

Lesson Builder & Unit Builder



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LESSON BUILDER

About the Lesson Builder

The Taskstream Lesson Builder facilitates the creation and management of standards-based plans for classroom activities.

When you access the *Lesson Builder* homepage, you are navigated to a filtered list of all of your existing lessons.

To access the Lesson Builder

1. From the top navigational bar, click Lessons, Units & Rubrics.
2. Click the Go to the Lesson Builder link.

You can also access the Lesson Builder [while creating or editing a unit](#).

The contents of the *Lesson Builder* homepage reflect your most recent filter choice. You can change your filter at any time. Lessons can be filtered by folder or status:

- Active lessons (i.e. lessons that have not been [moved to the archive](#))
- Archived lessons
- Recently edited lessons (i.e. lessons that you have accessed in the last 30 days)
- Lessons grouped by [unit](#). This is not a filter, but as SORT. When you select this option, ALL of your lessons (active and archived) are displayed, grouped by unit. Any lessons that are not part of a unit are listed together at the end of the list.

To change the lesson filter

1. Select the folder or status from the pull-down filter list.
2. Click the Update List button.

Each lesson is described by name. When your lesson was copied from one that was created by someone else, the original creator's name is also displayed.

Lessons display in alphabetical order (or, if grouped by unit, by alphabetical order within each unit).

*To quickly locate a specific lesson, enter a full or partial lesson title in the **Search by Title** field and click **Search**. The results include all lessons (independent of status or filter currently applied on the page) that match that title.*

A **New Comments!** message (in red font) alerts you to any lessons for which a Reviewer has supplied comments that you have not yet read.

Icons indicate when a lesson has been used in a unit and/or stored in one of the custom folders you have created in the *My Folders* area of Taskstream.

- To view the names of units to which a lesson has been added, click the *Used in Unit* icon.

- To view the names of custom folders to which the lesson has been added, click the **View Folder Details** link.

When your filter displays them, **Archived** lessons are clearly labeled in a red font. A **New Comments!** message (in red font) alerts you to any lessons for which a Reviewer has supplied comments that you have not yet read. Additional icons indicate when lessons are undergoing review or evaluation, or have been [shared through the Cybrary](#).

From the *Lesson Builder* homepage, you can:


- Create new standards-based lessons, using a variety of templates.
- Quickly establish lesson basics in the Activity/Lesson log.
- Search for and view (by clicking the lesson name, which is a link).
- [Edit, rename or delete](#) existing lessons.
- [Archive](#) one or multiple lessons.

Create a New Lesson

From the *Lesson Builder* homepage, you can create new lessons from scratch, or you can select an existing lesson to [copy and adapt](#) for new purposes.

To create a new lesson from scratch

1. Enter a **New Lesson Title**.
2. Select a starting template for your lesson plan from the **Choose a Format** pull-down list.

 You can save time by selecting the "Activity/Lesson Log" as your format. This template, also known as the "quick form," enables you to quickly establish critical elements of a new activity. When you are ready to elaborate (for example, by adding implementation information or materials and resources), you can easily [change the abbreviated lesson plan to a more detailed format](#).

Your organization may have chosen to provide only a single lesson format. In that case, this step would not apply.

3. (Optional) If you have created custom folders on your Taskstream homepage 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.
4. Click the **Create New** button. You are navigated to the *Build Lesson* tab to [enter lesson information](#), using the template you selected.

Once you have created and saved your lesson, you can [request feedback](#) and/or [share it with others](#) in a number of ways. You can also [schedule your lessons](#) by adding them to the Taskstream Calendar shared by your organization.

Build a Lesson

Whether you're creating a new lesson from scratch or adapting a copy of an existing lesson, the details of the plan are developed on the Build Lesson page of the Lesson Builder. The name of your selected lesson is displayed below the page title.

The other tabs displayed at the top of this area also relate to the current lesson.

- **Publish:** if your organization has chosen to enable this feature, you can share the saved lesson via the Cybrary. Other subscribers are able to copy Cybrary published works and edit those copies, but attribution to the original author is permanently affixed to them.

The Cybrary is a community collection of published work, located in the Resources area. Your organization may or may not be reviewing work before making it available in the Cybrary.

- **Schedule:** add the saved lesson to the Taskstream calendar.
- **Archive:** move the lesson from the active list to the archive (*Archived lessons remain available to you*).
- **Format:** change lesson from the [quick form](#) to one of the longer formats.

The Format function does not apply if your lesson is already using a longer format.

The header area of the *Build Lesson* page displays the creation and (when applicable) modification dates of your lesson plan, together with the format used. If your lesson was based on a lesson created by someone else (e.g. a lesson copied from the Cybrary or from an email link), the original author attribution is also displayed.

Additional lesson-related functionality is provided by a set of buttons that display both above and below the actual lesson plan. Some of these actions (e.g. "Rename") are also available from other places in the Lesson Builder, while others (e.g. "Print View") are only available from the *Build Lesson* page.

