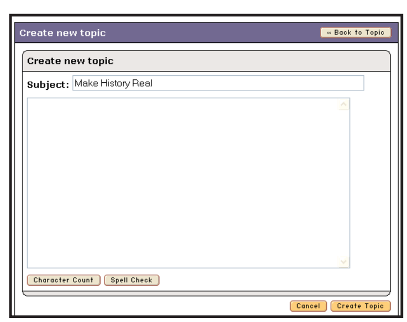
Starting a Discussion Topic

To add a new topic to a forum, click the **Create New Topic** button at the top of the forum page.



Enter the name of the topic you wish to add in the subject field. Add the description of the topic to the text field.

Clicking the **Spell Check** button at the bottom of the page will open the spell-checking feature in a pop-up window; Spell Check searches the subject and body of your entry and recommends replacements for



misspellings.

Clicking the **Character Count** button allows you to track the number of characters in your entry. The character limit for topic entries is 7000 characters.

Click the **Create Topic** button when you are ready to post your topic. You will then return to the forum's topic list, and your topic will appear with a new status icon at the top of the topic list.

Search Area

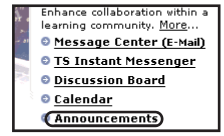
Click the **Search** tab or one of the various Search buttons located on most Discussion Board pages. Complete the resulting form to search for specific topics by keyword, forum and date range.

Announcements

Announcements notify large groups of TaskStream members of important or timely events. Announcements can only be posted by Site Coordinators and by TaskStream.

To access Announcements, click the **Announcements** link from the left menu bar or from the home page.

Menu Bar

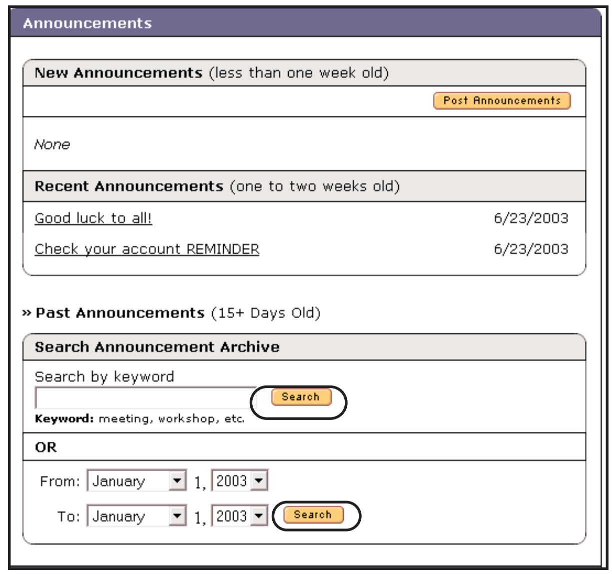


Home Page

New Announcements (less than one week old) are displayed in the black bar at the top of the page. To view a recent announcement, click its underlined title.

Recent Announcements (one to two weeks old) are displayed in the Recent Announcements section. To view a recent announcement, double click on its title.

Search Announcements To search the Announcements Archive you have two options: 1) type in a keyword and click the **Search** button, 2) set a date range with a From and To date and click the **Search** button.

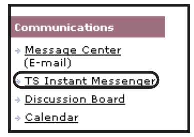


Note: Announcement can be posted by designated Site Coordinators using the TS Coordinator tool. New posted announcements create an alert on the Home Page of each individual in the group or area it is posted to.

TaskStream Messenger

The TaskStream Messenger allows you to send and receive instant messages to other TaskStream subscribers. If the person you are messaging is logged in at the same time as you, then you will be able to communicate synchronously with him or her.

To access TaskStream Messenger, click the **TS Instant Messenger** link located at the top of the left menu bar or on the home page.



