

# Folios & Web Pages



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## ABOUT THE FOLIOS & WEB PAGES TOOL


The Folios & Web Pages Tool facilitates the creation of web-based portfolios, resource folios, and web pages to which you can add text, images, standards, files, and Taskstream work.

### Types of Folios and Web Pages

**Presentation Portfolios** are single or multi-page presentations of selected work, resources, and/or artifacts. You can select a visual style to personalize or enhance a Presentation Portfolio. They are organized into pages and content sections.

**Resource Folios** allow you to organize resources into sections that are accessed on one (1) page. Resource Folios are typically used for organizational rather than for presentational purposes. Therefore, there are no style choices in this step. Resource Folios always consist of a single page, organized into sections.

**Web Pages** are single or multi-page presentations of selected work, resources, and/or artifacts. Like Presentation Portfolios, you can select a visual style to personalize or enhance Web Pages. The only difference between Presentation Portfolios and Web Pages is that they have different available starting templates.



When you [access the Folios & Web Pages home page](#)<sup>1</sup>, you are navigated to a list of all your existing folios and pages. By default, items on this home page are grouped by template category. Use the  button to toggle between tile and list views of this home page.

### The Tile View

The tile view presents each folio or web page in a separate tile that contains the folio name and the date on which it was last modified. Icons indicate when your work has been shared for review or is locked for evaluation. It is also indicated when new Comments have been added, or when a folio or page has been shared through the Cybrary.


The thumbnail in the tile reflects the style (theme, color and layout) that you have selected for this folio. Click the **Web Preview** button in the tile to open a pop-up view of your own work content.


When you click the folio name or the thumbnail, you are navigated to the *Edit Content* page.


Function buttons below each thumbnail enable you to navigate to the [Edit Content](#) () and [Style](#) () pages for that folio.

*Note that if you have not yet selected a Style for your work, clicking the Edit button, folio name OR thumbnail will navigate you to the Style page.*


Other buttons enable you to copy () , rename () or delete () this folio.

 You cannot delete or rename a folio or web page that is locked.

Click Share () to display another set of function buttons that are specifically related to sharing your work.

- Use the link button () to open a pop-up to view and copy the URL of the published work.

<sup>1</sup> access this feature from the top navigational bar

- Click  to share this folio/web page via email.
- Use any of the social media icon buttons to share published work via your account with that service.

*Until you have published the folio/web page, the Share button will only include the option to share via email.*

### **The List View**

In the List view, folios and pages are annotated with the names of the templates used to create them. Icons indicate when your work has been shared for review or is locked for evaluation. It is also indicated when new Comments have been added, or when a folio or page has been shared through the Cybrary. When you click the folio name, you are navigated to the [Edit Content](#) page.

- *When you have published to the web*, an icon will be accompanied by a link you can click to **View Web Address**. In addition, icon buttons enable you to share the published work via your accounts with various [social media](#) services.
- *If you have filtered the display by "recently edited,"* the list also displays the date on which the folio was last modified.
- The list also shows when you have associated a folio or page with one of the custom folders you have created on your Taskstream home page, with which to organize your work.


Function buttons to the right of each folio name enable you to [edit folio content](#), or [copy, rename or delete existing folios](#).

In either view, you can choose to re-sort the list alphabetically by title. Use the filter and search features to quickly locate a specific folio/page.

Select a value from the **Sort by** pull-down, and click **Update List** to refresh the display accordingly.

If you have associated folios/web pages with custom folders, you can narrow the results on this home page by using the **Filter by folder** pull-down list. Click **Update List** to refresh the page to display only items associated with the folder you selected.


Enter a full or partial title (*minimum of 2 characters*) in the **Search by title** field and click Search. The results include all folios and web page that match the criterion entered.

 Sort and Filter settings are "remembered" by the system. When you return to Folio and Web Pages home page, the Sort and Filter you used during your previous visit are automatically applied.

To clear these settings and return to the default display, click the **Show All** button

From the *Folio and Web Pages* home page, you can:

- Create a new folio or web page, using a variety of templates;
- View an existing folio or web page by clicking the title, which is a link;
- [Edit an existing Folio or Web Page](#);
- [Copy, rename or delete](#) an existing folio or web page.

 *If you need to convert your web folio from one of the format types described above to another, use the [Rename button](#) to access the conversion option.*

## Create a New Folio or Web Page

From the *Folios and Web Pages* home page, you can create new folios and web pages from scratch, or you can begin by copying an existing folio/page.

### To create a new folio or web page from scratch

1. Enter a **New Folio or Web Page Title**.
2. (Optional) If you have created custom folders on your Taskstream home page in which to organize your work, you can choose to file your new lesson in one of these folders by selecting from the **Add to Folder** pull-down list
3. Click **Create New**.
4. You are navigated to a page where you can (optionally) [select a theme](#) to customize the appearance of your folio or web page.
5. You can begin to [add content](#) to the folio/page structure.

Once you have created and saved your web page or folio, you can [share it with others](#) in a number of ways.


If your folio or web page is applied as work to a DRF program, you may have been granted the ability to request feedback from a Reviewer.

## Manage Existing Folios and Web Pages


In addition to [Edit](#), three related function buttons appear below each thumbnail on the [Folios & Web Pages](#) home page tile view and to the far right of each title in the list view. Use these buttons to rename, copy or delete a listed folio or web page.

### Rename an Existing Folio or Web Page

When you click the  or **Rename** button, you are navigated to a Rename page.


 In addition to changing the name, this feature can be used to convert a web folio from one format to another.

1. Enter a **new name** for your folio or web page.
2. (Optional) To **change the type of web folio format**, select either the *Portfolio* or *Resource Folio* option.

 A Resource Folio can always be converted to a Portfolio. However, a multi-page Portfolio CANNOT be converted to a Resource Folio; only single page Portfolios can be converted.

3. Click **Apply Changes**.
4. (Optional) Click **Cancel** to retain your original title (and, when applicable, format).


### Copy an Existing Folio or Web Page

When you click the  or **Copy** button, you are navigated to a *Copy* page.


Please note: If you are NOT THE AUTHOR of any sample work potentially included in the folio or web page selected, the system does not allow you to copy sample work links. You will be alerted when this applies.

1. Enter a **new name** for your folio or web page (*maximum of 100 characters*).
2. (*Optional*) To associate your folio or web page with one of the custom folders you have created on your Taskstream home page in which to organize your work, select a destination from the **Add to Folder** pull-down list
3. Click **Copy**.

## Delete an Existing Folio or Web Page

When you click the  or **Delete** button, you are asked to confirm that you want to permanently delete the selected folio or web page.

- To proceed with the deletion, click **OK**.
- (*Optional*) Click **Cancel**.

 Deleted work remains available in the Mylibrary for restoration for ONLY 30 DAYS.

## Inactive DRF Programs

To arrive at this page, from the [Folios & Web Pages main page](#), you selected to access your inactive DRFs.

### Looking for old work or Inactive DRF Programs?

It is likely that the program for your coursework in a previous semester has been made inactive by the Program Manager at your organization. This is done to help identify for students what program they should currently access to complete assignments for their coursework.

