

Integration

Canvas/LAT Integration

Setup Guide



watermark[™]

1.800.311.5656 | support@watermarkinsights.com

Contents

Data Integration Solutions

Part 1: Step-by-step Setup Guide for the Canvas Administrator/Taskstream Admin

- Configure Canvas and Taskstream admin areas

Part 2: Step-by-step Setup Guide for the Taskstream TS Coordinator (aka Assessment Coordinator)

- LMS Mapping within Taskstream DRF Program

Part 3: Step-by-step Setup Guide for the student within Canvas

- Student Experience: How to submit

Part 4: Step-by-step Guide for the Taskstream Evaluator

- How to send a Taskstream score into Canvas

Data Integration Solutions

Enterprise Data Hub Launches

The Enterprise Data Hub establishes a central portal through which institutions can manage data between Taskstream by Watermark and other enterprise data resource systems within or outside of the campus infrastructure. The Enterprise Data Hub has been built to scale and utilizes non-relational database technology to process vast amounts of data.

Direct Access to Taskstream from within Canvas

The Enterprise Data Hub creates a direct data link from Taskstream by Watermark to Canvas data. Taskstream by Watermark which previously required students to log into both Canvas and Taskstream by Watermark can now be completed from within Canvas alone, greatly simplifying and streamlining the student workflow and user experience.

Students are able to navigate into a single course section in Canvas and interact with their assessment requirements in the LMS assignment area.

This seamless integration establishes a critical connection between student work submitted at the course level in the LMS and the learning outcomes assessed at the course, program and institution levels in Taskstream by Watermark.

Grade Transfer from Taskstream to Canvas LMS Gradebook

Artifacts submitted to Taskstream by Watermark assessment requirement within the Canvas assignment area are available in Taskstream by Watermark for scoring by the Evaluator. Once the Evaluator submits a final score for the artifact it automatically passes back to the LMS and populates the gradebook. This eliminates the need to score assignments in two systems, simplifying the Evaluator workflow.

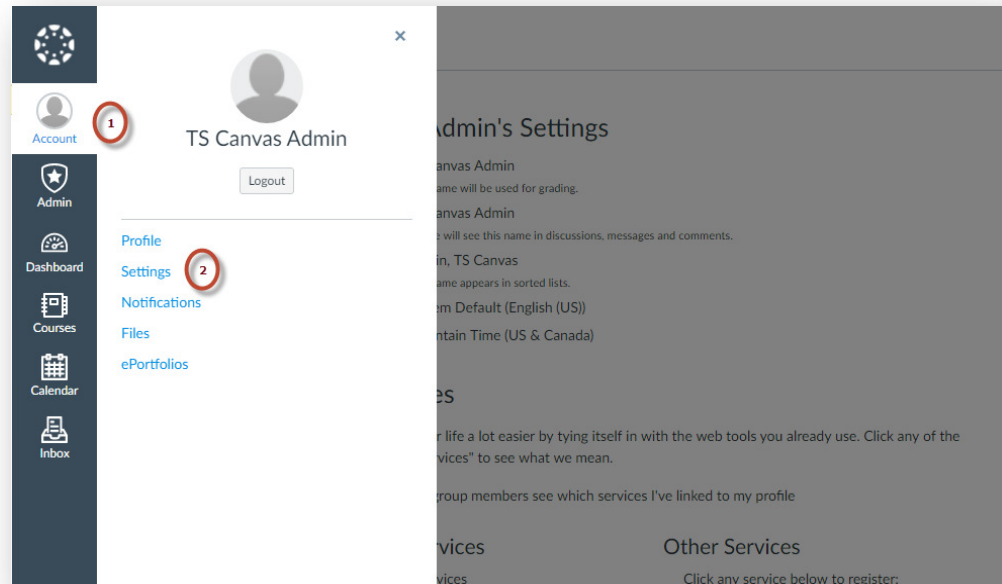
This document explains step by step how you can set up your LMS to utilize the Taskstream by Watermark Integration Solutions.

Part 1: Step-by-step Setup Guide for the Canvas Administrator/Taskstream Administrator

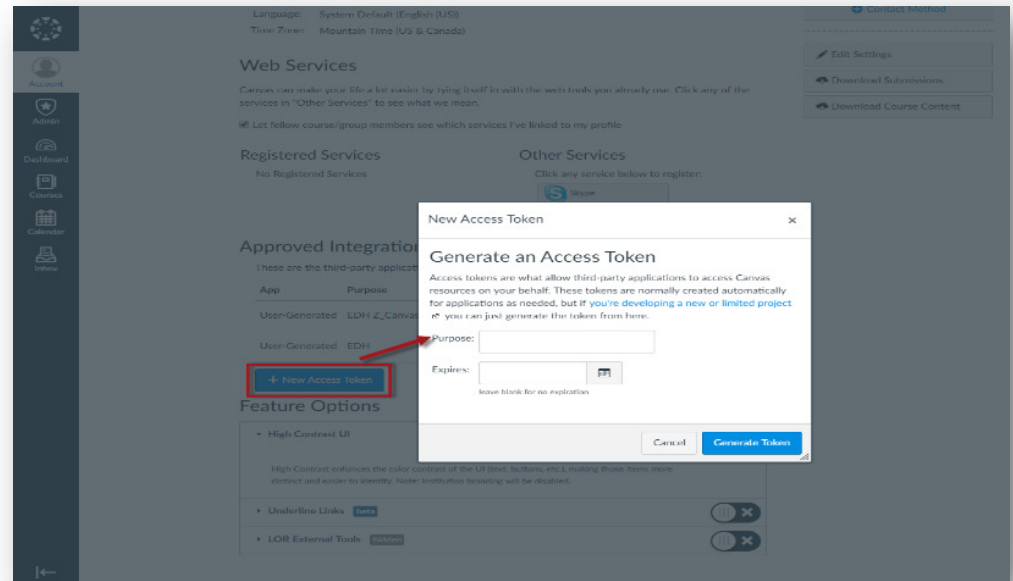
Configure Canvas and Taskstream admin area – Required for Student Experience and Grade Transfer

Steps:

1. Log into Canvas with a System administrator account
2. On the right hand bar, click on the “Account” icon
3. Then click on the “Settings” link.



4. Under the “Approved Integrations” section, click on the **New Access Token** button.
5. This will launch a pop-up and enter a **Purpose** (ex: Taskstream Integration). Leave the **Expires** field blank and click **Generate Token**.
6. It returns a token string. Copy this value down as it will be used for configuring on the Taskstream end.



1. Logon to Taskstream – LAT (Learning Achievement Tools).
2. Click on **System Admin** from top navigation menu. Login with your credentials. If you do not have access, please contact your Taskstream contact.
3. From the **System Administrator Home Page**, click **Enterprise Data Hub**.

taskstream System Administrator

Welcome to the System Administrator Home Page
The System Administrator is able to configure preferences and access features that require a higher level of administrative access.

Tip: While an organization may have multiple System Administrators, one individual will be designated the primary System Administrator for the organization.
For help contact Mentoring Services at help@taskstream.com or 1-800-311-5656.

Administrative Options
for Z_Blackboard Demo OA

General Application Settings

- Home Page Customizations**
Post a welcoming or other important message for everyone in the organization that will appear at the top of the home page.
- Analytics and Dashboards**
Select which dashboards and widgets are appropriate for users at your institution.
- Cybrary Publishing Options**
Select if and how items are published to the Cybrary. View current storage usage.

Registration and Subscribers

- Subscribers' Information**
Update Usernames, Passwords and Email Addresses
- Registration Preferences**
Limit subscribers to using specified email domains at registration.