Left Menu Bar

Home Page

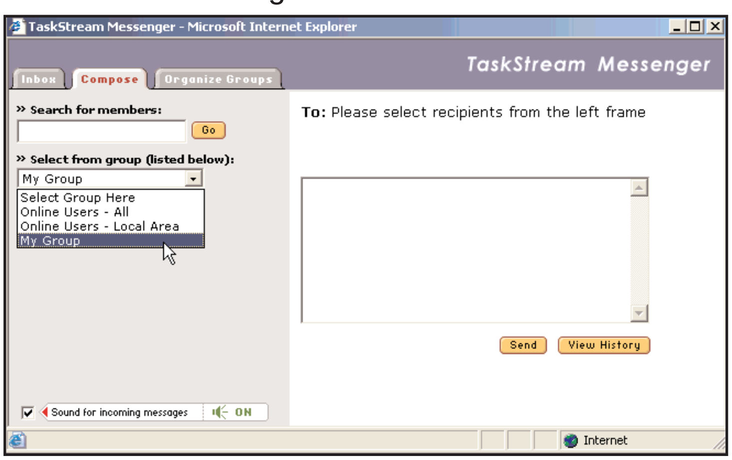
Selecting Recipients

There are two ways that you can find TaskStream members to send an instant message.

1. **People Search:** Type the person's first, last, or full name in the people search text box and click the **Go** button. The results of your search will be listed under the Check all that apply heading.
2. **View people by the groups with which they are associated:** When you first open the compose page, the default group is your Local Area. The names listed below are the members who share the same local area as you. To change the group you are viewing, click the **Groups** pull down menu and select a different group.

Once you have found the individual(s) with whom you wish to communicate, click the checkbox next to each person's name. As you select a person, his or her name appears above the text box on the right.

Select Recipients



Compose and Send

Composing and Sending Messages

After you have addressed your message, you can compose the body of your message in the text box provided. When you are finished, click the **Send** button.

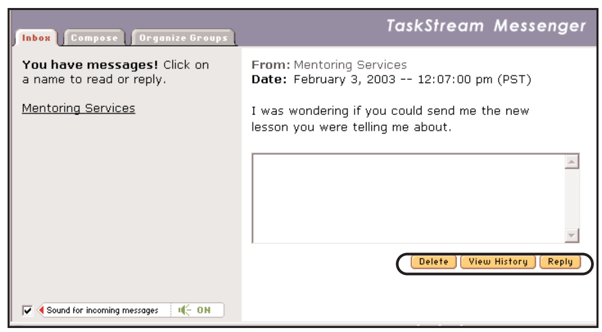
Receiving a Message

When you receive a new instant message, the TaskStream Messenger icon flashes and, if enabled, a TaskStream chime will sound.

Note: See the "Controlling the Incoming Message Sound" section for information on how to enable the sound feature.

Click on the flashing icon to open your TaskStream Messenger Inbox. The name of each person that has sent you a message will appear on the left-hand side. Click the person's name to display the message he or she has sent you.

You can reply to a message by typing your response and clicking the **Reply** button at the bottom of the message text box. Clicking the **History** button (located next to the Reply button) will allow you to see a saved history of all TaskStream Message communication you have had with the selected person.



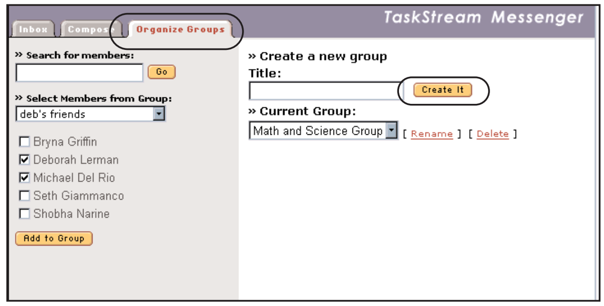
Controlling the Incoming Message Sound

If you would like to hear a sound each time a new TaskStream message has been sent to you, click the checkbox next to the "Sound for Incoming Messages" flag located on the lower left-hand corner of the TaskStream Messenger to turn the sound feature on. Conversely, if you want to turn this feature off, deselect the checkbox.

Note: In order to enable the sound feature, your computer must be equipped with either a Flash or QuickTime plugin. Additionally, the following configurations do not support this new feature: IE 4.0-4.5 (MAC), AOL All versions (MAC).

Creating a Group

The TaskStream Messenger allows you to create a group of TaskStream members with whom you communicate often. To create a group, click the **Organize Groups** tab.



