"My Account"

In Taskstream

taskstream

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About My Account

The *My Account* information area contains user data that provides the system with:

- subscription information (includes the ability to renew)
- history of logins (count with timestamps)
- subscription preferences (enable or disable features)
- personal contact data (name, student ID, and email address)
- time and date preferences (format of time and date)
- email subscriptions (select Taskstream notifications to receive via email)
- login credentials (username and password change)

To access My Account Information:

1. Log into www.taskstream.com.

2. In the top right corner of the homepage, click **My Account**.

   The *My Account* page loads with the Subscription tab in view (*by default*).

   > *If you require a name change on your non-transferable account, please contact Mentoring Services at 1-800-311-5656.*

Subscription

The Subscription tab contains account information such as profile data, history, and preferences that can be set and updated as needed. Some of the information is not editable by you but can be addressed by the System Administrator.

The Subscription page has four (4) main sections:

Personal Information

View some of your personal information and a photo (if you have chosen to include one).

Click on the **Edit Personal Information** button or navigate to the Personal Information tab to edit the information displayed.

Organizational Affiliations

View any organizational affiliations tied to your Taskstream account. You may have multiple affiliations within your organization; for example, you may be affiliated with the History department and the cross-disciplinary Asian Studies program.

From this section, you can also renew your account or view your next expiration date.

History

The History Area displays a count of the number of logins for your user id.

Click **View Details** to access a record of your login history.

Subscription Preferences

Customize your settings for certain Subscription Preferences:

- Enable or disable any of the Taskstream tool packs available to you
- Enable or disable the HTML Formatting Toolbar. When enabled, this toolbar is available in most Taskstream tools where there are large text input areas and enables you to easily format text.
- Disable or enable the "Reminder to Submit work" on DRF requirements (*this preference may not appear for some learning communities*).

View History Details

The History section of the *Subscription* tab displays the number of times you've logged into your account.

To view the dates and times of all of these logins

1. Click the **View Details** button next to that number

2. A *Login History* window opens, displaying a numbered list of the date and timestamps of each login.

   As shown in the image below, this list is sorted in reverse chronological order, with the most recent login always appearing as #1.

3. Use the tools at the top of the display to navigate through the list.
   - Use the **Next>>** and **<<Previous** links to move back and forth from page to page within this history.
   - Navigate to a specific page of this history by entering the page number (in the **Go to page** box) and clicking the **Go** button.

Subscription Preferences

The items that appear under *Subscription Preferences* depend on how your account was originally setup. Each option is described in detail, to assist you in deciding whether you want to enable or disable it.

If your account is eligible for the **Teaching Productivity Tool Pack**, you can enable or disable this package. The tool pack facilitates teaching activities through instructional design tools (Lesson Builder, Unit Builder, and Rubric Wizard) and through resources such as standards, formats and content related to teaching and education.

When enabled, the **HTML Formatting Toolbar** helps you add formatting to text input areas, in the same way as you would when using a word processor or when writing messages from your personal email service. This toolbar is available in most Taskstream tools where there are large text input areas.

> Formatting options include: Bold, underline, and italics, Text alignment (left, right, center), Bulleted Lists (Ordered and Unordered), Font control (type, size, color, special symbols), Hyperlinks, Cut, Copy, Paste, Multiple Undo, Paste from Other Documents (cleans up various types of tags - Word, Plain Text, etc.), Advanced linking - open pop-up, links to anchors, emails, etc., Full window preview, and One-click table formatting

> *The HTML Toolbar is not supported by Safari on iPad.*

When enabled, the **Reminder to submit work** generates interactive on-screen reminder messages whenever you navigate away from a DRF program *Work* screen that contains either "Work in Progress" or work that "Needs Revision." When using the **Add** content feature of the DRF *Work* screen, this reminder also displays when you are returning to the Requirement after successfully adding whichever type of content you had selected.

> ⚠ If this preference is set to "Disabled,", the system will NEVER send reminders. Alternatively, you can keep the preference set to "Enabled" and still disable reminders for the duration of a specific work session.
>
> **To temporarily disable reminders**, when a reminder displays from a DRF work screen, use the checkbox in the alert. That temporary "disable" will stay in effect throughout that work session, but reminders will be automatically re-enabled for your next work session.

> The *default* setting for this preference (enabled or disabled) is determined by your learning community.

