CFAES

Engage: Extension Data Portal User Manual

THE OHIO STATE UNIVERSITY
EXTENSION

COLLEGE *of* FOOD, AGRICULTURAL, *and* ENVIRONMENTAL SCIENCES
Learning and Organizational Development
extension.osu.edu/LOD

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Introduction

The Extension Data Portal is a system built on the Salesforce platform to meet OSU Extension's data and reporting needs. The CFAES and OSU Extension Salesforce instance is called "Engage." The Extension Data Portal is an app that lives inside the Engage platform, along with other apps such as the Master Gardener Volunteers app.

What does it do?

- Streamlines data collection across OSU Extension.
- Allows aggregation of data to inform local, state, and federal reports and help OSU Extension share the impact of our programs.
- Connects with other tools to consolidate information and avoid duplicate data entry.

How is the Extension Data Portal different from Vita?

1. The Extension Data Portal is a new system built for OSU Extension to track events and activities that were previously entered into the Extension module of Vita. It does not have fields that were in Vita that are no longer relevant.

2. Unlike Vita, Publications and Service will not be tracked in the Extension Data Portal. These should be kept in a Word document until the new faculty information system, Interfolio, is launched in 2024.

3. Vita required staff to create their own copies of Program and Event records each year. The Extension Data Portal has a standardized list of Programs for organizing Events, and ties staff members to Events via Engagements, so there only needs to be one record for an individual event even if there were multiple instructors or team members involved in other ways. Individual Instruction will now be tracked in the same place as events, with a record created for each topic/theme holding all contacts for a specified time period.

How is the Extension Data Portal different from Interfolio?

1. Interfolio is the university's replacement for Vita (faculty information system). The Extension Data Portal does not track scholarly work that were previously entered into the Elements side of Vita (e.g., publications, funding, service, academic courses, awards, etc.).

2. All information and instructions about Interfolio will be sent from the Office of Academic Affairs. Questions specific to our college (CFAES), should be directed to Dr. Tracy Kitchel, Senior Associate Dean and Director of Faculty and Staff Affairs for CFAES.

3. Interfolio is also being used for the workflow process for faculty promotion. This process started in Fall 2023 for CFAES faculty members going through promotion/tenure.

What are the expectations for data entry?

You are the critical component of moving us toward a data culture. That's because data must be entered into the system on a timely basis. The expectation in 2024 and beyond is that everybody will enter data monthly. That way, we can respond immediately and accurately to information requests and you will be able to create updated and timely reports that can incorporate a variety of charts and graphs. Consider a discussion with your manager/supervisor about what data they would like to have in your reports.

Navigation

Logging In

To access the Extension Data Portal, open the following link in a browser such as Google Chrome, Firefox, or Microsoft Edge: https://go.osu.edu/Engage-EDP

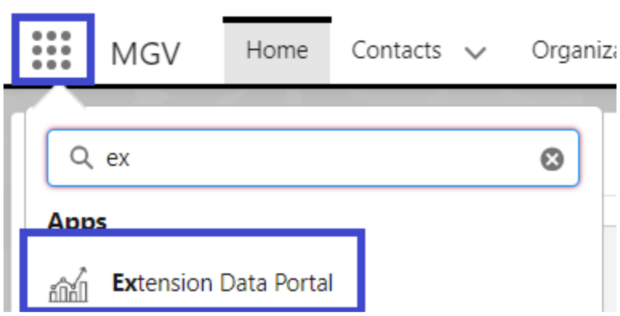
Click on "Log in with OSU Web Login Service" then log in with your OSU credentials. Multifactor authentication (BuckeyePass) will be required.

Access to the Extension Data Portal requires completion of Institutional Data Policy training, available in BuckeyeLearn (http://go.osu.edu/idp-enroll), and the Engage: Extension Data Portal training in Carmen Canvas (https://carmen.osu.edu/).