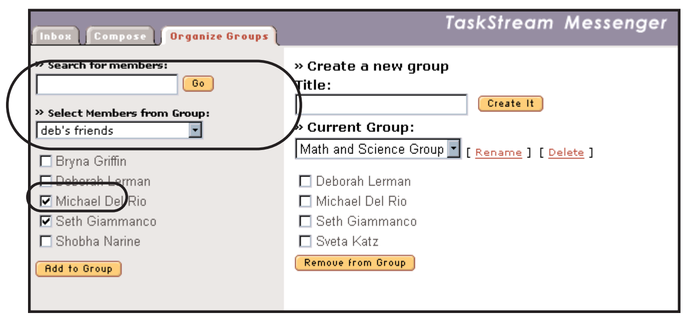
Type the title of the new group in the Title field and click the **Create It** button. The group will appear in the Current Group pull-down menu.

Assigning Members to Groups

When you want to organize an existing group, you need to select that group from the Current Group pull-down menu on the right hand side of the page. (This happens automatically when you create a new group.) Once you have selected the group, you may begin adding or removing group members.

Adding Members

Use the gray area on the left to select the people in the group. There are two methods for finding other TaskStream members to add to your group.



1. **Search for members:** Type in a first and/or last name of the person you would like to find and click the **GO** button.
2. **Search for member from an existing group:** Use the Select Members from Group pull-down menu to view a list of the members already in selected groups, this includes the default “Online Users - All” and “Online Users - Local Area” groups.

Once you have found a person to add to the Current Group, check the box next to his or her name, and click the **Add to Group** button to add their names to the group roster on the right.

Removing Members

Select the group from the Current Group pull-down menu. A roster of group members appears below. Check the boxes next to the names of those to be removed and click the **Remove from Group** button.

Calendar

The Calendar allows you to organize, record, and plan daily and monthly activities. The Calendar can also be used to schedule lessons and units.

To access the Calendar, click the **Calendar** link from the left menu bar or from the home page.

Left Menu Bar

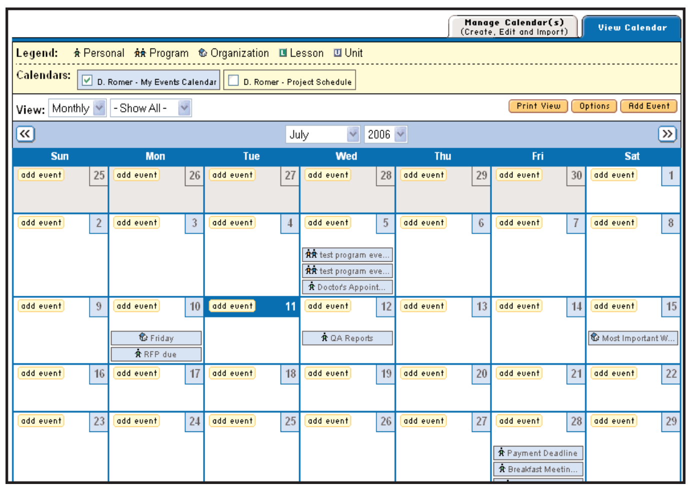
Home Page

Viewing Events

Monthly View

The Calendar opens with the monthly view by default with the current date shaded in a darker blue.

On the calendar, you will see personal events you scheduled and other program or organization events posted by a TS Coordinator. You will also see your scheduled lessons and units.



- Personal Events are identified by a single stick figure icon.

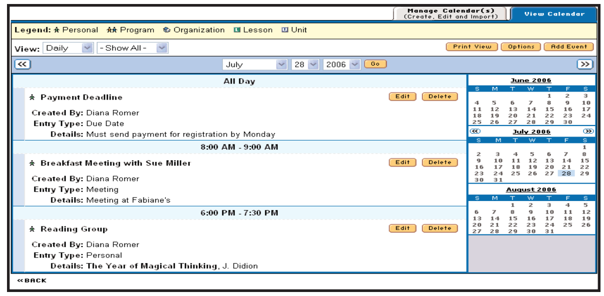
- Program Events are identified by the icon with two stick figures.

- Organization Events are identified by a building icon.

- Lesson Events are identified by the L icon.

- Unit Events are identified by the U icon.

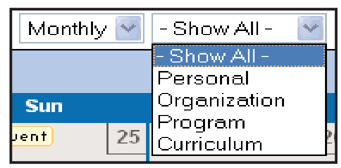
Daily View



To view the details of events scheduled for a given day, click an event title or the date. You can also switch to the daily view by selecting Daily from the View pull-down menu. The calendar view switches to the daily view and displays the selected day's event information.

