Quick-Start Guide:
Folios & Web Pages

Table of Contents

Access the Folios & Web Pages Area

Go to login.taskstream.com and log in using your assigned username and password.

Click **Folio & Web Pages** from the top navigation bar.

Create a New Folio or Web Page

1. Click the **Create New** button at the top right of the page
2. Enter a name in the **New Folio/Web Page Name** field.
3. *(Optional)* Select the folder you would like to add your folio to.
4. Click the **Create New** button.

5. Select the **Template Category**.

6.   Select the specific template you wish to use as a starting template and click the **Continue** button.

Customize the Appearance of your Folio or Web Page

Scroll up or down in the theme browsing window to see the themes that are available to you.
Options may vary depending on your organization's settings.
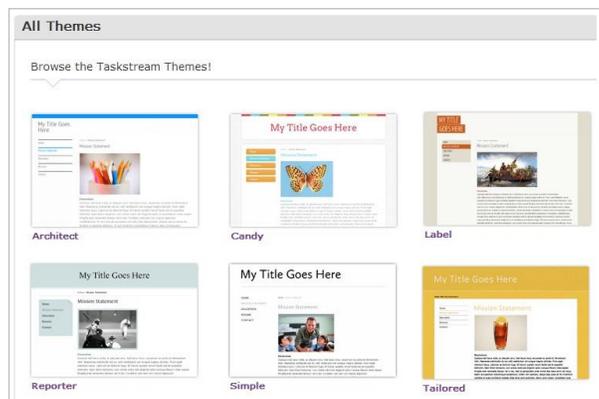
Clicking on a theme will bring you to the customization page.

1. Choose a layout and a color for your folio.
2. Click the **Preview** button to see how your folio will look with this theme
3. After looking at the preview, close the pop-up window and either click **Apply** to choose the selected theme or click **Cancel** to return to the theme selection screen.
4. Once you are happy with your theme selections, click **Apply**.

You will be brought back to the theme selection page. Click the **Edit Content** tab in the upper right to begin customizing the content of your portfolio.

Customize Portfolio Content

Your portfolio workspace is divided into two frames. In the left frame you can edit the page structure of your portfolio by using buttons at the top to **add**, **delete**, **move** and **copy** pages and sections. In the right frame, you can add work to your folio or web page.
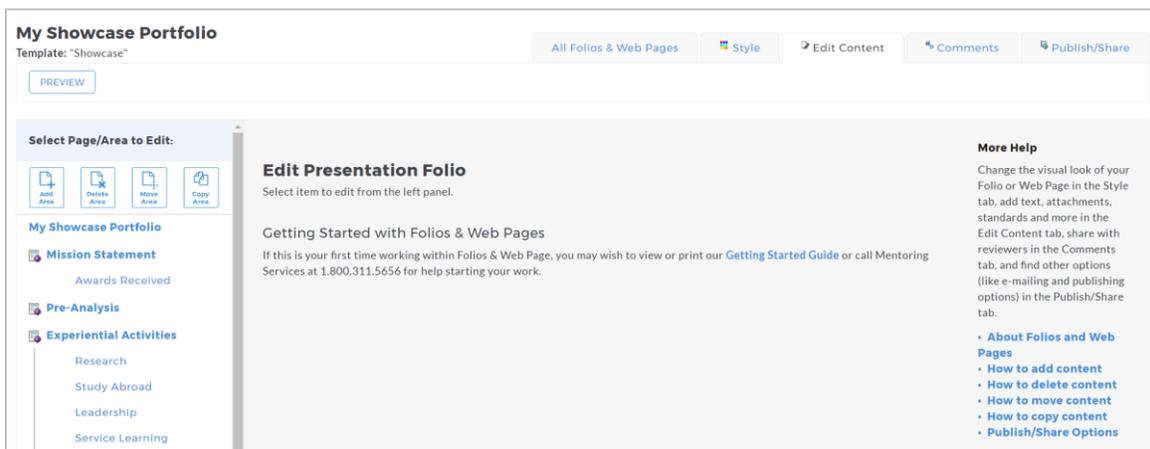
To add work, select a page or section from the left frame.

