User Roles

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 4

Authentication Coordinator Page 5

Data Manager Page 6

Senior Sponsor Page 7

Branch Administrator* Page 8

API Manager* Page 9

* - 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.

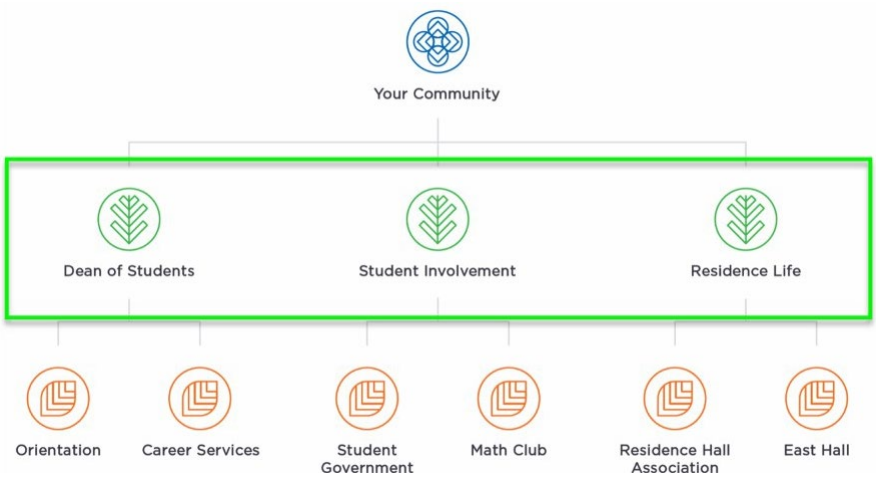
What is the level of involvement and time commitment of a Senior Sponsor in onboarding and implementation?

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.