

# Engage: Extension Data Portal User Manual



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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 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: [go.osu.edu/Engage-EDP](https://go.osu.edu/Engage-EDP)

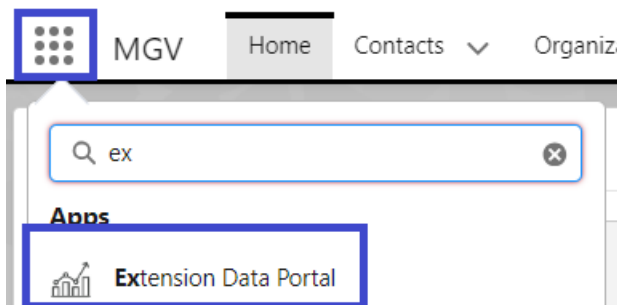
Click on "Log in with OSU Web Login Service" then log in with your OSU credentials. Multifactor authentication (BuckeyePass) will be required.

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

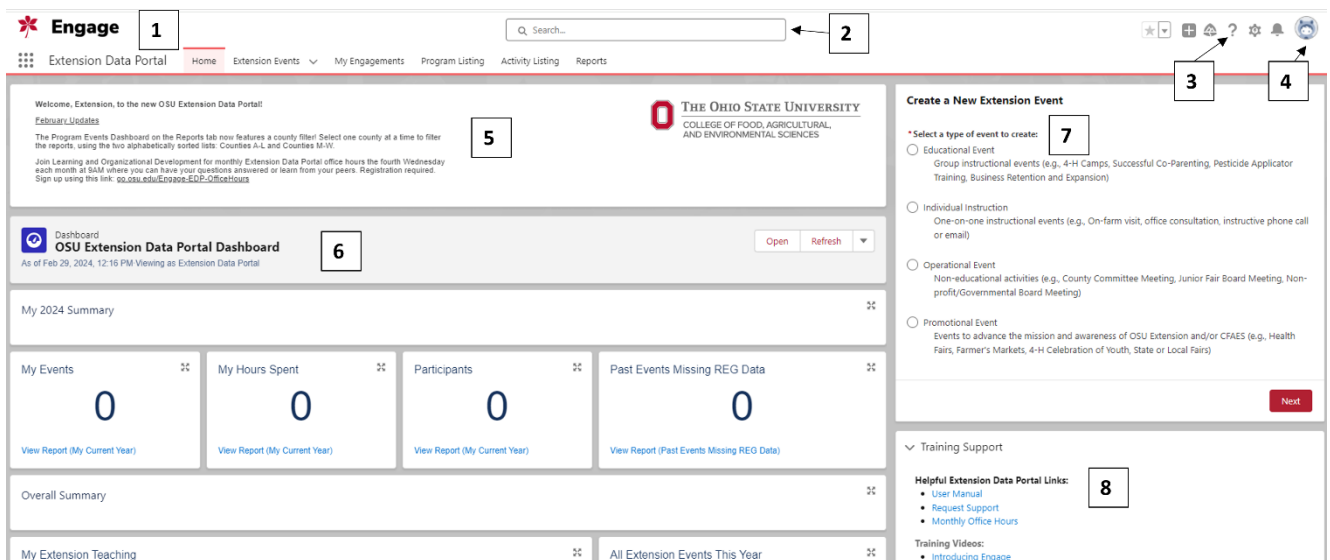
## Navigation

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.

