Engage Pre-Discovery Workbook

Welcome to Engage! Please read through, share, and complete this document prior to the first call with your consultant. We look forward to working with you soon!

campuslabs

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* These pages have questions for you to answer before our first call

Who We Are

Welcome to the Engage family! We are so excited to begin building your campus's Engage platform with you. This interactive guide is to enhance our time together so we can assess your goals and make a plan for your success. As you go through each section, think about what realistically works best for you and your team in the time we have before we launch to the rest of campus.

Our teams

We take a team approach to developing and maintaining your site so you will hear from more than your consultant during your experience with us. Below you can learn more about the rest of our team:

Onboarding Team: We work with you to implement and build your Engage site. You will talk with us about training content, best practices, and process-based questions

Adoption Team: After you complete onboarding you will meet your adoption consultant who will maintain your relationship for the long-term. You can approach them with the same concept questions you would ask your onboarding consultant.

Support Team: Throughout your time with Engage you may have some technical questions or run into a site error. Support can work with you through navigation, process, and technical questions.

- Support Chat Hours: 9:00 a.m.-5:00 p.m. EDT M-F
- Support Phone Hours: 8:00 a.m.-8:00 p.m. EDT M-F
- Phone: 716-270-0000 Email: support@campuslabs.com

Account Manager: Your account manager is here for any contract-related questions. They will work to support your campus through the renewal process, explore expanding your portfolio of Campus Labs solutions, and adding features to your agreement with us.

Additional resources: We try to go above and beyond to provide you will all the resources you will need to be successful. Check out these tools available to you while you are working on your Engage site.

- Engage Help Center: Brimming with articles, step-by-step instructions, webinars, and videos.
- Professional services: in-person advising, custom workshops, technical services and more.
- Connect Conference: Come meet our team and the international Engage community in person at our annual Connect conference. We'll have professional development opportunities, networking, live trainings, events and so much more.
- Campus Intelligence: Resources we have created around thought leadership and our research.

More About Engage

Engage is a student engagement platform designed to empower students' discovery of opportunities and taking charge of their own co-curricular involvement, all while streamlining administrator workflow and processes. Below are some of the features in Engage to give you an idea of what can be accomplished within your site:

Organization Management: paperless registration, renewal, and position terms and conditions

Events: sharable event calendar, targeted event promotion, customized workflow, attendance tracking, and tailored RSVP functions

Simplified reporting: User, event, and organization data is all at your fingertips and can be adapted to your needs.

Co-curricular Transcripts: Customized to your campus, students can display all their out-of-the classroom accomplishments and record credit-worthy activities.

User-friendly interface: Students can browse our mobile-compatible site, join events and organizations via our Corq app, and communicate with admin on submissions.

Add-ons that may be in your contract: Ask your consultant for more information.

- Organization Accounting
- Budget Management
- Elections
- Event Check-in App
- Card Swipe Attendance Tracking
- Co-Curricular Paths

Who Are You?

We would like to get to know who we can expect on your team. Everyone on your campus will ideally be using Engage soon but who are the crucial people for behind the scenes functions? We recommend first bringing in a small group (1-3 people) who will be responsible for the site functioning at the highest level and will oversee the users, processes, and data in the site; these people will be the *Community Administrator(s)**. Once we have our Community Administrators selected and trained we can make your separate training plan for people who will perform specific day-to-day functions (organization registration, event approval, finance management, etc.) who will be *Branch Administrators** and student leaders.

* - More information about these roles in the Role Dictionary (pg. 3-9)

Who should complete this worksheet?

This worksheet should be completed by the senior sponsor and/or primary contact prior to implementation. All roles are required unless otherwise noted as optional.

How will this worksheet be used?

We will use this worksheet to coordinate schedules, meetings, and provide appropriate training and permissions within Engage. Please refer to the role dictionary for further descriptions, time commitments/levels of involvement, and examples from other campuses.

How do I complete this worksheet?

Review all potential roles and complete all those that are relevant. This form is a fillable .PDF so you can enter your answers right into the electronic version of this document. If you have questions, please reach out to your onboarding consultant.

What else should I consider?

Roles are not exclusive – An individual may fill multiple roles based on the goals and workflow of your institution and a role may be filled by multiple people. The individual(s) will be responsible for all actions and time commitments in each role.

There is a Role Dictionary after the worksheet that goes into more detail for each of the required roles for your reference.