> *Your learning community may have decided that this setting should ALWAYS be disabled, in which case this item does not appear on this screen.*

> 💡 *To set your Taskstream Message Center Notification preference, or subscribe to Taskstream notifications, use the* Email Subscriptions *tab in this area.*

To enable or disable settings for subscription preferences

- Click **Enable** or **Disable** (as appropriate) under each section.

  If Enabled is currently selected for a specific preference: the page displays **Enabled** in that area, accompanied by a **Disable** button.

  If Disabled is currently selected for a specific preference: the page displays **Disabled** in that area, accompanied by an **Enable** button.

Renew Subscriptions

1. From the *Subscription* tab, go to the *Organizational Affiliations* section.

2. Click **Renew Subscription**. The system prompts you with a message that the next step is the registration area with on-screen directions.

3. Click **OK**.

4. *(Optional)* To quit the action, click **Cancel**.

5. Follow these steps to activate your subscription:

    a. To begin activating your subscription, point your web browser to the following URL: http://www.taskstream.com

    b. Below the *Subscriber Login* area, click **Subscribe/Renew Today**.

    c. Select the option that applies to you. First time subscribers should select **Create a new Taskstream subscription**.

    d. Select a subscription option:
    - If you are purchasing by credit card, use Option 1.
    - If you have been issued a Key Code, use Option 2.

    e. Click **Continue**.

    f. Follow the directions on the resulting forms to complete the subscription purchase or activation process.

> *Please ensure that you enter a valid email address so that Taskstream can send your Taskstream username and password to you. All email addresses are confidential and will not be made available to third parties.*

> 💡 *We suggest that you add the email addresses taskstream-subscriptions@taskstream.com, help@taskstream.com, and notification@taskstream.com to your email application's address book to help ensure that emails from Taskstream will be delivered and not blocked by any spam software or settings that could be enabled on your computer.*

Personal Information

In addition to your user name and (optional) id that were added by the site Coordinator when your account was established, the My Account *Personal Information* tab includes contact information and a profile photo that you can edit.

> *Your name and email address are also visible on the My Account Subscription tab, together with your photo (if uploaded)*

All information on this page is *optional*.

> 💡 *Personal Information is not be shared with third parties.*

The *Personal Information* page is organized in four (4)main areas:

Profile Information

The Profile information section includes a photo as well as some biographical details.

*You can change your profile photo at any time. If a photo has been uploaded previously, begin by clicking **Remove** to discard that photo before loading a new one.*

To upload a photo

1. Click the **Browse** button.

2. Locate the photo file in your computer or network and select

3. Click **Open**.

4. The name of the selected file displays in the *Upload Profile Photo* field

5. Click **Upload Photo**.

Personal Contact Information

This standard address block has fields in which to store your personal address, phone, and email information.

When entering multiple **Role(s)**, separate them with commas.

Work, College, or University Information

This standard address block has fields in which to store your school or business address, phone, and fax information.

Information Required by Your Learning Community

This area enables the collection of information that might be required by your specific learning community. These questions (if any) are answered initially during the subscription process or when pushed out by one of your local Taskstream leaders.

You can edit your responses to any of the data collection questions included by your school or organization.

To edit Personal Information on this page

1. *Either* click the **Edit Personal Information** button on the *Subscription* tab
   OR click the *Personal Information* tab

2. Enter or select information in the appropriate field(s)

3. Click the **Update Account Information** button

*Note that the Personal, Work/School and Learning Community information sections have separate **Update Account Information** buttons.*

4. Click **Back to Edit Personal Information** to continue editing the Personal Information page
   OR
   click any other My Account tab to work on another page in this area.

Time & Date Preferences

The *Time & Date Preferences* tab of My Accounts enables you to set the time zone you want to use and to select how you want dates to be displayed within your Taskstream account.

If you use LAT for multiple organizations, you can set different date and time preferences for each.

To select date display options

1. Click the radio button next to the example of the **Short Date** that illustrates the display you prefer. This format will *automatically* be used in those displays, reports and communications that have size constraints for that information.

2. Click the radio button next to the example of the **Long Date** that illustrates the display you prefer. This format will *automatically* be used in those displays, reports and communications that allow for a longer date description.