*Taskstream does not delete your work from these programs, but you can NO LONGER access to submit work for evaluation.*

### To view the DRF associated with the inactive version of the program:

1. From the main navigation bar at the top of your screen, click **Folios & Web Pages**.
2. In the yellow box on the right side of the page, click **Access Your Inactive DRFs**. The Inactive DRF Programs page loads.
3. To continue to edit this work (*in an editable copy*), click **Save as Presentation Folio**.
  - a. (*Optional*) You can also open a read-only view of the DRF.

## STYLE AND STRUCTURE

### Select Template

After naming your folio or web page, you will need to select a starting template.

A template establishes a *starting point* for content structure of your folio or web page. For example, you might want to collect your content on one page, or you might prefer to distribute it across multiple pages.


*Your choice of template is only a starting point. You will be able to [customize your structure](#) as you add and edit content.*

Using the radio buttons in the **Select Template Category** area, choose whether you want to view General Purpose Templates created by Taskstream or Custom Templates created by an individual from your organization.

The template list is organized by folio and web page type.

Click the **Preview** button to view your selection.

To choose the template, click the **Continue** button.

 You cannot change your template selection after you have moved on to the next step.

### Choose Style

Set your own personal stamp on your Folio or Web Page by selecting a design theme from the *Style* page.

*This page is also accessed when you choose to Change Visual Style from the Options tab of a DRF.*

The main area of this page contains a gallery of available themes. Each thumbnail displays a default version of the related theme, though many themes have the potential for [customizing](#) color and/or layout.

*Available themes will vary, based on your organization.*

#### To apply a style to your content

1. Click on any *Theme* thumbnail to select it.
2. You are navigated to the *Customization* page, featuring a large design sample of this same theme.
3. (Optional; when applicable) [Customize the color and/or layout](#). As you work on this page, the design sample changes to reflect your latest selections.
4. (Optional) Click **Cancel** to return to the Style page WITHOUT changing your currently applied styling.
5. To SAVE this as the styling for your Folio or Web Page, click **Apply**.



## My Style

The left panel of the *Style* page displays a thumbnail image of the most recently-saved theme.

If no styling has been specifically selected for this Folio or Web Page, no image is displayed.

To view the actual *saved* Folio or Web Page, click the **Preview** button.

*In some cases, the theme currently applied to this Folio or Web Page **may not be available for Preview**<sup>2</sup> from this Style page. In such cases, the "MyStyle" thumbnail will correctly display the currently saved and applied theme.*

 Don't forget to close the pop-up Preview window when you are done.

## Customize the Appearance of Your Folio

After you have [selected a Theme](#) from the Style page, you are navigated to the *Customization* page to continue personalizing the look of your Folio or Web Page.


The *Customization* page features a large design sample of this same theme, plus options that can be used to customize that theme:

- **Layout** enables you to choose how the navigation links will be displayed for your folio or web page. Many themes offer both horizontal and vertical navigation layouts.
- **Color** enables you to choose from the color schemes designed for this theme. In some cases, a change of color scheme may also include change to a patterned element (such as background).

*The specific options available will vary per theme.*

### To change layout and/or color for this theme

1. Click the thumbnail of the layout or color you want to apply
2. The design sample refreshes to reflect your latest selection(s).
3. To see how your own content would appear with this styling, click **Preview**. A fully navigable Preview opens in a separate window.

 Unlike the view window that you can open from the *Style* page, this Preview is NOT the current SAVED styling for your work. If you exit this area without applying your selection, your Folio or Web Page is not changed.

4. To leave your current saved "My Style" unchanged and return to the *Style* page, click **Cancel**.
5. To store the options shown on the design sample as "My Style" (replacing the last saved styling), click **Apply**.

<sup>2</sup> (For example, a Web Page designed in AMS may be saved with a theme that is not available in LAT)

## About the Folio & Web Pages Work Area

The *Edit Content* page of the Folio & Web Pages tool provides a work area that enables you to:

**Edit the structure.** The structure of your portfolio or web page displays in the left panel of the *Edit Content* page. Buttons at the top of this panel are used to add, delete, move, or copy pages or sections.

**Add and edit content.** The large right panel of the *Edit Content* page is used to add text, images, standards, files, web links, videos, reports, sample work, and additional content sections to the structure. Use Web View to preview the published version of your folio or web page.

The **Web View** button (positioned above the left panel) enables you to preview the published version of your folio or web page. This fully-navigable web view uses the template, color and layout that you chose [on the Style page](#).

### Add/Edit Content

When you click on a page or section in the left panel of the *Edit Content* page, the right panel displays the name of the selected area.

Use the **Add** toolbar, at the bottom of the right panel, to select the type of content you want to add to this page or section:

- **[Text & Image](#)** - create a block of formatted text and/or insert images.


*You can also re-title the selected page/section while using this tool.*

- **[Slideshow](#)** - create a slideshow from image files in your computer
- **[Standards](#)** - select educational Standards that relate to your work
- **[Main Text](#)** - add another block of formatted text (*maintained separately from the "Text & Image section"*)
- **[Attachments](#)** - attach files from your computer and/or artifacts (such as a lesson plan) that you have created in Taskstream
- **[Videos](#)** - upload a video file, or attach a previously uploaded video
- **[Links](#)** - provide links to websites or to other pages in this Folio/Web Page
- **[Embed Media](#)** - attach hosted media to your web folio. This feature enables you to attach media that is stored in service applications such as Vimeo, YouTube, SoundCloud, Flickr, Picasa or SlideShare.

*In order to be shared in this way in Taskstream, media must have been created and/or stored in a web-based application and have its own URL.*

- **[Reports](#)** - attach saved Taskstream reports
- **[Sample Work](#)** - add student artifacts to a web page as well as gather evaluation results associated with the student artifacts and display them in an exhibit room

As each content section is added, a pair of related **Edit** (or **Manage**) and **Delete** buttons enables you to subsequently update that content or remove it from the Folio or Web Page area.

 Once you have added at least two (2) content sections to any area, a **Reorder Content** button is displayed at the top of the right work panel. Use this button to [reorganize the various types of content you have added](#) into the order that best helps communicate the story of this area of your folio or web page.

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## Create and Manage Structure

A set of buttons at the top of the left panel enables you to add to and modify the structure of your folio or web page:

- [Add](#) a new content page
  - In addition, a **Section** button (at the bottom of the right panel) enables you to [add new sections](#) to the currently-selected area of your portfolio or web page.
- [Delete](#) a selected page or section
- [Move](#) a page or section *within this structure*
- [Copy](#) a selected page or section *within the current folio or web page*

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## Add a New Page/Section

To add a new page to Web Pages or Presentation Portfolios, or a new section to Resource Folios, select the main page or any sub-page by clicking its title in the left frame.

*NOTE: Please note that unlike pages, sections all appear on a single page.*

Then click the **Add Area** button at the top of the left frame. Enter a name for the new page/section. You can choose to add a description. Click the **Create** button to add the new page/section to your folio or web page.