Your Onboarding and Implementation Team

Role	Name	Title	Email	Phone
Onboarding Team				
Senior Sponsor				
Community Administrator				
Project Coordinator*				
*Additional Contact**				
*Additional Contact**				
*Additional Contact**				
Technical Implementation Team				
Data Manager				
Authentication Coordinator				
API Manager*				
*Additional IT Contact**				
*Additional IT Contact**				
*Additional IT Contact**				

* - Denotes an optional position

Roles: Snapshot

Additional (IT) Contact: This is someone who will be a part of the team but not the lead contact. Read *Branch Administrator* in the Roles Dictionary for more information.

API Manager: *Experience with web services and knowledge of data exchange methods and can create API exchange for your campus.*

Authentication Coordinator: *Configure authentication to establish single sign-on and credentialing.*

Community Administrator: Responsible for successful onboarding/training and will be the main site administrator after launch.

Data Manager(s): Responsible for preparing, transferring, and managing the updates of the core data files.

Project Coordinator: Some campuses find it helpful to have a point-person to oversee the implementation/onboarding project details.

Senior Sponsor: Cabinet level team members accountable for bringing this tool to campus, visioning the strategic use of the toolsets, and the success of the Campus Labs partnership.

Role Dictionary

This section will go into greater detail for all the required team roles during implementation.

Listed in order of significance to a successful implementation

Community Administrator Page 8

Authentication Coordinator Page 9

Data Manager Page 10

Senior Sponsor Page 11

Branch Administrator* Page 12

API Manager* Page 13

* - Denotes an optional position during implementation/onboarding

Involvement levels in the Role Dictionary

	High	Medium	Low	N/A
The identified individual should be prepared to:	Dedicate at least 3 hours a week to training or scheduled calls and action items associated with implementation.	Dedicate around 1-1.5 hour a week to calls and action items.	Updated on progress. May be included in conversations or assigned responsibility for an action item.	Not involved at this level of implementation.

Community Administrator

What are the responsibilities of a Engage Community Administrator?

This role is responsible for the development and oversight of the Engage community and will serve as an All-Access Administrator. The Community Administrator will be the main point of contact during implementation, rollout, and continued development of the full community. The Community Administrator will also be informed about all product updates, additional features and integrations, and have direct connection to the Student Engagement consultant. For questions that arise regarding the contract, site configuration, or changes to the community, the Community Administrator will always serve as the primary point of contact.

On other campuses, who has been a Engage Community Administrator?

Community Administrators have held titles such as Director of Student Engagement, Director Student Activities, Director of Campus Centers, etc.

What is the level of involvement and time commitment of a Engage Community Administrator in on-boarding and implementation?

Onboarding	Technical Implementation	Implementation Training	Launch	On-going Support
High	Medium	High	High	Varies

What is the level of involvement and time commitment of a Engage Community Administrator after launch?

The Community Administrator will be a contact point on campus for users as well as a contact point for Campus Labs Consultants for regular check-ins around meeting assessment goals, product updates, and product communications.

Authentication Coordinator

What are the responsibilities of an Authentication Coordinator?

Campus Labs connects to campus authentication systems to identify and credential users. The centerpiece of each method is a secure transmission of a unique identifier for a user upon a successful granting of credentials. The Authentication Coordinator will be responsible for filling out the authentication worksheet and working with Campus Labs Technical Specialists to complete authentication set up and procedures. They will also need to communicate the designated external identifier to all Data Managers and Primary Contacts for the life of the Campus Labs product.

On other Campuses, who has been an Authentication Coordinator?

Authentication Coordinators have held positions such as Chief Information Officer and SIS Administrator; they have also been members of the IT staff who can facilitate authentication set up.

What is the level of involvement and time commitment of an Authentication Coordinator in onboarding and implementation?

Onboarding	Technical Implementation	Onboarding Training	Launch	On-going support
Medium	Medium	Low	Low	Low

Authentication will be the first step completed during on-boarding. The Authentication Coordinator will participate in conversations and attend meetings about selecting the appropriate authentication method and external identifier. They will also be responsible to make sure all new users are added with their external identifier. This could require communication with Data Managers and Primary Contacts.

What is the level of involvement and time commitment of an Authentication Coordinator after launch?

The Authentication Coordinator will maintain the Authentication process and make sure any new data managers are aware of authentication procedures. They may occasionally be called upon should changes need to be made to the campus' authentication method or configuration.

Data Manager

What are the responsibilities of a Data Manager?