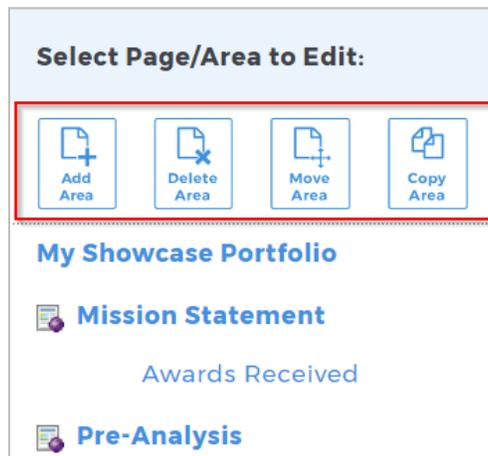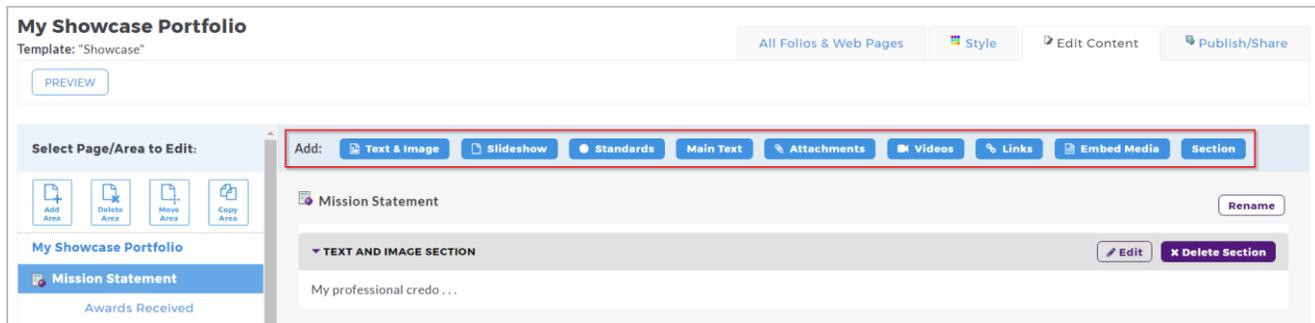When the workspace area for that page opens, click the button corresponding to the type of content you wish to add from the **Add** toolbar at the top. You can choose to add **Text & Image**, **Slideshow**, **Standards**, **Main Text**, **Attachments**, **Videos**, **Links**, and/or **Embed Media**. You can also use the **Section** button to add a new subsection in the area you are working in.
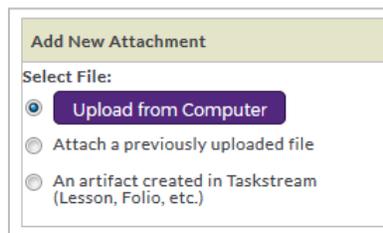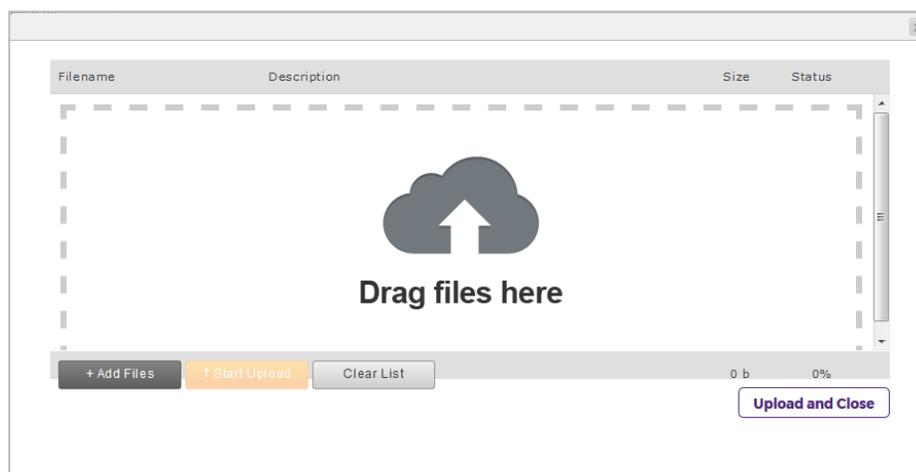

Adding Attachments

Step 1: Click the **Attachments** button

Step 2: Select the type of file you wish to add.

If you choose to add a file saved on your computer, select the **Upload from Computer** radio-button to find the file you want to attach.

A pop-up window will appear. You may drag your files into the indicated space, or click **+ Add Files**.