If you add a page to an existing sub-page, you can choose the placement level of the new page.

## Add Content Section to a Presentation Portfolio

Every Presentation Portfolio area or Web Page can be divided into content sections, allowing you to break up related content. Think of your folio page as a single essay and each content section as a paragraph.

For example, if the first page contains personal information, you may want to separate it into sections for academic, professional, and contact information.

### To add a new content section

1. From the structure display in the left panel of the *Edit Content* page, select the Portfolio area or Web Page.
2. Click the **Section** button (from the **Add** bar at the bottom of the right panel).
3. In the *Add Section* window, enter a **Title** for the new section.
4. You can choose to add a descriptor. Click the **Create** button to add the new section.

*You cannot add additional content sections to a Resource Folio.*

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## Delete Page or Section

To delete a page or section, click to select the item from the left frame, and then click the **Delete Area** button at the top of the left frame. An alert box will appear, asking you to confirm the deletion. Click **OK** to accept the deletion or **Cancel** to cancel the deletion.

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## Move Page or Section

1. In the Page/Area structure (*left panel*), click to select the item you want to move.
2. From the top of the left panel, click **Move Area**.

**Cancel** and **Paste to other folio** buttons appear at the top of the left panel. **Paste** buttons appear to the right of each page or section within the current portfolio.

### To paste the moved page or section (*within the current folio or web page*):

1. Click **Paste** next to the page or section into which you want to move your selection. A Select Position pop-up window loads.
2. Select whether the page or section is to be pasted *above*, *below*, or *within* the selected page or section.
3. Click **Submit**. The item appears in the location that you selected.
4. (*Optional*) Click **Cancel**.

### To paste the moved page or section to another existing folio or web page:

1. Click **Paste to other folio**. A list of all your existing folios and web pages appears.
2. Select the one into which you want to move your selection.
3. Click **Paste** next to the page or section where the selected item should be moved.
4. Select whether the page or section is to be pasted *above*, *below*, or *within* the selected page or section.
5. Click **Submit**. The item appears in the location that you selected.
6. (*Optional*) Click **Cancel**.

When you copy or move items with sample work links, if the folio you attempt to copy into appears disabled, if it is published but NOT password-protected. You must set the option for protection before you can continue.

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## Copy Page or Section

1. In the Page/Area structure (*left panel*), click to select the item you want to copy.
2. From the top of the left panel, click **Copy Area**.

**Cancel** and **Paste to other folio** buttons appear at the top of the left panel. **Paste** buttons appear to the right of each page or section within the current portfolio.

### To paste the copied page or section (*within the current folio or web page*):

1. Click **Paste** next to the page or section into which you want to copy your selection. A Select Position pop-up window loads.

2. Select whether the page or section is to be pasted *above*, *below*, or *within* the selected page or section.
3. Click **Submit**. A copy of the item appears in the location that you selected.
4. (Optional) Click **Cancel**.

**To paste the copied page or section to another existing folio or web page:**

1. Click **Copy to other folio**. A list of all your existing folios and web pages appears.
2. Select the one into which you want to copy your selection.
3. Click **Paste** next to the page or section where the selected item should be copied.
4. Select whether the page or section is to be pasted *above*, *below*, or *within* the selected page or section.
5. Click **Submit**. A copy of the item appears in the location that you selected.
6. (Optional) Click **Cancel**.

*When you copy or move items with sample work links, if the folio you attempt to copy into appears disabled, if it is published but NOT password-protected. You must set the option for protection before you can continue.*

## FOLIO AND WEB PAGE CONTENT

### Text and Image

Use the **Text & Image** button of [the Edit Content page](#) to enter text directly into Taskstream for the requirement or selected area of a presentation folio/web page. Text can include bullet lists, tables, etc. You can also upload your own images or select from available stock images to illustrate your work.

This button can be found in the **Add** bar at the bottom of the right panel of this page.

To enter an additional (separate) block of text elsewhere on this page or section, use [the Main Text button](#).

### To add text or images to a folio or web page

1. On the left panel of the *Edit Content* page, select the page/section to which you want to add text or images.
2. Click **Text & Images**.
3. Enter text into the box provided (*Maximum of 90,000 characters*).

*If you have set a personal preference in My Account to enable the HTML Formatting Toolbar, you will be able to format text without the need for HTML.*

*Formatting options include such things as font styling (type and size, as well as bold/underline/italics and color enhancements), text alignment (left, right, center), bulleted lists, special characters, hyperlinks, tables, etc.*

 This toolbar is not supported by Safari on iPad.

- a. (Optional) Use **Check Spelling** to look over your text for spelling errors.
  - b. (Optional) Use **Character Count** to help you keep track of the size of your text input.
  - c. (Optional) To save your text and continue to add text &/or images, click **Save Draft**
4. If you want to add images, click **Add an Image to your text section**, to expand that work area.
    - a. EITHER **Upload Your Own Image**
      - Click **Choose File** to open a browser window.
      - Select a file from your computer.
      - Enter a **Title** for your image. This name does not have to be the name of the file you are uploading, but can be anything that describes the image.

*Images must be less than 512 KB in size. Permissible file formats are gif or .jpg. For Mac users, make sure to add .gif and/or .jpg extensions to the file name.*

### OR Choose from Stock Images

- **Select a Category** of stock images, from the pull-down list.

- The scroll box directly underneath populates with image options from the category selected.
- Click on any image name to view it in the preview box to the right of the list. Repeat as needed.

*While each stock image has a default name, you can change the image Title after you have saved a draft of this area.*

- (Optional) customize how the selected image will appear in your text area:
    - If you want to specify a location for this image within the text area, click the **Image Placement** pull-down to select Left, Center, or Right.
    - (when available) If you need to resize your image within the text, click the **Scale Image** pull-down to select Small, Medium, Normal (no resizing).
  - (Optional) To save your image parameters and continue to add text &/or images, click Save Draft.
- When you have finished adding text and/or images, click the **Save and Return** button. You are navigated back to the *Edit Content* page.

## Main Text

To add additional text to your folio or web page, use the **Main Text** button of [the Edit Content page](#).

This button can be found in the **Add** bar at the bottom of the right panel of this page.

*This text section is independent of the section added via the [Text & Image](#) button, enabling you to maintain two (2) separate text blocks in this area of your Folio or Web Page.*

### To add main text to a folio or web page

1. On the left panel of the *Edit Content* page, select the page/section to which you want to add main text.
2. Click **Main Text**.
3. Enter text into the box provided (*Maximum of 90,000 characters*).

*If you have set a personal preference in My Account to enable the HTML Formatting Toolbar, you will be able to format text without the need for HTML.*

*Formatting options include such things as font styling (type and size, as well as bold/underline/italics and color enhancements), text alignment (left, right, center), bulleted lists, special characters, hyperlinks, tables, etc.*

 This toolbar is not supported by Safari on iPad.

4. (Optional) Use **Check Spelling** to look over your text for spelling errors.
5. (Optional) Use **Character Count** to help you keep track of the size of your text input.
6. (Optional) To save your text and continue to add more text, click **Save Draft**

- When you have finished adding main text, click the **Save and Return** button. You are navigated back to the *Edit Content* page.