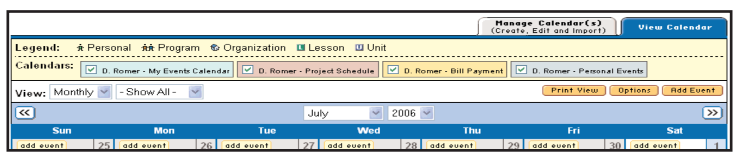
From the daily view, you can use the arrow buttons to view the previous or next day's events. To select a specific date you wish to view, use the pull-down menus to select the date and then click the **Go** button.

Filtering Events



From either the monthly or daily views, you can choose to filter the displayed events. Using the pull-down menu, you can choose to show all events, or solely your personal, organization, program, or curriculum events.

Viewing Calendars from Others in your Learning Community

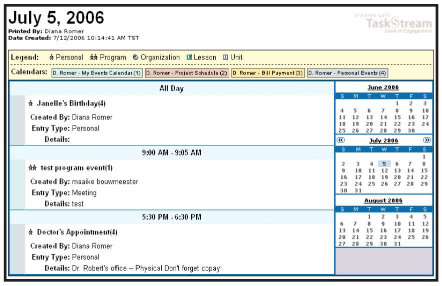


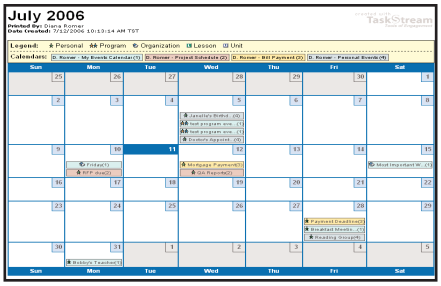
If you have selected to view the calendars from others in your learning community, you will be able to select to view the calendars by selecting the check box(es) associated with the calendar(s) you wish to view.

Printing Calendar

To print the calendar, click the **Print View** button to access a printable version of the daily or monthly calendar.

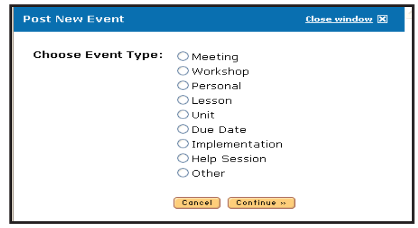
From this print view, you can print the lesson by selecting **Print** from the **File** menu at the top of the screen.



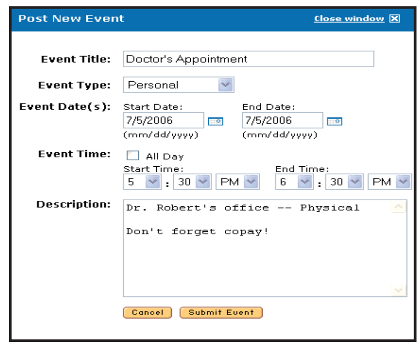


Post New Event

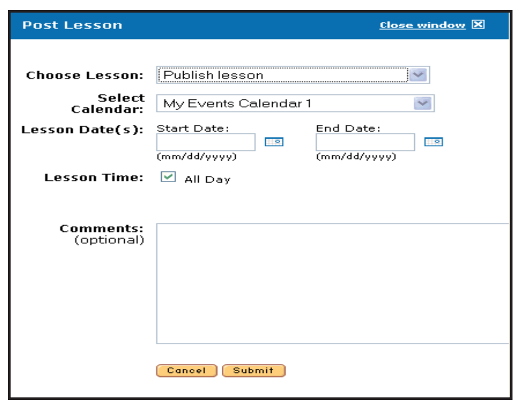
To post a new event, click the **Add Event** button located at the top of the calendar or on the day on which you wish to schedule.



The Post New Event form will open. Choose the type of event you wish to schedule and click the **Continue** button.



If you choose any type of event other than lessons and units, you will then be given the opportunity to enter an event title and edit the event type . If you can post events on multiple calendars, you will need to select the calendar to which you want to post the event. You need to choose the event date and the event time. By default, the event will be marked as an all day event. To schedule the event for a specific time, uncheck the All Day box. This will enable you to choose a start and end time. You can then enter a description for the event. Once you have finished entering the information for the event, click the **Submit Event** button.