Once you have chosen your file, click **Start Upload**. You may also add an optional description. When the file has uploaded, click the **X** to close the window. If you wish, you can click **Upload and Close** in the lower right, which will simultaneously upload the file and close the pop-up window.

If you choose to add a previously uploaded file, select the **Attach a previously uploaded file** radio-button, selecting the category of work and the specific work product where the file is attached.

If you choose to add work that you created in your account, select the **An artifact created in Taskstream** radio-button. You will then be able to select the type of work to be added (web page, web folio, etc.), and the specific work you would like to attach.

Step 3: *(Optional)* Name the file.

Step 4: *(Optional)* Add a description of the file, if applicable.

Step 5: *(Optional)* Select the checkbox if you would like to specify standards that this attachment addresses.

Step 6: Click the **Add File** button when finished.

Repeat steps 2-6 as necessary, then click **Save and Return**.

Change the Order of Your Content

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.

Click **Reorder Content** in the right work panel.

In the Drag to Reorder Content pop-up box you will see the various content types that you have already added to the selected area.
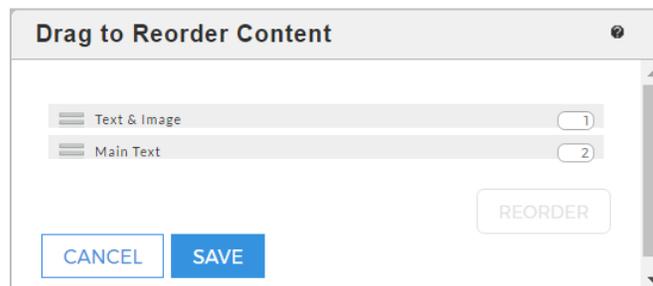
There are two approaches to reorder content:

**Drag and Drop Content Sections**

- Select (click with mouse or, if using a touch-screen, tap) the row of the content type that you want to move.
- 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.
- Release the "drag." The row comes to rest in the last position held by the placeholder.
- Click the **Save** button.

Manually Re-Number Content Type Sections

- Type new position numbers in the text boxes that display to the far right of every content type on this list.
- *(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.
- Click the **Save** button.
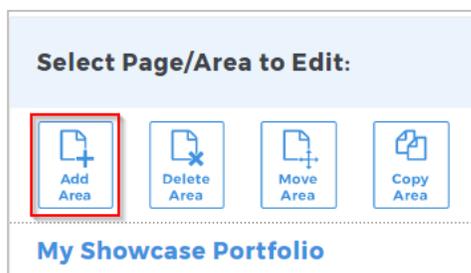
Previewing Your Folio or Web page

You can preview your folio or web page at any point of the creation and editing process by clicking the **Preview** button. The web view will open in a new window, giving you an idea of how your folio or web page will appear once emailed, published to the web, or saved offline.
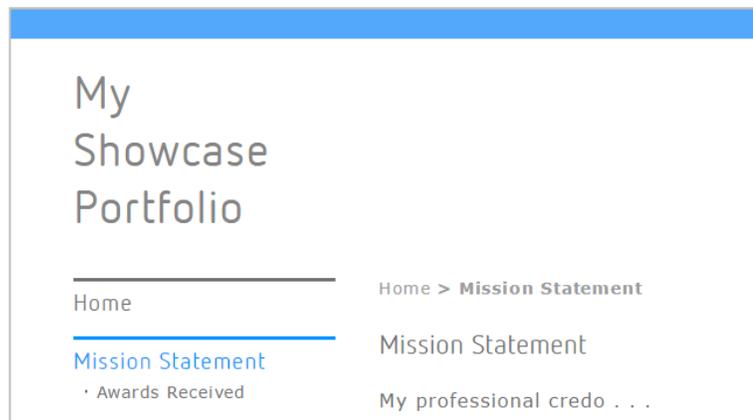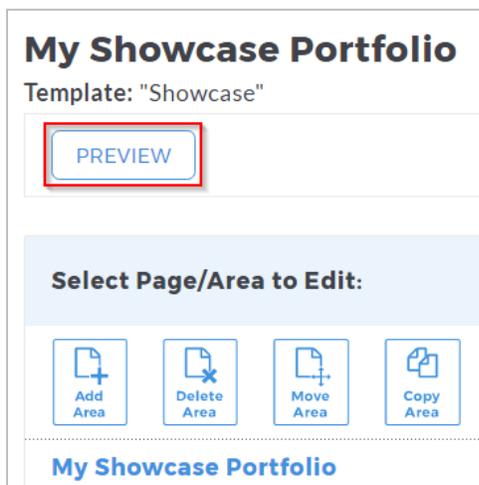
Altering the Structure of the Folio or Web Page

Adding a New Page

To add a new page to your folio or web page, select an existing main page or a sub-page by clicking the title from the left frame, and then click the **Add Area** button from the top of the left frame.