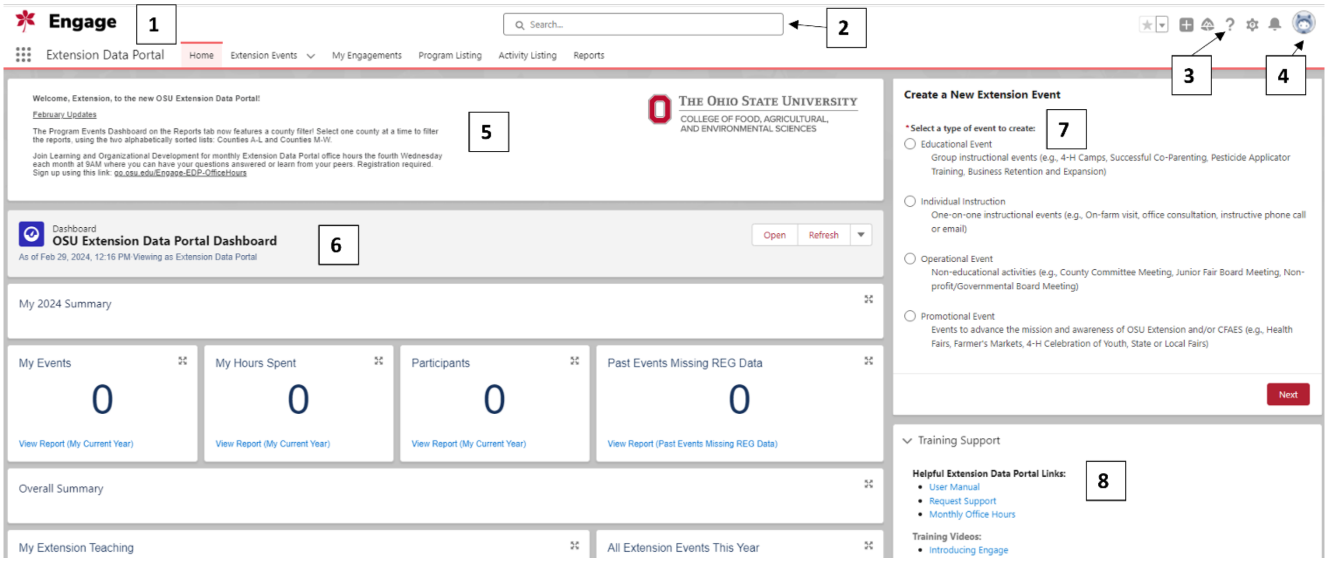
Navigation

You will now be logged into Engage, the name of our Salesforce platform. If you are already a user of Salesforce for Master Gardener Volunteers/Hands On Connect (MGV/HOC), you will now need to open the Extension Data Portal app. If you are not a MGV/HOC user, you will already be in the Extension Data Portal app by default.

To open the app, click on the 9-dot App Menu icon in the top left corner, then select Extension Data Portal under Apps:



The Home page consists of a header that stays the same across all Extension Data Portal app pages and a collection of widgets, graphical elements that provide information or can be interacted with, including charts, helpful links, and an Event creation widget.



Extension Data Portal App Header:

1. Navigation Bar: This menu stays the same across the Extension Data Portal app and is used to navigate to other pages. The highlighted link indicates the page you are on, which will be the Home page by default. Additional pages include:
    - Extension Events: A list of Events that you have recently viewed or Event records that you own.
    - My Engagements: A list of all Events (also called Program Cohorts) that you are linked to through a Program Engagement record, including events you created and own as well as those created by others.
    - Program Listing: A list of all Extension Educational Programs with descriptions. This page can be used for reference or to create new Educational Events or Individual Instruction records.
    - Activity Listing: A list of all Extension non-Educational Activity Types and descriptions. This page can be used for reference or to create new Operational and Promotional Event records.
    - Reports: This page has a dashboard with Extension-wide data that can be filtered by Geographic Area, Program Area, County, and/or Year. You can view and download reports from this page.
2. Search Bar: Use the search bar at the top to quickly locate records or reports. If the record you are looking for does not show up while you are typing, click the “Show more results” link to view more records.
3. Get Help (?): This question mark icon in the top right corner has links to training and a form for submitting support requests.
4. View Profile: The face icon, or your image, in the top right corner has links for logging out or viewing your profile. From your profile you can customize your profile image.

Home Page Widgets:

5. Welcome Banner: This box will provide any important news related to the Extension Data Portal.
6. Extension Data Portal Dashboard: A dashboard on the home page with a summary of your current year events and engagements, your Extension Teaching summary, and a summary of all Extension Events this year by Program Area.
7. Create a New Extension Event: A widget that lets you quickly create new Extension Event records.
8. Training Support and Recent Records: This box has links to training materials and your recently accessed records. Use the carrot next to the Training Support or Recent Records headings to expand the box and show relevant links.

Extension Programs and Activity Types

As part of the transition to a new system, a new list of Programs and Activity Types was created for each Program Area to streamline data entry and improve reporting capabilities. Every educational or non-educational event should fit into one of the pre-existing programs, but there are "Other" programs to allow for new or unique events, which may eventually lead to the creation of new Programs.

Programs are grouped into Categories and Program Areas. In some cases, Sub-Categories are used to further segment Categories. Some Programs cross Program Areas. In those cases, both Program Areas have the Program organized into their own Category structure.