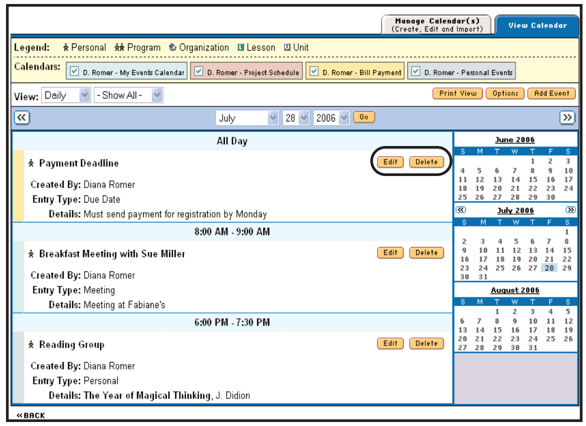
If you choose lesson or unit as the type of event, you will be prompted to select a lesson or unit from the lessons or units you have created within TaskStream's Lesson or Unit Builder. You will then be able to select the calendar to which you wish to add this lesson or unit and the date and time you wish to schedule the lesson or unit.

Posting lessons and units to the calendar will automatically record the implementation dates in the Implementation area of the Manage Lesson or Manage Unit area.

Likewise, entering implementation records in the Lesson and Unit Builders will automatically post these lessons and units to your calendar.

Note: If you are a TS Coordinator, you can post events to specific programs and/or areas of your learning community. Please refer to the TS Coordinator downloadable manual for more details on posting program/organization events.

Edit or Delete Events



You can only edit or delete events that you have posted. To edit or delete an event, first open the daily view by clicking the event title or the date of the event you wish to edit or delete.

To the right of the event, you will see the **Edit** and **Delete** buttons. To make changes to an event, click the **Edit** button. To delete an event, click the **Delete** button.

Viewing Options

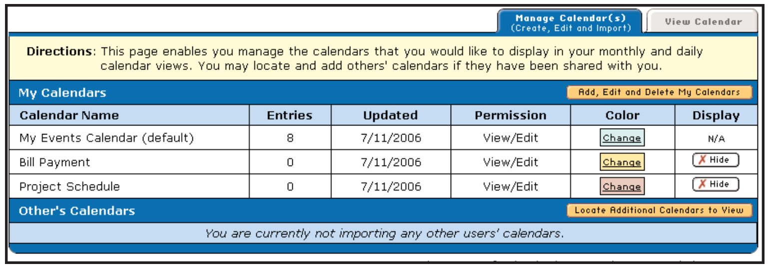
Click the **Options** button to access the viewing options menu. You can choose to show both the units and the lessons included in the units or to show only the units without showing the lessons.

Managing Calendars

To access your management privileges for your calendars, click the **Manage My Calendars** tab.

Managing Your Calendars

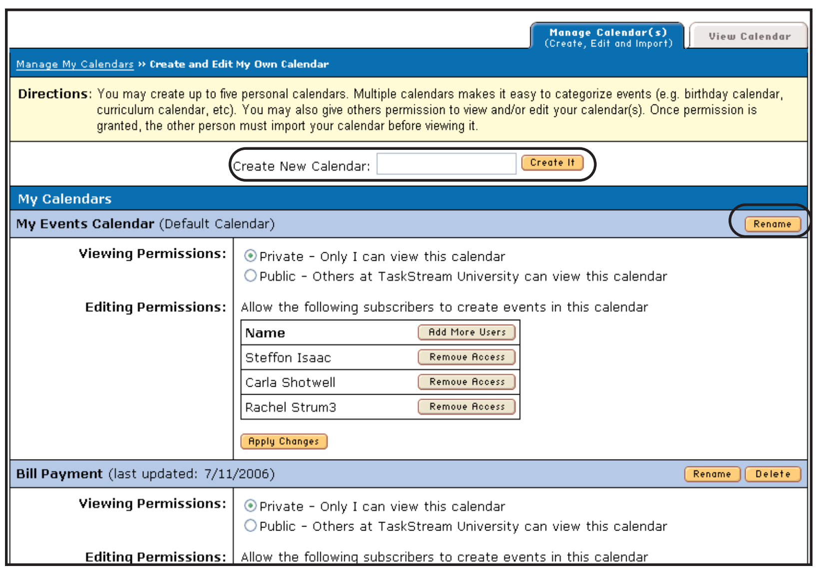
From the Manage My Calendars area, you are able to view the preferences for the calendars to which you have access. Specifically, you can view the name of the calendar, the number of entries that have been made to the calendar, the last date when the calendar was updated, the permissions you have within the calendar, the color in which the events of the calendar will be displayed, and the current display option. From this screen, you are able to change the color in which the events of the calendar are displayed. To change the color, click the **Change** link from the Color column.