- **Print View:** generate a printer-friendly version of the lesson plan in a pop-up window and (*optionally*) send it to your local printer.
 1. Click **Print View**.
 2. From the *File* menu of the pop-up browser window, select **Print**.
- **Email:** lessons can be sent to Taskstream subscribers or to an external email address. The recipient receives a message with a link to the lesson.

Those who receive links via the Taskstream Message Center may, at your discretion, be granted the ability to copy and adapt your lesson.

- **Generate Link (URL):** the system generates a unique web address (URL), which you can copy and paste into any webpage or weblink area to create a link to this lesson.
- **Save As/Copy:** make an additional copy of this lesson for another purpose. You can edit the new copy without changing the original lesson.
- **Rename:** rename this lesson (*the same option is available from the Lesson Builder homepage*).
- **Request Feedback:** you have the ability to select a Reviewer, from a Program with which you are associated, and request feedback on this lesson.

Add Content to Elements

The left panel of the *Build Lesson* page displays the format template. Each element of the unit is identified by a button with a descriptive name. As you add and save information for an element, the area to the right of the button is filled with a read-only version of that content.

To add/edit information about a lesson element

1. Click the element button.
2. A new window displays, in which to describe that element of the lesson or activity.

The features of this window will vary based on the particular element you are describing. For example, describing *Subjects* may require you to select applicable checkboxes, while attaching *Standards* navigates you to the Standards Wizard.

Some windows include multiple tabs, enabling you to provide information in several ways. For example, the *Assessment* description has tabs that enable you to include text, an attached Taskstream rubric, and/or a variety of uploaded files or web links that support or illustrate the method of Assessment.

- When adding **text**, note that the maximum number of characters allowed will vary based on element. If you have enabled the HTML toolbar, it will be available for many (but not all) text fields.
 - Some elements may include a combination of text and selection fields.
 - If the element you selected includes an *Attachments* tab, you can upload and attach files to your lesson form.
 1. Click the Attachments tab.
 2. Name your file (Maximum of 256 characters).
 3. To select the file you want to upload, click Browse.
 4. Locate the file and click Open.
 5. (Optional) Add a description of your link (Maximum of 1,000 characters).
 6. (Optional) Use Spell Check to review for spelling errors.
 7. Click Add File.
 - If the element you selected includes a *Web Links* tab, you can add web links to your lesson form.
 1. Click the **Web Links** tab.
 2. Name your web link (*Maximum of 50 characters*).
 3. Provide the URL (*web address*) for the site to which you want to link (*Maximum of 200 characters*).
 4. (Optional) Add a description of your link (*Maximum of 300 characters*).
 5. (Optional) Use **Spell Check** to review for spelling errors.
 6. Click **Add Link**.
3. After you have entered information for an element, click **Save & Close Window**. You are navigated back to the main *Build Lesson* page.

Lesson forms are automatically saved as you work.


Change Lesson Format

To change an Activity/Lesson Log into another lesson format

1. Select the Lesson from the Lesson Builder homepage by clicking either the Lesson name (link) or the related Edit button.
2. Click the Format tab.

If the lesson you are in is NOT currently in the Activity/Lesson Log (quick form) format, the Format page will display a message that you cannot change the format of this lesson.

3. Use the pull-down list (labeled **To New Format**) to select a format to which you want to convert this Activity Lesson Log.
4. Click the **Change Format** button. You are prompted to confirm that you want to continue with the conversion.

 "Change Format" is a one-time process for any lesson. Once you have converted this lesson's format, you will not be able to change it back.

5. (Optional) Click the **Cancel** button to leave the Activity/Lesson Log unchanged.
6. Click the **OK** button to proceed with the conversion.
7. A pop-up window confirms that the format conversion was a success.
 - To [continue working on this same lesson](#), click the **Build Lesson** button.
 - To return to the *Lesson Builder* homepage, click the **View All Lessons** button.

UNIT BUILDER

About the Unit Builder

The Taskstream Unit Builder facilitates the building of units of standards-based instruction by creating new lessons and activities and/or sequencing existing ones.

When you access the *Unit Builder* homepage, you are navigated to a filtered list of all your existing units.

To access the Unit Builder

1. From the top navigational bar, click **Lessons, Units & Rubrics**.
2. Click **Go to Unit Builder**.

The contents of the *Unit Builder* homepage reflect your most recent filter choice. You can change your filter at any time. Units can be filtered by folder or status:

- Active units (i.e. units that have not been [moved to the archive](#))
- Archived units
- Recently edited units (i.e. units that you have accessed in the last 30 days)

To change the unit filter

1. Select the folder or status from the pull-down filter list.
2. Click the **Update List** button.

Each unit is described by name. When your unit was based one that was created by someone else, the original creator's name is also displayed.

Lessons display in alphabetical order (or, if grouped by unit, by alphabetical order within each unit).