The data manager will be responsibility for extracting and preparing the required data, transferring data to Campus Labs, and serving as the primary campus contact for the Campus Labs technical team for the life of the product. The Data Manager(s) must have a thorough understanding of the selected exchange type as well as have access to and familiarity with the SIS/LMS or other source system where data will be extracted. They will communicate with multiple product primary contacts to coordinate the structure of files and the scheduling of priorities. Data managers will also need to communicate with the Authentication Coordinator to properly use external attributes.

On other Campuses, who has been a Data Manager?

Data Managers have held positions such as Chief Information Officer, SIS Administrator or have been a member of the IT staff (a programmer, for instance).

What is the level of involvement and time commitment of a Data Manager in onboarding and implementation?

Onboarding	Technical Implementation	Onboarding Training	Launch	On-going support
Medium	High	Low	Low	Low

The Data Manger will participate in conversations and attend meetings about the design and use of data files during on-boarding. They will be responsible for instituting the proper exchange system, maintaining ongoing communication with our Technical Implementation Specialists to work through the process, and carrying out the actual construction of the Core Data files.

What is the level of involvement and time commitment of a Data Manager after launch?

The Data Managers will maintain the data processes, update files when necessary, and be the point person for Core Data updates and information.

Senior Sponsor

What are the responsibilities of a Senior Sponsor?

The Senior Sponsor is the campus leader who is responsible for the oversight of a successful Engage implementation and adoption over the long-term relationship with Campus Labs. This person is typically involved in the contract approval/renewal stage and offers their team strategic vision for campus-wide success with Engage.

On other Campuses, who has been a Senior Sponsor?

Often this person is cabinet-level or a division head such as a VP of Student Affairs, Dean of Students, or Chief Information Officer.

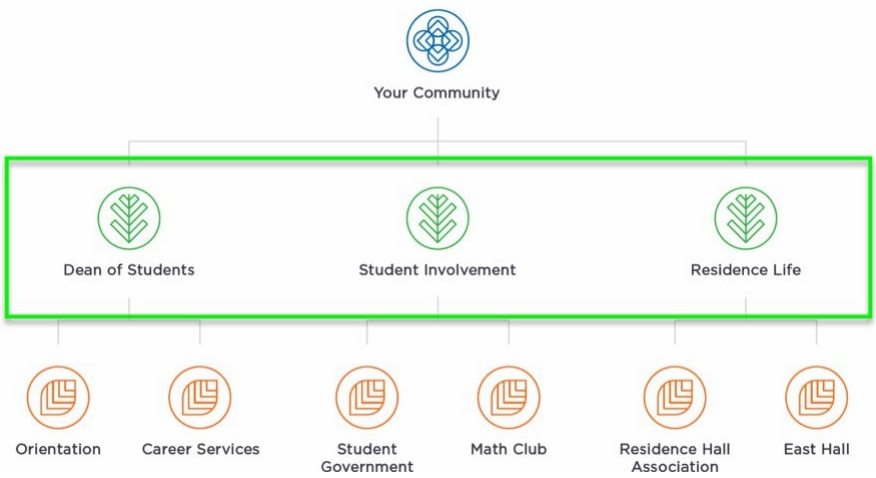
What is the level of involvement and time commitment of a Senior Sponsor in onboarding and implementation?

Onboarding	Technical Implementation	Onboarding Training	Launch	On-going support
Low	Low	N/A	Low	Low

Branch Administrator

What are the responsibilities of a Branch Administrator?

A branch administrator is a user responsible for overseeing the functioning of an Administrative Branch in an Engage community. Branches allow various departments, divisions, or areas of university life to operate independently within the system, running processes like the event submission processes and organization registration separately. Admin branches can also be overseen by different administrative users, allowing staff on campus to independently control various features within the site. In the diagram of the Engage structure below, you can see the different administrative branches highlighted, showing how different departments might oversee different types of organizations.



On other Campuses, who has been a Branch Administrator?

Director of Residence Life, Room Reservation Coordinator, Director of Campus Activities, Finance Manager, etc.

What is the level of involvement and time commitment of a Branch Administrator in on-boarding and implementation?

On-Boarding	Technical Implementation	Onboarding Training	Launch	On-going Support
Medium	Low	Medium	High	Medium

What is the level of involvement and time commitment of a Branch Administrator after launch?

By default, branch administrators can manage three distinct areas:

- All functions of the branch organization's public facing page, including news articles, forms, roster, documents, galleries, etc. for the branch's own organization page
- All functions of the organizations that are housed within that administrative branch; branch administrators can access the Action Center for any of the organizations within that branch and create, edit, or delete content on behalf of those organizations
- All Branch Tools for the department or area, including the event submission process, organization registration, and position templates

API Manager

What are the responsibilities of an API Manager?