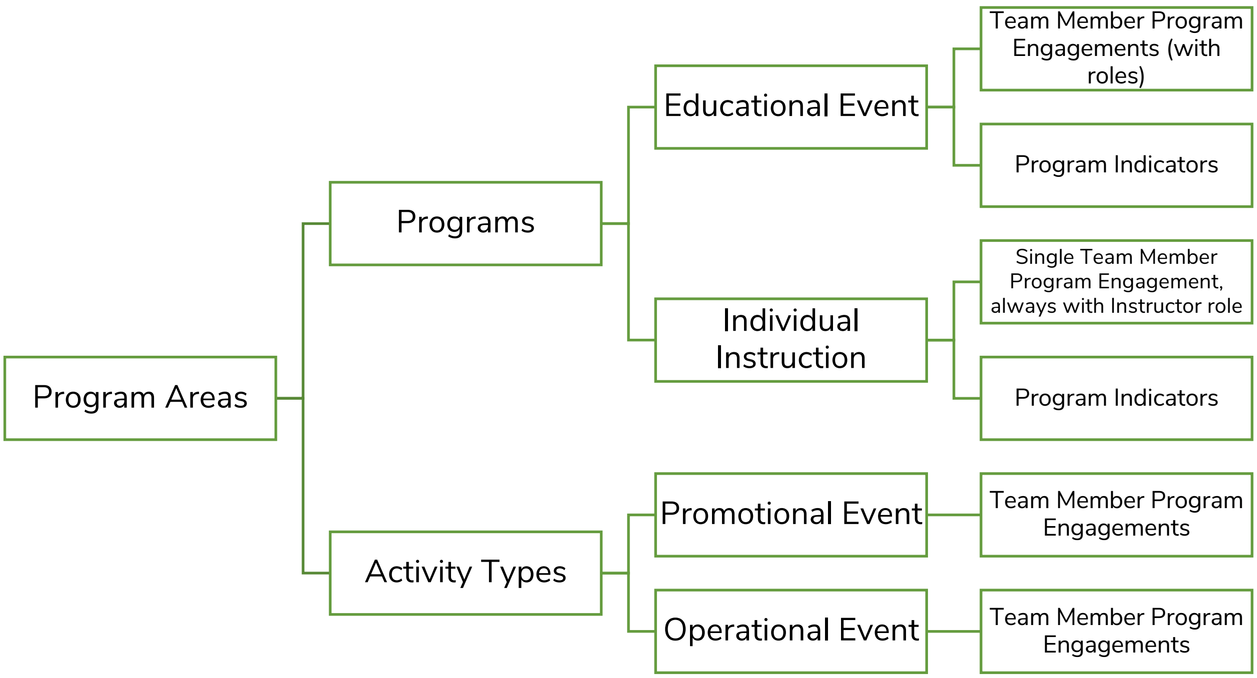
Activity Types are split into Operational and Promotional and are used to organize non-educational events.

Record Type Definitions

Record Type	Definitions
Program	A program is the large, overarching concept (think "curriculum"). These are standardized by Program Area. Every Educational Event is tied to a Program.
Activity Type	Activity Types are overarching categories standardized by Program Area, similar to Programs, but used to group Operational and Promotional Events.
Extension Event	A record used to track educational events, individual instruction, promotional events, or operational events. Extension Event records are sometimes referred to as Program Cohorts within the system.

Record Type	Definitions
Program Engagement	A record used to track a person's role or involvement with an Extension Event. Currently, only Team Member Engagements can be added to Extension Events are used to determine who taught during an event or had some other role in making the event happen. Team Member Engagements allow each staff member to have their own record with hours spent and role information on a single, shared Extension Event record.
Program Indicator	Records that can be added to Extension Events to record indicator values. For example, the number of participants that indicated that they intend you use information they learned during the event. The type of indicators that can be added to an Education Event are determined by the Program Area and the Program.
Educational Event	An Educational Event is a type of Event record to track group instructional events (e.g., 4-H Camps, Successful Co-Parenting, Pesticide Applicator Training, Business Retention and Expansion). One record should be created for each occurrence of an event. If there were multiple instructors or team member involved, each should be tied to the Event record using a Team Member Program Engagement.
Individual Instruction	Individual Instruction is a type of Event record to track one-on-one instructional events (e.g., On-farm visit, office consultation, instructive phone call or email). One record should be used to track multiple instructional contacts. We recommend tracking individual instruction contacts by topic/theme and month. The date range indicated for an Individual Instruction record must be in a single calendar year for reporting purposes.
Operational Event	An Operational Event is a type of Event record to track non-educational activities (e.g., County Committee Meeting, Senior Fair Board Meeting, Non-profit/Governmental Board Meeting).
Promotional Event	A Promotional Event is a type of Event record to track events that advance the mission and awareness of OSU Extension and/or CFAES (e.g., Health Fairs, Farmer's Markets, 4-H Celebration of Youth, State or Local Fairs).