*To quickly locate a specific lesson, enter a full or partial lesson title in the **Search by Title** field and click **Search**. The results include all lessons (independent of status or filter currently applied on the page) that match that title.*

Each unit is described by name. When your unit was copied from one that was created by someone else, the original creator's name is also displayed. Units display in alphabetical order.

*To quickly locate a specific unit, enter a full or partial unit title in the **Search by Title** field and click **Search**. The results include all units (independent of status or filter currently applied on the page) that match that title.*

An icon indicates when a unit has been stored in one of custom folders you have created in the *My Folders* area of Taskstream.

- To view the names of custom folders to which the unit has been added, click the **View Folder Details** link.

When your filter displays them, **Archived** units are clearly labeled in a red font. A **New Comments!** message (in red font) alerts you to any units for which a Reviewer has supplied comments that you have not yet read. Additional icons indicate when units are undergoing review or evaluation, or have been [shared through the Cybrary](#).

From the *Unit Builder* homepage, you can:

- Create new units of standards-based instruction, using a variety of templates.
- Search for and view (by clicking the unit name, which is a link).
- [Edit, rename or delete](#) existing units.
- [Archive](#) one or multiple units.

Create a New Unit

From the *Unit Builder* homepage, you can create new unit from scratch or you can select an existing unit to [copy and adapt](#) (together with any associated lessons) for new purposes.

To create a new unit from scratch

1. Enter a new **Unit Title**
2. Select a starting template for your unit plan from the **Choose a Format** pull-down list.

Your organization may have chosen to provide only a single unit format. In that case, this step would not apply.

3. (*Optional*) If you have created custom folders on your Taskstream homepage in which to organize your work, you can choose to file your new unit in one of these folders by selecting from the **Add to Folder** pull-down list.
4. Click the **Create New** button. You are navigated to the *Build Unit* tab to [enter unit information](#), using the template you selected.

Once you have created and saved your unit, you can [request feedback](#) and/or [share it with others](#) in a number of ways. You can also [schedule your units](#) by adding them to the Taskstream Calendar shared by your organization.

Build a Unit

Whether you're creating a [new unit from scratch](#) or adapting a [copy of an existing unit](#), the details of the plan are developed on the *Build Unit* page of the Unit Builder. The name of your selected unit is displayed below the page title.

The other tabs displayed at the top of this area also relate to the current unit.

- **Publish:** if your organization has chosen to enable this feature, you can share the saved unit via the Cybrary. Other subscribers are able to copy Cybrary published works and edit those copies, but attribution to the original author is permanently affixed to them.

The Cybrary is a community collection of published work, located in the Resources area. Your organization may or may not be reviewing work before making it available in the Cybrary.

- **Schedule:** add the saved unit to the Taskstream calendar.
- **Archive:** move the unit from the active list to the archive (*Archived units remain available to you*).

The header area of the *Build Unit* page displays the creation and (when applicable) modification dates of your unit plan, together with the format used. If your unit was based on a unit created by someone else (e.g. a unit copied from the Cybrary or from an email link), the original author attribution is also displayed.

Additional unit-related functionality is provided by a set of buttons that display both above and below the actual unit plan. Some of these actions (e.g. "Rename") are also available from other places in the Unit Builder, while others (e.g. "Print View") are only available from the *Build Unit* page.

- **Print View:** generate a printer-friendly version of the unit plan in a pop-up window and (*optionally*) send it to your local printer.
 1. Click **Print View**.
 2. (*Optional*) Click any *Learning Activities* link to navigate to a printer-friendly view of the related lesson.
 3. From the *File* menu of the pop-up browser window, select **Print**.
- **Email:** units can be sent to Taskstream subscribers or to an external email address. The recipient receives a message with a link to the unit and attached lesson(s).

Those who receive links via the Taskstream Message Center may, at your discretion, be granted the ability to copy and adapt your unit/lessons.

- **Generate Link (URL):** the system generates a unique web address (URL), which you can copy and paste into any webpage or weblink area to create a link to this unit and the attached lesson(s).
- **Save As/Copy:** make an additional copy of this unit (and the attached lessons) for another purpose. You can edit the new copy without changing the original.
- **Rename:** rename this unit (the same option is available from the Unit Builder homepage).
- **Request Feedback:** you have the ability to select a Reviewer, from a Program with which you are associated, and request feedback on this unit.

Add Content to Elements

The left panel of the *Build Unit* page displays the format template. Each element of the unit plan is identified by a button with a descriptive name. As you add and save information for an element, the area to the right of the button is filled with a read-only version of that content.

The "Learning Activities" (or similarly-named) element enables you to [associate lessons \(created in Lesson Builder\) with the unit](#). In addition to attaching existing lessons, you can access the Lesson Builder to create new lessons that will immediately attach to this unit.

To add/edit information about a unit element

1. Click the element button.
2. A new window displays, in which to describe that element of the unit plan.

The features of this window will vary based on the particular element you are describing. For example, describing *Subjects* may require you to select applicable checkboxes, while attaching *Standards* navigates you to the Standards Wizard.

