Welcome to Campus Labs!

Get Ready to Experience Your Data

On behalf of everyone at Campus Labs, we'd like to welcome you to our Member Campus community. Like 1,100+ other campuses, you've taken the first step toward doing more with your data. Throughout the implementation process, different members of our team, including Campus Success consultants and Product Support specialists, will work with you to ensure your platform tools are meeting the unique needs of your institution. Use this guide as a reference, and don't hesitate to contact us if you ever have a question.

Our Commitment to You

Founded in 2001, Campus Labs strives to empower campuses and transform higher ed through the strategic use of data. We help institutions break down their silos and build a strong foundation for unified information, valuable insights, and better decisions. Whether the goal is meaningful reporting for accreditation, a more precise way to predict student success, or innovative tools to help students engage in campus life, our solutions can help.

Implementation at a Glance

At Campus Labs, we have a proven implementation approach divided into four distinct phases designed to maximize your success:

Discovery

The Discovery phase is the first step of implementation. Your implementation team will be introduced to your consultant, who will meet with you to discuss your campus's goals, desired timelines, and expectations. The Discovery phase allows our team to get to know your campus more specifically so we can better design an implementation timeline for you that supports your needs.

Technical Implementation

During Technical Implementation, our dedicated Technical Implementation team will work with your campus contacts to achieve any technical setup such as authentication, creating accounts, or configuring your site. Completing the majority of the technical setup will be necessary before we move into training your team on the product.

Customization & Consultation

In the Customization & Consultation phase, you will primarily work with our implementation team to learn the ins and outs of the product. You will also meet frequently with your consultant in between trainings to apply the material to your campus's goals, review homework completed during the training process, and ensure you are staying on track with your target launch timelines.

Launch & User Adoption

In the Launch & User Adoption phase, we will connect you to numerous resources, such as our ongoing trainings and our product Help Centers. In this phase, your consultant will continue to support you as you develop plans for marketing, student and/or staff training, resource development, or any other needs you may have to support a successful launch.

Discovery

Overview

Discovery is the initial step to transition you to the technical implementation and training process. During Discovery, you will be introduced to your consultant who will get to know your implementation team and your primary goals. Together, your team and your consultant will determine a training plan and timeline that aligns with your campus implementation goals.

Goals for Discovery:

- Meet your Engage consultant
- Discuss reasons for purchase, main goals, launch timeline, and implementation strategy
- Gain general understanding of processes and what to expect during your implementation
- Work with your consultant to prioritize trainings given established goals and learn how to sign up for these trainings

Questions to consider:

- Which staff members or stakeholders will be a part of your implementation team?
- Who will be your main point of contact for your team throughout implementation?
- What is your desired training and launch timeline?
- Do you have any upcoming deadlines (organization registration, SGA election, etc.) that you want to incorporate for the launch of Engage on campus?
- What were your primary reasons for purchasing Engage, and what are the main goals you are trying to accomplish with the product?
- Are there any barriers that could slow down or create challenges for implementation?

Next steps:

- ☐ Complete Authentication Integration Worksheet to begin authentication setup process
- ☐ After authentication setup is complete, register for the first training using the link received from your consultant
- ☐ Send consultant availability for necessary consultation calls

Technical Implementation

Overview

Technical implementation for Engage is made up of two phases; Authentication and Data Transfers. Below is a brief description of each of these phases. For more detail on any of these phases, click on the links provided below.

Authentication

The process of Authentication will allow your users to sign into Campus Labs applications using credentials maintained in your institution identity management system. During this phase of implementation, a Campus Labs Authentication Specialist will work with an IT representative from your campus to complete the Authentication Integration Worksheet, and configure your Campus Labs Platform to authenticate against the selected method. Once this phase is complete, users will be able to access the Campus Labs application(s) using the same credentials they use to access other systems managed by your institution.
***Authentication must be complete before we can set up any applications.**

Data Importing

Most of the products on the Campus Labs Platform require data to be imported before the application can be used in a meaningful way. Data is usually extracted from a SIS (Student Information System) or ERP (Enterprise Resource Planning) System, formatted based on Campus Labs specifications, and then imported into your application as needed. Imports can be set up to automatically import data on a regular basis via a secure FTP, if included in your Campus Labs contract, or via a secure FTP manually. Data imports can include user accounts, as well as demographic and enrollment information.

