QUICKSTART GUIDE FOR CAMPUS-WIDE STRATEGIC PLANNING

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Log in to Taskstream

Taskstream by Watermark is LSU’s system of record for institutional effectiveness. This tutorial will walk you through accessing Taskstream/AMS and the technical components to meet the requirements for LSU’s campus-wide annual strategic planning and assessment process. Additional resources are available at www.lsue.edu/oie.

To access Taskstream, login to myLSU and click the Taskstream icon on the left navigation panel:

LSU Taskstream Home Page

Please select AMS. You will now be taken to your home page. Your home page will contain one or more units or programs with which you are affiliated, and a Strategic Plan Workspace within each one of the units. Each workspace is the area into which you may input your strategic plan information.

To begin, click the current workspace for strategic planning, Strategic Plan Workspace 2017-. Do not use the “select report” drop-down box.

(Please Note: The following screenshots serve as examples. The units for which you have access will be visible to you.)
Your Workspace [Strategic Plan Workspace 2017- ]

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

The **Standing Requirements** category contains information that will remain relatively steady over time, whereas the **Planning Cycles** will be updated each year.

**NOTE:** Multiple planning cycles will be active to allow completion of the previous year (2018-19) and preparation for the next (2019-20).

Please be sure that you are working in the intended planning cycle.
Entering Information

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

While this guide will walk you through the technical components of adding content to your workspace, you will find additional directions regarding the type of content you are expected to enter into a particular requirement by selecting an area, such as “Mission Statement,” which will show the following under Directions.

When you are ready to enter content, click the green CHECK OUT button in the upper right-hand corner of the page. Checking out your requirement allows you to add or modify content to it, but others with access to the workspace will be unable to see your changes or make changes of their own until you have checked it back in.

When you are finished entering your data, click the CHECK IN button that replace Check Out.

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

NOTE: All requirements in AMS use this Check-Out/Check-In system. When you log out of Taskstream/AMS or navigate away to a different website, all workspace requirements will be automatically checked in.
Standing Requirements

Strategic Plan
To upload the unit’s strategic plan, begin by clicking **Strategic Plan** under the Standing Requirements section on the left navigation panel. You will see directions provided. Please click **CHECK OUT** from the upper right.

Once you have clicked **CHECK OUT**, you will see options across the bottom of the screen to upload the strategic plan.
Choose “attachments” and then select “upload from computer.” The following screen will appear:

Drag your strategic plan document into the space provided or choose it from your files. Click **Upload and Close** and then **Save and Return**. To complete this section, click **CHECK IN** from the upper right.
Mission Statement
To enter the unit’s mission statement, begin by clicking on Mission Statement under the Standing Requirements section on the left navigation panel. You will see directions provided. Please click CHECK OUT.

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

Directions
Use this space to document the mission statement, as defined in the unit’s strategic plan. The mission statement should be a clear and concise statement outlining the planning unit’s purpose, including any unique features, populations served, etc. The unit’s mission statement must align with the mission of the University.

To begin, please Check Out this requirement and then click the Edit button. This will open the content window and you will be able to input (or copy/paste) the appropriate Mission Statement into the window. When you are satisfied, click the Submit button. In order for others to access this requirement you will need to Check In the requirement when you are finished.
Enter the unit’s mission statement into the box provided and then click *Submit* in the upper right.

Next, The following screen will appear, please click *No Updates Required*.

The screen will go back to the main mission statement section. **CHECK IN** to complete this section.
Priority Outcomes
This requirement allows you to document priority outcomes. To begin entering your outcomes, click **Priority Outcomes** from the left navigation panel, then click **CHECK OUT** in the upper right-hand corner of the page.

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

1. **ESTABLISH A NEW SET** of priority objectives/outcomes by clicking **Create New Set**.

Enter a title for your set. Click the box to designate alignment/mapping. Click **Continue**.
2. **USE AN EXISTING SET** or revise an existing set, click *Select Existing Set.*

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

**ADDING or REVISING OUTCOMES.** Now you can add or revise outcomes within this set. To add, click *Create New Outcome.*
Enter a title. You may also enter a more in-depth description, if desired. Click Continue when finished.

The following window confirms that you have added a new outcome. You can then click Add mapping to map your outcome to an institution-wide goal (more on this below), or you can click Add another outcome to enter another outcome, or you can click Back to all outcome sets to return to your outcomes page. Repeat these steps for all outcomes you want to enter.
Mapping Outcomes to LSU2025

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

Outcomes may be easily edited via the “*Edit*” button to the right of the listed outcome.

If *Mapping* to LSU2025 was not completed when the outcome was created or revisions are needed, you may click on “*Map*” to accomplish this at any time.

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

CREATE NEW MAPPING

Use the first drop-down menu on this page to select *Goal sets distributed to [NAME OF YOUR UNIT]*, then click *Go*.

Next, click the radio button next to goal set, LSU2025, to map your outcome, then click *Continue*.
Choose which of the LSU2025 strategies align with your outcomes (you can select more than one if applicable) and click Continue. [Note: The six strategic challenges and the three primary areas of our Institutional Framework will be available to select. The snapshot below provides an example.]

- Transforming Education
  - Improve Pre-K-12 Education
  - Advance Higher Education
  - Enhance Continuing Education
  - Related Strategies: Promoting a Culture of Lifelong Learning

You will now see the outcome set items mapped or aligned with your Outcome. Repeat these steps for all future mappings.

Once you are finished making changes to your Outcomes requirement, click CHECK IN in the upper right-hand corner of the page.
Planning Cycle: Measures & Targets

The first step in the annual Planning Cycle is to enter (or review from prior year) Measures & Targets for each outcome. To begin working in this requirement, click its name from the workspace structure on the left, then click **CHECK OUT** in the upper right-hand corner of the page.