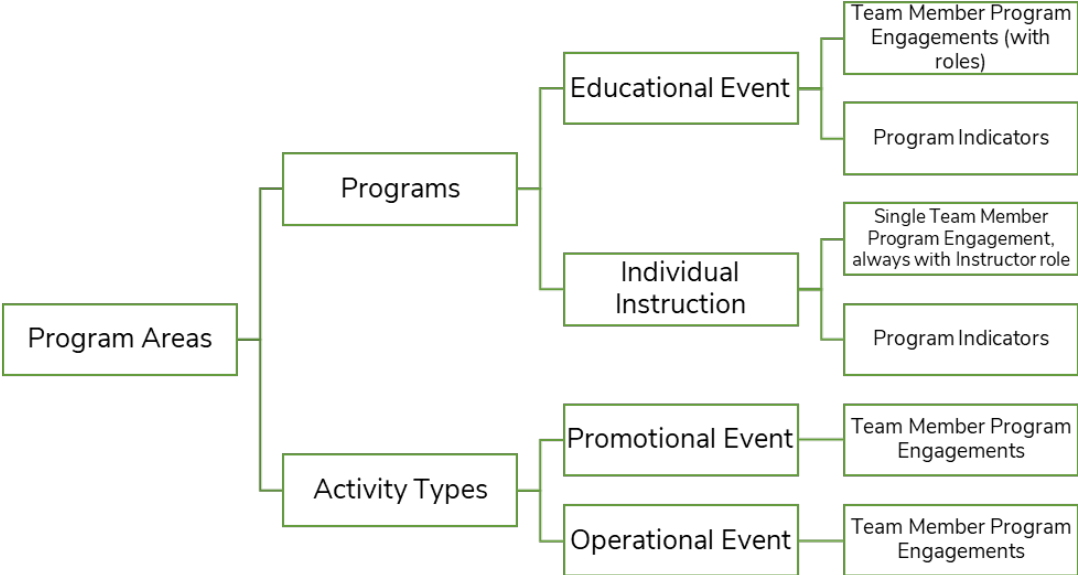
Activity Types are split into Operational and Promotional and are used to organize non-educational events.

## 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.
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.

Record Type	Definitions
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:

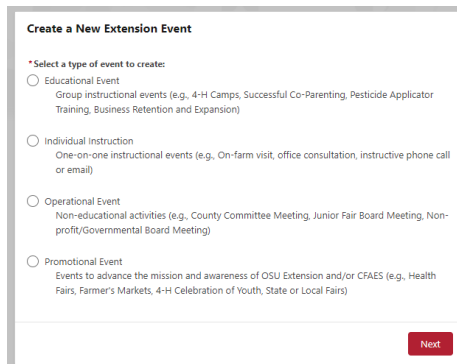


# Events and Engagements

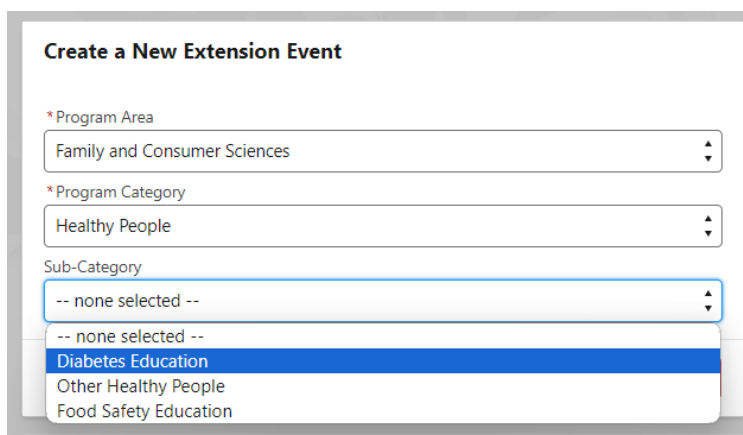
## Create a New Extension Event

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.”



The screenshot shows a form titled "Create a New Extension Event". It contains a section labeled "\*Select a type of event to create:" with four radio button options: "Educational Event" (with sub-options: Group instructional events (e.g., 4-H Camps, Successful Co-Parenting, Pesticide Applicator Training, Business Retention and Expansion)), "Individual Instruction" (with sub-option: One-on-one instructional events (e.g., On-farm visit, office consultation, instructive phone call or email)), "Operational Event" (with sub-option: Non-educational activities (e.g., County Committee Meeting, Junior Fair Board Meeting, Non-profit/Governmental Board Meeting)), and "Promotional Event" (with sub-option: Events to 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)). A red "Next" button is located at the bottom right of the form.



The screenshot shows a form titled "Create a New Extension Event". It contains three dropdown menus: "\*Program Area" with "Family and Consumer Sciences" selected, "\*Program Category" with "Healthy People" selected, and "Sub-Category" with "-- none selected --" selected. A list of sub-categories is visible below the dropdown, including "Diabetes Education", "Other Healthy People", and "Food Safety Education".

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. Notes for you or your other team member’s reference can be included in the “Notes” field. This field is not used or displayed on any reports.
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 check the box that says “I will be teaching / I taught at this event.” This is checked by default when you select the Instructor or Presenter role but can be checked along with any role. 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. You will be asked to provide additional information about their involvement later in the process.