The API manager is responsible for the development, maintenance, testing, and support of various API's. API Managers should have a thorough understanding of JSON and RESTful services. They will also serve as the primary campus contact for the Campus Labs Technical team for the life of the products. The Manager will also need excellent communication skills with end users, department members, and management in order to understand business requirements.

On other Campuses, who has been an API Manager?

API managers have been faculty members or IT specialists with programming or software development experience.

What is the level of involvement and time commitment of an API Programmer in onboarding and implementation?

Onboarding	Technical Implementation	Onboarding Training	Launch	On-going support
Low	High	N/A	N/A	Low

What is the level of involvement and time commitment of an API Programmer after launch?

The API Manager will maintain the API's, update or trouble shoot as necessary.

What Are Your Goals?

Our onboarding team wants to make sure we are giving you the best experience possible when establishing Engage on your campus. Please give some thought on the goal-setting questions below before our first call so we can dig a little deeper and create a training plan tailored to you and your team. Answer to the best of your ability and if you have *many* goals – what are the highest priority?

Three goals for what you would like to see from the Engage experience.

After your Engage site is established, what outcomes would you like to see on your campus? (Ex. 10% boost in event attendance from last year, moving 80% of paper processes to Engage by launch, etc.)

- _____
- _____
- _____

Three big picture/institutional goals for Engage:

What is important to campus leadership and how can Engage support your campus's strategic plan?

- _____
- _____
- _____

What is going to be the most important information for you to include in reports?

Engage can give you data on student engagement, event attendance, registration, transactions, and much more. If you have reports that need to be passed up the chain – what are they asking about? What would you like to know about student engagement on your campus?

- _____
- _____
- _____

What is Your Timeline?

Your time is important so planning our training journey is crucial for success. Our flexible training timeline is below; we tailor this to your team's needs and schedules. Most campuses like to take a week or so to work through the training videos and complete the associated action items before a consultant call. Everyone works at their own pace so enter the general dates that you think will work best for your team:

Engage Core Training:

- Watch training 1 & 2 and complete the Action Items*
    - Consultant Call #1 _____‡
- Training 3 + Action Items
    - Consultant Call #2 _____
- Training 4 & 5 + Action Items
    - Consultant Call #3 _____
- Any modules your campus has purchased and should be prepared for launch to users will be added after our core training. Plan for at least 2-3 weeks for Budget Management, Organization Accounting, and Paths; the other modules can be completed with minimal support. If you don't know what modules you have – no worries, your consultant will help you plan during the first call.
- **Ideal launch deadline: _____**

* We recommend setting aside *at least* 3 hours to watch trainings and complete the action items before a call. Some people need more time, some need less but we suggest erring on giving yourself more than less time.

‡ Onboarding consultant calls are scheduled for an hour at a time and are best used if *all* the training action items are completed beforehand.

Additional Considerations

Now that you have assessed your goals, team, and timeline – let's think about what will come next.

Branding and marketing your Engage community:

This is an excellent opportunity to contact your campus marketing and communications offices for support. Branding of your Engage community is a key portion of marketing your site and preparing it for launch to your campus. This includes selecting a community logo, the site accent color, and uploading cover photos for the public facing side of the site. After you determine how you would like to build your brand, you'll have to let people know how to find it. Campuses have found many different creative ways to entice users to their sites. You can learn more about these topics in our Engage Help Center – Branding your Engage Community and in our Marketing Kit. Also - Recommended Image Dimensions in Engage

Training the rest of campus:

After onboarding and implementation you and your team will be the campus experts in Engage; now it is time to bring in the rest of the institution. Many campuses first train their branch administrators - people who have specific roles in the site but do not need to be involved in overall site administration. Next, we recommend training your student leaders who will help with buy-in on campus and will be regular users in the site. While you are working on how to train everyone, you can build hype by sharing our Intro to Engage video with the rest of campus and executing your marketing plan. After you first start working with your consultant, they will share some more detailed training resources.

Adding organizations

After importing user accounts and before inviting users to the site, we want to create pages for all of your great clubs, organizations, departments, and offices. You have three options to go about this process; all are equally as good but take different amounts of time to complete. Not sure which one to pick? Ask your consultant and they will help you select the best option for you.

