

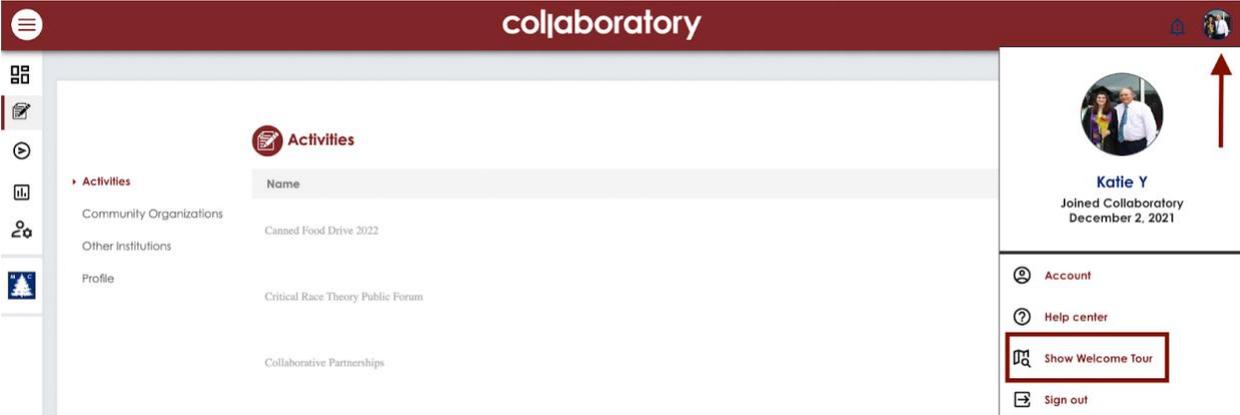
CWRU Collaboratory Support Guide

Getting Started with Collaboratory.....	2
Welcome Tour.....	2
The Dashboard	2
Your Institutional Profile	4
Edit Your Institutional Profile.....	4
Institutional Relationship.....	5
Faculty/Staff.....	6
Student.....	6
Updating Your Collaboratory Relationship	6
Create an Activity.....	6
Step 1: Navigate to Add Activities.....	6
Step 2: Create Your Activity	6
Activity Leads and Faculty/Staff Partners	7
Activity Leads	7
Faculty/Staff Partners	7
Status of Activity Leads and Faculty/Staff Partners.....	7
Strategies for Entering Activities Completed by Students in a Course.....	8
Clone an Activity	9
Steps.....	9
We’d Love to Help!.....	11
Collaboratory Support Articles	11
FAQs	12
Defining Community Engagement.....	12
How Do Community Engagement and Public Service Differ?	12
Vetting Activities for Collaboratory	12
Glossary	13

Getting Started with Collaboratory

Welcome Tour

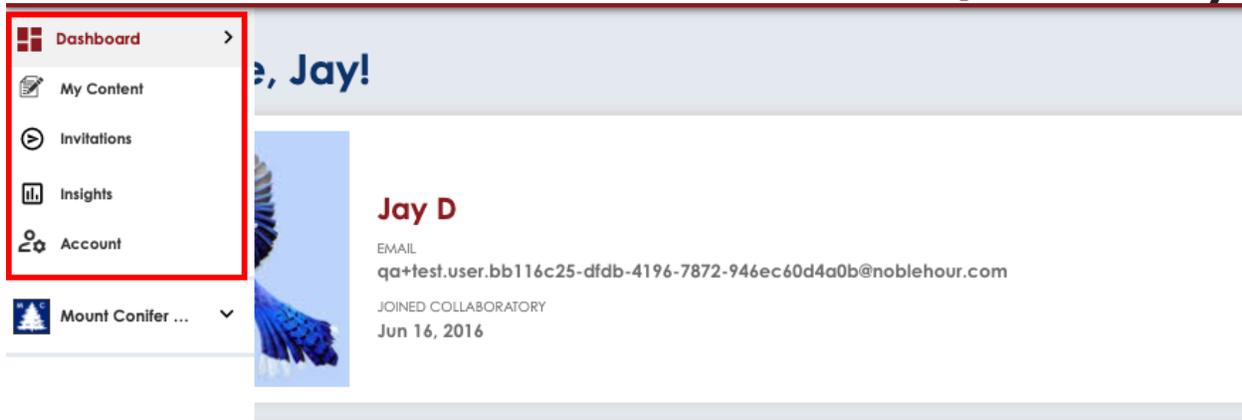
At any point, you are welcome to view a tour walking you through the Navigation, by clicking in the top right corner and selecting "Show Welcome Tour."



