NAVIGATING ENGAGE

C.O.S.O.
Committee on Student Organizations

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Understanding Engage

The Engage platform allows you to discover organizations and events at your institution and track your outside of the classroom experiences and activities. At the University of Miami, Engage is your connection to over 300 student organizations.

The Engage Switchboard includes:

Explore:

- Default view for all users.
- Discovery view allows students to search for organizations to join, events to attend, and posts to read.
- Students can view organization pages and access content created by organizations.

Manage:

- Takes you to your Action Center.
    - Action Center provides a central hub for student leaders and administrators to manage their personal to-dos. Such as, approving form submissions, re-registering an organization, creating and managing content for an organization or branch.
- Organization leaders can manage content for organization pages.
- Take action on forms, events, and registration submissions.

Admin:

- Represents users in your community with the highest level of access.

Getting Started

Basic Site Navigation, Keeping Track of Your Involvement, Exploring Organizations and Events, Managing Organizations as a Student Leader:

- On the community homepage in the upper right-hand corner, click your name or profile picture. This will open up the **User Drawer** which, allows you to
    - Manage your personal profile, privacy settings, notification settings.
    - View a historical and current list of submissions (e.g. events, forms, elections, organization registrations).
    - View notifications from the Engage site that are relevant to you, your submissions, and the organizations you manage.

- The Engage Switchboard previously mentioned is the icon next to your user profile or name. Below is an explanation of what can be found on the Explore and Manage page.
    - On the **Explore** page, the search bar can be used to search for events, organizations, or new posts throughout the site. Below the search bar are the campus alerts or important announcements and any current campus elections going on. Followed by a list of your memberships including any notifications if you have any memberships pending. Scrolling further are the events and news posts that have been shared to the entire campus community. As well as important links your campus admins have chosen to share. On the top of the explore page are the events tab, organizations tab, and news tab that gathers the information you may be looking for better organized.
    - On the **Manage** page, you will see a list of your organization's memberships. What you are able to do for each organization depends on the level of management access that you hold for each of your organization memberships. When an organization is clicked through the action center you are taken into the management center for that organization, where you can see if that organization is eligible for re-registration. Opening up the organization tool drawer on the upper left-hand corner allows individuals to see which, tools you are able to manage within that organization. Tools include,
        - Roster: Includes your ability to manage positions for the organization, send organization messages, invite members, remove members, and approve pending memberships.
        - About: You can update some of your organization's basic details, such as the profile photo, description, summary for the organization directory, contact information, and social media links.
        - Events: Allows you to create and manage your organization's events. Submit an event request, or manage an individual event, including inviting attendees, tracking participation, or changing an event's details.

- News: Helps you share what your organization is doing with the community. You can create, edit, and delete News posts from this area.
- Gallery: Helps you create a more visually appealing organization homepage. Photos are a great way to show off the exciting things your organization has done! Your gallery photos will be showcased at the top of your organization's public-facing page.
- Documents: Allows you to create a shared storage space for important organizational files. You can share these files publicly or only with certain members or Position holders within your organization.
- Forms: Move any of your organization's paper forms into Engage. Use forms for sign-ups, interest forms, applications, and more!
- Elections: Allows you to create elections for your organization, either for the entire community to vote on, or exclusive to organization members.

Re-registering your organization:

Access your Action Center for the organization by clicking Manage.

Use one of the two ways to go about re-registering your organization:

Option 1 (Select a single organization to view): Click the name of an organization to navigate to the management section where you will see the following message "This organization is eligible for re-registration". Click "Re-Reigster this organization" to start the re-registration process.