## Slideshow

Add multiple images as a slideshow to this section of your portfolio:

*Images 2 MB or less in size can be uploaded to the slideshow. Images greater than 512K in size are automatically compressed. If the images cannot be successfully compressed to less than 512K in size, you are not able to upload the image without first optimizing it using a digital graphics program. For more information, see Taskstream's Technical FAQ: "My file is too large to upload"*

- From the *Edit Content* page, click **Slideshow**.
- Enter a **Title** for the slideshow (*only if first time creation of slideshow*).
- Click **Create Slideshow** (*only if first time creation of slideshow*).
- Enter a name for the image. If you do not enter a title for the image, the file name is used as the title.
- To locate the image, click **Browse**. A dialog box loads
  - Select and open the image file from your computer. The path of the file appears in the Browse field.
- (*Optional*) Enter a description for the image file.
- (*Optional*) Use **Check Spelling** to look over your text for spelling errors.
- Click **Add Image**.
 

Repeat steps 4 through 8 as needed.

### To edit an existing slideshow:

- From the *Current Slideshow Images* scroll box, select an image name.
- (*Optional*) To edit the title or description for the selected image, click **Edit**. The *Edit Slideshow Image* page loads.

#### How to edit information for a selected image

- Update the **Title**.
  - Update the **NOTES/Description** field (*Maximum of 350 characters*).
  - Click **Apply Changes**.
  - (*Optional*) To quit your action, click **Cancel**. No changes are made.
- (*Optional*) To eliminate all images from the slideshow, click **Remove All**.
  - (*Optional*) To change the position of the selected image within the slideshow, click either **Move Up** or **Move Down**.
  - (*Optional*) To take out the selected image from the slideshow, click **Remove Selected**.
  - (*Optional*) To erase your current slideshow, click **Delete Entire Slideshow**.



7. (Optional) To save slideshow changes at any time, click **Save**.
8. Click **Save and Return**.
9. (Optional) To quit your action, click **Cancel**.

## Videos


With Taskstream, videos can be attached as Folio and Web Page content. Using the **Video** button of [the Edit Content page](#), you can upload new video files for a specific Folio or Web page area, or attach videos that you have previously uploaded to Taskstream.

This button can be found in the **Add** bar at the bottom of the right panel of this page.

*Please note that, because video compression and manipulation occur outside of Taskstream, we are only able to provide limited support and do not endorse or support any specific video program.*

### To add video to a folio or web page

1. On the left panel of the *Edit Content* page, select the page/section to which you want to add video.
2. Click **Video**. You are navigated to an *Add/Edit Video* screen.
3. In the *Add New Video* panel (on the left side of the screen), use a radio button to indicate whether you want to select a new file from your computer or attach a video you have previously uploaded
  - a. If you select **Attach a previously uploaded video**, select a video from the pull-down list of video files previously attached to any of your work in Taskstream.
  - b. If you select **A video saved on your computer**, to upload a new video file:
    - Click **Choose File** to open a browser window.
    - Select a video file from your computer

 The maximum upload size per video is 100 MB. If your video file is larger than 100 MB, you will need to compress the video or reduce its size prior to uploading to Taskstream.

4. Enter a name for your video in the **Name File** box.
5. (Optional) Specific the **Play Length** of your video, in minutes.
6. (Optional) Enter a **Description** of your video. Descriptions can help you recall the purpose of the video.
7. (Optional) Check to attach relevant **Standards** addressed by the uploaded file. You are redirected to the Standards Wizard.
8. Click the **Add File** button. As video files are attached, they will be listed at the bottom of the form where they can be edited or deleted.
9. Once you have uploaded your video, click on the **Save and Return** button to return to the *Edit Content* page.

## Attachments

Use the **Attachments** button of [the Edit Content page](#) to attach documents and other supporting files to your folio or web page.

This button can be found in the **Add** bar at the bottom of the right panel of this page.

Use this functionality to upload files from your computer, attach files that you have previously uploaded to Taskstream, and/or attach a Taskstream work artifact (such as rubrics or web pages).

### To add attachments to a folio or web page

1. On the left panel of the *Edit Content* page, select the page/section to which you want to add attachments.
2. Click **Attachments**.
3. In the *Add New Attachments* panel on the left side of the screen, use a radio button to Select File:
  - a. *If you select **A file saved on your computer***, to upload a new file:
    - Click **Choose File** to open a browser window.
    - Select a file from your computer.
    - Enter a name for this attachment in the **Name File** box. This name does not have to be the name of the file you are uploading, but can be anything that describes the file.
  - b. *If you select **Attach a previously uploaded file***, select a file from the pull-down list of files previously attached to any of your work in Taskstream.
    - *(Optional)* Rename your attachment in the **Name File** box.
  - c. *If you select **An artifact created in Taskstream***
    - Use the first pull-down list to select the *Category* area (Lesson Plan, Rubric, Web Page, etc.) in which the file is currently attached.
    - Use the second pull-down list to select *Work* from artifacts in that category.
4. *(Optional)* Enter a **Description** to indicate the purpose of this attachment or help you recall why you wanted to include it.
5. *(Optional)* Select to attach relevant **Standards** addressed by the uploaded file. You are redirected to the Standards Wizard.
6. Click **Add File**. As files are attached, they are listed on the right. You can preview, edit or delete them. You can also select standards addressed by the attachment.
7. Once you have completed entering attachments, click on the **Save and Return** button to return to the *Edit Content* page.

## Links

Use the **Links** button of [the Edit Content page](#) to access a form for linking other web pages to your folio or web page.

This button can be found in the **Add** bar at the bottom of the right panel of this page.

As well as linking to external web sites, you can link to existing pages and sections within the current folio/web page.

### To add links to a folio or web page

1. On the left panel of the *Edit Content* page, select the page/section to which you want to add links.
2. Click **Links**.
3. Enter a name for this link in the **Name Link** box. This name does not have to be the name of the website/page/section to which you are linking, but can be anything that describes the link.
4. *If you want to link to an external website:*
  - a. Carefully enter the associated **Website URL** (e.g. *http://www.google.com*)
  - b. *(Optional)* Click the **Text** button to verify that you have entered a valid (working) URL. The site should open in a new window.
5. *If you want to link to an existing page/section within your current work:*
  - a. Select the page or section from the pull-down list
6. *(Optional)* Enter a **Description** to indicate the purpose of this link or help you recall why you wanted to include it.
7. *(Optional)* Select to attach relevant **Standards** addressed by the uploaded file. You are redirected to the Standards Wizard.
8. Click **Add Link**. As links are added, they are listed on the right. You can preview, edit or delete them. You can also select standards addressed by the file.
9. Once you have completed entering links, click on the **Save and Return** button to return to the *Edit Content* page.

## Embed Media

Use the **Embed Media** button to attach hosted media files to your requirement or web folio. This feature enables you to attach media that is stored in service applications such as Vimeo, YouTube, SoundCloud, Flickr, Picasa or SlideShare.