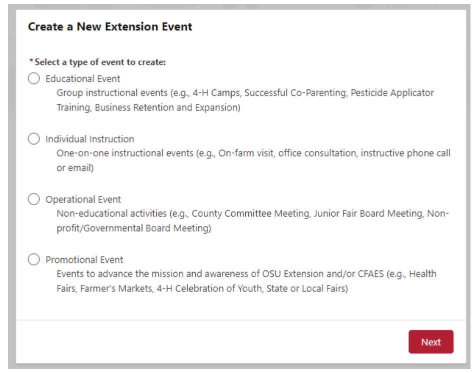
The following chart shows how various record types are related:



Events and Engagements

Create a New Extension Event

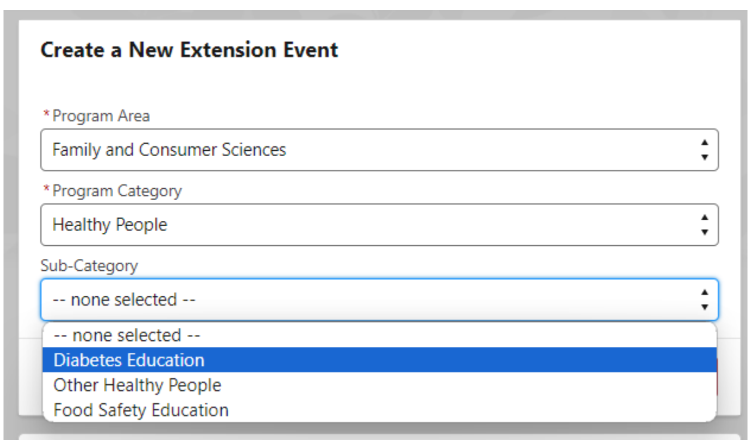
To create a new Event record and related Engagements, use the **Create a New Extension Event** widget on the home page by following these steps:



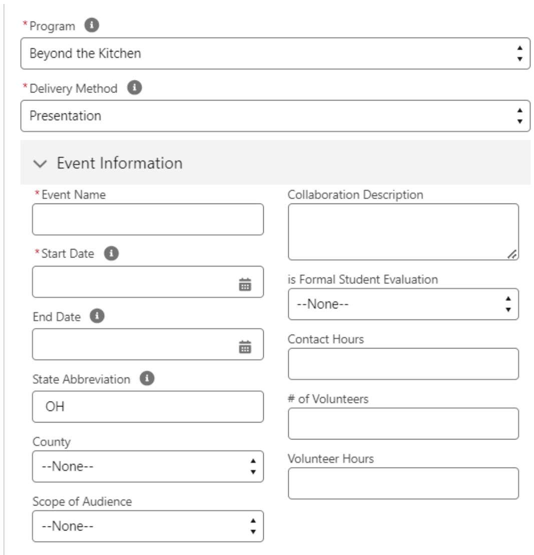
1. Go to the Home page using the Navigation bar.

2. On the right side of the screen, the **Create a New Extension Event** widget prompts you to select a type of event to create. Select the relevant event type then click "Next."

3. Select the Program Area from the drop-down that is most relevant for your event. In the case of Programs that cross Program Areas, select your Program Area. If you are creating an Educational Event or Individual Instruction record, you will also be prompted to select a Program Category and potentially a Sub-Category. The selections you make here will narrow down the list of Programs or Activity Types available on the next page. Once you have selected the most relevant options, click "Next."



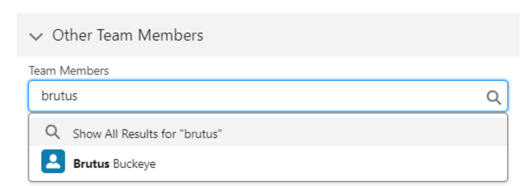
4. Select the relevant Program or Activity Type from the drop-down. For Educational Events, also select a Delivery Method that best fits your event.



5. Fill in Event Information details. Required fields are identified with a * and include Event Name and Start Date. If you would like Events to be grouped together for reporting purposes, use the same Event Name.

6. For Educational Events and Individual Instruction records, provide details about Your Involvement in the event. For Individual Instruction, this includes Hours Spent. For Education Events, you will also be prompted to provide information on your role. In order for an Event to show up on your Teaching Report, you must indicate that your role was Instructor or Presenter. You may select multiple roles.

7. In the Other Team Members section, use the “Search People...” box under Team Members to connect other internal Extension colleagues to the event. This feature is not an option for Individual Instruction.



