10 Hidden Gems in Engage

ENGAGE

Katie Felton

Senior Onboarding Consultant

kfelton@campuslabs.com

Today's Learning Outcomes

- At the end of today's session, attendees will be able to:
  - Identify at least 3 features of Engage that are underutilized by campuses
  - Understand best practices for implementation of hidden-gem features for their campus

#1
Custom Branch Notifications

Custom Branch Notifications

- Engage offers Branch Administrators the ability to customize Notifications users receive from the Branch

- Event Submissions, Form Submissions, and Organization Registration Submissions

- Allows you to customize notification language to include auto-populated fields

Custom Branch Notifications

Submissions - Event Approved
Get notified when your event submission is approved

EMAIL   SYSTEM

Subject Content

Your event submission {{EventName}} has been approved!

Heading Content

| **B** | *I* | <u>U</u> | 🔗 | ✂ | ↩ | ↪ |

Your event request {{EventName}} has been approved by {{SenderName}} in {{OrganizationName}}.

Body Content

| **B** | *I* | <u>U</u> | 🔗 | ✂ | ↩ | ↪ |

{{Comments}}

CANCEL   SAVE

Fields

Placeholder tokens that can be used within the content of the template.

Placeholder	Example Value
{{Comments}}	Great Job!
{{EventName}}	Officer Meeting
{{EventSubmissionUrl}}	https://example.com/subm...
{{ManageEventsUrl}}	https://example.com/actio...
{{OrganizationName}}	Chess Club
{{CommunityDisplayName}}	Community Display Name

Live Preview

Your event submission Officer Meeting has been approved!

Your event request Officer Meeting has been approved by Sender Name in Chess Club.

Great Job!

View Submission

Go To Manage Events

You are receiving this email because you are a
Manage your email preferences.

#2
Hidden & Admin Only Categories

Hidden and Admin Only Categories

- Event and Organization Categories can be hidden from General Users

- Can also be set for "Admin Use Only"

- Allows for behind the scenes reporting

- Admin Only Categories can ensure specialized categorization is being used effectively

Hidden Categories

#3
Messaging

Messaging

- Engage offers the ability to generate custom-filtered lists of users for messaging purposes

- Can be leveraged for Email Relays or Text Messaging*

  - *Users must opt in to receiving Text Messages from Engage

- Can be generated at the Community or Organization Level

  - Community Level – filter based on Position Template, Organization Types, and Organization Categories

  - Organization Level – filter based on Positions or Specific Members

Community Level Messaging

Send Message

Use the filters to generate a temporary relay email address. Then send your message to the email address and the system will distribute the message to all users who fit the filter criteria. You can use any email creation tool at your disposal to generate rich-text emails. The temporary relay will be available for 24 hours.

1) Select Recipients

Send to these **Position Templates**	In any of these **Organization Types**	Who are *also* in these **Organization Categories**
Select	Select	Select
None	All	All

2) Enter Title

Email Subject

3) Generate Relay Address

Generate   Cancel   Total recipients: **0**

Organization Level Messaging

Create Message Relay

Use the filters to generate a temporary relay email address. Then send your message to the email address and the system will distribute the message to all users who fit the filter criteria. You can use any email creation tool at your disposal to generate rich-text emails. The temporary relay will be available for 24 hours.

1) Select Recipients

Send to members holding these
Positions

EDIT...

None

and/or these specific
Members

EDIT...

None

2) Enter Title

Subject

3) Generate Relay Address

Total recipients:

0

GENERATE   CANCEL

#4
Community Form
Reviewer Workflow

Community Form Reviewer Workflow

- Community-level Forms offer the ability to build-in a workflow for your reviewer process

- Allows admins to set different levels for each reviewer in the process

- Will stagger notifications for reviewers based on the level to which they are assigned

Community Form Reviewer Workflow

#5
Additional Fields

Additional Fields

- Additional Fields allow campuses to gather more customized data in various data sets within Engage

- Can be added to the User Profile, the Organization Profile, Events, Funding Requests, and Purchase Requests

- Leverages most of the familiar question types from Forms
    - Not able to include Ranking Questions

- Gives Administrators the ability to determine visibility levels across different audiences.

Additional Fields

#6
Homepage Alerts

Homepage Alerts

- Alerts help make your content more visible and promote traffic because they appear in a prime location that users are highly likely to see

- You can have up to three at any given time and include hyperlinks

Alerts

Explore Hometown University

Search Events, Organizations, and News Articles

Prepare for the Involvement Fair!

Are you an organization officer or leader? Get ready for the Fall Involvement Fair by signing up your organization here!

Re-register your organization

It's time to re-register your organization on campus. Stop by the Office of Student Involvement's organization page for more information.

Major & Career Advising

Looking to change majors? Drop by the Career Center for 1:1 advising. Click here for more information.

#7
Self-Reported Experiences

Self-Reported Experiences (SREs)

- Self-Reported Experiences are meant to provide institutions with a way to collect information from students on things that they do outside of the classroom that aren't already being tracked in Engage.

- These experiences can include anything from honors and awards received, employment or internships held, to off-campus memberships and event participation.

Self-Reported Experiences (SREs)

#8
Opportunity Wall

Opportunity Wall

- An embeddable widget that a campus can put on institution websites with minimal HTML experience

- Pulls a listing of upcoming public events, giving visitors of your webpage easy access to details and information about events they might be interested in attending

Opportunity Wall

#9
Event Conditional Reviewers

Event Conditional Reviewers

- Event reviewers can be setup to only be notified if certain conditions are met.

- For example, you may decide that your campus security officer only needs to review events with attendances over 100 students, or that your catering department only needs to review events that have identified needing university catering.

Event Conditional Reviewers

Conditions:

○ ALL Events
● Events with ANY of the following Conditions
○ Events with ALL of the following Conditions

Select a question
Where will your event be he... ▼   =   Select an anwser
                                      On Campus ▼   🗑

Select a question
Where will your event be he... ▼   =   Select an anwser
                                      Off Campus - Out of Town ▼   🗑

＋ ADD CONDITION

B **Brandon Diniz**
       View Only
       All Events

M **Marqui Lammers**
       Can Vote
       Conditional

R **Ryan O'Connell**
       Can Vote
       All Events

K **Katie Beach**
       Can Vote
       Conditional

R **Rosy Lee**
       View Only
       All Events

#10
Co-Curricular Transcript

Co-Curricular Transcript

- Students can use Engage to generate a record of their involvement to document experiences gained outside the classroom.

- This document is called the Co-Curricular Transcript (which can be rebranded to fit campus needs), and can be used when applying for grad school, provide speaking points for job interviews, and to showcase your students' leadership experience.

Co-Curricular Transcript Example

Thank You!
Questions?

Katie Felton
Senior Onboarding Consultant
kfelton@campuslabs.com