Some windows include multiple tabs, enabling you to provide information in several ways. For example, the *Assessment/Rubrics* description has tabs that enable you to include text, an attached Taskstream rubric, and/or a variety of uploaded files or web links that support or illustrate the method of Assessment.

- When adding **text**, note that the maximum number of characters allowed will vary based on element. If you have enabled the HTML toolbar, it will be available for many (but not all) text fields.
 - Some may include a combination of text and selection fields.
 - If the element you selected includes an *Attachments* tab, you can upload and attach files to your unit plan.
 1. Click the *Attachments* tab.
 2. Name your file (*Maximum of 256 characters*).
 3. To select the file you want to upload, click **Browse**.
 4. Locate the file and click **Open**.
 5. (*Optional*) Add a description of your link (*Maximum of 1,000 characters*).
 6. (*Optional*) Use **Spell Check** to review for spelling errors.
 7. Click **Add File**.
 - If the element you selected includes an *Web Links* tab, you can add web links to your unit plan.
 1. Click the **Web Links** tab.
 2. Name your web link (*Maximum of 50 characters*).
 3. Provide the URL (*web address*) for the site to which you want to link (*Maximum of 200 characters*).
 4. (*Optional*) Add a description of your link (*Maximum of 300 characters*).
 5. (*Optional*) Use **Spell Check** to review for spelling errors.
 6. Click **Add Link**.
3. Use the **Learning Activities** element to [attach lessons to this unit](#).
 4. After you have entered information for an element, click **Save & Close Window**. You are navigated back to the main *Build Unit* page.

Unit plans are automatically saved as you work.

Add/Manage Lessons in a Unit

The unit template includes a specific element to attach lessons to the unit and manage them.

The name of this element varies, based on the format you selected, but often appears in the "Implementation" section as **Learning Activities**.

All lessons currently attached to the unit are listed within this element. If an annotation has been added for the lesson, that text appears below the lesson name.

Click any lesson name (link) in that element to display a print view of that lesson.


To add or manage lessons to your unit (*created via Lesson Builder*)

1. Click **Learning Activities** (or similarly named element).
2. You are navigated to an *Included Lessons* page, which lists the various lessons currently associated with this unit.

From this page, you can:


- Click the name of any attached lesson to see it in Print View (and optionally send to your printer)
- Reorder the list of attached lessons
 1. Click the drop-down **Order** field to the left of the lesson name.
 2. Select the new order position.

Repeat these steps until all lessons have been assigned the appropriate number to reflect the order in which you want them to appear on the list.

 There is no automated re-ordering. When you change the position number of one lesson, be sure to change other lessons as well. If the same position is assigned to more than one lesson when you select **Accept and Return to Unit**, you will be alerted and asked to reorder them.

- Attaching existing lessons (*created in Lesson Builder*) to this unit
 1. Click the **Add New Learning Activity** (or similarly named) button. You are navigated to the *Add Lesson* page, which has functions to both create new lessons and add existing ones.
 2. From the **Select a Lesson** pull-down list, select the title of the existing lesson you want to add to this unit.
 3. *(Optional)* Enter an activity or lesson description in the *Annotation* field.
 4. *(Optional)* To quit your action, click **Cancel**.
 5. Click **Add to Unit**.
- Access the *Lesson Builder* to create new lessons (which will immediately attach to this unit)
 1. Click the **Add New Learning Activity** (or similarly named) button (This is the Drop-down text). You are navigated to the *Add Lesson* page, which has functions to both create new lessons and add existing ones.
 2. Enter a **Title** for your new activity/lesson.
 3. *(Optional)* Enter an activity or lesson description in the *Annotation* field.

4. If your organization has opted to provide multiple lesson formats, select a starting template for your lesson plan from the **Choose a Format** pull-down list.

 You can save time by selecting the "Activity/Lesson Log" as your format. This template, also known as the "quick form," enables you to quickly establish critical elements of a new activity. When you are ready to elaborate (for example, by adding implementation information or materials and resources), you can easily go to Lesson Builder and [change the abbreviated lesson plan to a more detailed format](#).

5. (Optional) To quit your action, click **Cancel**.
 6. Click **Create Lesson**.
 7. You are navigated to the Lesson Builder, where you complete the lesson template. Notice that the relationship of this new lesson to your unit is automatically displayed in the header area of *Lesson Builder* page.
 - **Edit Lesson** in the Lesson Builder. Clicking this button navigates you to the *Build Lesson* page, where you can edit or add information to any element.

Note that when you edit a lesson or create a new one, you are navigated away from the Unit Builder.
 - Add an annotation to a lesson listing. The information you enter via the **Add Annotation** button only applies to this unit. This annotation will not appear for other units with which the lesson may be associated.
 - **Remove** a lesson from the unit. This does NOT delete the lesson from Taskstream. The lesson remains available from the Lesson Builder.
3. When you have completed adding or managing attached lessons, click the **Accept & Return to Unit** button to return to the main *Build Unit* page.