Integration

- Single Sign-On**
Manage connects for SAML, LTI and Shibboleth.
- Enterprise Data Hub**
Manage data feeds from Learning Management Systems, Student Information Systems and other sources.
- TS DataExchange**
Import data from CSV files to create accounts, manage program enrollment and add field placement records.
- Turnitin Originality Checking**
Enable Turnitin Originality reporting for DRF programs.
- TS Export**
Setup automatic transmissions of evaluation data via secure FTP.

- Click on the **Go** button associated with **Register Data Source Connectors**.

taskstream System Administrator

Enterprise Data Hub

[System Administrator Home](#) >
ENTERPRISE DATA HUB

DIRECTIONS:
The Enterprise Data Hub is where you have the option to centralize, manage and distribute course and program information throughout the Taskstream toolset. It also provides a way of creating tighter integration with your institution's external data sources and also allows you to reference any existing TSDE resources which may have setup for flat file (CSV) import. Once this area is setup, additional functionality will become enabled (ie. grade transfer to LMS, and an integrated TS student experience within the LMS).

Options (for Z_Blackboard Demo OA)

◉ Register Data Source Connectors	GO
◉ Manage Data Source Feeds	GO
◉ Data Feed Summary	GO
◉ Enable Data Integration	GO

- Select the Canvas **data source** from the dropdown and click **Add** button.

taskstream System Administrator

Manage Data Source Connectors

[System Administrator Home](#) » [Enterprise Data Hub](#) » **MANAGE DATA SOURCE CONNECTORS**

DIRECTIONS:
This report shows a list of data source connectors your institution registered with taskstream. To register new data source connector, please select a data source from the dropdown and click "Add" button.

Add a new Data Provider: --Select Data Source Connector-- **ADD** Search:

--Select Data Source Connector--
 LMS/CMS: Blackboard Learn
 LMS/CMS: Moodle
 LMS/CMS: Canvas

Previous | Next Page 1 of 1 **GO**

Data Source Connector	URL	Registration Name	Confirmed	Status	Modified Date	Modified By	Created Date	Created By	Action
Blackboard Learn	https://bbdemo.taskstream.com:8445	bbdemo	Yes	Active	06/22/2016 12:24 PM	Michael Chan	12/04/2015 2:07 PM	Michael Chan	Edit Test Connection Disable
Blackboard Learn	https://bbdemo.taskstream.com:8445	Bbdemo2	Yes	Active			02/10/2016 6:02 PM	Michael Chan	Edit Test Connection Disable

Previous | Next Page 1 of 1 **GO**

Showing 1 to 2 of 2 Data Source Connectors

- Fill out all information on the screen as all of the fields are required.
 - **Registration Name** – Give it a unique name (10 character limit).
 - **Tech Email** – Add a technical contact in case registered data source runs into issues.
 - **URL** – Your Canvas URL
 - **Token** – Token value generated from the first step earlier in the Canvas Setting page.
 - Click on the **Register** button to verify if the URL and token are accepted. If accepted, the system will route you back to the **Manage Data Source Connectors** page.

taskstream System Administrator

Register Blackboard Learn Data Source Connector

[System Administrator Home](#) » [Enterprise Data Hub](#) » [Manage Data Source Connectors](#) »

REGISTER DATA SOURCE CONNECTOR

DIRECTIONS:
To register Blackboard Learn as a tool provider, please fill out the required fields on the registration form below.
Legend: ■ = Required Field

Vendor ID	TSVendor1546030917105517
Program ID	TSProgram1546030917105517
■ Registration Name:	<input type="text"/>
■ Tech Email:	<input type="text"/>
■ URL:	<input type="text"/>
■ Tool Registration Password:	<input type="text"/>
■ Administrator Username: <small>This account name will be used to exchange data only. It is recommended you create a separate account for this.</small>	<input type="text"/>
<input type="checkbox"/> Request Permission in order to utilize the Taskstream integration solutions	

- Click on the **Go** button associated with **Manage Data Source Feeds**.

taskstream System Administrator

Enterprise Data Hub

[System Administrator Home](#) »

ENTERPRISE DATA HUB

DIRECTIONS:
The Enterprise Data Hub is where you have the option to centralize, manage and distribute course and program information throughout the Taskstream toolset. It also provides a way of creating tighter integration with your institution's external data sources and also allows you to reference any existing TSDE resources which may have setup for flat file (CSV) import. Once this area is setup, additional functionality will become enabled (ie. grade transfer to LMS, and an integrated TS student experience within the LMS).

Options (for Z_Blackboard Demo OA)

◉ Register Data Source Connectors	GO
◉ Manage Data Source Feeds	GO
◉ Data Feed Summary	GO
◉ Enable Data Integration	GO

- The **Manage Data Source** feature allows you to specify the course for your incoming data (and ultimately outgoing data) by data type
 - For the **Course Section, Enrollment, User and Grade** data type, select your registered data source under the **Source In** column, and then check **Enable grade transfer** under the **Source Out** column if you would like ability for Taskstream evaluators to send the scores back to Canvas.
 - * Don't check the flag 'use LTI'.

Manage Data Source Feeds

[System Administrator Home](#) » [Enterprise Data Hub](#) »
MANAGE DATA SOURCE FEEDS

DIRECTIONS:

This screen allows you to specify the source for your incoming and outgoing data, by data type. It also allows you to specify the synchronization frequency, if you want to update the data automatically or manually, which notifications you would like to receive, and where you would like them sent to.

Data Type Configuration

Data Type	Source In	Source Out
Course Section, Enrollment, User, Grade	LMS/CMS: Canvas (Canvas) <input type="button" value="Edit"/>	<input checked="" type="checkbox"/> Enable grade transfer <input type="checkbox"/> (use LTI)

- Click **Apply Changes** and it will take you to the previous page where you will need to go to **Enable Data Integration** section.

- Click on the **GO** button associated with **Enable Data Integration**

taskstream System Administrator

Enterprise Data Hub

[System Administrator Home](#) »

ENTERPRISE DATA HUB

DIRECTIONS:

The Enterprise Data Hub is where you have the option to centralize, manage and distribute course and program information throughout the Taskstream toolset. It also provides a way of creating tighter integration with your institution's external data sources and also allows you to reference any existing TSDE resources which may have setup for flat file (CSV) import. Once this area is setup, additional functionality will become enabled (ie. grade transfer to LMS, and an integrated TS student experience within the LMS).

Options (for Z_Blackboard Demo OA)

Register Data Source Connectors	GO
Manage Data Source Feeds	GO
Data Feed Summary	GO
Enable Data Integration	GO

Enable Data Integration

- You must either enable the integration for all the DRF Programs or enable it for select DRF program(s)
- Once you have enable integration on this page, it will enable the LMS Mapping button to appear on the DRF Template tab under DRF Program Management. That will eventually allow your assessment coordinator to map your Canvas data against the Taskstream Data template structure

The screenshot shows the 'taskstream' interface for a 'System Administrator'. The page title is 'Enable Data Integration'. Below the title is a breadcrumb trail: 'System Administrator Home > Enterprise Data Hub > ENABLE DATA INTEGRATION'. A section titled 'DIRECTIONS:' contains the text: 'This screen allows you to disable the data integration for all programs, enable it for all programs, or enable it for a single program.' Underneath is an 'Options' section with three radio button choices: 'Disable for all programs', 'Enable for all programs' (which is selected), and 'Enable for program(s)'. The 'Enable for program(s)' option is expanded to show a dropdown menu with the following items: 'EX ED 111', 'EX ED 111 Demo', 'Ex Ed Sample CRN', and 'General Education'. At the bottom of the options section are two buttons: 'Cancel' on the left and 'APPLY CHANGES' on the right.