8. The Race, Ethnicity, and Gender (REG) section will appear if your event has already occurred. Click on the checkboxes that match the type of data you need (Youth/Adult, Race/Ethnicity, Male/Female). Use the fields that appear to enter the number of participants that fall into each REG category. You can add this data later from the Event record. REG data is not collected for Promotional or Operational Events; instead, you can report the total number of participants in the Event Information area above. After finishing data entry, click “Next.”

9. For Educational Events, the next screen will provide an opportunity for you to share a Success Story. If you don't have a story to share, leave the field blank and click "Next."

10. For Educational Events, you will now be prompted to provide Role information for all team members that you included in the "Other Team Members" field. The only required field is Role. Team members can also add additional information, such as their Hours Spent, after the Event is created. Click "Next" after selecting a Role to be taken to the next person's role assignment screen.

11. After completing all role assignments, you will have the opportunity to add Indicators to Education Events or Individual Instruction. The Indicators available are based on the Program you selected in step 4. Indicators can be added or edited later from the Event record page.

12. Finally, you will see a note about the record being successfully created and a link to the new record. Click the link to go to the event's record page or click the "Finish" button to create another new record, starting from the event type selection page.

Program Listing Event Creation

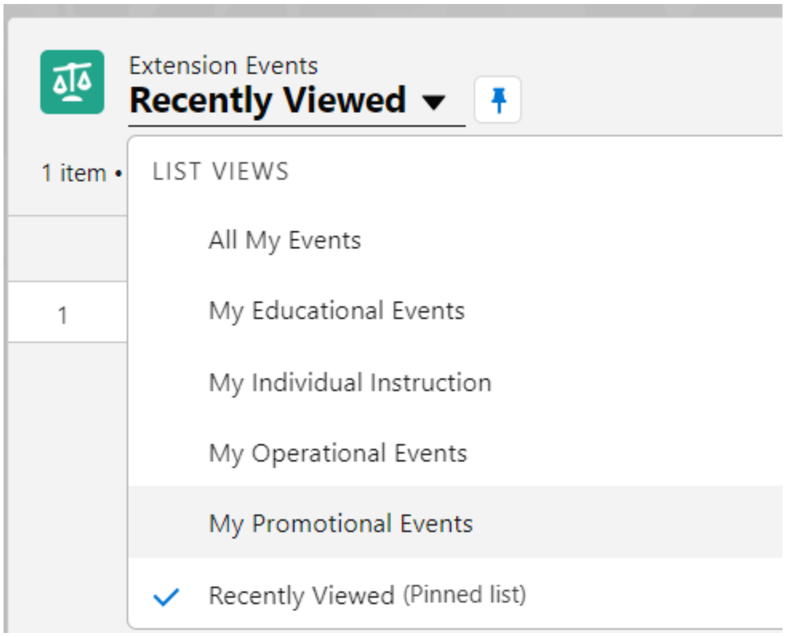
Educational Events and Individual Instruction records can also be created from the Program Listing tab. Use the search bar to easily locate a Program that fits your topic, click the radio button circle to the left of the Program Name, then click the "Create New Event Record" button in the bottom right. You will be prompted to choose between Education Event and Individual Instruction, and then can enter details following a process similar to that described above for the Create a New Extension Event Record widget.

Activity Listing Event Creation

Promotional and Operational Event records can also be created from the Activity Listing tab. Use the search bar to locate an Activity Type that fits your event, paying attention to the Program Area and Category column, then click the radio button circle to the left of the Activity Type and finally click the "Create New Event Record" button in the bottom right. The type of event being created, Promotional or Operational, is determined by the Activity Type selected. You will be prompted to enter details following a process similar to that described above for the Create a New Extension Event Record widget.

Extension Event List View

From the Extension Events tab, you can view a list of all your events, recently viewed events, or a filtered list of any of your events by type (Educational, Individual Instruction, Promotional, or Operational). To switch the list view, click the drop-down arrow next to the current list name, which is Recently Viewed by default, then select the desired view:



The pin icon next to the list view name can be used to change your default list view.

Bulk Updating Records from the Extension Event List View

Changes can be made to up to 50 records at a time on the Extension Events tab. In order to update records, the list view must contain only one type of record. The following list views can be used:

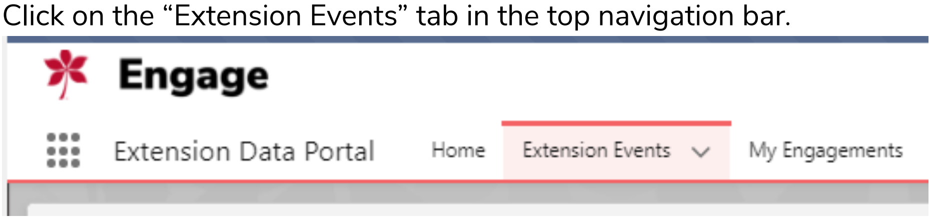
- My Educational Events
- My Individual Instruction
- My Operational Events
- My Promotional Events

The bulk update function can be useful if you'd like the change the name of multiple events. You can also use this process to update the Program for multiple events at once, which may be necessary when cleaning up data imported from Vita.