3. Click the **Update Preferences** button to apply your selections to your account.

   Available date formats are similar to the ones shown in this image:

Short Date:	⦿ 01/31/2007
	○ 01.31.2007
	○ 01-31-2007
	○ 31/01/2007
	○ 31.01.2007
	○ 31-Jan-07
	○ 2007/01/31
	○ 2007.01.31
	○ 2007-01-31
Long Date:	⦿ Wednesday, January 31, 2007
	○ January 31, 2007
	○ Wednesday, 31 January, 2007
	○ 31 January, 2007
Time Zone:	(GMT+03:00) AST/ADT Kuwait, Riyadh ▾
	Update Preferences

To select a time zone

1. Make your selection from the pull-down **Time Zone** menu. Each zone on this list is identified with a three-part description:
   - The number of hours divergence from Greenwich Mean Time, described as GTM + (plus) or - (minus) that number of hours.

   GMT (Greenwich Mean Time), also known as UMT (Coordinated Universal Time) is the standard time zone upon which all other time zone are based. For example, when it is 7:00 GMT, it is 9:00 in South Africa (GMT +2) and 4:00 in Argentina (GMT -3).

- An acronym used to describe this time zone. For example, EST/EDT represents Eastern Standard Time/Eastern Daylight (savings) Time in the US and Canada.
- Key geographic regions (cities or countries) using this specific time zone.

2. Click the **Update Preferences** button to apply your selection to your account

Email Subscriptions

The *Email Subscriptions* page stores your preferences for email communication from Taskstream. Use this page to manage subscriptions to automated Taskstream email notifications and to select an option for Message Center forwarding.

If your account has multiple organizational affiliations (for example, if you are affiliated with both the Psychology and Education departments), your preferences are applied to all of them.

This screen is accessed from the *Email Subscriptions* tab in My Account. It is also accessed any time you click an "Unsubscribe" link on an email that you have received from Taskstream.

⚠️ User preferences set on this page are *for this account only*. These settings DO NOT affect other accounts that share the same email.

Automated Taskstream emails

This page displays an alphabetical list of the categories of notifications you may receive from Taskstream to your external email account. Any subscribed notifications will be sent to the address that is displayed, as an aid to memory, in the upper right corner of this page.

- Use these checkboxes to indicate whether (check) or not (unchecked) you want to subscribe to these types of emails.

  You can subscribe to any combination of email types, including all or none.

- Use the **Select All** option at the top of the list to quickly mark all email types with the same preference.

Message Center Forwarding

Use the radio buttons to choose whether or not you receive a notification message to an external (not Taskstream) email address each time you receive a new message via the Taskstream Message Center. This notification message will include the text of the email.

When the forwarding preference is set to **Do not...**, you will need to check your Taskstream Message Center Inbox in order to see whether you have any new messages.

The default choice for Message Center Forwarding is usually set to "enabled" (although your organization may choose to default to "disabled").

The email to which messages would be sent is referenced in the onscreen *Forward messages I receive in My Message Center to my email on file* note. This defaults to the address entered during the LAT registration process.

Use the *Personal Information* tab to manage this valid external email address.

To manage subscriptions

1. Use checkboxes to indicate the types of **Automated Taskstream Emails** to which you want to subscribe/unsubscribe.

2. Set your **Message Center Forwarding** preference.

3. Click the **Update Preferences** button.

4. Your changes are verified.

5. Click **<<Back to Manage Subscriptions** to continue editing this page
    OR click any other My Account tab to work on another page in this area.

Taskstream users can forward artifacts (such as lessons, rubrics, etc.) to recipients using their external email addresses. You cannot disable receiving these messages from other Taskstream users.

Username and Password

Before you are permitted to change your user name, password, or email address, you must begin by verifying current password.

1. Click the My Account *Username & Password* tab to access the *Verify Password Information* screen.

2. Enter your **Current Password**. The password hint you previously entered is displayed underneath the Current Password field.

3. Click **Continue**. You are navigated to the full *Username/Password* screen, where you may create a new password (and hint) and/or edit your username or email address.

4. Enter any information you need updated. Leave blank any fields you DO NOT want to change.

    a. When you are entering information in any field, be sure to enter the same information in the matching **Confirm** field.

5. Click **Apply Changes**. The system displays a message that states:

    You have successfully changed your password and password hint.
    An e-mail confirmation has been sent to yourname@taskstream.com.

Passwords must contain at least six (6) characters. Passwords must contain at least one (1) number.

Passwords cannot contain your username. Password Hint must contain at least one (1) character. Username must contain at least four (4) characters.

Password Hint

A password hint is used to help you remember your password should you forget it. It should be something that, when read by *you and only you*, will trigger your memory of your password.

For instance, if your password is the name of your child, do not use "the name of my child" but instead something like, "born in 1978 in Boston".

If you have any questions, please email Mentoring Services at help@taskstream.com or call 800-311-5656.