8. The Race, Ethnicity, and Gender (REG) section will appear if your event has already occurred, based on the Start Date entered above. 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. There are three options on this page:
  - Yes, I used CART and have an Access Code to import data: use this option if you used CART to create a form with program evaluation questions. Enter the “Access Code” from your CART confirmation email. Indicators will be automatically added to the event the following Monday, or the Monday after the event occurs.
  - Yes, I would like to add indicators manually now: use this option to add indicators manually if you used paper forms or another tool for program evaluation. The Indicators available are based on the Program you selected in step 4. First, select the indicators that you used then on the next screen enter all the values.
  - No, skip adding indicators for this event now: use this option to skip adding indicators if you would like to add them later or if you did not complete a program evaluation during this event. 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 “Create Another Event” button to create another new record, starting from the event type selection page (step 2).

### 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

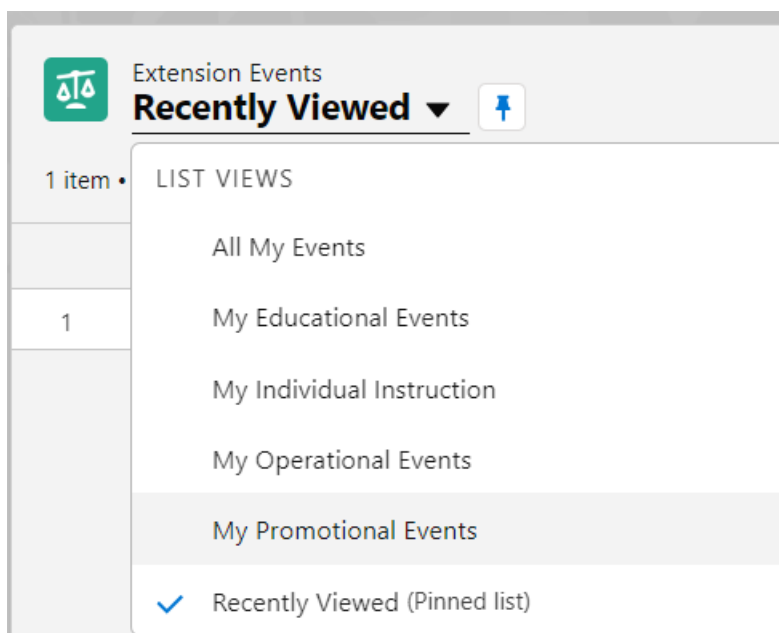
Instruction, and then can enter details following a process similar to that described above for the Create a New Extension Event Record widget.

### 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. 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

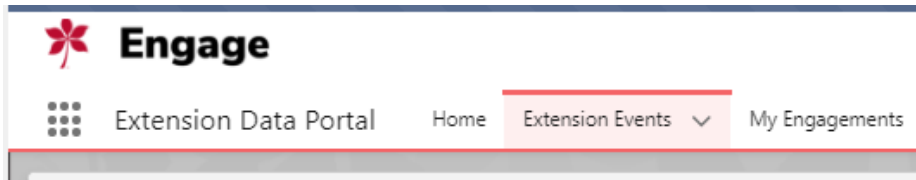
The bulk update function can be useful if you'd like to change the name of multiple events. You can also use this process to update the Program for multiple events at once, which may be necessary when cleaning up data imported from Vita.

A demonstration of the bulk update process is available in the Engage: Additional Resources playlist on the LOD YouTube channel at the following link:

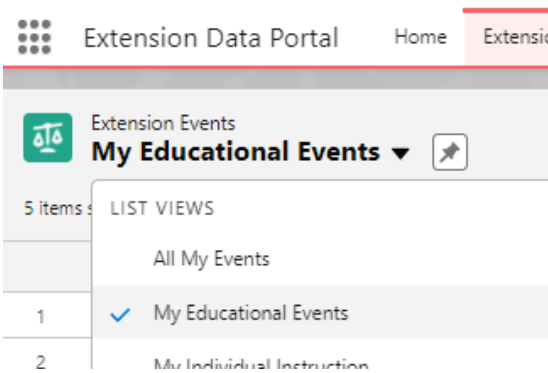
[go.osu.edu/Engage\\_EDP\\_BulkUpdateDemo](https://go.osu.edu/Engage_EDP_BulkUpdateDemo)

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.

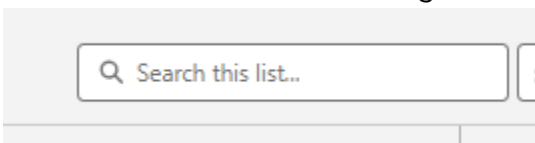


- 2) Change the list view to "My Educational Events" by clicking the drop-down arrow next to the current list view name, which is "Recently Viewed" by default.