SHARED LESSON & UNIT BUILDER FUNCTIONALITY

Save As/Copy an Existing Lesson or Unit

The Lesson Builder and the Unit Builder each have a **Save As/Copy** feature, which enables you to make a copy of any of your existing work items and adapt them for other purposes.


You are also able to adapt [copies of lessons and units that were emailed](#) to you by another Taskstream user, as well as those you have copied from the Cybrary.

Changes made to the copy *DO NOT* affect the original lesson or unit.

 If you have submitted a lesson or unit to a DRF, that item is locked and cannot be edited. However, if you copy the locked item, you *ARE* able to edit the new version.

To copy an existing lesson or unit

1. With the item lesson open on the *Build Lesson* or *Build Unit* page, click the **Save As/Copy** button.

 It is critical that you click **Save As/Copy** BEFORE making any changes, otherwise you will overwrite (i.e. replace) the original version of the lesson or unit.

2. **Enter the name of your new** lesson or unit in the field provided.
3. (Optional) Store your new copy in one of the custom folders you have created on your Taskstream homepage by selecting the folder name from the **Add to Folder** pull-down list.
4. *If you are copying a lesson or unit that is tied to a rubric(s)*, use the radio button provided to indicate whether you want to:
 - Make copies of each associated rubric. Note that each rubric copy would need to be named. *OR,*
 - Keep links to the same rubric(s) as the original lesson/unit. *(changes made to the rubric(s) are reflected in both the original and the copy).*

Copies made of units automatically include copies of the lessons attached to those units.

5. *If you are copying a unit that has lessons attached*, you must **Select a new title** for each lesson copied.
6. (Optional) To quit your action and not copy the lesson(s)/unit, click the **Cancel** button.
7. Click the **Copy** button.
8. (Optional) To modify your new copy, rename and/or edit it as you would any [lesson or unit](#) that you created from scratch.

Manage Lessons and Units

From the [Lesson Builder](#) and [Unit Builder](#) homepages, you can manage (respectively) your existing lessons and units.

A set of three related function buttons appears to the far right of each lesson and unit on the homepage list. Use these buttons to [edit](#), [rename](#) or [delete](#) a listed item.

Edit a Saved Lesson or Unit


When you click the **Edit** button, you are navigated to the main *Build Lesson* or *Build Unit* page. All the existing content for the selected lesson or unit is in view.

You can also open an existing lesson or unit by clicking the name (a link) on the homepage list.

The most recent **Date modified** always appears in the header of the *Build Lesson* or *Build Unit* page, as well as in any **Print View** generated for the lesson or unit.

Edit and/or add information to the various elements, using the same techniques as when you initially created the [lesson](#) or [unit](#).

As you edit the contents of any element, your updates are automatically saved.

 When editing a lesson that was originally created using the "quick form," you may want to [convert the lesson](#) to a more detailed format. This will add more elements to the template.

You can click the **Rename** button on this page to give your lesson or unit [a new title](#).

When you have completed your edits, click the *All Lessons* or *All Units* tab to navigate back to the related homepage.

Rename a Saved Lesson or Unit


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

1. Enter your new title in the **Rename title** field.
2. Click **Rename**.
3. You are navigated back to the related homepage.

*You can also rename a lesson or unit from the *Build Lesson* or *Build Unit* page.*

Delete a Saved Lesson or Unit

When you click the **Delete** button, you are asked to confirm that you want to permanently delete the selected lesson or unit.

 Unlike when you [remove a lesson from a unit](#) template **Learning Activities** (or similarly named) element, this function entirely deletes the lesson or unit from Taskstream.

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

When you delete a unit that has lessons attached, this does NOT delete the lessons. These lessons remain active in the Lesson Builder unless individually deleted from that area of Taskstream.

Request Feedback for Lesson or Unit

If you are associated with a Program that has been set up for Reviews, you can request feedback on your lesson or unit. You can (optionally) [include comments](#), on the lesson/unit as a whole or on specific elements, for your Reviewer(s) to read.

The request for feedback also enables your Reviewer(s) to copy your lesson into their lesson library.

To request feedback on a lesson or unit

1. From the *Build Lesson* or *Build Unit* page for the item on which you want feedback, click the **Request Feedback** button.
2. The pop-up *Select Reviewer* window displays the Program(s) you are enrolled in that have been set up for Reviews. Below the title of each Program is a list of Reviewers who are available to you.

If you have been grouped with a specific Reviewer, you can only request feedback from that Reviewer.

If no grouping has been assigned, you can request feedback from any Reviewer in that Program

3. Use the checkbox(es) to select the Reviewer(s) from whom you want to request feedback.
 - a. (Optional) Click the **Select All** checkbox for any Program to request feedback from ALL available Reviewers in that Program.
4. (Optional) To quit your action, click **Cancel**.
5. Click the **Submit for Review** button. The system validates that you have requested feedback from the individual Reviewers you selected.
6. Click **Close Window**
7. (Optional) Use **Add Comment** to enter a general comment and/or line-item (element-specific) comment(s) on your lesson or unit (*see below for more details*). All comments you have added will be available when the Reviewer accesses the lesson/unit.