1. **2019-2020 Planning Cycle**
   - Measures & Targets
   - Findings & Use of Findings
   - Action Plan (Optional)
   - Action Plan Status (Optional)
   - Strategic Planning Annual Report (SPAR)

The first time that this requirement is checked out, you will see two buttons, **Create New Assessment Plan** and **Copy Existing Plan as Starting Point**. If you are planning to continue from a previous cycle, you can click **Copy Existing Plan as Starting Point** to make an editable copy of a previous year’s plan. To create a new plan from scratch, click **Create New Assessment Plan**.

- **CREATE NEW ASSESSMENT PLAN**
- **COPY EXISTING PLAN AS STARTING POINT**

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

- **Select Set**

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

- **Select outcome sets for Measure**
- **SELECT EXISTING SET**
- **ACCEPT AND RETURN TO PLAN**

Select an Outcome Set you wish to assess that cycle by clicking the radio button next to its name, then click **Continue**.
Check the boxes next to the outcomes you wish to assess and then click *Accept and Return to Plan* in the upper right-hand corner of the page.

To add a measure to an outcome, click *Add New Measure* to the right of that outcome.
Then, add the details of your Measure in the appropriate fields. The required fields include: Measure Title, Details/Description, and Target. The other fields are optional.

Click Apply Changes when you are finished.

Your newly added measure will now appear within your outcome.

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

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

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

Once you have gathered the findings/results for your measures in a given cycle, you may document that data in your workspace in the Findings & Use of Findings requirement. To begin working in this requirement, click “Findings & Use of Findings” from the workspace structure on the left, then click CHECK OUT in the upper right-hand corner of the page.

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

Then, add the details of your findings and use of findings. Please be sure to articulate the use of findings by addressing questions such as: What actions have you taken to improve your unit’s programs or services based on evidence gathered from this assessment? Did the results yield the desired target, why or why not? What actions may need to happen to achieve the goal or for improvement? Are there ways to improve the assessment process? Click Submit when complete.
Your newly added findings will now appear within your measure.

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

In the window that opens, you can either click Browse to search through your computer for a document to upload, or the Web Links tab to include a link to another online resource.
Repeat these steps to add findings to your other measures, then click **CHECK IN** in the upper right-hand corner of the page and document your changes in the Revision History Log.
Optional: Action Plan

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

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

Then, click Select Set to choose an Outcome Set that will drive your actions.
Next, click *Select Existing Set* in the upper right-hand corner of the page.

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

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

To add an action to an outcome, click *Add New Action* to the right of that outcome.
Then, add the details of your action in the appropriate response elements.

<table>
<thead>
<tr>
<th>Action Information for:</th>
<th>* Goal: test 1</th>
</tr>
</thead>
</table>

* Required fields

**Action Information for:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linked to Findings</td>
<td>No Findings have been created on this workspace using the same Goal as this Action.</td>
</tr>
<tr>
<td>* Action Item Title</td>
<td></td>
</tr>
<tr>
<td>Action details</td>
<td></td>
</tr>
<tr>
<td>Implementation Plan (Timeline)</td>
<td></td>
</tr>
<tr>
<td>Key/Responsible Personnel</td>
<td></td>
</tr>
<tr>
<td>Measures</td>
<td></td>
</tr>
<tr>
<td>Budget approval required? (describe)</td>
<td></td>
</tr>
<tr>
<td>Budget request amount</td>
<td>$</td>
</tr>
<tr>
<td>Priority level</td>
<td></td>
</tr>
</tbody>
</table>

Click **Apply Changes** when you are finished.

**APPLY CHANGES**

You newly added action will now appear within your outcome.
You may include additional information related to your action by clicking Add/Edit Attachments and Links.

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

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

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

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

Then, add the details of your action’s progress in the appropriate response elements on the following page. Click Submit when you are finished.

Your newly added status will now appear within your action.
You may include additional information related to your action status by clicking *Add/Edit Attachments and Links*.

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

Repeat these steps to update the status of this or other actions, then click **CHECK IN** in the upper right-hand corner of the page and document your changes in the Revision History Log.
Strategic Planning Annual Report (SPAR)

The Strategic Planning Annual Report (SPAR) provides a checkpoint of status and is used in conjunction with faculty and staff performance evaluations. The SPAR is uploaded as an attachment in Taskstream. To begin working in this requirement, click its name from the workspace structure on the left, then click CHECK OUT in the upper right-hand corner of the page.

An Add toolbar will appear at the bottom of the page that indicates the types of content you can include in this requirement, although the most common types are Text & Image, Attachments, and Links.

To upload a document from your computer to this requirement, click Attachments.

On the following page, click Upload from Computer in the Add New Attachment box on the left:
You can then either drag your file(s) directly into the window which opens, or you can click Add Files to search through your computer for file(s) to upload.

Once you have selected your file(s), click Upload and Close.
You will then see your uploaded file(s) appear in the middle of the page. Click *Save and Return*.

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

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

Once you see all the links you would like to add in the middle of the page, click *Save and Return*. Once you are finished making changes to your Other Documents requirement, click *CHECK IN* in the upper right-hand corner of the page.
Additional Resources

Additional resources, including the Campus-wide Strategic Planning Guidelines, may be found at www.lsu.edu/oie.

Questions

If you have any questions or need to add users to access your planning materials, please contact Sandi Gillilan, Associate Vice Provost for Institutional Effectiveness, at sgillilan@lsu.edu.