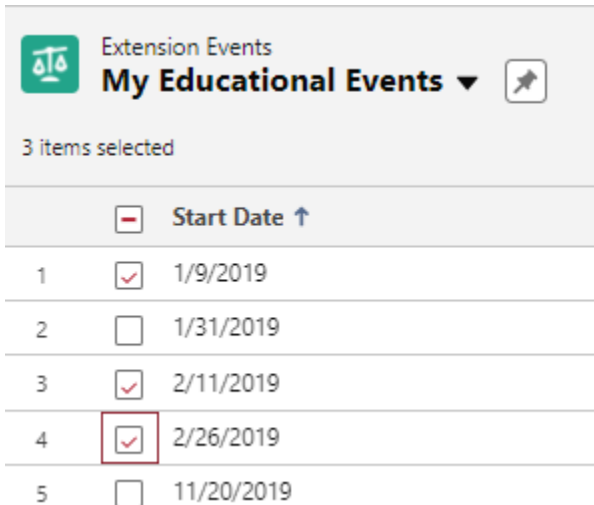


Note: The same process can be used for Individual Instruction, Operational, and Promotional events, but you can only edit one of the four record types at a time.

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



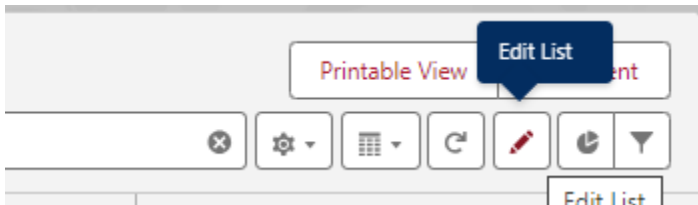
- 4) Click the checkbox next to each record that you would like to update.



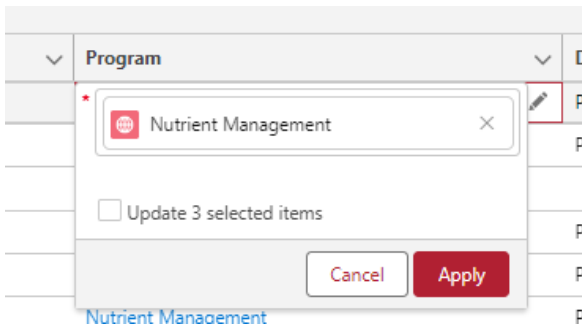
The screenshot shows a table titled "My Educational Events" under the "Extension Events" section. It indicates "3 items selected". The table has a header row with a minus sign icon and the text "Start Date ↑". Below the header, there are five rows of data. The first, third, and fourth rows have their checkboxes checked. The fourth row is highlighted with a red box around the checkbox.

	<input type="checkbox"/>	Start Date ↑
1	<input checked="" type="checkbox"/>	1/9/2019
2	<input type="checkbox"/>	1/31/2019
3	<input checked="" type="checkbox"/>	2/11/2019
4	<input checked="" type="checkbox"/>	2/26/2019
5	<input type="checkbox"/>	11/20/2019

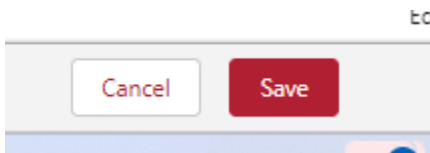
- 5) Click the “Edit List” button on the far right, under the “New Event” button.



- 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.”



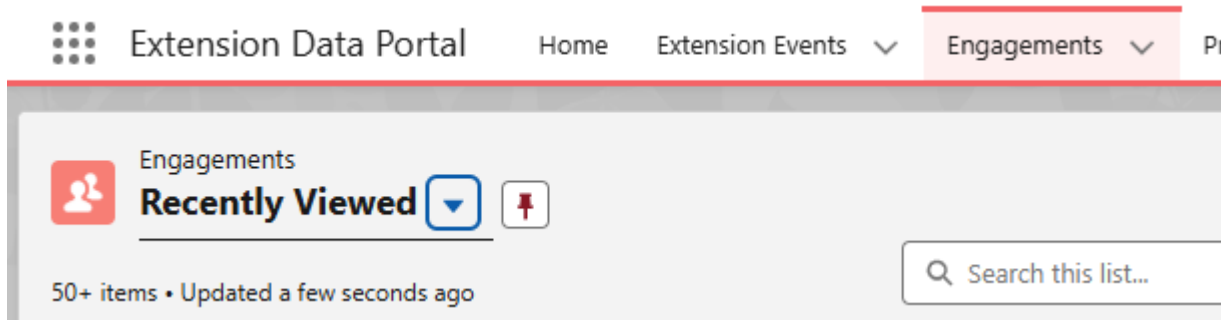
- 7) Click the “Save” button at the bottom of the list.