*In order to be shared in this way in Taskstream, media must have been created and/or stored in a web-based application and have its own URL.*

The **Embed Media** button can be found in the Add bar at the bottom right panel of the *Work* or *Content* page.

### How does Embed Media differ from other media content types?

Other options in the **Add** bar enable you to attach various types of media to your DRF or web folio page. However, the Video, Slideshow, Text & Image and Attachment content types require that you have the actual video, image or other type of file and can upload it.

When using Embed Media, whether the work is your own or was created by someone else, you are linking to published work via URL and will not be asked to upload a file.

## How does Embed Media differ from adding contents as web links?

When you add a content section for Links, your DRF or web folio page *displays a section of captioned URLs* that function as hyperlinks. An individual looking at your work will be able to click on these links and navigate to the related websites. However, when you add a content section for Embed Media, your DRF or web folio page *displays the actual items* related to the URLs.

For example, a "Link" to a document published in SlideShare would display only the URL for that document; someone who wanted to read the document would need to click on that URL to navigate to SlideShare. The same URL entered as "Embed Media" presents the document (in the SlideShare format) directly on your DRF or web folio page.

## To Embed Media on a requirement or web folio page

1. On the left panel of the work page, select the area to which you want to add hosted media.
2. Click **Embed Media**. You are navigated to the *Add/Embed Media* page for this area.

*The Embed Media panel on the left side of the screen displays the icons of currently-supported media services. Hover over any icon for the name of the service represented.*

3. Carefully enter the **URL** belonging to this item.
4. Enter a **Title** for this media item. *By default*, this title will display above the media item on your DRF or web folio page.
  - a. *(Optional)* Use the checkbox to indicate that you do NOT want the title to display on your page.
5. *(Optional)* Enter a **Description** to indicate the purpose of this item or help you recall why you wanted to include it with your work.
  - a. Use the radio buttons to indicate whether the **Description Position** should be *Before* (above) or *After* (below) the media item.
6. Use the radio buttons to indicate whether the **Display Size** of the media item should remain as the *Original* size (*default*) or be scaled to a *Custom* size.
  - a. *If you select Custom size*, use the boxes provided to enter your preferred width and height in pixels.
7. *(Optional)* **Check Spelling** of your Title and Description.
8. Click **Add**. As media items are attached, they are listed on the right. A thumbnail of each currently attached item is displayed together with the Title, Description and the name of the associated service.
  - a. *(Optional)* From this page, you can view currently attached media items, delete them from this area or edit related information.
9. Once you have completed entering media URLs, click on the **Save and Return** button to return to the *Edit Content* page

## Edit Embed Media Information

Each item listed on the *Add/Embed Media* page has a corresponding **Edit** button.

When you click an **Edit** button, a pop-up box enables you to modify the information currently stored for that item. This includes the URL, Title (and title visibility preference), Description (and description position) and Display Size.

To store your changes and close this box, click **Apply**.

## Standards

To access the Standards Wizard, from the Edit Content tab, click **Standards**. You can use this area to add standards and corresponding benchmarks to your web folio.

To learn more, see the online Help section describing the Standards Wizard.

## Attach Saved Reports

Use the **Reports** button of [the Edit Content page](#) to navigate to the *Manage Attached Reports* screen, which displays a list of reports attached to the portfolio workspace section.

This button can be found in the **Add** bar at the bottom of the right panel of this page.


*Reports can be added to your web publication ONLY if you have permissions to run reports. If so, you need to generate and save reports via the TS Coordinator Reports area, then return to this area to add them to your web publication. Only LAT reports and Survey reports can be saved and linked to and from this area. Only LAT reports and Survey reports can be saved and linked to and from this area.*

### To attach a saved report to your portfolio or web page

1. Click **Select Saved Report**. A list of reports saved by you or shared by other Site Coordinators displays on the *Saved report* list along with the name of the saved report, the date when the report was saved and the name of the Site Coordinator who saved the report.

The report list is divided into report sections:

- Performance by DRF Category
- Performance by Standards
- Performance by Standards (Comparative Report)
- Performance by Rubric Criteria (Custom Report)
- Performance by Rubric Criteria (Comparative Report)
- Form-based Author Submission Results
- Form-based Evaluation Results
- Survey Report

 To narrow your list, click the *Show: All Reports* pull-down to select the exact report type you want to include. Click **Go**. The list results *ONLY* display the selected report type.

- a. (Optional) To preview of the report, click on the report name.
- b. To attach a report, click **Select** next to the report name. The system navigates to the *Add/Edit: Link to Saved Reports for [your page]*. This section allows you to rename the report link for the saved report; add description/notes about the report, along with other preference settings.
  - Click **Apply Changes**.
  - (Optional) Use **Check Spelling** to look over your text for spelling errors.

- (Optional) To quit your action, click **Cancel**.
  - c. (Optional) To return to the *Attach Reports* page, click **<<Back**.
2. (Optional) To view the attached report, click **View**. A preview pop-up loads.
  3. (Optional) To revise the attached report preferences, click **Edit**.

### Attach Saved Report Preferences

- a. Enter a report name.
  - b. Enter a description for the report link. The data entered displays in the portfolio and on the web page.
  - c. Make your selection from the following preference settings:
    - **Author Anonymity** - controls whether Authors' (e.g., students') names are displayed on the attached saved report or appear encoded. This preference setting is **ONLY** available when you attempt to attach all saved reports.
    - **Evaluator Anonymity** - controls whether Evaluators' names are displayed or hidden on the attached saved report. This preference setting is **ONLY** available when you attempt to attach certain saved reports:
      - Performance by DRF Category Report
      - Performance by Standards Report
      - Performance by Rubric Criteria Custom Report
      - Form-based Evaluation Results Report
    - **Access to Author work** - controls whether or not Authors' work can be accessed by the person viewing the attached report. This preference setting is **ONLY** available when you attach certain saved reports:
      - Performance by DRF Category Report
      - Performance by Standards Report
      - Performance by Rubric Criteria Custom Report
    - **Export to Excel** - controls whether the Export to Excel link appears on the saved attached report for the person viewing the attached report. This preference setting is **ONLY** available when you attempt to attach all saved reports.
  - d. Click **Apply Changes**.
  - e. (Optional) Use **Check Spelling** to look over your text for spelling errors.
  - f. (Optional) To quit your action, click **Cancel**.
4. (Optional) To quit your action, click **Cancel**.
  5. (Optional) To purge an attached report, click **Delete**.
  6. Click **Save and Return**. To understand the symbols displayed for each attached report line, please refer to the legend under Settings, located directly beneath the *Currently Attached reports* table.

## Sample Work

This content type is used to add student artifacts to a web page as well as gather evaluation results associated with the student artifacts and display them in an exhibit room (able to secure site). The items for addition to the exhibit room must be in Release or Final/Reconciled statuses for eligibility. If the status should change, the items are no longer viewable from the exhibit room.