Adding a New Content Section

To add a new content section to your folio or web page, click the **Section** button from the Add toolbar.

After clicking the **Create** button, you should see the new section appear in the portfolio structure in the left frame.

Deleting a Page or Section

To delete a page or section of your web folio, click to select the item from the left frame, and then click the **Delete** Area button from the top of the left frame. This will delete the page or section, all content it contains, and any linked pages or sections.
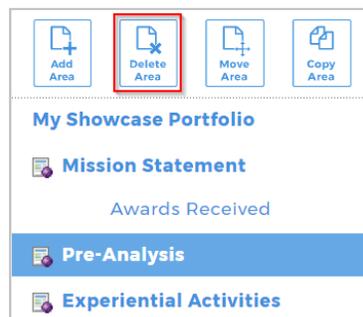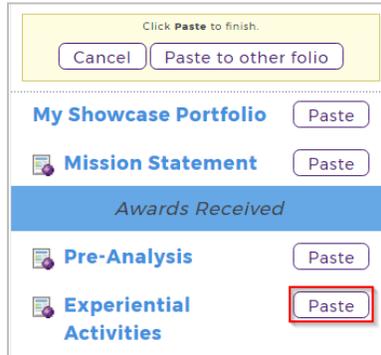

Moving a Page or Section

To move a page or section, click to select the item that you want to move in the left structure. Then click the **Move Area** button from the top of the left frame.
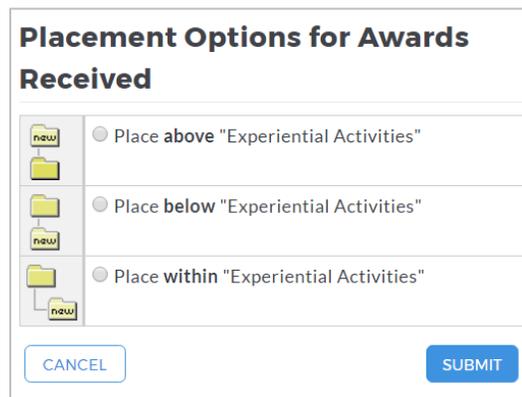
A **Cancel** button and a **Paste to other folio button** will appear at the top of the left frame, and a list of the pages and sections within the current portfolio will be displayed with Paste buttons appearing next to each one.
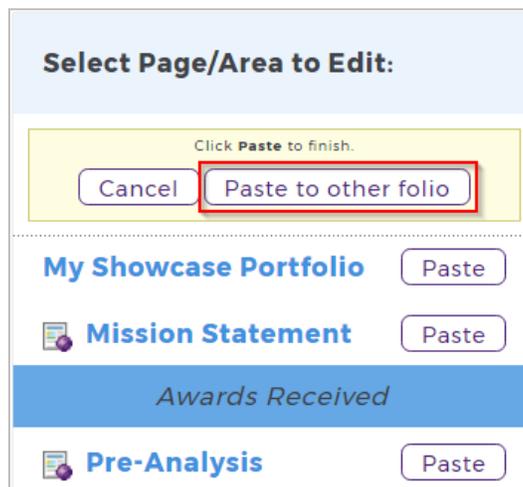
To paste the page or section within the current folio, click the **Paste** button next to the page or section to which you want to move your selection.

The Placement Options window will appear, displaying the various location options for pasting the selected item. Select the location, and click the **Submit** button. The item will be moved to the location that you selected.
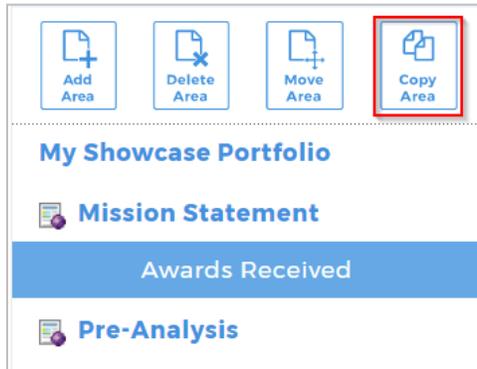

To paste the page or section to another existing portfolio, click the **Paste to other folio** button. A list of all your existing portfolios will appear. Select the one to which you want to move your selection, and paste your selection as described above.