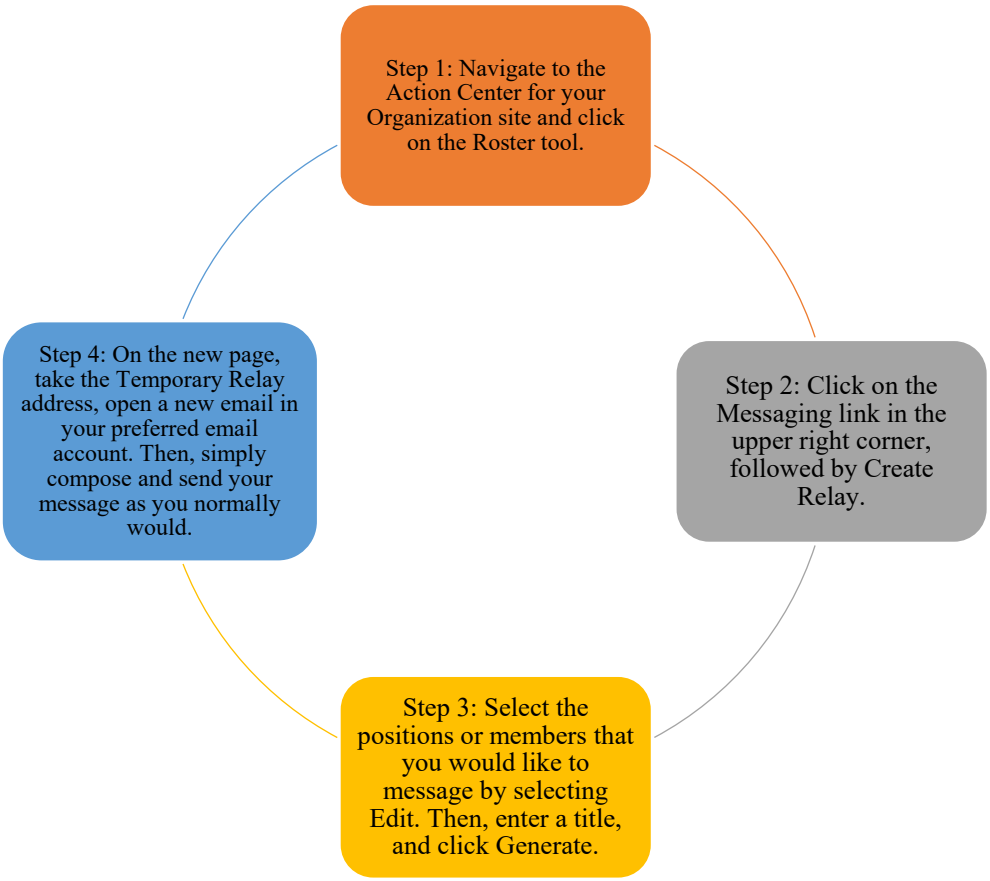
Option 2 (View re-registration eligibility of all organizations): On your Action Center homepage, selection the "Register an Organization" button on the right hand side. Then, you will be shown a list of all organzations on your campus. Locate your organization. If eligible, you will see the blue "Re-Register" button to the right or if an existing submission is already in progress.

Organization Rosters

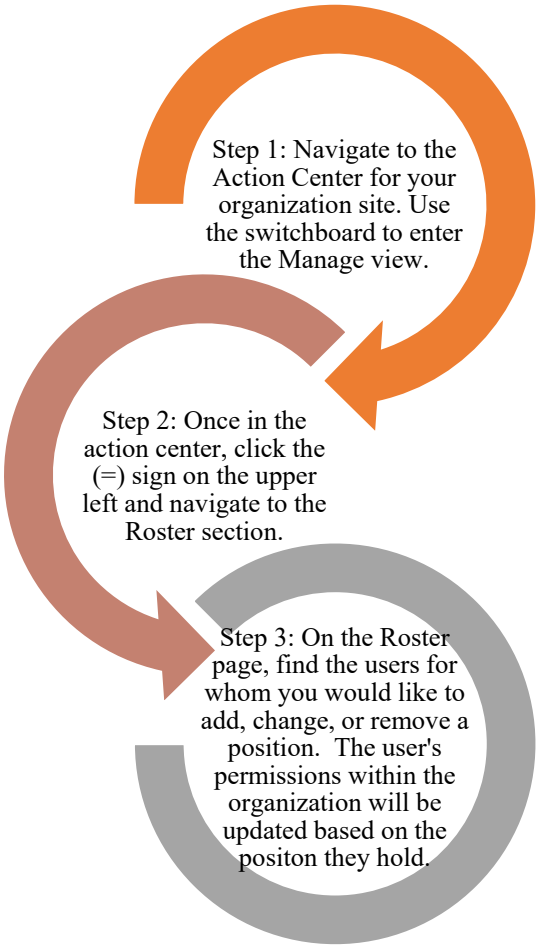
Establishing a Primary Contact:

- The primary contact, your organizations president, is designated as the user who submits the organization registration and can be changed at any time throughout the semester by going to the Roster section of your Action Center.