- Once you click "**Apply Changes**" here, please send an email to integration@taskstream.com so that we may review everything and ensure that the data pull process is working seamlessly.

- Go back to the **System Administration Home Page**. Click **Single Sign-On**.

taskstream System Administrator

Welcome to the System Administrator Home Page
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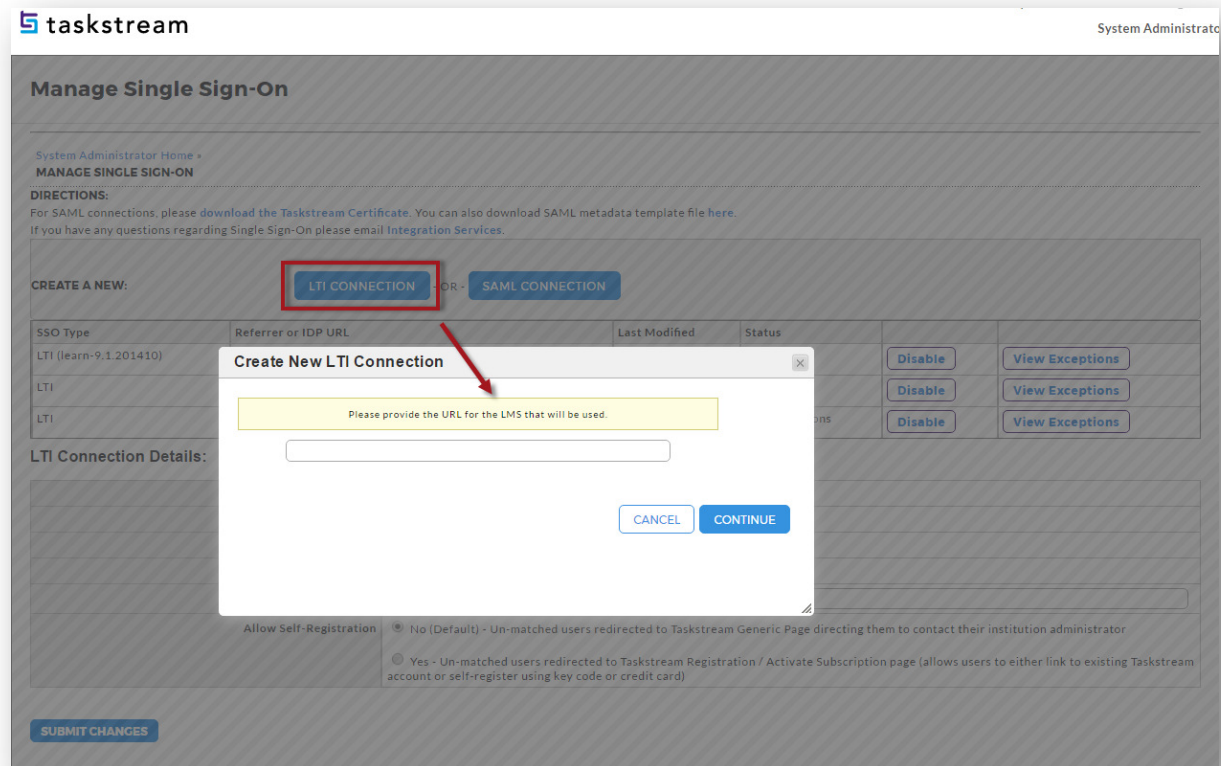
Registration and Subscribers

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Import data from CSV files to create accounts, manage program enrollment and add field placement records.
- Turnitin Originality Checking**
Enable Turnitin Originality reporting for DRF programs.
- TS Export**
Setup automatic transmissions of evaluation data via secure FTP.

- Click on **LTI Connection** button to create a new LTI connection by providing the Canvas URL that will be used, then click **Continue**.
- The system will produce an **Launch URL, Assignment Direct Access URL, Shared key** and **Shared Secret** which will be needed later to configure on the Canvas side.



Note: In this document, we will focus on the **Assignment Direct Access URL**. This URL will provide your students with a streamlined content view within Canvas that deep link the student to their Taskstream submission area. Faculty can also use this URL to SSO into the Taskstream homepage with the full range of menu options.

If your institution wants a basic SSO implementation where both faculty and students see the full Taskstream website of menu options, then the **Launch URL** should be used. However, there is currently no deep-linking and grade pass-back ability using this URL.

- Enter an **Error Notification Email** if you wish to receive an email notification if there are SSO issues.
- **Allow Self-Registration** – If your institution has new students self-register/pay for a Taskstream account, then select **Yes**. Else, select **No**.
- **Keep this page open and open a separate browser session to go to Canvas.**

taskstream System Administrator

Manage Single Sign-On

System Administrator Home »
MANAGE SINGLE SIGN-ON

DIRECTIONS:
 For SAML connections, please [download the Taskstream Certificate](#). You can also download SAML metadata template file [here](#).
 If you have any questions regarding Single Sign-On please email [Integration Services](#).

CREATE A NEW: LTI CONNECTION - OR - SAML CONNECTION

SSO Type	Referrer or IDP URL	Last Modified	Status		
LTI	https://canvasdemo.taskstream.com:3001	12/15/16	Inactive	Enable	View Exceptions
LTI	http://ltiapps.net/test/tc.php	02/26/15	Active	Disable	View Exceptions
LTI	https://canvasdemo.taskstream.com	03/09/17	Active	Disable	View Exceptions
LTI	https://mjohnson.instructure.com	01/10/17	Active	Disable	View Exceptions

LTI Connection Details:

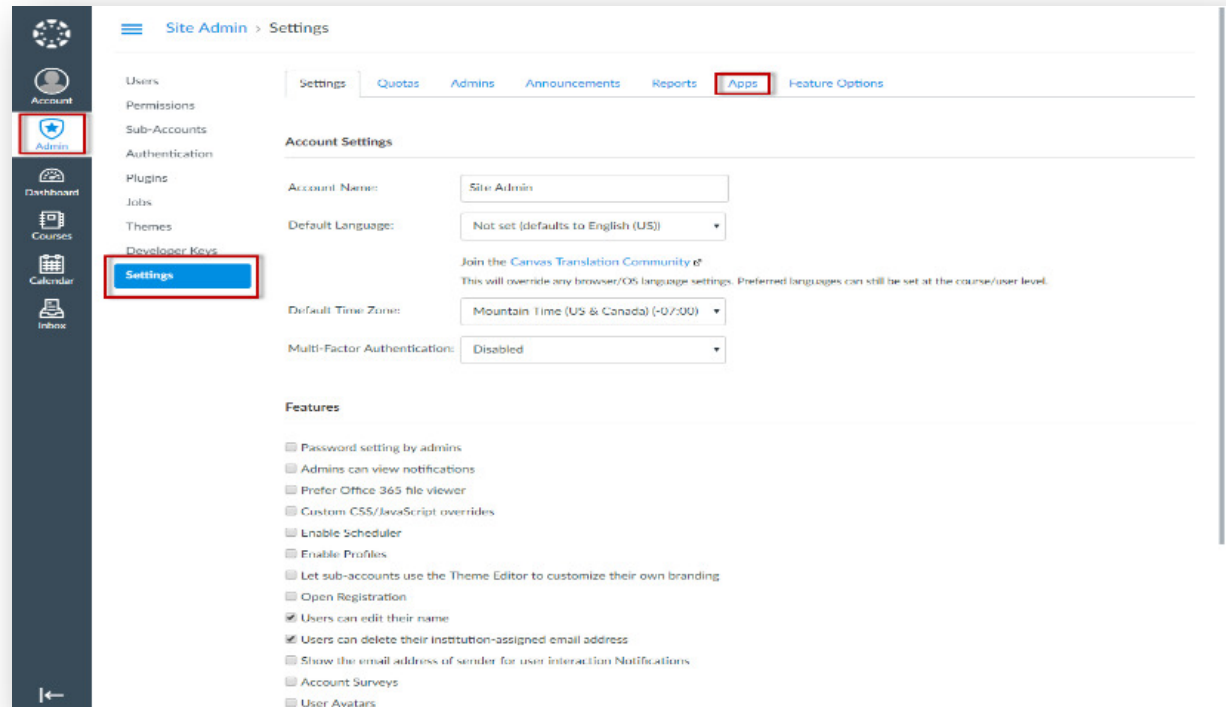
Launch URL	https://w.taskstream.com/SingleSignOn2/Login/u1hyhnhmhu
Assignment Direct Access	https://w.taskstream.com/SingleSignOn2/ContentEntryPoint/u1hyhnhmhu
Shared Key	u1hyhnhmhu
Shared Secret	fee87e939e1c4deb8846300e63093552
Error Notification Email	<input type="text" value="ema@taskstream.com"/>
Allow Self-Registration	<input checked="" type="radio"/> No (Default) - Un-matched users redirected to Taskstream Generic Page directing them to contact their institution administrator <input type="radio"/> Yes - Un-matched users redirected to Taskstream Registration / Activate Subscription page (allows users to either link to existing Taskstream account or self-register using key code or credit card)

SUBMIT CHANGES

Annotations:
 - Red box around 'Assignment Direct Access' and 'Launch URL' fields.
 - Red arrow pointing to 'Assignment Direct Access' with text: "Provides streamlined view, deep linking capability for students, while faculty goes to Taskstream homepage with full set of menu options."
 - Red arrow pointing to 'Launch URL' with text: "No deep linking for students or grade pass-back. Show full set of Taskstream menu options."
 - Red arrow pointing to 'Error Notification Email' field.

Back in Canvas, as the system admin, you will need to add a new **External App** at either the site-level or in your course shell. The external app will store the Taskstream LTI values. This link will take the student directly into their Taskstream assignment(s), while faculty will go directly into the Taskstream homepage.

- Click on **Setting** from your left-hand menu.
- Click on the **Apps** tab.



- Click the **+ App** button.

Site Admin > Settings

Users Settings Quotas Admins Announcements Reports Apps Feature Options

External Apps **+ App**

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

Name

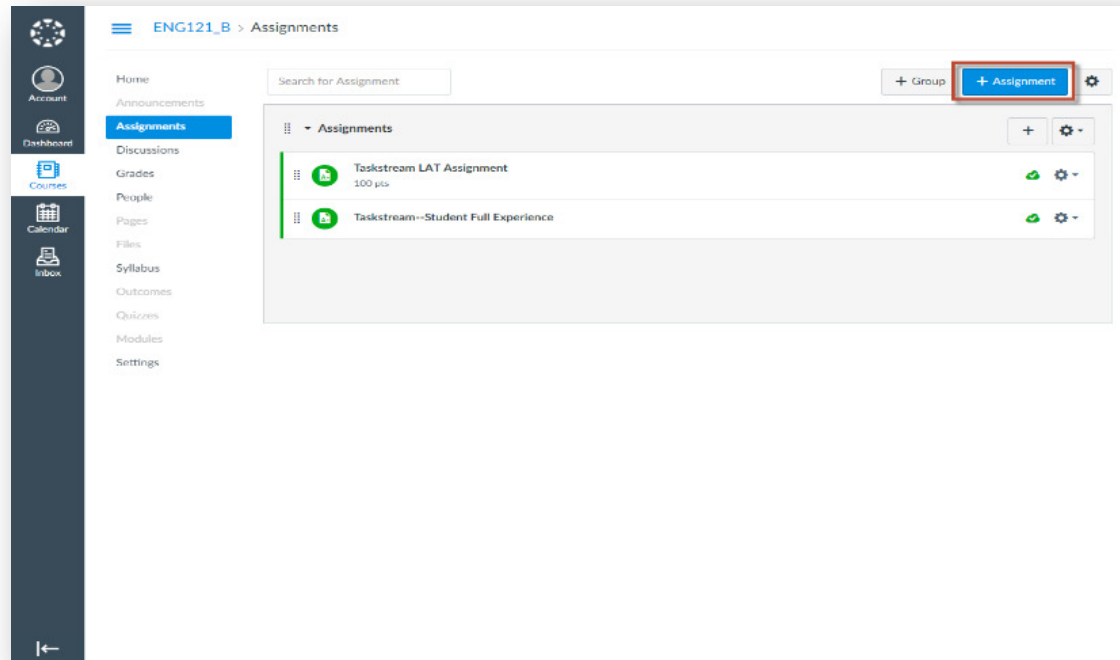
In the **Add App** pop-up,

- **Configuration Type** – Leave as **Manual Entry**.
- **Name** – Enter a name (e.g.: Taskstream Assignments) for the external app.
- **Consumer Key** – Enter the Taskstream **Shared Key** from a couple of steps earlier.
- **Shared Secret** – Enter the Taskstream **Shared Secret** from a couple of steps earlier.
- **URL** – Enter the Taskstream **Assignment Direct Access URL** from a couple of steps earlier.
- **Domain** – Enter **w.taskstream.com**
- **Privacy** – Set as **Public**.
- **Custom Fields** and **Description** – Leave as blank.
- Click **Submit** to save the record.