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.

## Engagements List View

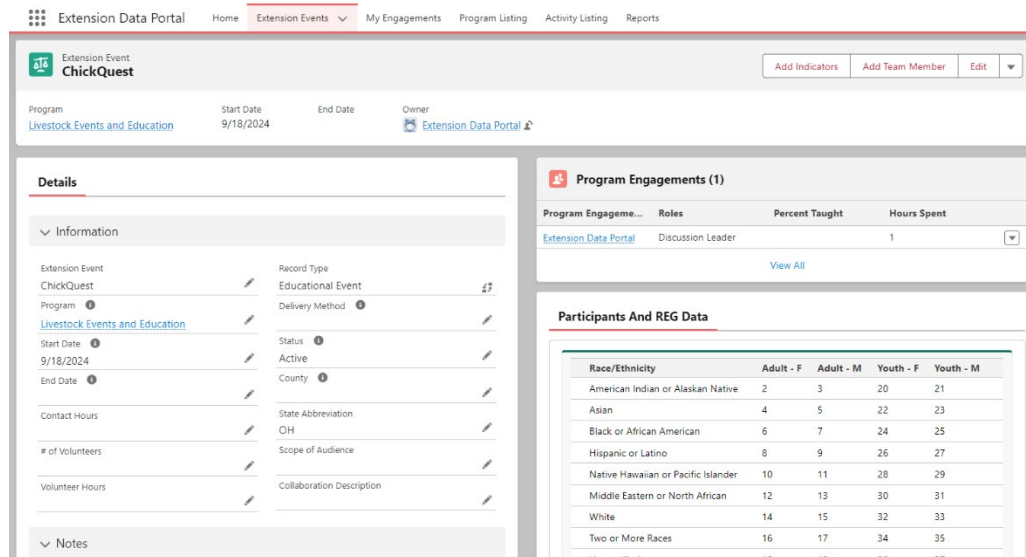
From the Engagements tab, you can view a list of all events that you have been linked to with an Engagement, recently viewed engagements, your Teaching Engagements, or a filtered list of any of your engagements by year. While the Extension Events tab list views show you records you have created, the Engagements tab will also show records that colleagues have created and linked you to view an Engagement. 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.

## 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.



**Extension Event: ChickQuest**

Program: Livestock Events and Education | Start Date: 9/18/2024 | End Date: | Owner: Extension Data Portal

**Details**

**Information**

Extension Event: ChickQuest	Record Type: Educational Event
Program: Livestock Events and Education	Delivery Method:
Start Date: 9/18/2024	Status: Active
End Date:	County:
Contact Hours:	State Abbreviation: OH
# of Volunteers:	Scope of Audience:
Volunteer Hours:	Collaboration Description:

**Program Engagements (1)**

Program Engagem...	Roles	Percent Taught	Hours Spent
Extension Data Portal	Discussion Leader		1

**Participants And REG Data**

Race/Ethnicity	Adult - F	Adult - M	Youth - F	Youth - M
American Indian or Alaskan Native	2	3	20	21
Asian	4	5	22	23
Black or African American	6	7	24	25
Hispanic or Latino	8	9	26	27
Native Hawaiian or Pacific Islander	10	11	28	29
Middle Eastern or North African	12	13	30	31
White	14	15	32	33
Two or More Races	16	17	34	35
Unspecified	18	19	36	37

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 perform 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. This button also lets you add a CART Access Code to import indicators. 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.
- **Use as Template:** Create a new event record based on the current record, without copying participant counts, success stories, and other details.

On the left side of the Event Record page, below the header, you'll see a section labeled "Details."

- The "Details" tab shows all Event record fields in three sections: Information, Notes, and Evaluation and Outcomes. Click the pencil icon next to a field to edit the record **if you are the Owner**.