Sending a Message as an Organization Leader:



Changing Position Holders in your Organization:



Removing Members from your Organization:

- To remove a member from your organization, navigate to the Action Center for your organization site and click on the Roster tool. Then, locate the member(s) you would like to remove and click End Membership.

Approving Organizations Membership Requests:

- To approve organization membership requests for your organization, navigate to the Action Center for your organization site and click on the Roster tool. Then, select Manage Roster where you will be able to view current, pending, and prospective members. There you will be able to Approve, Deny, or Resend an Invitation.

Inviting New Members to Join an Organization:

Step1: Navigate to the Action Center for your organization site an click on the Roster tool.

Step 2: At the top of the page, click the Invite people. **Note**: Up to 500 email addresses can be entered in the text box.

Step 3: After the email address is added, click + Add E-mail Addresses.Then, select which position you would like the users to hold and press Send Invitations.

Note: If you want different invited members to hold different positions, then they will have to be invited separately or invite all users as general Members and then, mange individual positions later.

Creating Positions Specific to your Organization:

STEP: 1 Navigate to the Action Center for your organization site and click on the Roster tool.

STEP: 2 From the Roster menu, click Manage Positions. Then, simply click + Position and give the position a name.

STEP: 3 Select the check box "Show holders of this position on the organization roster" if you want the user to be visibile on the roster page. If you want the position to be avaialbe for users to hold immediately, select "Active".

STEP: 4 Set the management access for that specific position.

Event Management

Navigating through Events:

- The Events tool allows you to manage your organization's events from one location. Officers or users with access to manage the events tool have additional set of tools such as, the ability to create events, manage event attendance, and invite users to events.
- If one or more of your co-hosting organizations are frozen or locked, they will appear on this page but, not the Explore view of Engage.

Creating a New Event in your Organization:

- Manage your organization by selecting Manage from the switchboard and choosing your organization. Then, go to Events in the organization tool menu. Once you click on Create Event. Enter an event title, theme, description, start and end time, and location into their respective boxes. In addition, you will be able to identify if the event will be co-hosted with other organizations.

Tracking Event Participation:

- After an event is created and approved, you can manage RSVPs and invitations and finally track the attendance at your event. In order to do this, switch to the Manage view of Engage using your switchboard and select your organization. Use the organization tool menu to open the Events tab and then, click the event and click Track Attendance.
- There are two ways to track attendance: Tracking participation manually, tracking attendance using card swipe, and tracking attendance on Mobile.
    - Tracking Participation Manually: Click +Add Attendance button. Three tabs will appear. (1) Invitations- Here a list of users who were invited to the event will appear. The appropriate level of attendance and additional comments can be added. (2) Text Entry- Here you can enter attendee information in bulk, using the user's campus email address or Card ID. For each entry, you can choose the attendance status. Up to 500 attendees can be entered. (3) File Upload- Here you can enter a .csv or .txt file containing attendee's information. Make sure to limit attendance uploads to a maximum of 1,000 records.
    - Tracking Attendance Using Card Swipe: Copy the Swipe Access Code directly on the Manage Event page without even opening Track

Attendance. Then, click the link to go to the swipe page. Enter the code and click Submit. This code can only be reached by an organization officer but, can be shared with anyone on campus that may want to assist you with checking people into your event. Once that step is complete, you can begin swiping.