The Dashboard

The Dashboard is your personal workspace in Collaboratory. To access Dashboard, simply click on, or hover over, the Dashboard button on top of the left navigation panel.





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me

From your Dashboard you can see an overview of your content that is in progress or that has been submitted, any invitations to [claim ownership or partnership on an activity](#), your individual reports, account information, and access to your institution's Collaboratory:

- **My Content:** My Content shows all of the content that you have added or created. From My Content, you can view, submit, edit, or delete content. Content is filtered by type.
- **Invitations:** Invitations shows all of the content on which you have been asked to be a partner - either [as a proxy](#) or as [a faculty/staff partner](#). From Invitations you can [accept invitations to be a proxy, claim proxied content](#), and accept being listed as a partner on an activity if you are faculty or staff.
- **Insights:** The Insights tab displays general information about your activities and impacts in the community. Use this tab to view summary statistics of your activities, focus areas, funders, and community partners.
- **Account:** Account allows you to [manage your Collaboratory account](#) information (e.g. password, picture, email). You can also access your Account settings at any time by clicking on your profile image in the right-hand corner of any Collaboratory page.

Clicking on the name of your institution within the Dashboard will take you to your institution's Collaboratory homepage. From your institution dropdown, pictured below (as an administrator would see it), you will have access to a variety of different actions:

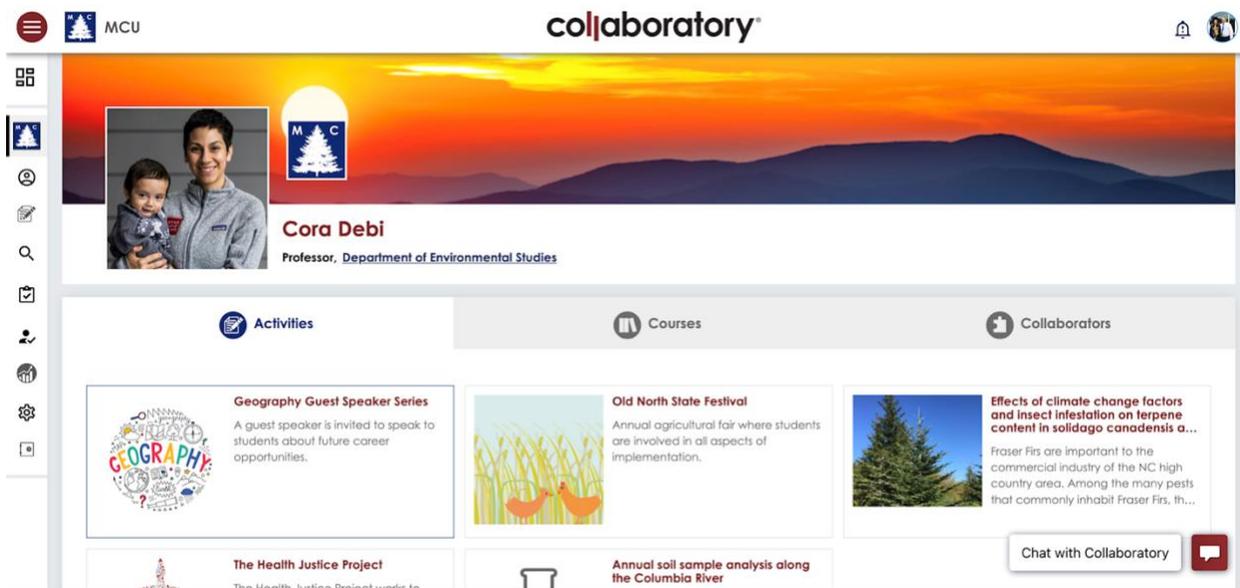
- **My Public Profile:** This is your public profile, visible to external viewers visiting your institution's Collaboratory. It shows activities, courses, and collaborators with whom you work. You can [edit your public profile](#) by clicking the 'Edit' button in the upper right corner.