Adding Comments

Once a lesson or unit has been submitted for Review, Add Comment buttons are added to the Build page and can be used by both you and your Reviewers.

Lessons and units can have two (2) types of comments: **general**¹ and **line-item**².

- **Add Comment** buttons are added to every element in the format.
- A *General Comment Area*, with its own **Add Comment** button, is added immediately above the first element in your format.

¹ commentary or concerns about the overall lesson or unit

² element-specific issues or annotations

- By default, both types of comments initially display when you request feedback. Uncheck the **Show** checkboxes to hide comments by type.

Once you have shared your lesson or unit, your Reviewer has the ability to view and respond to your comments in the General Comment Area and/or any of the line-item comment areas.

Each element on the Build Lesson or Build Unit page (including the General Comment Area) will display the complete comment history for that element.

- All comments are date/time-stamped.
- A person who creates a comment can edit that comment as needed, using the **Edit Comment** button.

You and your reviewer follow the same steps to add a comment.

1. Click the appropriate **Add Comment** button.

If you want to make an overall comment about the lesson/unit, be sure to use the button in the General Comment Area.

2. Enter comment text in the field provided (maximum 8000 characters). If you have enabled the HTML toolbar, it is available for these comments.
3. Click the **Save and Close Window** button. You are returned to the Build Lesson or Build Unit page.

Add a Lesson or Unit to Calendar

Via Lesson Builder and Unit Builder, you can add the date(s) on which you intend to teach the lesson or unit to your Taskstream calendar. By adding the even to your calendar, you and the Coordinators of your organization can track the standards you have and have not addressed throughout the course of the year.


For more detailed information on how to track standards using lesson dates, please consult the "Read the Gap and Frequency Analysis Report" information in the Standards Wizard area of the online Help.

If a lesson or unit will be taught multiple times (e.g. French 101 Monday/Wednesday and French 101 Tuesday/Thursday, both in the fall semester; or, French 101 Winter Session and French 101 Summer Session), you can create a separate calendar record for each event.

You can edit the [schedule information](#) after an event has been scheduled.

To add a lesson or unit to your Taskstream calendar

1. Starting from the *Build Lesson* or *Build Unit* page for the item you want to add to the calendar, click the *Schedule* tab.

 *When scheduling lessons that have been included in a unit, manage the schedule via the Unit Builder. All lessons for that unit will be displayed together on the Schedule tab, saving time and limiting scheduling errors.*

2. If this is the first time you have added this lesson or unit to the calendar, you are immediately navigated to an *Add/Edit Implementation Record*. The *Event title* is displayed at the top of the record.

3. Enter (as mm/dd/yyyy) or select (by using the date-picker from the calendar icon) a *Start Date* and *End Date* for this event.
4. By default, the event Time is selected as "All Day". To set a specific time for this event:
 - a. Uncheck the "All Day" box.
 - b. Using the pull-down fields that now display, select the hour and minute of the *Start time* and *End time*.
 - c. As Taskstream uses a 12 hour clock, you must also select whether the time is "AM" or "PM."

Events that span multiple days (i.e. start and end on different dates) are considered to be "All Day" events. As this applies to lessons and units, units are nearly always "All Day" events, while lessons are more likely to occur on a single day at a specific time of day.

5. (Optional) Add *Comments* for the calendar, in the box provided.
6. Click the **Submit** button to complete the scheduling of this event.

*If you are in Unit Builder and scheduling multiple lessons within the unit, you must click the **Submit** button for each lesson you schedule.*

Lessons and units can also be scheduled directly from the Taskstream Calendar tool.

Managing scheduling history

When you access the Schedule tab for a lesson or unit that has been added to the calendar at least once, you will see this lesson or unit's implementation history.

- To edit a previous entry, click the **Edit** button. The *Add/Edit Implementation Record* opens, and you can make your changes. When you have finished editing the record, click **Submit** to save the changes to the calendar.
- To delete an existing implementation record, click the **Delete** button. You will be asked to confirm that you want to delete the record from the calendar.
- To enter an additional date on which you want to teach the same lesson or unit again, click the **Add to Calendar** button and repeat the steps [for adding a new event](#) to the calendar.

Print or Share Lessons, Units & Rubrics

Once you have created and saved a lesson, unit or rubric in Taskstream, there are a number of ways in which you can share your work with others.

Note that when units are shared, all attached lessons are also shared.


- **Print:** The [Build Lesson](#), [Build Unit](#) and [Build Rubric](#) pages all have a **Print View** button that can be used to generate a printer-friendly version of the work. Rubrics can also be exported in a MS Word format.