Organization Content

Navigating through Forms:

- To access forms, simply click on the Forms tab while on the Explore view of Engage.
- In the Forms Directory, the user will see:
    1. Any of their own in-progress submissions
    2. Forms that have been featured by a community administrator
    3. Forms hosted by branches that oversee organizations for which they are a member
    4. Forms hosted by organizations they are a member of
    5. All other forms

- Building a form for your organization or branch: Switch to the Manage view and select your organization. Open the organization drawer and select Forms. Then, click +Create Form.
    - When creating a form, you will first be prompted to identify your form properties. (See below chart for an explanation on each property.)

Setting	Function
Active	Determine if the form should be accessible yet. If the active option is not chosen, then users will not be able to complete the form. Leaving "Active" unchecked allows you to work on a form before making it live to your users.
Start/end time	The time period for which the form should be open. Submissions will only be accepted during this time period.
Feature in Explore Forms	Enabling this option will make this form appear as "Featured" in the Forms Directory in Explore, allowing users to more easily find and fill out this form. ***This option only appears to community-wide administrators who oversee forms.***
Hide from Explore Forms	Enabling this option will hide the form from the Explore view of Engage, including the Forms Directory and the organization page that created the form. This option can be used to hide organization registration related forms from public view, or to make forms private to send via message relay to a subset of users. ***This option only appears to community-wide administrators who oversee forms.***
Submission Approval Process	Choose whether you would like the form's submissions to go through an approval/denial process where they are pending until processed, or if you prefer the for's submissions to be automatically marked as "received" without any approval process.
Allow Submissions from Public Users	Enabling this option means anyone, including those who do not have an account in your community, is able to fill out the form. If you enable this setting, "allow multiple submissions" will be disabled because there is no method to limit respondents to one submission.
Collect Personal Information	If allowing form submissions from public users, you can choose to add an additional screen to the submission process which will collect the name and email address of any user who completes the form without being signed in.
Allow Multiple Submissions	Users can submit more than one submission. If this option is not selected, users will be restricted from the form after one submission.
Submission Restrictions	Determine if you want to restrict the form to certain users. If you're creating this form at the administrative level, you have the option to restrict the form to primary contacts in specific organization types. If you create this form in an organization, you can restrict the form to users within your organization that hold a specific position. If you want to make your form available to any user in your community, do not select any submission restrictions.

- Once, settings have been determined you will be taken to the first page of your form. To jump to additional pages of the form, click Page List. To name the page, click Page Properties. Once, you are ready to start adding questions into the form, take a look at the list of question types that are available to you. (See below chart for an explanation on each type of question..)

Question Type	Function
Check Box List	Multiple choice question that allows users to choose more than one option.
Radio Button List	Multiple choice question that only allows users to select one option.
Text Field	Open text response. Alter the number of rows to provide the user a larger space to write in for longer answers. You can also use the Text Field question to utilize validation, ensuring a specific format is entered.
Drop Down List	Multiple choice question where users can only choose one option. The only difference between the dropdown and radio button options is that the user has to click the dropdown to view the available choices.
Instructions	This is your method of providing additional instructions or information to the user. Instructions do not require any action on the part of the user.
Single Check Box	Think of this as a method to provide the user a set of terms and conditions that they need to agree to before they can proceed on the form. You can input the terms that need to be agreed upon and the user will be provided a single check box to confirm their agreement.
Ranking	Provide the user multiple answer choices for them to rank. You can also determine the maximum number of items they need to rank.
File Upload	Allow the user to upload a file from their computer. Files must be under 4 MB and the uploader accepts most file types. If you prefer a specific file type, make sure to indicate this within the instructions of the question.

- In addition, for each of the question types, you also have additional question options. (See below chart for an explanation.)

Potential options and their descriptions are below.

Question Setting	Function
Required	Select the "Required" box if you want the question to be mandatory for users before proceeding. This option is available for all question types.
Shuffle Answers	For Check Box List and Radio Button List question types, you can choose to shuffle your answers. For example, if you input an alphabetical list but want the answer choices to appear random, you can shuffle them. Note: This will not shuffle the answers every time a different user fills out the form.
Minimum and maximum answers	If you are utilizing the Check Box List, you can identify the minimum or maximum number of answers a user can select.