Campuses may use the import process to create accounts for students and staff to ensure a smooth transition for users as they log into the system. While accounts can be created by logging into Engage, a user account import allows campuses to supply specific data for students to create consistency in the platform. This includes things like first and last names, as well as campus email addresses.

In addition to account creation, data imports allow you to connect important demographic and enrollment data points to student accounts. This can be very helpful in reporting and assessment of student engagement on campus. Periodic imports ensure that data is up to date for the most accurate reporting. User accounts, demographic and enrollment data can be imported in the same file, or in separate files over time, depending on the needs of a campus.

Technical Implementation, cont.

Data Transfer Methods

I. Scheduled file import via Secure File Transport Protocol (sFTP)
Allows institutions to send large data sets to the platform by saving .CSV "flat" files containing data for Accounts, Demographics and Courses into a Campus Labs hosted directory via a sFTP connection. The institution must provide the data in the file format indicated by Campus Labs along with a manifest file (.done file) which indicates to the platform that the data file is complete and ready to be imported. Once the data and manifest files are saved to the directory, the platform processes the file and incorporates the information into its data set.

II. Web service & API endpoints
A more advanced method, requiring proficient campus IT professionals, which allows both bulk and individual field loading of data to the platform via secure, scheduled transactions over the internet. Each data type endpoint offers the ability to create, retrieve, and update the data. This additional, fine toothed control of each data type offers institutions ultimate flexibility in the delivery and management of core data in the platform.

III. Manual file uploads
This method requires a user to import the data via a web interface. This method is the most limited in terms of flexibility and is generally reserved as a last resort if the more robust options are not possible.

Customization and Consultation

Overview

Every new Engage campus participates in a training process consisting of five trainings at the start of their Engage implementation. In each training, we will review a different topic or area of Engage and you will learn new features and functionality of the system. Each training is an hour long and will be recorded so you can review the trainings when needed. This allows you to learn and work at your own pace.

What is the consultation call?

The consultation call is your opportunity to meet one-on-one with your consultant to discuss and apply what you have learned in the trainings. Your consultant will review your completed homework and strategize about how to take what you learn in the trainings and adapt it to your campus and implementation goals.

Training Process at a Glance:

Implementation Training 1: The Engage Structure and your Community Administrative Tools

Implementation Training 2: Admin Branches, Organization Tools, and Forms

Consultation Call

Implementation Training 3: Organizations, Registrations, and Positions

Consultation Call

Implementation Training 4: Event Management and Tracking

Implementation Training 5: Involvement Overview

Consultation Call

***Based on your subscription, you may also be attending the following additional trainings: Elections, Co-Curricular Paths, Budget Management, or Organization Accounting*

Implementation Training One

The Engage structure and your Community administrative tools

Our first training will cover all the basics you need to get started! We'll be covering the Engage structure and an overview of the platform. We will also show you how to access your community administrative toolset that allows you to oversee your entire Engage community. *Appropriate attendees include all members of the Engage implementation team.*

Homework:

- ☐ Choose the name you will use to brand your Engage community
- ☐ Upload a profile photo in your user profile
- ☐ Create the privacy policy for your community
- ☐ Create any campus links you want to provide on the home page
- ☐ Choose your branding color, upload your institution logo, and add site cover photos
- ☐ Build your user profile Additional Fields with information you want to collect from your users

Implementation Training Two

Organization Tools and Forms

This training will focus on the concepts of the organization and the administrative branch in Engage. You will learn to utilize your Action Center to create great content for your organization or department. You'll also begin getting rid of those pesky paper forms as you discover the Engage form builder! *Appropriate attendees include all members of your implementation team and any users who will have administrative access to your branches.*

Homework:

- ☐ Assign staff members or other users the appropriate level of access to your administrative branch(es)
- ☐ Create a News post in your branch organization
- ☐ Upload your department's important files using the Documents tool
- ☐ Upload a photo album into your branch's Gallery
- ☐ Begin building all of your great Forms into Engage! Aim to build three of your department's primary forms