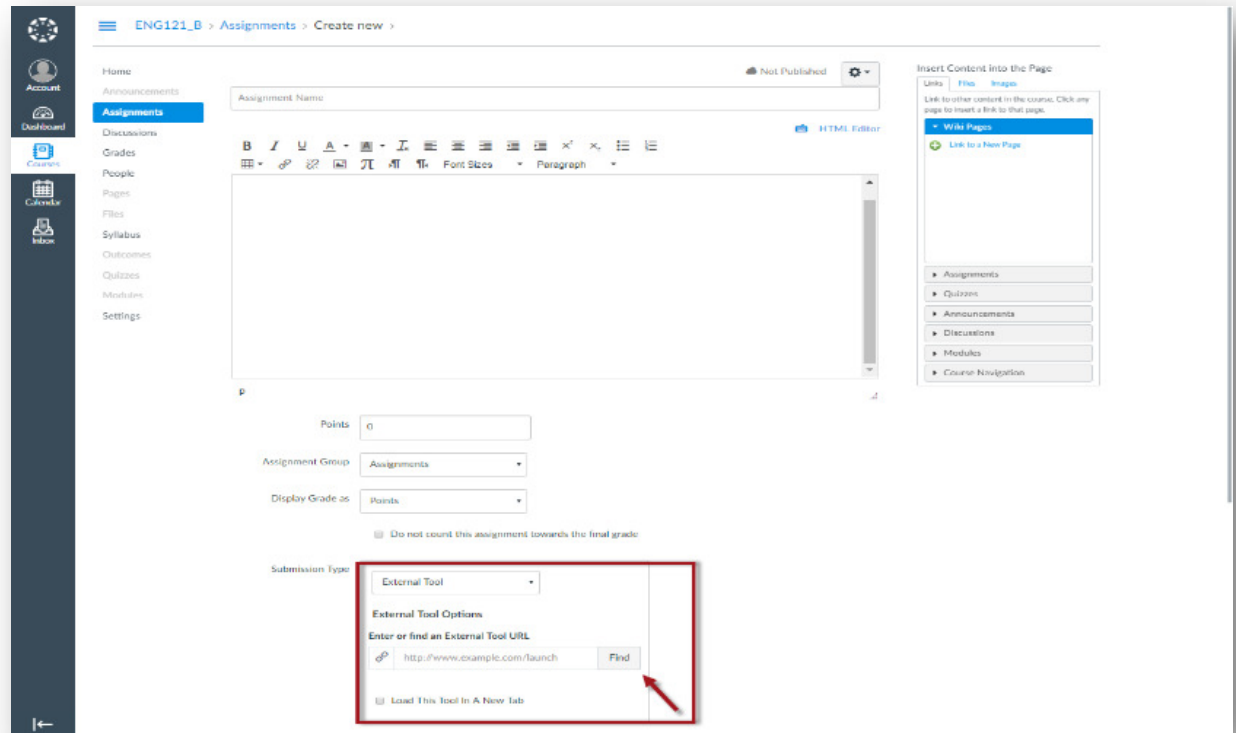
The screenshot shows the 'Add App' configuration form in a web application. The form is titled 'Add App' and is displayed as a modal window over a 'Site Admin > Settings' page. The form fields include: Configuration Type (Manual Entry), Name (Taskstream Assignments), Consumer key (Consumer key), Shared Secret (Shared Secret), Launch URL (Launch URL), Domain (Domain), Privacy (Anonymous), Custom Fields (Custom Fields), and Description (Description). The form has 'Cancel' and 'Submit' buttons at the bottom right. The background shows a sidebar with navigation options like Account, Admin, Dashboard, Courses, Calendar, and Inbox, and a main content area with a '+ App' button.

To **expose the SSO link** for students and faculty members, the External Tool above needs to be added to the **Assignments** section of the respective course.

- Click the **Courses** link on the leftmost navigation bar.
- Click the **Course Shell** name.
- Click on the **Assignment** link for your course shell.
- Click **+ Assignment** from the right side.
- Enter an Assignment name (e.g. Taskstream Assignments).
- Enter **100** into points field (optional).



- For the **Submission Type**, select **External Tool**.
- Choose the appropriate **External Tool URL** by clicking the **Find**.
- This opens up a pop-up window showing a list of possible **External Tools**. This will contain the LTI URL that attempts to SSO the Canvas user into his/her Taskstream assignment area.
- Select the external tool that was added a couple of steps previously. Choose the appropriate tool by clicking on the URL. Then choose **Select**.
- If you prefer Taskstream to appear within the Canvas frame, then do not check **'Load This Tool In A New Tab'**.
- **Moderated Grading??**
- Enter a **Due** date (optional).
- Click **Save & Publish** to save the assignment settings and publish it to the Course Section. Students can now connect to their Taskstream assignment via this new link.



Part 2: Step-by-Step Setup Guide for the Taskstream TS Coordinator (aka Assessment Coordinator)

LMS Mapping within Taskstream DRF Program – Required for Student Experience

Steps

- Once the Canvas data has been transferred into Taskstream, a TS Coordinator needs to map the Canvas course sections to the DRF requirements. This must be done to allow students to access Taskstream directly through Canvas and/or to allow evaluators to send grades back to Canvas.
- To map course sections to a DRF program, the TS Coordinator must access the DRF Template tab from within Program Management, then click on the **LMS Mapping** button.

The screenshot shows the 'DRF Program Management' page in Taskstream. The 'LMS MAPPING' button is highlighted with a red box. Below the navigation tabs, there are instructions and a table for setting up a DRF template.

DRF Program Management
History Majors

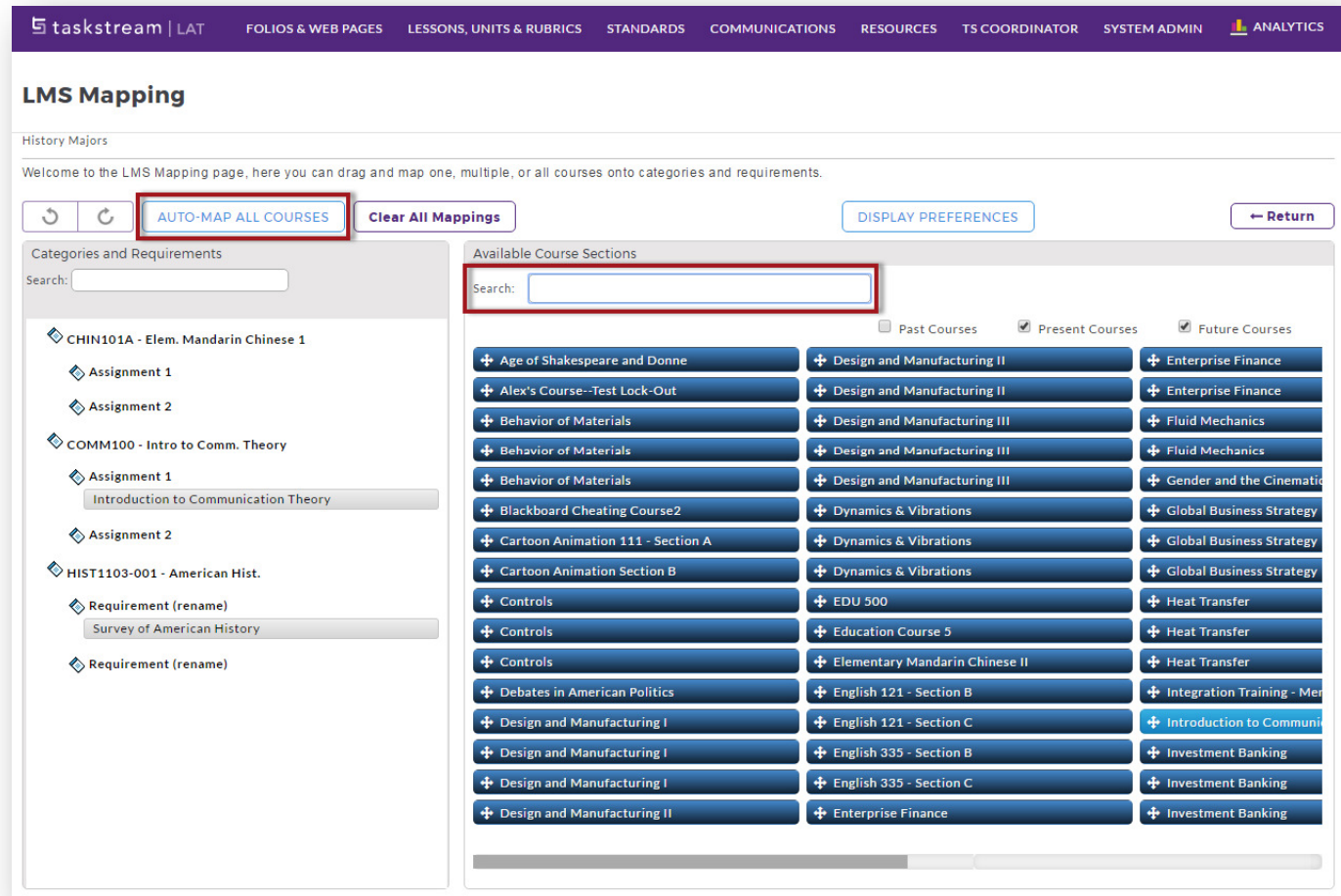
Directions: The DRF Template selected for this DRF Program appears below. Use the options on this page to edit, view, or remove the DRF Template from this DRF Program, to select/edit the number of evaluators for any single submission, to set a due date for the categories/requirements, to require an evaluation after the regular evaluation process is completed (outside evaluation), or to change author/evaluator access for each requirement within this DRF Program.