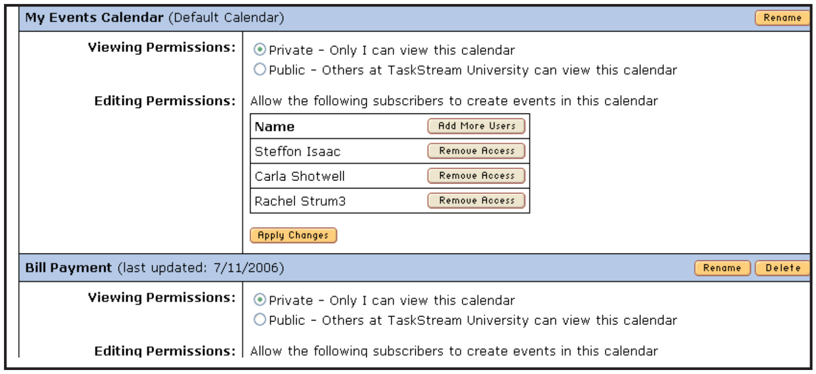
To add, edit and delete your calendars, click the **Add, Edit and Delete My Calendars** button.

To add an additional calendar, enter the name for your new calendar and then click the **Create It** button.

To rename any of your calendars, click the **Rename** button. Enter a new name for the calendar and then click the **OK** button.



For each of your calendars, you are able to edit the viewing permissions choosing whether to keep the calendar private or public. Selecting to make your calendar public will enable other individuals within your organization to view your calendar.



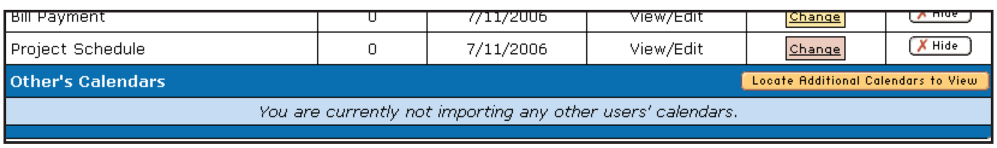
You can also choose to grant other individuals within your organization the ability to add events to your calendar. To choose individuals to whom you would like to grant the ability to add events to your calendar, click the **Add More Users** button and then select the individuals to whom you wish to be able to add events from the Member Locator.

Note: Choosing to make your calendar public and viewable to others in your learning community and choosing to allow other individuals from your learning community to edit your calendar are two separate options..

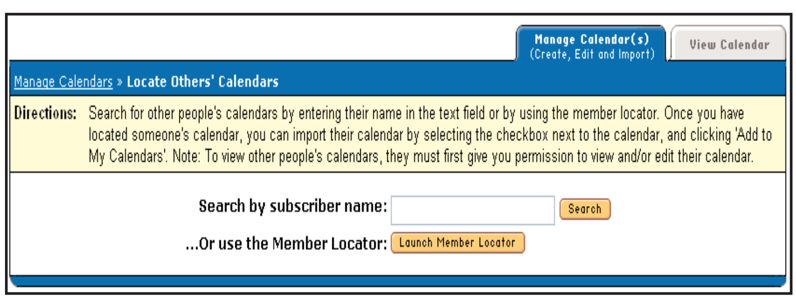
To delete additional calendars, click the **Delete** button.

Note: You will not be able to delete your original calendar.

Locating Other Calendars



You are able to access the calendars created by others in your learning community. To locate the calendars you can choose to view, click the **Locate Additional Calendars to View** button.



You will then be able to search by name or by searching the Member Locator. Select the calendars you wish to view by clicking the corresponding check boxes and then click the **Add to My Calendars** button..

Note: Subscribers with TS Coordinator privileges will be able to view the lessons and units placed on any calendar within their learning community.