- **Activities:** The [Activities](#) tab shows you all of the publicly visible activities for your institution. Use this section to browse activities, explore the reach of your colleagues, and [add your activities](#).
- **Search:** The Search tab allows you to search your institution's Collaboratory for activities, partners, faculty/staff, and units by keyword, theme, location, etc. Use [the search feature](#) to find specific activities or partners working with your institution.

Your Institutional Profile

All Faculty and Staff members have an Institutional Profile in CWRU'S Collaboratory that is public-facing and shares information about them, their engagement activities, and collaborators. When you log-in to Collaboratory for the first time, an Institutional Profile is created for you.

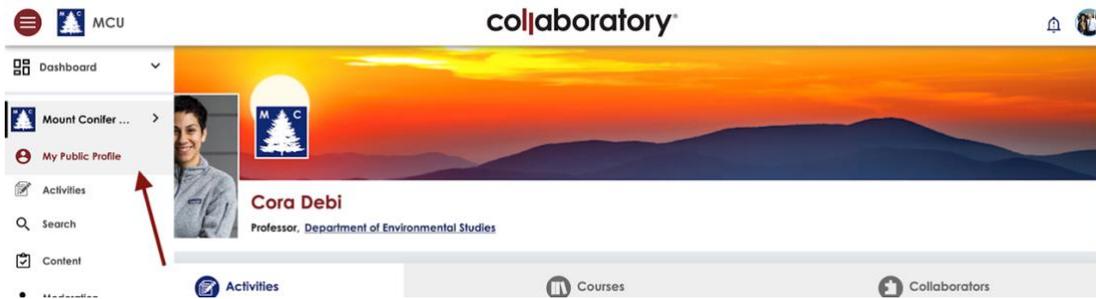
Your Institutional Profile will not appear publicly until you have published at least one Activity. Once you publish an Activity your Institutional Profile will be visible in public searches.



Edit Your Institutional Profile

1. After you have logged in, click the navigation pane on the left side and select Case Western Reserve University on your dashboard.
2. Then, select "My Public Profile," as pictured on the following page.
3. From your profile page, select "Edit."
4. Update your profile to:
 - Include a photo, personal statement, CV, and/or personal website
 - Choose to publicly display your email and/or phone number
 - List your title, position type, and primary appointment unit. **NOTE:** Identifying your appointment unit allows for your profile to be listed on your unit's public Collaboratory page. Without listing your unit, your profile will not be visible on your unit's public page. See images, below to update your appointment unit.
5. After completing all Profile information, select "Update."

NOTE: Since there is a significant and growing amount of information being uploaded to this system, it can sometimes take a minute or two for a search to complete or for a form to load. If you're running into significant issues, please let us know so we can address or troubleshoot the problem.



*Identity Faculty
 Staff
 Student
 Affiliate

Primary Position Title

Primary Position Type

Primary Appointment Unit **change**

Position Title

Position Type

Appointment Unit **change**

Add Title and Unit

Personal Statement

Institutional Relationship

A member's relationship to a Collaboratory institution can be Faculty, Staff, or Student. Relationships help determine what features are available for a user, along with their role. For institutions that utilize Single Sign On (SSO) a member's relationship is determined by their institution and assigned upon SSO

authentication. For institutions that do *not* utilize SSO, members' relationships are self-identified. The key relationship-based features for Faculty/Staff and Student relationships are described below:

Faculty/Staff

- Faculty and staff are permitted to “own” activities in Collaboratory. They can:
 - **Invite a Proxy:** Invite an individual to complete the activity form. The activity will come back to you for approval once it's completed and submitted.
 - **Be the Owner:** The Activity will be yours. You'll have the ability to edit, save, and submit the activity for approval by a portal moderator.
 - **Be the Proxy:** The activity will be submitted to the individual once you complete the form.