Implementation Training Three

Organizations, Registrations, and Positions

While customizing your organization registration process in Engage, you will learn best practices in creating and implementing a thorough organization registration process. We will also talk about how organization types, position templates, forms, and registrations connect. *Appropriate attendees include all members of your implementation team and staff members who organize and facilitate the registration process.*

Homework:

- ☐ Build your organization types and determine default settings for each
- ☐ Create your organization categories that represent your campus's or department's organizations
- ☐ Build the position templates you plan to utilize
- ☐ Build any forms you want to integrate with the organization registration process
- ☐ Create your organization Additional Fields
- ☐ Create your registration process(es) and attach the appropriate registration forms

Implementation Training Four

Event Tracking and Management

In this training, we will discuss the event registration process. We'll also look at the student experience of events, including event tracking and management. *Appropriate attendees include all members of your implementation team and staff members who organize and facilitate the event registration process.*

Homework:

- ☐ Create your event request form in your administrative branch admin tools
- ☐ Build your event Additional Fields
- ☐ Assign reviewers to your event request process using reviewer logic
- ☐ Create event categories for the different types of events your department and organizations host
- ☐ Create events from your branch organization's site

Implementation Training Five

Involvement Overview

In Engage, users have the ability to track their various co-curricular involvement experiences. In this training, we will review the self-reported experiences feature and the Co-Curricular Transcript. *Appropriate attendees include all members of your implementation team and staff members who will be responsible for managing involvement in Engage.*

Homework:

- ☐ Create the experience types your campus will be using
- ☐ If you plan to use the Co-Curricular Transcript, determine the Transcript branding and settings
- ☐ Discuss when you would like to receive trainings on any additional features that may be in your contract (Budget Management, Organization Accounting, Co-curricular Paths, Elections) with consultant, if applicable
- ☐ Complete the Implementation Feedback Form

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 activites, such as approving form submissions or creating organization content.

Administrative 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.

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 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.

Mobile 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/ lockAdmin
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.

Outcomes
Outcomes allows community admins the ability to tag organizations, events, and positions with specified learning outcomes. As users acquire tagged experiences, they gain exposure credit towards the specified outcome.

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

Launch and User Adoption

Overview

Once your implementation is complete, it's time to prepare for your launch! As you roll-out your new system on campus, we will provide you with ongoing support through on-going trainings, resources, and one-on-one attention from our consulting and support teams. We'll be by your side every step of the way to help your team achieve the most successful launch possible and to support your users through the adoption process.

Dedicated Consultant

Your greatest resource for your launch, adoption, and continued success with your Campus Labs product is your dedicated consultant! Your consultant will continue to be the main point of contact for your team moving forward from implementation, available to chat with you about adoption strategies, implementation of site features, new updates, best practices, training, and more. As you prepare for your launch and beyond, do not hesitate to reach out to your consultant for support!

Ongoing Trainings

The ongoing trainings offered are designed to support increased adoption or staff/student transitions on your campus. Whether you need to brush up on a concept or introduce new staff members to the platform, our ongoing trainings will support your efforts. These ongoing trainings are offered throughout the year and can be attended live or watched via a recording, allowing you to review concepts as needed.

Register for an ongoing Engage training

Campus Intelligence

Campus Intelligence is where thought leaders in higher education discuss emerging best practices, share creative strategies, and uncover valuable insights. It offers something for all areas of campus: Analytics & Insight, Improvement & Assessment, Teaching & Learning, Retention & Success, and Student Engagement. Whether you're focused on improving student engagement, assessing student learning, or aligning goals with your institutional mission, we're confident you'll find valuable insights to support your daily work.

Visit Campus Intelligence

Support

Help is just a phone call, online chat, or email away. Campus Labs provides industry leading support for you and your users. Students, faculty, and staff all receive access to comprehensive one-on-one support and unmatched product expertise.

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

Help Center

Learn how to use the Campus Labs tools through a combination of in-depth text articles and video walkthroughs, resources can share with your campus in your launch and adoption process. The Help Center provides up-to-date information for users at all levels, from those who are just getting started using the application to platform administrators.

Visit the Engage Help Center

Within the Help Center, you'll also find a collection of case studies, best practices, and resources from other member campuses. Our Best Practices are intended to assist you in discovering new, thoughtful, and creative ways to use the application to achieve your goals, increase adoption, and support your campus.

View Engage Best Practices