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

- Program Engagements track who was involved with the event. To edit your 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 your roles, percent taught, description of effort, and more. To add additional Team Members or add yourself to an existing event record, click the "Add Team Member" button at the top right of the page.
- Participants and REG Data lists number of participants by race/ethnicity, sex, and age group as well as number of participants that did not provide REG data and the total number of participants, which is a calculated field. .

If you are the Owner of the record, you can click the "Edit REG Data" button to view an edit screen. Check 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.

- 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:

Record Type

Educational Event



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

# Mobile App

Since Engage is built on the Salesforce platform, it is accessible via the Salesforce Mobile App on both iPhone and Android. Use the following steps to access the mobile version of the Extension Data Portal:

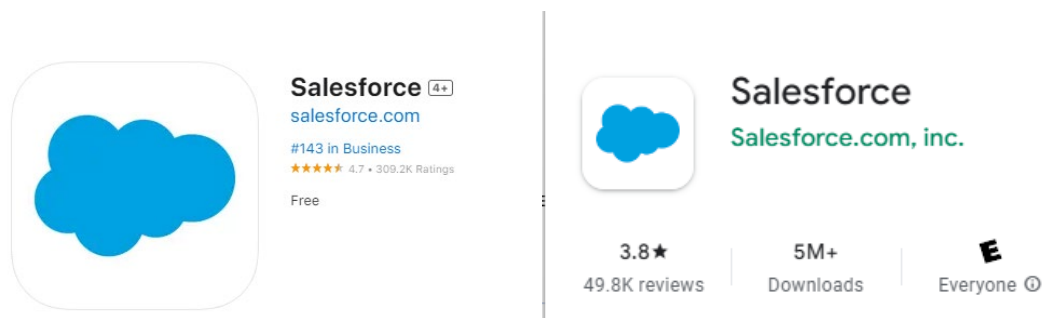
## Download and Install the app:

iPhone users: Download the Salesforce app from the App Store:

[apps.apple.com/app/id404249815](https://apps.apple.com/app/id404249815)

Android: Download the Salesforce app from Google Play:

[play.google.com/store/apps/details?id=com.salesforce.chatter](https://play.google.com/store/apps/details?id=com.salesforce.chatter)



## Log in:

Click on the “Use Custom Domain” link below on the bottom right of the login page.

For “Custom Domain,” enter “OSUCFAES” then click “Continue.” Next, click the “Log in with OSU Web Login Service.” You will be redirected to the OSU login page, where you can enter your OSU name.# credentials. Multifactor authentication (BuckeyePass) will be required.

When asked “Allow Access?” Click “Allow” after confirming that the account shown is your **name.#@osu.edu.cfaes** (this is your Engage username, not a valid email address).

## Using the App:

Click the App Launcher link and select “Extension Data Portal.” All tabs from the Extension Data Portal are available except for the home page. Use the tabs to view, edit, and create new records. The Reports page features a simplified version of the regular Program Events Dashboard.

Recent records are available to view and basic fields can be edited offline. Once you reconnect to a network, your updates will be submitted. Extension Event Records cannot be created while offline, and actions including Add Indicators, Add Team Members, Edit REG data, Clone,,and Delete will **not** be available offline. If you need to make changes while offline, we recommend you create your event record beforehand and use the “Notes” field to track anything you may need to do once back online.

# Support and Other Resources

## Support

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

[go.osu.edu/Engage-EDP-Help](https://go.osu.edu/Engage-EDP-Help)

## Resources

- FAQs: [go.osu.edu/Engage-EDP-FAQs](https://go.osu.edu/Engage-EDP-FAQs)
- Additional Resource videos: [go.osu.edu/Engage\\_EDP\\_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: [go.osu.edu/Engage-EDP-HomeView](https://go.osu.edu/Engage-EDP-HomeView)

# Field Glossary

## Record Type: Extension Event

An Education Event is a type of Event record to track a single instance of teaching/delivering the program (curriculum). Event data are heavily quantitative (this is where you will report direct/indirect contacts and indicator data).