To print lessons or units

1. Click **Print View**.

2. From the *File* menu of the pop-up browser window, select **Print**.

To print rubrics

1. Click **Print View**.
 2. From the top of the pop-up view window, select **Send to Printer Now**;
 3. *OR* Click  **Export to Word** to export the view as a Word document.
 - a. A pop-up window loads with the Export to Word dialog box. The appearance of this box differs, based on your browser.
 - b. To save your Word document without viewing, click Save and select a location. You can open this file as needed.
OR
 - c. To immediately view the file on screen in Word, click Open.
 - To store the open document for future use, be sure to "Save As" and place in the location of your choosing.
- **Email from Taskstream:** Use the **Email** button on the *Build Lesson*, *Build Unit* and *Build Rubric* page to [generate an email](#) to another Taskstream user (via Message Center) or to an outside email address. The recipient receives a message with a link to the unit and/or lesson(s), or rubric.

Those who receive links via the Taskstream Message Center may, at your discretion, be granted the ability to copy and adapt your unit/lesson/rubric.

- **Generate a Web link:** Use the **Generate Link (URL)** button on the *Build Lesson*, *Build Unit* and *Build Rubric* page to [generate a unique web address \(URL\)](#) for this item. You can include this URL in webpages, as weblink content for DRF requirement submissions, etc.
 1. Click **Generate Link (URL)**. Taskstream generates a unique web address for your work item and displays it in a pop-up window.
 2. Use *Ctrl + C* to copy this link.
 3. Use *Ctrl + V* to paste the link into your webpage, email, document, etc.
 4. Click **OK** to close the pop-up.

Anyone using this link will view a printer-friendly version of your work.

- **Publish to Cybrary:** Navigate to the Lesson Builder, Unit Builder or Rubric Wizard *Publish* folder, to [publish your work item to the Taskstream Cybrary](#).
- **Attach to a Taskstream DRF, Folio or Web Page:** The Add content functionality of folio pages, web pages and DRF requirements includes an **Attachments** tool.

For any specific DRF, "Attachments" may or may not appear, based on the decision of the template creator.

One of several options on the DRF, Folio or Web Page *Add Attachments* page is to select any of your saved lessons, units or rubrics from a pull-down list.

Email Lessons, Units and Rubrics

Use the Email button on the Build Lesson, Build Unit and Build Rubric page to generate an email to other Taskstream users (via Message Center) or to an outside email address.

When units are emailed, all attached lessons are also emailed.

The recipient receives a message with a link to the unit and/or lesson(s), or rubric.

- A message sent via external email provides the recipient with a link to a printer-friendly view of your work.
- When a link is sent via Message Center, you may choose to grant the recipient the ability [to copy and adapt the linked item](#) within Taskstream.

To email your lesson, unit or rubric

1. Starting from the *Build Lesson*, *Build Unit* or *Build Rubric* page for the item you want to share, click the **Email** button. The *Email* page loads, with options to email to both internal (Taskstream subscribers) and external recipients.
2. To *Select internal recipients*, who will be contacted via the Message Center:
 - a. Click the **Select Recipients** button to the right of the related *To:* field.
 - b. Using the Taskstream Member Locator, find and select your recipient(s).
 - c. *(Optional)* Send blind carbon copies of this email (including link) to other Taskstream subscriber(s):
 - i. Click the **Select Recipients** button to the right of the related *Bcc:* field.
 - ii. Use the Member Locator to select Bcc recipients.
 - iii. *(Optional)* Check the box to *Allow Taskstream recipients to copy this item for editing*.

If this box is UNCHECKED, the link will navigate Taskstream recipients to a printer-friendly view of the item.

3. To *Enter external recipients*, type the email address(es) in the related *To:* field. For multiple recipients, separate each email address with a comma.
 - a. *(Optional)* Send blind carbon copies of this email (including link) to other external recipients by typing their email address(es) in the related *Bcc:* field.
4. The *Your email address* field stores the information that will be used in the "from" section of the email. By default, this field is populated with the email address currently stored in the *Personal Information* area of My Account.
 - a. *(Optional)* Enter a different "from" email address.
 - b. *(Optional)* To receive your own copy of the email, check *Send a copy to this email address*.

 If you are sending emails to external recipients, this field MUST contain a VALID email address.

5. *(Optional)* Enter a personal message for your email. This message may serve to introduce or explain the linked item. *(Maximum of 2000 characters)*

- Click the **Send Message** button.

Import/Copy a lesson, unit or rubric from an email

When you receive an email in the Taskstream Message Center that includes a link to a lesson, unit or rubric, you may have been given the option to make a copy of that artifact. In this case, you can choose to use the copied item "as is" or edit it for your own purposes.

When units are copied, all attached lessons are also copied.

