Taskstream Tips

Logging in: There are two ways to log into the system.

1. Use the Citrus Portal (my.citruscollege.edu) and search for Taskstream. Use the link to go to the Portal login, and then put in your usual Citrus login name and password.
2. Go directly to login.taskstream.com and put in your full email address and the password you gave when you set up your Taskstream account.

Getting Help: There are help documents kept in the Shared Resources menu (top of page). Click the Search button and you will see a couple of links including one for Taskstream Template Instructions. The main page also has links to a set of helpful videos.

Checking out and Checking in: You need to check out a workspace to edit it. The Check Out button shows up at the top right part of the workspace. A padlock symbol beside the button means it has already been submitted or is locked for other reasons. If the Check Out button is gray instead of green, somebody else has it checked out right now. When you finish in a workspace, click on Check In to allow others to come in and edit. The system will automatically check the page in when you log out.

Who's been playing with my workspace? If you want to see who has checked out any given workspace just click on the View Log link at the top of the workspace. This will bring up a list of everyone who has checked in and checked out, as well as anyone who submitted the work and the reviewers' comments.

Where did my content go? You open up a workspace that should have work done but cannot find it. Look for the title of the section in the workspace–usually written in black with a gray horizontal bar across the page. Click on the small black triangle in front of it and the content should pop up.

Going Home: Taskstream does not like the back button on your browser. It often gets confused when you use it. However, if you select Home in the menu at the top of the page it will always take you back to the entry screen where you can see the workspaces (programs and/or courses) available to you.

Printing and Making PDFs and Word Docs: You can print out a section of your document or you can export all or part of your document to PDF or Word. To print a section, use the Print button. To export the section or document to Word, click on the Word button. The Publish tab near the top of the page offers options to export the entire document to PDF or Word. If you export to PDF it will also give you options to export the attachments as well. When you export to Word or PDF, you will get a message in the Messages folder (top of page) to let you know it is ready. To download the file, go to Resource Tools and click on Exports. You should see a link to download the file there.

Submitting the Work: Program reviews and SLO Assessments are not done until you submit them. Click on the Submission & Read Reviews tab at the top of the page and select Submit Work for any section that needs to be submitted. Make sure you have actually completed the work before you submit it.