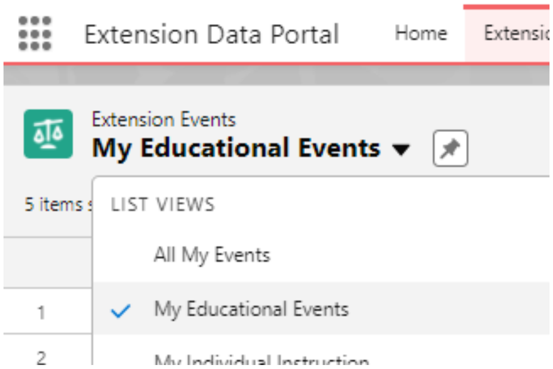
A demonstration of the bulk update process is available in the Engage: Additional Resources playlist on the LOD YouTube channel at the following link: http://go.osu.edu/Engage_EDP_BulkUpdateDemo

Follow these steps to update the Program for a set of Educational Events:

1) Click on the "Extension Events" tab in the top navigation bar.

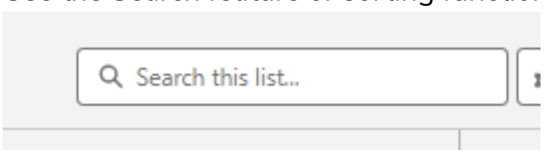


2) Change the list view to “My Educational Events” by clicking the drop-down arrow next to the current list view name, which is “Recently Viewed” by default.

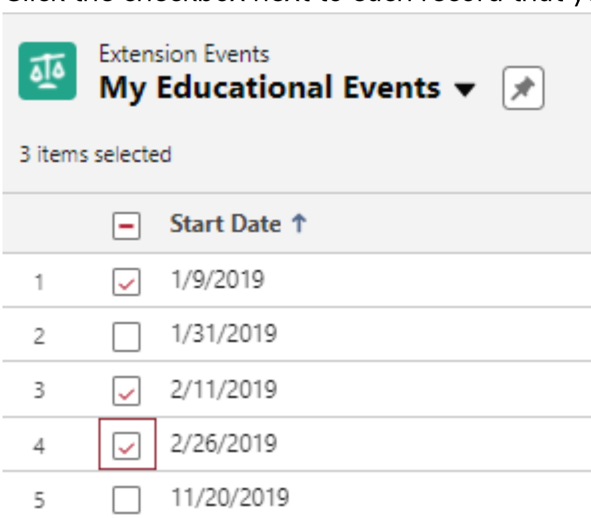


Note: The same process can be used for Individual Instruction, Operational, and Promotional events, but you can only edit one of the four record types at a time.

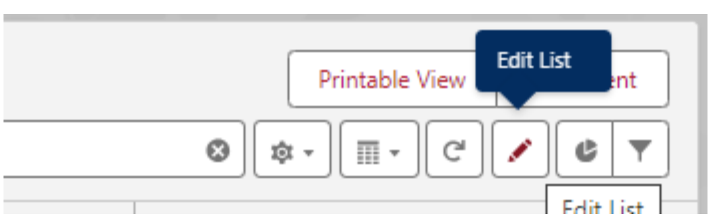
3) Use the Search feature or sorting functions to find the records you would like to edit.



4) Click the checkbox next to each record that you would like to update.

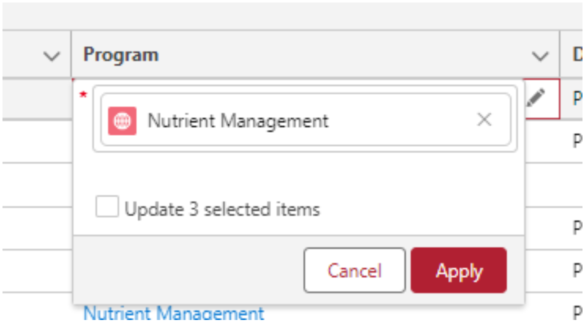


5) Click the “Edit List” button on the far right, under the “New Event” button.

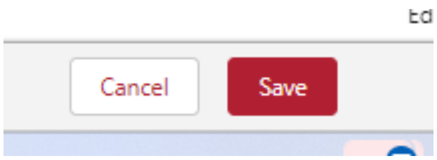


6) Click the pencil button next to the Program name in one of the records you would like to edit. Click the “X” by the Program name, then search to find the Program you would like

to use instead. Click the box next to “Update # selected items” to verify that you would like to update all of the records you checked the box next to in step 4, then click “Apply.”