To copy work from an email link

- Open the email in Message Center.
- Click the link (the name of the lesson, unit or rubric).
- You are navigated to a page that displays a printer-friendly version of the linked item. Click the **Copy** button that displays in the upper-right hand corner of the page.
 - If this button does not display, you have not been granted permission to copy this item.
- If you have a work item with the same title, you are asked to enter a **New name** for your copy.
 - Click the **Copy** button to complete the import process.
- A message displays to confirm that the item has been copied to your own list of work.
- (Optional) Click the **Go Back** button to return to the printer-friendly view of the item you have just copied.
- Click the **Go to the Lesson Builder**, **Go to the Unit Builder** or **Go to the Rubric Wizard** button to navigate to the tool related to the item you have just imported.

Imported lessons, units or rubrics display on the tool-related homepage and can be opened and edited just like any work item you created from scratch.

Publish to Cybrary

If your organization has chosen to enable you to contribute to the Cybrary, this option will be available from the Publish page of the Lesson Builder, the Unit Builder and the Rubric Wizard.

When you publish to the Taskstream Cybrary, you contribute to a community collection of published work that subscribers can access via the Resources option at the top of their Taskstream page. Other subscribers are able to copy Cybrary published works and edit them, but attribution to the original author is permanently affixed.

There are various organizational preferences associated with the Cybrary. Some organizations choose to review work before making it available to other Taskstream subscribers. Some organizations require that certain types of work be published in order for Administrators to access it. If you have questions about the Cybrary options your organization has chosen, please contact your organization's Taskstream administrator.


To publish a lesson, unit or rubric to the Cybrary

- Starting from the [Build Lesson](#), [Build Unit](#) or [Build Rubric](#) page for the item you want to publish, click the **Publish** tab.

- The current publication *Status* of this item is displayed. Click the **Publish** or **Publish to Cybrary** button next to that status.

In addition to being in the Cybrary, published rubrics are also available to AMS subscribers as a "shared resource." The variation in the button names reflects this difference.

- You are navigated to the *Cybrary Publishing Options* page. Enter a *summary* of this work item. When others browse the Cybrary, your summary will display next to the title and should therefore include useful information such as overall purpose, age-appropriateness (in the case of a lesson or unit), etc.
- To help others locate your work via searches, add strategic search *keywords*.

 *When publishing lessons and units, note that Grade and Subject information do not need to be entered as keywords; they are automatically included.*

- If your organization has chosen to review work submitted to the Cybrary before publishing it:* decide on the degree of availability you want to set for this item:
 - To limit your work to individuals in your own organization, select **Only people within my learning community**.
 - Alternatively, you can choose to share your work item with **Any Taskstream subscriber** (regardless of organization).
- (Optional)* To quit your action, click **Cancel**.
- Click **Publish** to complete your submission to the Cybrary.
- You are returned to the main *Publish* screen with the new status displayed.

After your work has been published

While you can edit your work at any time, the version that was submitted to the Cybrary remains unchanged. In order for changes to be reflected in the Cybrary, you will need to republish your work.

To publish changes to a work item

- Make your changes on the Build page for this item.
- Click the Save button to store your updates.
- Click the Publish tab.
- Click the (new) Republish button.
- You might be navigated to the Cybrary Publishing Options page.

*Only designated Cybrary Reviewers can unpublish work or edit **publication information**³.
Please contact your organization's Taskstream administrator to learn how to reach out to your organization's Cybrary Reviewers.*

³summary text and/or keywords

- a. (Optional) Update the *summary* text and/or *keywords*.
 - b. Click the **Update** button.
6. From the confirmation page, click a button to either go **Back to Publish Options** or continue to **Edit** this work item.

Archive Lesson and Units

When lessons and/or units are not currently needed, "archiving" enables you to store them as inactive rather than deleting them.

The **Filter** options of the Lesson Builder and Unit Builder homepages enable you to view— or not view— archived items as needed.

Individual lessons and units can be moved into the archive from the Build page. You can also select one or multiple plans from the Lesson Builder or Unit Builder homepage to archive at the same time.

To archive a plan from the Build Lesson or Build Unit page

1. From the [Build Lesson or Build Unit page](#) for the item you want to archive, click the *Archive* tab.
2. You are navigated to an *Archive Options* page, where the plan is currently set as "Active." Using the radio button, **Select visibility** as "Archived."
3. Click the **Apply Changes** button. A pop-up box confirms that the lesson or plan is now archived.
4. (Optional) Click the **Build Lesson** (or **Build Unit**) button to return to the *Build* page for this archived plan and continue work.
5. Click the **View All...** button to return to the Lesson Builder or Unit Builder homepage, where that plan is now labeled as **Archived**.

To re-activate an archived lesson or unit

Follow the same steps as described above but, in Step #2, select the "Active" radio button.

To archive one or more plans from the Lesson Builder or Unit Builder homepage

1. Use the checkboxes to the left of the lesson or unit titles to select one or more plans.
2. Click the **Archive** button at the top of the list (on the left side of your screen).
3. A pop-up window confirms that you have successfully archived the selected item(s).
4. Click the **OK** button to return to the homepage where that plan(s) are now labeled as **Archived**.

You cannot move multiple items OUT of the archive together. To re-activate archived items, you must individually reset them to "Visible."