*To display the work publicly, full student approval is needed. Sample Work can be added to your web publication for Programs you have created AND for those for which you have permission to run reports. This option is always available for Site Coordinators and Group Coordinators.*

Administrators can collect evidence from system-wide Programs and student-submitted work to group and display using the Folios & Web Pages tool as seen fit. Both the student work and evaluation are displayed in the web page view, therefore the viewer is able to link to and view any of the artifacts or evaluation reports. Sample work links generate real-time results based on search criteria results during addition of sample work.

## Add Sample Work

1. From the Edit Content tab, click **Sample Work**. The *Add/Edit Sample Work for [your structure selection]* screen loads.
2. Click **Search Sample Work**.
3. Go to the **Add New Sample Work** section.
4. From the **Select a Program to view available work** pull-down menu, select the DRF Program.

*If the Program selected in this step has requirement level evaluation, you are only able to choose from one requirement at a time to add work.*

*If the Program selected in this step has category level evaluation, you can choose from an entire category or one (1) requirement within the category to add the work.*

5. From the **Select Program area** pull-down menu, select the Program category or requirement.
6. From the **Search for Author name** pull-down menu, locate the Author name (*minimum characters to perform search is 2*).
7. Select your Author (*Only Authors that have evaluated work (released or not) within the selected requirement (or category) is displayed in the search results*).
8. Click **Continue**.


### Select Sample Work to Include

After completing steps 1 through 8 as listed above:

1. Select the Sample Work (*displayed in the left panel*) you want to include.
2. The right side frame enables you to preview the requirement (or category) content before your selection.
  - c. Click the tabs to view the sample work specifics.
  - d. Use Open Work in New Window to view the content in a separate window.

*If the Program selected in step 4 has requirement level evaluation, all work content submitted for the selected requirement is displayed and can be selected to add as sample work.*

*If the Program selected in step 4 has category level evaluation and you selected the category in the Program area pull-down, all requirements (for the category) plus their respective work content are displayed and can be selected to add as sample work.*

 If requirements in a category do not require submission, the system advises that no items are available for selection.

3. (Optional) To return to search, click **<<Back to Search**.
4. Click **Continue**.
5. Complete the *Select Sample Work Display Options* form before you can add the sample work.
  - a. Enter a sample work name.
  - b. (Optional) Enter a description of the sample work.
  - c. Select how you want Author Anonymity handled. *Author Anonymity is setup in the Program options area.*
  - d. (Optional) To include any notes entered by an Author for any uploaded work, select **Include Author descriptions**.
  - e. (Optional) To include any directions and all sample work included for the Author, select **Display the Overview/Directions**.
  - f. (Optional) To include standards that have been attached by the Author to any uploaded files, select **Include attached standards**.
  - g. (Optional) To include a link to the evaluation report associated with the sample work uploaded, select **Attach link to evaluation report**.
  - h. (Optional) To make all **Evaluator names with the evaluation report anonymous**, in the Attach link to evaluation report area, select the anonymous option.
6. (Optional) Use **Check Spelling** to look over your text for spelling errors.
7. Click **Apply Changes**.
8. (Optional) Click **Cancel**.

## Edit and Delete Sample Work

1. From the *Add/Edit Sample Work for [your structure selection]* screen, click **Edit**.
2. In the *Select Sample Work Display Options* page, edit any of the fields as needed.
3. (Optional) Use **Check Spelling** to look over your text for spelling errors.
4. Click **Apply Changes**.
5. (Optional) Click **Cancel**.

*You can ONLY edit options for display of sample work; you CANNOT edit the sample work content. If you need to edit content, you must create new sample work and, at that time, make your work content selections.*



## To delete Sample Work

1. From the *Add/Edit Sample Work for [your structure selection]* screen, click **Delete**. The system prompts you with a confirmation questions about the deletion.
2. Click **OK**.

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## View Evaluation Report

1. From the *Add/Edit Sample Work for [your structure selection]* screen, click **View Evaluation Report**. The Evaluation Results window loads.
2. *(Optional)* To print the report, click **Print View**.

If you select to display the Evaluator names as anonymous, the names appear encoded in all areas where it is referenced.

After you have added or edited sample work, click **Save and Return**. The system navigates back to the Edit Content tab. The newly added or edited sample work appears in a Sample Work section.

If the sample work is at the requirement level, the system displays the name, description (if available), DRF area (category and corresponding requirement) and Author.

If the sample work is at the category level, the system displays the name, description (if available), DRF area (category), the Program Name, Author (if set to Anonymous, this does not display), and number of requirements included in the sample work.

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## Sample Work Edit Content tab

From the Edit Content tab > Sample Work section, you can manage sample work or delete the section.

When you click on **Manage Sample Work**, you have the option to perform any of the actions listed above: add, edit, delete sample work, and view evaluation report.

When you click on **Delete Section**, the system displays a prompt to make sure you want to delete the section; you cannot undo this action.

If an evaluation report was attached to the sample work AND you enabled the inclusion of the evaluation report link, you can also **View Evaluation Report**.

1. From the *Add/Edit Sample Work for [your structure selection]* screen, click View Evaluation Report. The Evaluation Results window loads.
2. *(Optional)* To print the report, click **Print View**. If you select the display the Evaluator names as anonymous, the names appear encoded in all areas where it is referenced.

## Reorder Content

When you click the **Reorder Content** button from the right work panel, a *Drag to Reorder Content* pop-up box lists the various content types that you have already added to the selected area.

*When adding work to a DRF requirement that instructs you to fill in a form, the "Form" section is included in this list of moveable content types.*

Use this tool to reorganize the content you have added into any order that creates the best flow of communication in this area.

There are two approaches to Reorder Content:

### Drag and drop content type sections

1. Select (click with mouse or, if using a touch-screen, tap) the row of the content type that you want to move. The color of the row will darken, to indicate it has been selected.
2. Drag that row through the list to the preferred new position. As you drag, an orange placeholder indicates the potential new positions in which the selected item might land.
3. Release the "drag." The row comes to rest in the last position held by the placeholder.
  - The numbers in the text boxes in the right column of the page are automatically updated to reflect this new state.
4. Click the **Save** button to save and apply this new sort order.
5. (Optional) Click **Cancel** to leave the content types in their current order.
6. The pop-up closes. You are returned to the page from which you began. The right pane reflects the same content type order that you established in the pop-up.

### Manually re-number content type sections

1. Type new position numbers in the text boxes that display to the far right of every content type on this list
2. (Optional) Preview your new display order by clicking the Reorder button that appears below the column of text boxes. The new order is applied immediately: any numbering conflicts are automatically resolved, and rows automatically shift position according to their new numbers.

If your manual entry includes duplicate numbers, for example if two rows are marked as "3", the reorder function will automatically resolve these conflicts.

*If you do not click **Reorder**, the new numbers are automatically applied when you **Save**.*

3. Click the **Save** button to save and apply this new sort order.
4. (Optional) Click **Cancel** to leave the content types in their current order.
5. The pop-up closes. You are returned to the page from which you began. The right pane reflects the same content type order that you established in the pop-up.