Copying a Page or Section

To copy a page or section, click to select the item that you want to copy, and then click the **Copy Area** button at the top of the left frame.


Once again, a **Cancel** button and a **Paste to other folio** button will appear at the top of the left frame, and a list of the pages and sections within the current portfolio will be displayed with Paste buttons appearing next to each one.

To paste the page or section within the current folio, click the **Paste** button next to the page or section to which you want to move your selection.
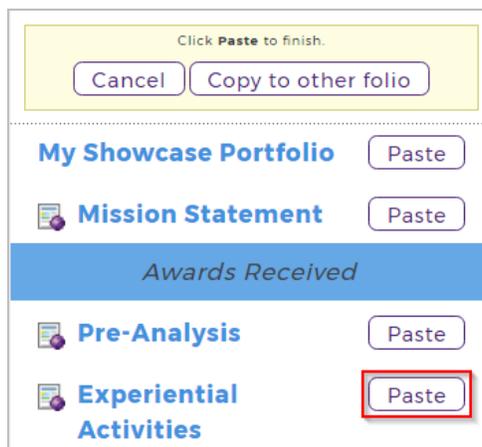
The Placement Options window will appear, displaying the various location options for pasting the selected item. Select the location, and click the **Submit** button. The copied item will be placed at the location that you selected.
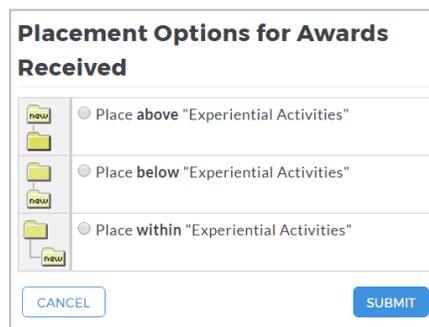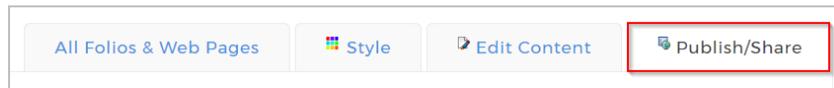
To paste the page or section to another existing portfolio, click the **Paste to other folio** button. A list of all your existing portfolios will appear. Select the one to which you want to copy your selection, and paste your selection as described above.
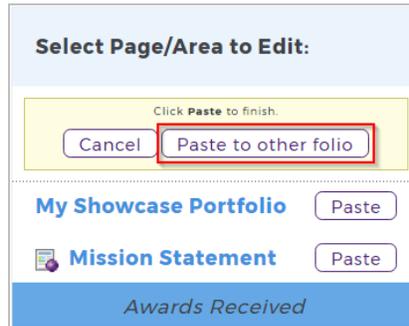
Sharing Your Folio or Web page

Click the **Publish/Share** tab.

Email your Folio or Web Page

Click **Email this Web Folio**.

On the resulting form, you will see that you can either send the portfolio to another Taskstream LAT by Watermark subscriber or you can choose to email to external recipients.

If you wish to email the portfolio to internal recipients, click the **Select Recipients** button to choose the Taskstream user(s) to whom you would like to email your portfolio.

- You can send a view-only copy.
- You can select the option to **Allow recipient(s) to make an editable copy of this presentation folio**. This will allow the recipient the ability to make a copy of the portfolio.
- You can select the option to **Allow recipient(s) to make an editable copy of the Taskstream work contained within the presentation folio**. They will not be able to copy the whole folio.

Personalize your message (optional), choose if you would like to specify a password for your portfolio (if sending to external recipients), and click **Send Message** to finalize the email of your folio.

Publish your Folio or Webpage

Click **Publish**.

1. If you would like to change the web address, make those changes in the first box.
2. You then have the option to require a password.
3. Click **Publish**.

4. The next screen will confirm that your publication was successful.
5. If you would also like to publish to social media sites, click on the appropriate Share button. You will be brought to the associated site's login screen to enter your information and proceed through their site.