Buttons: PREVIEW, PREFERENCES, EDIT THIS DRF TEMPLATE, REMOVE THIS DRF TEMPLATE, **LMS MAPPING**

Setup for Selected DRF Template "Integration Test"

DRF Template Area	Number of Evaluators Per Submission	Additional Outside Evaluation	Due Date	Author Visibility of DRF	Evaluator Visibility of DRF
CHIN101A - Elem. Mandarin Chinese 1					
Assignment 1	1	No	None	All	All
Assignment 2	1	No	None	All	All
COMM100 - Intro to Comm. Theory					
Assignment 1	1	No	None	All	All
Assignment 2	1	No	None	All	All
HIST1103-001 - American Hist.					
Requirement (rename)	1	No	None	All	All
Requirement (rename)	1	No	None	All	All

- On the left panel is a list of your DRF structure, while the right panel shows all the Canvas course sections that were imported into Taskstream. All course sections are initially set as dark blue, but once a course section becomes mapped, the color will become a lighter shade of blue.
- There are two approaches to mapping the Canvas course sections against a DRF Category or Requirement. First off, click **Display Preferences** to search by either course name or by course number.
- If the DRF Category name contains a portion of the Canvas course name or course number, such as “EDU 101”, then clicking the **Auto Map All Courses** button will try to automatically map the Canvas course sections against the appropriate DRF area.
- Another approach is to use the Search bar to look for a specific course. The system will filter the course section results based on the search text. You can then manually click and drag the course section over to the left panel against the appropriate the DRF area.



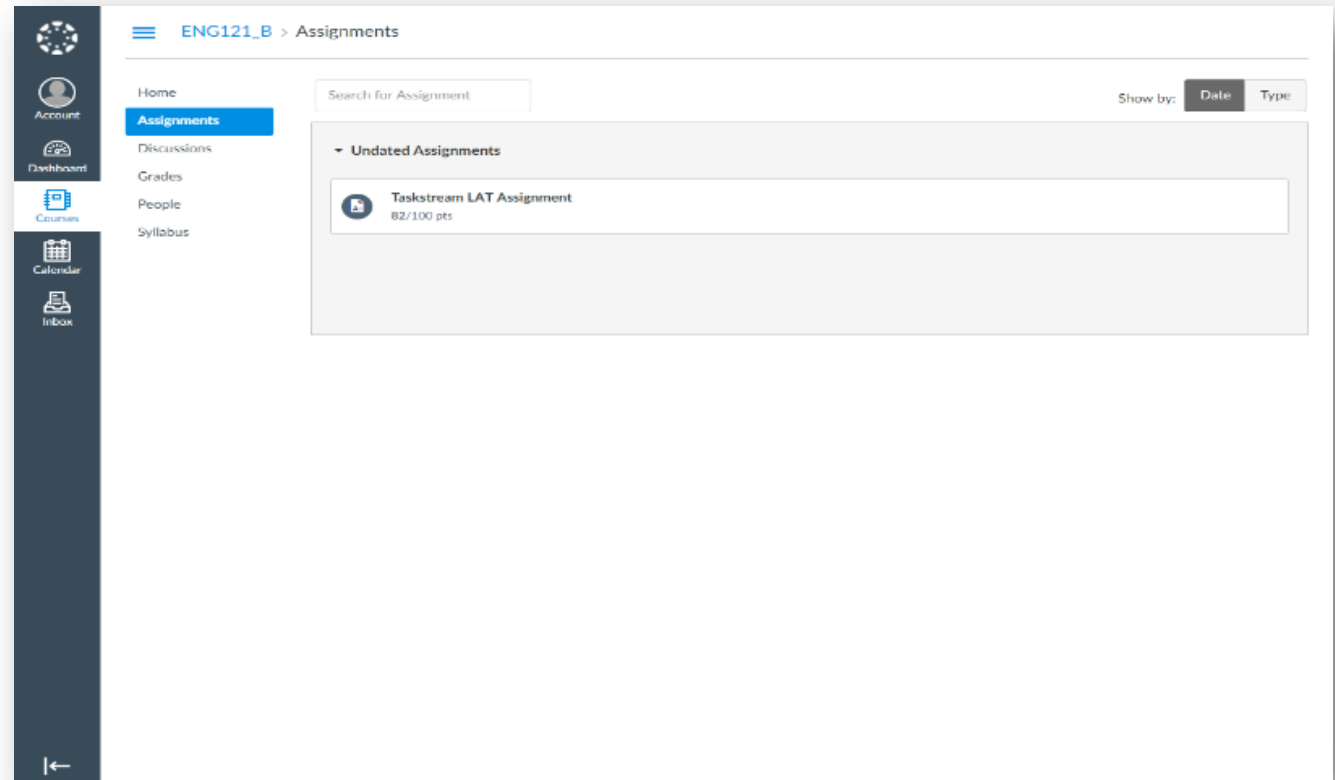
- Some shortcuts include:
 - Select more than one course section at a time by holding the CTRL key + clicking multiple course sections
 - Drag course sections(s) onto a DRF category to apply mapping to all of the requirements in that category.

Part 3: Step-by-Step Setup Guide for the student within Canvas

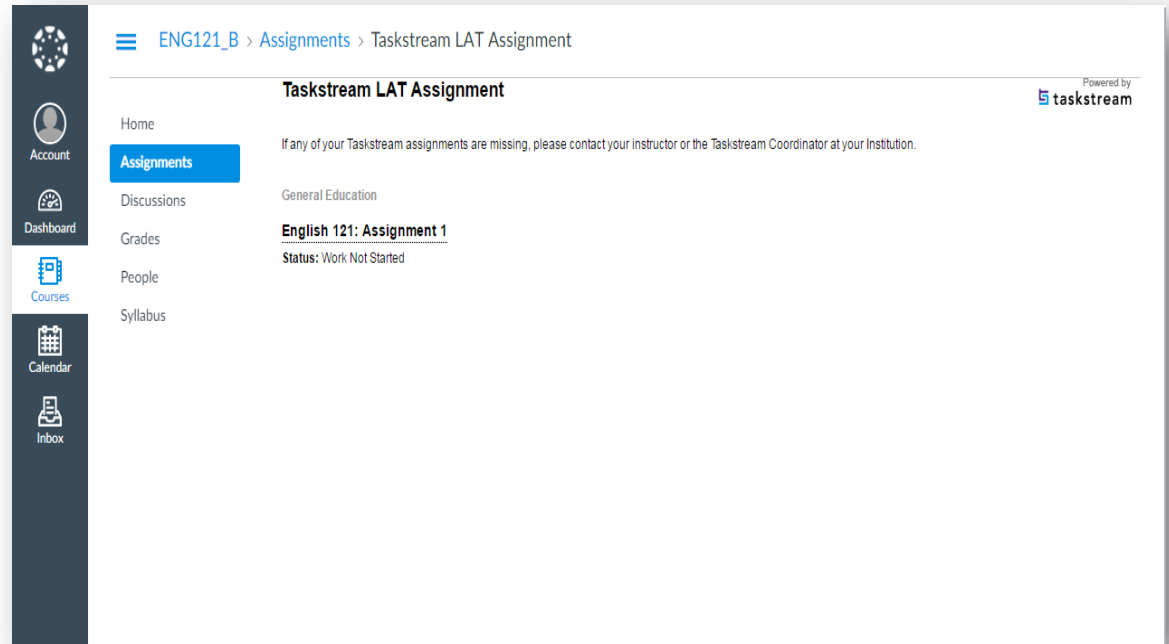
Student Experience: How to submit work into Taskstream while within Canvas

Steps

- While logged into Canvas, click on the **Courses** link on the left-hand panel.
- Click on the course, on the fly-out panel, to which you have been asked to submit work to Taskstream.
- On the left-hand panel within your course, click on the **Assignments** link.