*The **Reorder Content** button only displays when you have added at least two (2) content sections to this area of your DRF, Web Page or Folio.*

### Notes about using Reorder Content

Regardless of whether you "drag and drop" or manually enter new numbers, please note the following:

- **As you continue to add new content types** to this work area, they will appear *by default* at the bottom of the list.
- **If you subsequently delete a content type section**, the remaining sections in the same work area remain in the same order, minus the deleted content type section.
- Your **published** Web pages and Folios automatically reflect any change in the order of content. However, work previously published to the *Cybrary* must be re-published in order to reflect the new content arrangement.

## COMMENTS AND FEEDBACK

### Comments

If you are enrolled as an Author in a Collaborative or DRF Program and assigned at least one (1) Reviewer, a Comments tab is viewable and you are able to share your folio or web page with a Reviewer.

#### To share your web folio with a Reviewer(s):

1. Click **Request Comments**. A new pop-up window loads.
2. Select the appropriate checkboxes.
3. *(Optional)* If you want to Request Feedback on all areas, select **Request Feedback on All Areas**.
4. Click **Continue**.
5. To choose the Reviewer(s) with whom you want to share your work, select the appropriate name(s). To share the work with all Reviewers assigned to you in the Program, click **Select All**.
6. Click **Continue**. The next screen confirms that you have submitted your work to the selected Reviewer(s). *Read the directions to learn more about sending comments to your Reviewer.*
7. Click **Close Window**.

If you requested feedback on specific areas of your folio or web page, those selected areas are flagged with a red arrow.

#### To send general comments to your Reviewer(s):

1. Click Overall Comments. Next, enter a comment in the Add Your Comment field and
2. In the Overall Comments area, click Submit. Your comments appear on the page.

#### To send specific comments to your Reviewer(s):

1. From the left panel, click the page or section. The comment area loads.
2. In the *Add Your Comment* field, enter a comment.
3. Click **Submit**. Your comments display at the top of the selected page or section.

*Comments areas are visible by all people from whom you have previously requested comments.*

### Request Feedback

When the pop-up window opens, you should select the appropriate radio button to either request feedback for the entire web folio, or for specific areas of the web folio. Click the **Continue** button to proceed. If you choose to request feedback for specific areas of your web folio, you will need to select the areas that you want your Reviewer to address. Click the **Continue** button.

Choose the Reviewer(s) with whom you would like to share your work by checking off the appropriate name(s). Checking the **Select All** box will share the work with all Reviewers assigned to you in the Program. Click the **Submit** button. The next screen confirms that you have submitted your work to the selected Reviewer(s). Read the directions on sending comments to your Reviewer, however you will need to click the **Close Window** link at the top of the window to close the confirmation window and access the comment areas.

If you requested feedback on specific areas of your web folio, those selected areas will be flagged with a Feedback requested message in red text.

To send general comments to your Reviewer(s), click the **General Comment** link at the top of the web folio layout frame (left frame). Next, click the **Add Comment** button at the top of the General Comments area in the right frame. When the *General Comments* window opens, type a comment in the appropriate field and click the **Send Comment** button. Your comments will appear in the General Comments area of the web folio. To send specific comments to your Reviewer(s), click the page or section in the layout frame and the comment area for the selected page/section will open. Click the **Add Comment** button to access the comment window.

When the comments window opens, enter your comments in the text box, and then click the **Send Comment** button to send your comments to your Reviewer(s). Your comments will be displayed at the top of the selected page/section.

## PUBLISH/SHARE OPTIONS

Once you have created and saved a portfolio or web page in Taskstream, the *Publish/Share* page offers a number of ways in which to share your work with others.

To change template, color or layout of your folio/web page, you can navigate back to [the Style page](#) by either using the tab or clicking the **Change Visual Style** button at the top of the *Publish/Share* page.

- **Create a Printable PDF**

[Generate a printable PDF version](#) of your folio or web page. Your PDF can (*optionally*) include a Title Page and Table of Contents.

- **Email this Web Page**

Folios and web pages can be sent to other Taskstream subscribers [via the Message Center or to an external email address](#). The recipient will receive a message with a link to the folio or web page.

When sending a folio or web page to another Taskstream subscriber, you also have the option of allowing the recipient to create a copy of it.

- **Publish to the Web**

[Publish your folio or web page to the Internet](#), via a customized web address that you create. You can limit access by creating a password. Work published to the internet can also be shared via social media.

*Any future changes to your work are automatically reflected in the published version.*

After a folio or web page has been published, buttons in this area of the page enable you to manage your published site.

- **Unpublish** your (published) work at any time.
- **Edit URL/Password**
- **Email URL**
- [Share via the social media](#)
- **Submit to the Cybrary**

If your organization has enabled the Cybrary, you can [submit your folio or web page](#). Other Taskstream subscribers are able to copy Cybrary published works and edit them, but attribution to the original author is permanently affixed.

*Any future changes to your work are NOT automatically reflected in the shared copy. You would need to republish your work for the updates to be reflected in the Cybrary.*

## Share Via Email

This same option is available from the Author's *Options* page of the DRF work area, from the *Publish/Share* page of Folios & Web Pages and from the **Share** button on the tile view of the Folios & Web Pages home page.

Your DRF, folio or web page can be sent directly from the *Publish/Share* page to other Taskstream subscriber(s) via the Message Center or to an external email address. The recipient will receive a message with a link to the web page.

When sending a Folio or Web Page to another Taskstream subscriber, you also have the option to allow the recipient to create a copy of it. This option does not apply to an unpublished DRF.

### To email a link to a DRF, folio or web page

1. From the *Options* (DRF Author) or *Publish/Share* (Folios & Web Pages) page, click **Email this Web Page**.
2. To **Select Taskstream subscribers** (if any), who will receive the link in the Taskstream Message Center, click **Select Recipients**.
  - a. The *Member Locator* window loads.
  - b. Use the Taskstream Member Locator to select email recipients. The system navigates back to the *Publish/Share* page
  - c. By default, recipients are sent a web view (only) version of the folio or web page and are not allowed to copy any content. However, when sharing a Folio or Web Page, you can change the radio button selection to allow recipients to make editable copies of any Taskstream work (lessons, rubrics, etc.) OR to import the entire folio or web page import the folio or web page *including all associated Taskstream work* into their own folio and web page libraries as editable copies.
3. **Enter external recipients** (if any) who will receive the link via regular email by entering all addresses into the box provided. **Separate multiple addresses with a comma**<sup>3</sup>.
4. (Optional) Customize the **Subject** line of the email and/or **Add a personal message**.
5. **ONLY IF you are emailing to external addresses**, enter **Your email address** (defaults to the email currently stored as your contact information in My Account).
  - a. Check if you want your mailing confirmed by having a copy of the email sent to this address.
6. **ONLY IF you are emailing to external addresses**, **Customize web address (URL)**. This defaults to the title of the folio or web page.

When customizing a URL, use only letters, numbers, dashes ('-') and underscore ('\_'). NO OTHER CHARACTERS, including spaces and slashes, are allowed in the URL.

- a. (Optional) **Create password** to protect access to your folio or web page. Use a radio button to indicate that you *Require password*, then enter a password in the box provided.