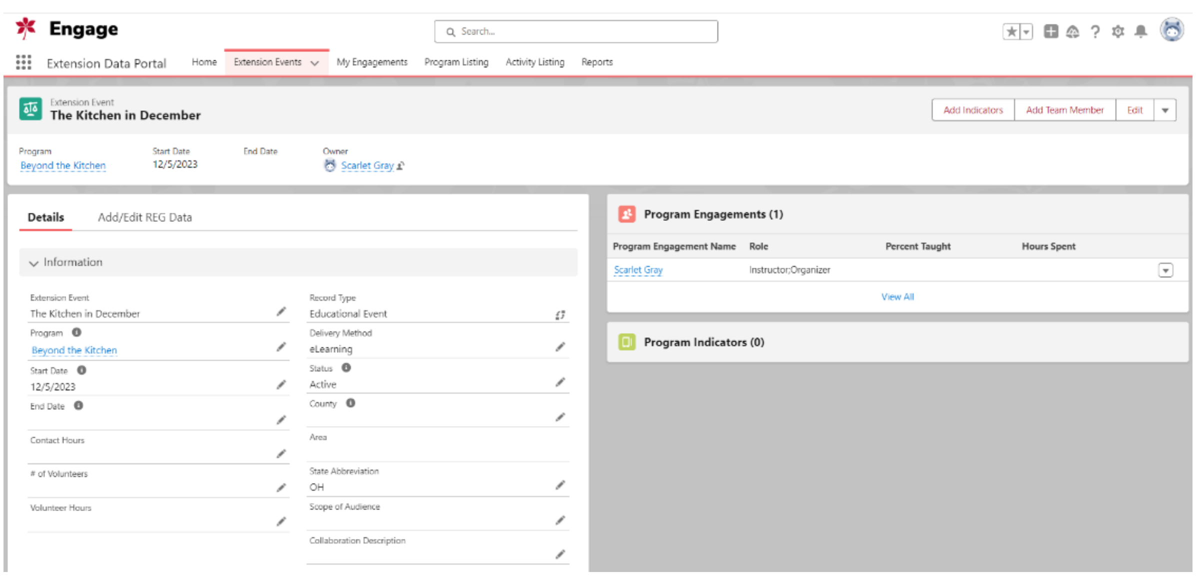
7) Click the “Save” button at the bottom of the list.



Now all of the selected Events have been updated with the new Program that you selected. Follow the same process to edit other fields, such as Name or Date.

Event Records

By clicking on an event name from a list view, report, or search screen, you will be taken to the Event record page. This screen lets you view detailed information about the event and any linked engagements (team members, including you, that were involved with the event). If you are the owner of the record, you can edit any of the details or delete the event.



On the top of the page, you'll see a header with the Event name, Program, Dates, and Owner. On the right side of the header are a few buttons and a dropdown that shows additional buttons. These buttons let you preform the following actions:

- **Add Indicators:** Any indicator available that you did not already create can be added by clicking this button in the top right if you are the owner of the record. Simply follow the prompts to add new indicators and their values.
- **Add Team Member:** If additional internal staff members were involved in the event, you can add them using this button in the top right, which will prompt you to add a role and optionally things like hours spent and percentage taught.
- **Edit:** If you are the owner of this record, change any of the Event Details information, excluding REG data, by clicking the Edit button in the top right or by clicking the pencil icon next to a field. Click Save to submit any changes.
- **Delete Event:** If you are the owner of this record, you can use this button, which can be accessed by clicking the down arrow in the top right next to the "Edit" button, in order to either Cancel the event, or if the record was created accidentally, delete it as well as any related Team Member Engagement and Indicator records.
- **Clone:** Make a new event record based on the current record, quickly creating a record for a similar event. This button can be accessed using the down arrow in the top right next to the "Edit" button.

On the left side of the Event Record page, below the header, you'll see a section with two tabs: "Details" and "Add/Edit REG Data."

- The "Details" tab shows all Event record fields as well as a summary of REG/participant data. Click the pencil icon next to a field to edit the record if you are the Owner.
- By clicking on the "Add/Edit REG Data" header, you'll open a different tab that shows the detailed REG data, if any, for the Event. If you are the Owner of the record, you can click the various Race, Age, and Gender group checkboxes to display fields that can then be edited to record participant data for the Event. Once done adding or editing these fields, click the "Next" button on the bottom right. You'll receive a success message noting that changes have been saved, unless you are not the Owner of the event, in which case an error message will be displayed, and changes will not be saved.

The right side of the Event Record page holds lists of Program Engagements and Program Indicators.