- Under the assignments link, within the right-hand area, a link (e.g. Taskstream Assignments) should be available to you (the student) to connect into Taskstream. This link will allow you to connect in the Taskstream DRF requirement(s) and to submit your work.
- Upon clicking on that link within the Canvas course, you are redirected to a screen that lists all the Taskstream DRF requirement(s) associated to (with) the Canvas course.
- The screen display the following information:
 - DRF Program Name
 - DRF Category Name: DRF Requirement Name
 - Student Work Status
 - Taskstream Requirement Due Date (if one exists)



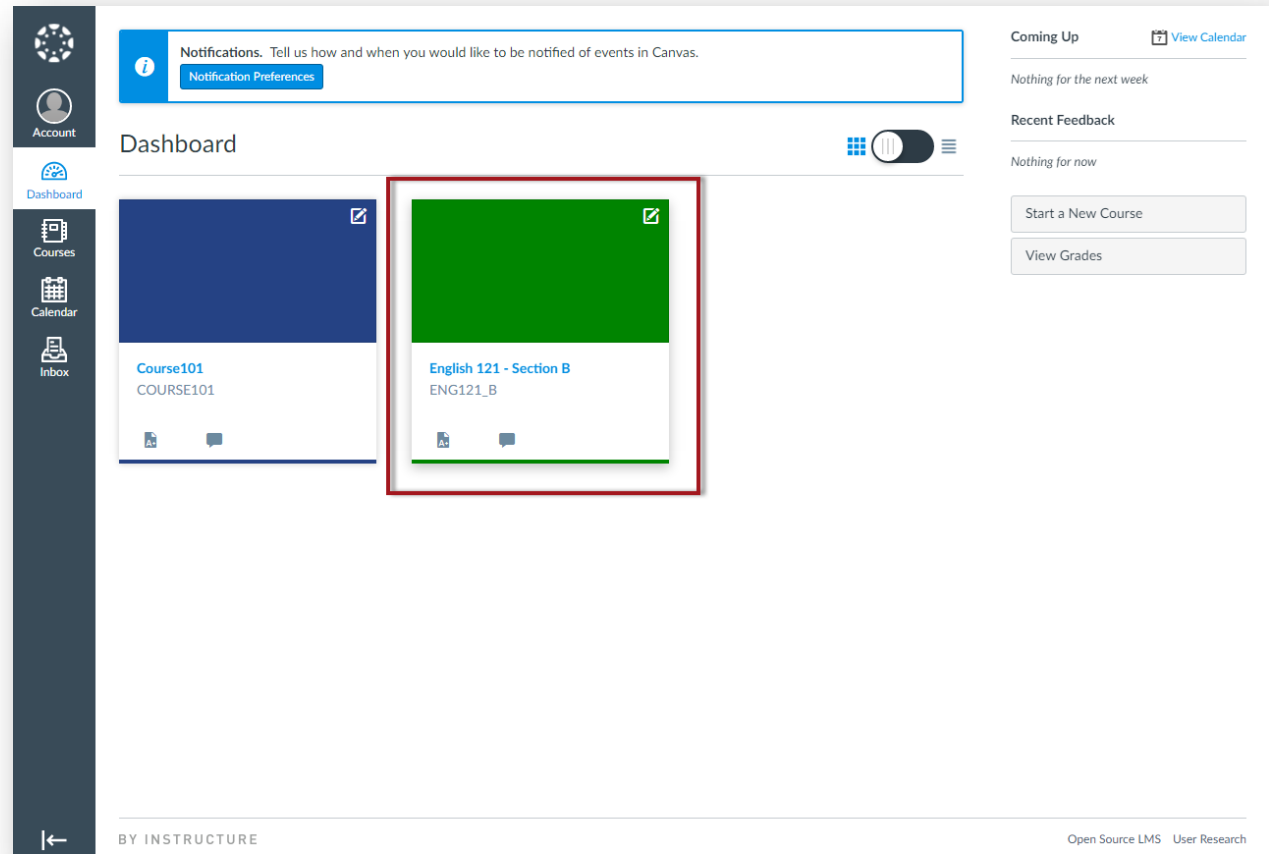
- Click on the link that best represents what you are trying to submit work for.
- You are initially taken to the **Directions** section. You can review any of the directions and/or evaluation method for the assignment.
- Click the **Work** link to begin submitting your work.
- Click the **Attachments, Text & Image** or **Videos** button to submit your work content for evaluation purposes.
- Follow through the subsequent screen to add your work and then click **Save and Return**.
- If you have added some content, the **Submit Work** button becomes available. Click it once you are ready to submit for formal evaluation.
- You can review the status of work submission by clicking the **Results & Comments** link.

Part 4: Step-by-Step Setup Guide for the Taskstream evaluator

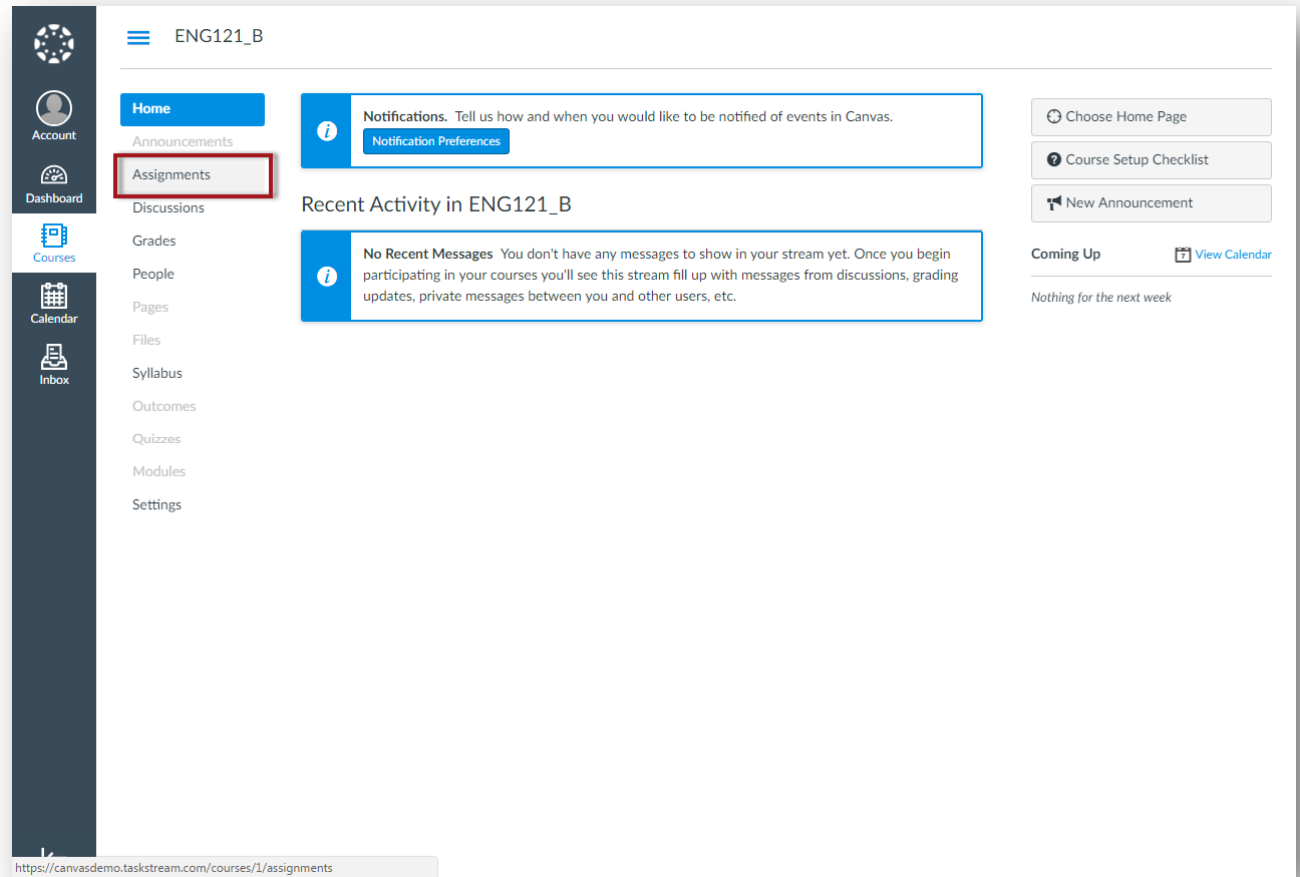
How to send a Taskstream score into Canvas