Passwords must have a minimum of four (4) alpha-numeric characters. No spaces are allowed in the password.

7. Click the **Send Message** button to send the link to your DRF, folio or web page.

## Publish to Web or Cybrary

A pair of **Publish** buttons on the Folio & Web Pages tool *Publish/Share* page enable you to publish your work in two ways:


When you **publish to the Web**, you enable anyone to access your work from the Internet via the web address that you create. This address can (optionally) also be shared via social media.

<sup>3</sup> for example: mike@something.com, rose@something.com, a\_lee@somewhere.edu

You can limit access by creating a password. You can unpublish your work at any time. Any future changes are automatically reflected in your published work

When you **publish to the Taskstream Cybrary**, you contribute to a community collection of published work accessed via the Resource Manager. Other subscribers are able to copy Cybrary published works and edit them, but attribution to the original author is permanently affixed.

*This option is only available if your organization has chosen to enable you to contribute to the Cybrary.*

 If you publish a web page to the Cybrary, anyone accessing that web page is NOT able to see sample work.

After work is published to the Cybrary, you can continue to make changes to the folio or web page. The version of the folio or web page in the Cybrary does not automatically update to include these changes, however you can manually republish.

1. From the *Current Status* area of the *Submit to Taskstream Cybrary* section, to add the new/updated version of the folio or web page to the Cybrary, click **Republish** .
2. From the *Submit to the Cybrary* section, click **Edit Publication** .
3. Make your changes.
4. Click **Update Publication Info** .
5. Click **Back to Publication Options** . In the *Current Status* area of the *Submit to Cybrary* section, the status is displayed as **Published** .

## Publish to the Web

1. On the *Publish/Share* page, under the *Publish to Web* section, click **Publish** . The *Publish Options* page loads.
2. (Optional) Your folio or web page is assigned a URL. You can choose to keep the suggested URL, or you can personalize the editable portion of the URL.
3. (Optional) To limit access to the URL of your published work, require a password.

*A minimum of four (4) characters is required for the password field. Only numbers and letters are allowed, no spaces. A password is required when the publication contains sample student work.*

4. To set your preferences and publish your work, click **Publish** . After submission, the URL is displayed along with your assigned password (if applicable).
  - (Optional) To change the URL, click **Edit Web Address** .

 For future reference, keep a copy of the web address and password OR **email** the web address via the provided link.

5. A *Publication Successful* screen confirms the successful publication of this folio or web page. This confirmation screen includes the full URL for your work, plus buttons for [sharing your work via social media](#) .
6. Click **Back to Options Screen** to return to the *Publish and Sharing Options* page.
  - In the *Current Status* area of the *Publish to Web* section, the status is displayed as **Published** . The URL, social media buttons and (when applicable) password also display.

## Submit to the Cybrary

*To learn about the Cybrary options your organization has chosen, or identify your organization's Cybrary Reviewers, please contact your organization's Taskstream administrator.*

1. On the *Publish/Share* page, under the *Submit to Cybrary* section, click **Publish**. The *Publish Options* page loads.
2. Enter a *summary* for your folio or web page
3. Enter *keywords* for your folio or web page. Separate your keywords with comma.
4. Click **Publish**
5. Click **Back to Options Screen** to return to the *Publish and Sharing Options* page.
  - In the *Current Status* area of the *Submit to Cybrary* section, the status is displayed as **Published**.

**If your organization reviews work submitted to the Cybrary** before its publication, you are able to:

- Choose whether you want to share your work with ONLY members of your organization or with all Taskstream subscribers.

*In the publication's item details, the Access Level field provides a restricted access option. Cybrary Archives are archived materials that are used as part of the Institutional repository of work submitted, but ARE NOT published to the Cybrary. These materials are ONLY accessible by the Cybrary Reviewer via the search feature for Cybrary review.*


- Withdraw the submitted folio or web page up until the time it is reviewed by the Cybrary Reviewer. To do so, click **Withdraw**.

*ONLY designated Cybrary Reviewers can unpublish or edit publication information for folios or web pages that have been approved to the Cybrary.*

## Share Folios and Web Pages via Social Media

The Folios & Web Pages tool enables you to share your published folios and web pages via popular social media outlets.

Currently, this feature enables you to share your work via Facebook, Twitter, LinkedIn and Google+.

 Regardless of the buttons that display, you can only share work on those social media outlets for which you have valid accounts.

For all **Published** folios and web pages, a row of social media buttons is displayed directly below the folio/web page URL in the following locations:

- On the [Folio & Web Page tool home page](#)
- Under the *Publish to the Web* section of [the Publish/Share page](#)
- On the confirmation page that completes [the "Publish" process](#)



## To share your folio or web page via social media

1. For the folio or web page you want to share, click the button representing your chosen social media outlet.
2. *If you are not currently logged into your account*, the standard login screen belonging to that social media outlet will display as a pop-up.
3. When you are logged into your account, a pop-up window displays the standard sharing interface used by that social media outlet. The URL is automatically embedded. You can customize the accompanying text.

*When sharing via **Twitter** or **LinkedIn**, please note: Twitter and LinkedIn will automatically shorten the URL.*

*For Twitter, the text of the tweet will default to the folio/web page title and the hashtag to #taskstream. Both can be changed before you send the tweet.*

- The next step in the pop-up window will vary based on the social media outlet to which you are posting.
4. When you have completed your post, if your social media has not automatically closed it, close the pop-up window.

## Export to PDF

This same option is available from the Author's *Options* page of the DRF work area AND from the *Publish/Share* page of Folios & Web Pages.

1. From the *Options* (DRF) or *Publish/Share* (Folios & Web Pages) page, click **Create a Printable PDF**.
2. Before you generate your PDF:
  - Select whether you want to include a Title Page, a Table of Contents, or both.
  - Choose how you want your name to appear on the title page.
  - Choose whether you want to include the date the folio or web page was created.
  - Choose whether you want to include the date the folio or web page was last modified.
  - Select whether you want to create an appendix of file attachments (*files cannot be exported to PDF but can be appended afterwards; the file names are added to the table of contents (if you have selected to include)*).
3. To process, click **Continue**.

*Attachments need to be printed separately, but the Appendix section of the PDF lists the attachment items selected and their respective formats. The output displays 'See appendix' to the right of every item selected for the appendix. Sample Work can be included in the Appendix.*

4. In the *Export to PDF* page, click **Generate Now**.
5. From the message prompt, click **OK** to continue. The PDF Export process can take a few minutes, depending on the size of the PDF. The PDF opens in a new window.

If you chose to include a Table of Contents in your PDF export, each section indicates a page number where the specific content is located. These sections also contain a hyperlink (*in the section name*) that can be used to navigate to the page where the specific content is located.

If you chose to include the appendix, the PDF adds an extra page at the end of your document that lists the titles of the file attachments you selected to include. You need to print out each file separately and append it to the end of your document.

### To create an Appendix

1. In Step 2 (*as described above*), open the file(s) you need to add to the appendix (*click on filename link*). A pop-up window loads.
2. Print out the file(s).
3. Append these printouts to the generated PDF.