- Organization Import: Even before you start building anything you can create a .CSV (Excel) of all of the organizations you would like in your site and insert it right into Engage. This is the option that will take the least amount of time but doesn't give you as much hands-on practice building organizations.
- Make an organization from the Admin area of the site: This will be covered in more detail during training and can take more time depending on how many organizations are on your campus. Practice makes perfect!
- Have students register their organizations: This will send students through the registration process you will build during training. This option will give you the most up-to-date information from the group because it will be fully entered by the user after launch.

Assigning users to groups

Once you have completed your initial user account import you can assign people to the organizations and positions within those organizations with an Involvement Import. This step will come later in the training but can be completed pre-launch to help give users a more personalized experience. Ask your consultant for more details.

Release Notes

We are continuously improving and enhancing Engage so you will want to be in the know on the latest updates. Your site will have a link at the bottom of the page to subscribe to Release Notes and see our latest developments. Make sure to sign-up once you can access your Engage community.

Technical Implementation Information.

After looking through these pages, please give them to your Authentication Coordinator who will be completing the technical implementation steps. These steps are crucial to the successful start of your site.

Configure Authentication

Before the onboarding team can begin training on Engage, the technical team must first configure authentication integration. This is a necessary step before your Engage community can be built, as it will allow for accounts to be created and users to sign into the community using their campus credentials. Once this step is complete, the campus implementation team can proceed and begin training.

Populate User Accounts

We recommend that a campus complete at least one user account import during implementation. While authentication allows accounts to be created as users sign in, an account import will pre-create accounts so that administrators can assign those accounts roles before the users have even signed in. Account imports also allow you to pre-populate the user's name, demographic, and enrollment details so that you can leverage this data across Engage and in reports.

Any campus can complete a manual user import up to three times a year to keep their records current. After the initial user import we recommend setting-up automated imports so your user-data will automatically update in the system. Alternatively, some contracts also allow you to use the Engage API to create accounts and populate select details. Ask your consultant if API is included in your contract.

Ideally, at least one account import would be complete before the campus implementation team proceeds to the step of populating student organizations into your community. Confer with your Onboarding Consultant to determine a target date.

Create a Vanity URL

Once your campus implementation team has determined a branded name for their Engage community, it's time to create a Vanity URL. While this step can be taken at any time, we recommend setting up the vanity URL earlier rather than later so that the implementation team has time to reflect this URL in marketing materials, website links, etc. While your original Campus Labs branded URL will remain functional, it is ideal for branding purposes if users do not have to learn a new URL shortly after the community has launched.

Set Up Card-Swiping

Check with your consultant to confirm whether your contract includes card-swiping. Your contract may also include the Event Check-in App, which for many campuses, makes configuring card-swiping unnecessary. If you do choose to implement card-swiping at your campus, this can be done by either technical or non-technical users depending on the campus. However, once complete, an account import will need to be processed (or automated import updated) to reflect user account IDs.

Assign API Keys

If your campus contract includes Application Programming Interface (API) access, you can also assign API keys at any point after authentication is complete. Generally, we recommend having a set plan for how each user will apply their key before assigning the keys out.

This information and more is available in our Technical Implementation Checklist.

Glossary of Terms

Additional Fields
Additional Fields allow administrators to track custom-built information about events, organizations, finance requests, and users.

Action Center
Action Center provides a central hub for student leaders and administrators to manage their tasks and activities, such as approving form submissions or creating organization content.

Alerts
Your users will never miss an important announcement when you utilize Alerts! Community Admins can create up to (three) simultaneous Alerts, or messages that appear front-and-center to all users of the community once they log in.

Branch - $
An administrative branch refers to a specific division, department, or office on campus. Each branch in a community has its own administrators with the authority to oversee and manage various settings, processes, and tools for all organizations it oversees. Each site includes one branch automatically.

Branch Administrator
A branch administrator is a user responsible for managing a particular branch in the community, overseeing all users, organizations, and processes that fall under it. Branch admins manage processes like organization registration, the event request process, and reporting for their specific branch.

Budget Management - *$*
Budget Management helps support campus budget review processes, such as annual or ongoing student organization funding allocations. Budgeting admins can configure request requirements and reviewer logic.

Campus-wide Elections - *$*
The Campus-Wide Elections tool allows community administrators to create elections that can be displayed directly on the landing page of your site. With these elections, admins can give the whole campus or an eligible subset access to vote.

Co-curricular Paths (Paths) - *$*
Co-Curricular Paths is a powerful tool that allows institutions to customize curriculums that measure and document the depth of co-curricular opportunities that extend beyond classroom learning. Students can easily record and view their progress through their defined Paths.