- Program Engagements track who was involved with the event. To edit an Engagement record, click on the drop-down icon to the right of the name and click edit. A pop up will appear where you can adjust roles, percent taught, description of effort, and more. To add additional Team Members, click the "Add Team Member" button at the top right of the page.
- Program Indicators hold values for indicators that are available to events based on Program Area and Program. For example, the number of people that indicated that they intend to use the information presented during event can be recorded as an indicator. To

add indicators, use the “Add Indicator” button at the top right side of the page. To edit or delete indicators, use the drop-down arrow icon to the right of the indicator and click edit or delete.

Reports, Dashboards, and Exports

From the Home page Extension Data Portal Dashboard or the Reports page, you can view report charts and tables. The reports and functionality available for each dashboard is detailed below.

- Actions:
  - Open – Open the Dashboard in a new tab.
  - Refresh – Click the Refresh button to view the latest data.
  - Download – Download an image file of the dashboard.
  - Share – Copy a link to the dashboard or report that can be used by anyone with access.
  - View Report – Open up the full report page. For charts, this page includes a table view of the data. From the full report page, you can Export and Subscribe to the individual report.

Home Page - Extension Data Portal Dashboard

- My Events: Count of current calendar year events that you have been involved in, based on Engagement records.
- My Hours Spent: Sum of hours spent on your current calendar year events, based on Engagement records.
- Participants: Total number of participants in current calendar year events that you have been involved in, based on Engagement records.
- Past Events Missing REG Data: Number of Educational and Individual Instruction records that you own that have already taken place and still need to have REG data entered. REG data is key to tracking the reach of OSU Extension programming and should be provided on all Educational Event and Individual Instruction records.
- My Extension Teaching: A list of Educational Events that you taught during, based on the teaching indicator on Engagements records, as well as your Individual Instruction. Records are grouped by Month, Year, and Name. Cancelled events are not included.
- All Extension Events This Year: A graph of total participants in Extension Events in the current calendar year by Program Area. This includes all events, not just events you were involved in or own.

Report Tab - Program Events Dashboard

- Filters: Geographic Area, Program Area, Program Year, County (split into Counties A-L and Counties M-W).
- Summary of All Events (excludes cancelled events):
  - Total Reported Events, Contact Hours, Participants, Adult Participants, and Youth Participants.
- Breakout of Events by Type (excludes cancelled events):

    - Education Event count, Education Event participants, Promotional and Operational Event count, Promotional and Operational Event participants, Individual Instruction participants.
- Overall Education Event Contacts by Program Area, Program Category, and Program (excludes cancelled events):
    - Educational Event Participants Over Time, by Calendar Year Quarter and Program Area.
    - Events, Contact Hours, and Participants by Program Category.
    - Events, Contact Hours, and Participants by Program.

Imported Events from Vita

Events records tied to 2019-2023 Programs in Vita were matched with new Extension Data Portal Programs and imported as Extension Events. This import included 96,743 event records that initially are owned by an admin user, "EDP Admin," until the actual owner becomes an active EDP user. Since Events were created by each individual in Vita, historical events only include one Team Member Program Engagement per Event.

Due to the size of the import and the new structure of Events and Programs, there may be cleanup required. After gaining access to the EDP, it is recommended that you review your imported events using the Extension Events tab and the "All My Events" list view. Below are common adjustments that may be needed and can be completed on the Extension Event record page after clicking on the name of the Event from the Extension Events tab.

Changing Program or Activity Type

In order to match an event to a different Program or Activity type, click the pencil button next to Program in the Details section:

Next, click the "X" button to the right of the Program Name, search for and select a new Program or Activity Type, then click "Save."

Bulk Program or Activity Type Updates

In order to change the Program or Activity Type for multiple records at the same time, follow the Bulk Update instructions above.

Changing Event Record Type

If the Event was imported as the wrong type of event (Educational, Individual Instruction, Operational, or Promotional), the Record Type can be updated from the Event record page by clicking the Change icon to the right of Record Type in the Details section:

Select the correct record type, then click Save on the pop-up edit screen that appears.

Support and Other Resources

Support

To request support for the Extension Data Portal, use the following form:

https://go.osu.edu/Engage-EDP-Help

Monthly EDP Office Hours are held on the fourth Wednesday each month at 9 AM. Registration is required. Sign up using this link: https://go.osu.edu/Engage-EDP-OfficeHours

Resources

- FAQs: http://go.osu.edu/Engage-EDP-FAQs
- Additional Resource videos: https://go.osu.edu/Engage_EDP_resource_videos
- To view an annotated, interactive image of the Extension Data Portal home page, use the following link: https://go.osu.edu/Engage-EDP-HomeView