You also have the ability to put additional properties on your answer choices for Check Box List, Radio Buttons and Ranking question types.

Question Setting	Function
Include Text Area	Text Area allows you to provide additional space for users to write-in an answer. For example, you may want to include an "Other" option to a multiple choice question, but want users to write-in their additional option.
Include Tooltip	The tooltip allows you to hover over the answer choice to read additional information about it. The additional information will appear automatically next to the answer choice.
Include Additional Text	Similar to the tooltip, Additional Text allows you to put in additional information about an answer choice. The difference between the two is in how the information appears. With Additional Text, an information icon appears next to the answer choice. Clicking that icon will open up a box with the additional information.

- Building an administrative form: Access the Admin view of your site and click the Configure dropdown. Then, click Forms and +Create Form.

- Managing Reviewers:

    - Organization form: Navigate to the Manage view and select your organization. Open the tool menu and select Forms. Click the “Properties” button for the form of interest. Select the Reviewers tab.

    - Administrative form: Can be used when setting form reviewers for a community form. Go to administrative form by switching to the Admin view, selecting the Configure dropdown and then Forms. Click on the “Properties” button for the form you would like to configure. Select the Reviewers tab.

- Adding and Modifying Reviewers:

    - Adding Reviewers: Click the "Add Reviewer" person-shaped icon. With organization forms, you can select any member of the organization to be a reviewer on the form, without giving them the ability to approve or deny the submission. For an administrative/community form, any Engage user can be added as a reviewer without giving them the ability to approve or deny the submission.

    - If your form has an approval process enabled in its properties, you can optionally choose to allow this reviewer to have "voting" access to the form. While any reviewer can read and comment on submissions, a voting reviewer can additionally provide feedback using a thumbs up/thumbs down visual to the submission.

    - If your form has Reviewer Workflow enabled, you can also select the workflow level for the reviewer when adding them to the form.

    - Similarly, you can click on any existing reviewer's name to change their voting access or workflow step.

Note: For organization forms, only users with full Forms access in the organization (or community administrators) will be able to make final decisions about submissions. For administrative/ community forms, only community administrators with full access to Forms will be able to make final decisions about submissions.

Documents Overview:

- This tool allows you to create a shared storage space for important organizational files. You must be the Primary contact or an officer with full access to Documents to upload files to your organization.
- Upload a Document: Navigate to the Action Center and select Documents from the Organization Tool Drawer. Then, you can decide if you wish to upload a single file or create a folder. Once you decide, you can set the appropriate level of permission. It is important to note when uploading a single file, the maximum file size is 10MB.

Changing your Organization's Profile Picture:

- You must be the Primary contact of your organization or have officer rights to make changes to your organization. This can be done by navigating to your Action Center by accessing the Manage view on Engage and selecting your organization and then, opening the organization tool drawer. Then, you must select the About tab and press upload the image under the section labeled Profile Picture.

Additional Tools

Creating an Organization Election:

- Defining Election Parameters: Go to the Action Center for your organization, and then click on Elections in the organization tool drawer. **Note**: This option may not be available for everyone. Then, click the Create Election button, identify the name of the election, and any additional instructions that should be included.
- Setting Up Ballots: To start creating ballots click Create Ballot. Enter the name, then determine if the ballot should be general access by selecting Enable or Disable. Then, fill out the setting you want to see for each of the available eligibility lists.
    - **Note**: You can create as many ballots as needed, Title and access of your ballot can be revised at any time by clicking Form Properties in the upper right corner, and in order for users to vote when the election starts, make sure to set your election to Active.

Link to Engage Support:

https://engagesupport.campuslabs.com/hc/en-us

About COSO:

The Committee on Student Organizations (COSO) is dedicated to advocating for student organizations and their members.

The students on this selective committee focus on helping new student organizations become established as well as providing current student organizations with the training and tools to be successful on campus. Some of COSO's well known events include Canefest, the Spring Involvement Fair, and SOAR awards to recognize excellence in organization leadership.

If you have any additional questions, please do not hesitate to reach out to us. We are here to support.

coso_chair@miami.edu