Co-Curricular Transcript (CCT)
Students can use Engage to generate a record of their out-of-classroom involvement, such as their organization membership and event participation. Community admins can customize branding and publication options for CCTs.

Community
The Community provides the foundation for your engagement platform. Every community is managed by community administrators who have the authority to oversee and manage all aspects of the platform.

Community Administrator
Community administrators have the highest level of access within the Engage community. Community admins are able to oversee and manage all aspects of the community, including branches, organizations, and users.

Community Home
Community Home is the landing page for all users when they first log-in to your community. Community Home is customized for the user who is logged in, showing their memberships, Co-Curricular Path progress, and public or community-wide events and news.

Corq
Corq is a mobile companion app that helps promote engagement opportunities, allowing students to sort through upcoming events and organizations on-the-go. Corq is available for iOS and Android mobile devices.

Eligibility Lists
Eligibility Lists allow election administrators the ability to specify the exact sub-population that should have access to vote on a particular ballot in an election.

Event Categories
Event Categories allow you and your users to classify events in ways that are relevant to your campus community. Event categories function as a search option within the public event list, allowing users to discover events associated with their personal areas of interest.

Event Form
The Event Form allows you to collect information about your students' events, helping you as an administrator and your campus event staff make informed decisions about the events you are reviewing.

Interests
Community administrators can create Interests that are used to recommend involvement opportunities, such as events and organizations, to students. Individual users and organizations can identify their Interests in their personal Engage profiles.

Involvement Import
Involvement imports allow community administrators the ability to directly associate users to organization rosters, bypassing the 2-step verification process that normally follows a join request or an invitation response.

Message Relays
Engage allows administrators to define a subset of users through a series of filters, such as organization type, organization category, or position template and generate a one-time email address, or relay, to send the defined list of users a message.

Event Check-In App - *$*
Take your engagement on-the-go with our easy-to-use Mobile Check-in App. A seamless process and intuitive interface will make checking in for events a part of your campus culture – giving you greater insight into your engagement efforts.

Organization
Organizations create a central, online location for department administrators and student leaders to more efficiently manage their organizations and stakeholders. Each organization consists of a public-facing side and an Action Center where organization administrators can oversee content and activity.

Glossary of Terms

Organization Accounting - *$*
Organization Accounting tools help organization treasurers keep track of their campus funding. This tool supports an auditable allocation and transaction-tracking system for campus financial staff.

Organization Categories
Organization Categories allow you and your users to classify organizations into similar groupings. Users can sort through the full organization directory by organization category, making it easier for users to find organizations of interest to join.

Organization Officer/Admin
An organization officer is a user who has permission to manage tools within an organization, including the ability to create, edit, and delete content or manage organization membership.

Organization Types
Organization Types allow you to classify your organizations based on how you want them to behave. Organization types allow you to add restrictions to tools, assign specific position templates, or customize the re-registration process for different organizations.

Position Templates
Position Templates allow administrators a consistent way to manage who holds various positions within the organizations they oversee. Position Templates represent roles like President, Vice-President, Captain, Advisor, or Director.

User Access
User Access allows you to determine or limit the level of management or administrative access a user has in the system, whether at the organization, branch, or community level.

User Drawer
The User Drawer is where you can access the tools that are specific to you! Here you'll be able to see upcoming events you've RSVP'd to, complete unfinished forms, and update your personal profile.

Self-Reported Experiences (Experiences)
Experiences allow admins to collect information from students on activities they do outside of the classroom that aren't being tracked in Engage. Example experiences include honors and awards, employment, internships, study abroad or research. Users can easily record and view their progress through their defined Paths.

Service Hours - *$*
Service Hours allows users to manually submit service hours associated with a specific organization. Admins have the ability to aggregate this data and see the impact users are making in their organizations and surrounding communities.

$ - indicates an additional feature available for purchase

Frequently Referenced Support Articles

- Using Engage for Residence Life
- Using Engage for Student Government Initiatives
- Using Engage for Orientation and New Student Programs
- Account Import Guide
- Involvement Imports Walkthrough
- Finance Transaction Imports
- Experience Imports Walkthrough
- The Life Cycle of Managing your Organizations
- Registration Steps Walkthrough
- Updating an Organization as an Administrator
- Assigning Registrations to New and Existing Organizations
- Editing a User's Memberships
- Setting up your Event Submission Process
- Tracking Event Participation
- Reviewing Submitted Events as a Reviewer
- Community Admin Overview
- Branch Admin Overview
- Engage Community Structure
- Intro to Engage for Students
- Intro to Engage for Campus Partners