- **Extension Event (name):** This field should be the topic covered or the name of the event. Identically named Extension Event records will be “rolled up” into a single line on reports.
- **Record Type:** Indicates if the record is for an Educational Event, Individual Instruction, Operational Event, or Promotional Event.
- **Program:** The program or activity type to which the Event belongs. To see a full list of Programs with descriptions go to the Program Listing page. To see a full list of Activity Types (for Operational and Promotional Events) go to the Activity Listing page.
- **Delivery Method:** The instruction delivery method for Educational Events.
- **Start Date:** The date the event took place or the first day of the period being tracked for Individual Instruction. For multi-day events, set as the first day of the event. For Individual Instruction, set as the beginning of the time period being reported (e.g., 01/01/202X).
- **End Date:** The final day of multi-day events or the end of the time period being tracked for Individual Instruction. Not used for single day events. For multi-day events, set as the final day of the event. For Individual Instruction, set as the end of the time period being reported (e.g., 12/31/202X).
- **Status:** Active by default. Cancelled status is used for events that were planned but did not take place.
- **County:** The county where the event took place. For online events, this should be the location of the intended participants. Only used for events within Ohio.
- **Area:** OSU Extension Administrative Area calculated automatically based on County selected.
- **State Abbreviation:** The state where the event took place. Defaults to OH.
- **Scope of Audience:** Where program participants live.
- **Contact hours:** The number of hours of teaching. Used for Educational Event and Individual Instruction records.
- **# of Volunteers:** The number of volunteers who assisted with an event. Used for Educational, Operational, and Promotional events.
- **Volunteer hours:** The number of total hours of volunteer time that went into the event. This is time spent the volunteers indicated in the # of Volunteers field.
- **Collaboration Description:** A description of any collaboration or partnership for the event. This description does not need to include collaborations already reflected in the Program Engagements.
- **Is Formal Student Evaluation:** Yes or No to indicate if a formal evaluation was used.
- **Description of Evaluation:** The type of evaluation used, for example: “Evaluation of Effective Extension Teaching (EEET)”. Only available if “is Formal Student Evaluation” is set to “Yes.”
- **Success Stories:** Success stories tell the story of Extension and how our work helps people solve real problems that impact their everyday lives. Stories should include:
  - **Relevance** (the critical issue or situation you are addressing)
  - **Response** (what you did to address the issue/situation - programs, activities, etc.)
  - **Results** (what happened as a result of the programs, activities, etc.)
- **Total Participants:** A calculated total of all Race, Ethnicity, Age Group, and Gender fields.
- **REG Data:** Race, Ethnicity, and Gender for USDA-NIFA Federal Reporting. REG fields are also split into Youth and Adult groups.
- **Created By:** The user who created the event.

- **Last Modified By:** The user who last modified the record.
- **Owner:** The user who owns the record and can make edits. By default, this is the user who created the record.
- **Import User:** The Owner of the record used for imported events for users who do not yet have EDP access.
- **Title:** Name of the Event, with "Individual Instruction: " added in front of any Individual Instruction record names. Used for reports and automatically generated.
- **Year:** The Year calculated based on Start Date. Used for reports and automatically generated.
- **Vita ID, PEARS ID:** IDs from external systems for imported records.

## Record Type: Program Engagement

- **Program Engagement (name):** The name of the Owner at the time the record was created. This should always match the Owner or the Import User of the Program Engagement.
- **Record Type:** The type of engagement. Team Member is used for staff who were involved with an event.
- **Extension Event (Program Cohort):** The event record that the engagement belongs to.
- **Program:** The program that the engagement belongs to. This is determined by the Extension Event record.
- **Roles:** The role(s) that the individual had for the linked event record.
- **Hours Spent:** Time that is actually spent on the event, including preparation. Round to the closest hour. This field replaces the previously tracked "Days Spent" and is used in fiscal reports for NIFA.
- **Teaching:** Checked if the Team Member had a teaching role in the linked event. When checked, this event will be included in teaching table reports for this team member.
- **Percent Taught (%):** This percentage is 100% if there was only one instructor. If there were multiple instructors, this value indicates the percentage of the event taught by each instructor. Only available if "Teaching" checkbox is checked.
- **Description of Effort:** A description of the teaching effort of the linked team member. This field is only available when the Teaching field is checked and Percent Taught is less than 100%.
- **Start Date:** The date the engagement took place or the start date for an event that spans multiple days. This defaults to the Event date.
- **End Date:** The end of the date range for the person's engagement on an event. This defaults to the event's end date.
- **Owner:** The owner of the Engagement. This is the Team Member who will receive credit for the engagement. The Program Engagement name matches this person's name. If the Team Member is not yet an active EDP user, then this field is set to "EDP Admin" until ownership is transferred to the Import User.
- **Import User:** The Owner of the record used for engagements for users who do not yet have EDP access.
- **Created By:** The user who created the engagement
- **Last Modified By:** The user who last edited the record.