Steps

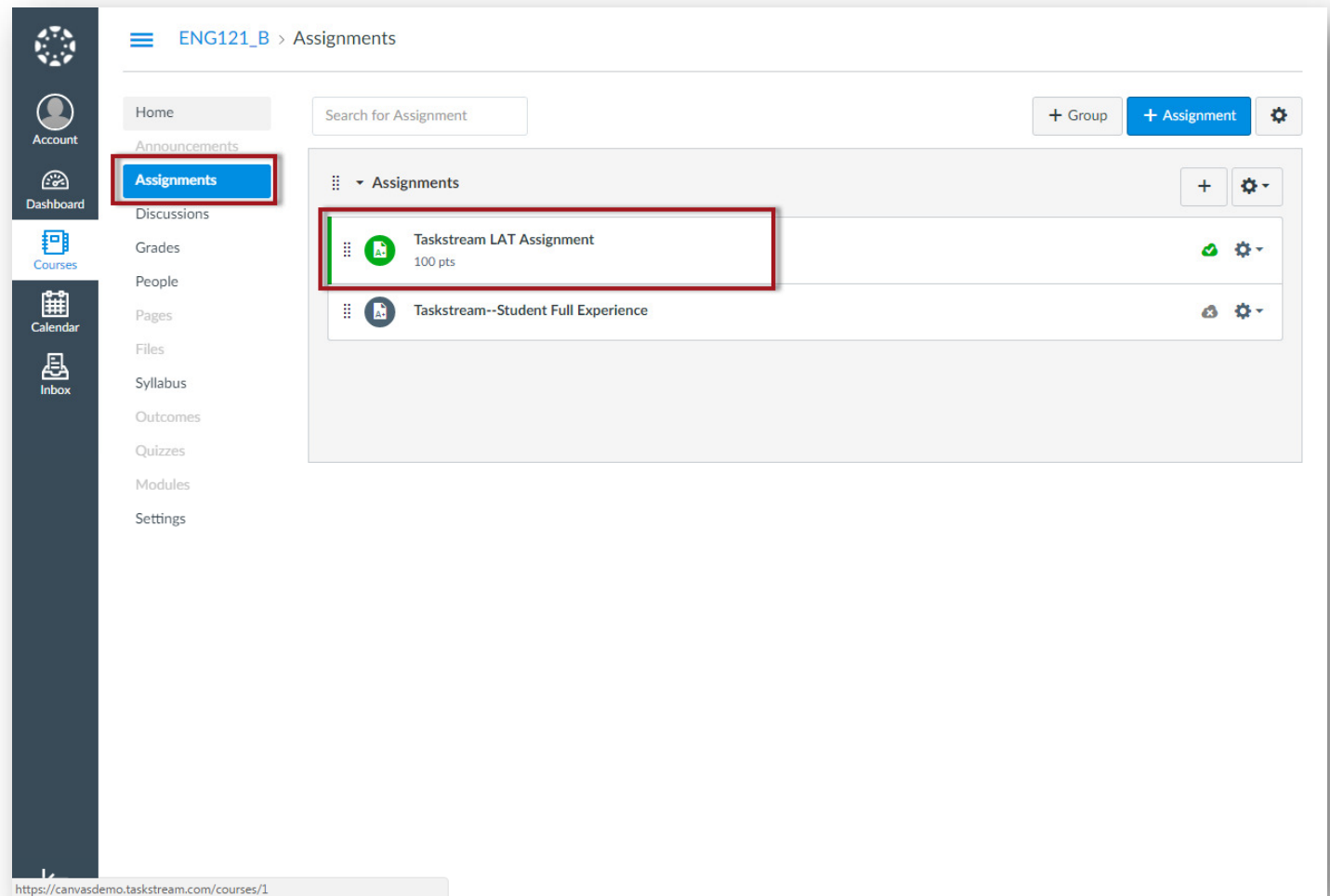
- Click on a Canvas course
- While logged into Canvas, click on the **Courses** link on the left-hand panel.
- Click on the course, on the fly-out panel, to which you have been asked to submit work to Taskstream.
- On the left-hand panel within your course, click on the **Assignments** link.
- Under the assignments link, within the right-hand area, a link (e.g. Taskstream Assignments) should be available to you (the instructor) to connect into Taskstream. This link will allow you to connect into Taskstream homepage where you can navigate to your Taskstream DRF program to do the local assessment.



- While logged into Taskstream as an evaluator, locate your DRF program and click on **Evaluation Required** to locate and start a specific student assessment.



- For the Taskstream evaluator who is about to score a student assessment, there is now an option to **Transfer to Canvas Gradebook**.
- Since it is likely that the Taskstream scoring method is not on a 100 point scale, you will need to determine out a 100 point scale what you think the student deserves to see in the Canvas grade book.
- Enter an integer value in the **Send final score** field.
- Click the **Submit Evaluation Now** and the score will be sent to Canvas.
- You can immediately go to the Canvas **Grades** section to confirm if the score has been sent over.



taskstream | LAT FOLIOS & WEB PAGES LESSONS, UNITS & RUBRICS STANDARDS COMMUNICATIONS RESOURCES TS COORDINATOR SYSTEM ADMIN ANALYTICS

Evaluate a program

Change Organization: z_Canvas2_multiple **Go**

Search for Items
 - Enter Title Keywords -
 - Select Item Type - **Go**

My Links **Manage**
 Messages **new items**
 Announcements
 Add a Link

My Folders **Manage**
 Recently Edited Items
 Recently Deleted Items
 Create a New Folder

Mentoring Services Assistance

Evaluator Evaluation Manager

ALL ITEMS
 EVALUATION REQUIRED **1+** AWAITING RELEASE **0** CUSTOMIZE DISPLAY

DRF PROGRAM

DRF General Education >

Evaluation Required **1+**
 Awaiting Release **0**
 Reports

Don't see your program?

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