Student

- Students are not permitted to own activities or invite a faculty, staff, or student to be a proxy.
- A proxy cannot create activities on the behalf of a user with a student relationship. Proxies can only create activities for faculty or staff.
- Students are only able to **Be the Proxy**.

Updating Your Collaboratory Relationship

If you log into Collaboratory through SSO, using your CWRU credentials, then your relationship is identified via that authentication process and cannot be manually changed. If your relationship needs to be changed, you must reach out to U-Tech with any necessary modifications. If there are any issues with making these modifications or questions you are welcome to reach out to [our office](#).

Some members may not have a relationship associated with their account. This is because some members, like alumni, may still be able to authenticate with their institution. If a member's institutional credentials are still active, they will be able to authenticate with their institution's Collaboratory via SSO. However, members with no relationship will have limited rights in Collaboratory.

Create an Activity

Step 1: Navigate to Add Activities

1. From your Collaboratory homepage, select “Add Activities.”
2. To contribute your own Activity, select “Create.”
3. To clone one of your existing activities, after clicking Create, click "Clone an Existing Activity." For more information, see the [Cloning an Activity Article](#).
4. Review the introduction and select Begin.

Step 2: Create Your Activity

1. You will be asked a series of questions to [categorize your project](#). Answer them to the best of your ability to determine if your Activity is community engagement or public service, and to confirm your Activity belongs in Collaboratory.
2. Once your Activity has been categorized, creating an Activity requires completing six sections, culminating in your e-signature.
3. To save your progress, click Next at the bottom of any step, or Save and Exit on Step 6.

When you Submit your Activity, it is forwarded to a Moderator for review. You will receive a notification of your Activity's approval or denial. Once it has been approved, it will be made public in your institution's Collaboratory.

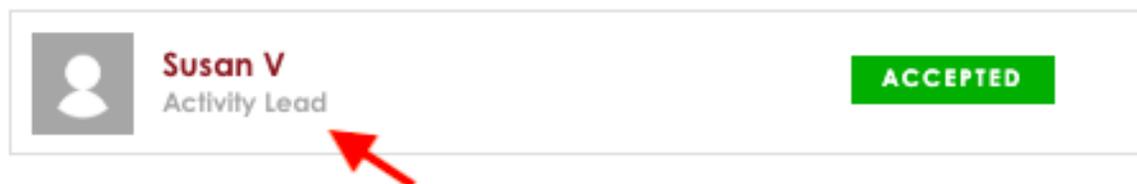
Faculty and Staff members may be associated with an Activity in 2 ways: as an Activity Lead or as a Faculty/Staff Partner. Both Activity Leads and Faculty/Staff Partners are identified in Step 2 of Activity creation.

Activity Leads and Faculty/Staff Partners

Activity Leads

The Activity Lead owns the Activity. For an Activity to be published and publicly visible, it must have an identified and accepted Activity Lead. If an Activity is proxied on behalf of the Activity Lead, the Activity cannot be submitted for moderation by either the Activity Lead or proxy until the Activity Lead has claimed it. The same is true for [cloned activities](#), an Activity Lead still has to be named and have claimed the activity.

Faculty/Staff 



Faculty/Staff Partners

Faculty/Staff Partners are identified by either the Activity Lead or proxy as collaborators during Activity creation. Once the Faculty/Staff Partner accepts the invitation to partner they may edit the Activity. The Activity will appear on the Faculty/Staff Partner's profile once it is published.

Status of Activity Leads and Faculty/Staff Partners

If an Activity Lead identifies a Faculty/Staff Partner during Activity creation, the status of the Faculty/Staff Partner within Step 2 will be listed as "Queued" until the Activity is submitted for moderation and the Faculty/Staff accepts the invitation to partner. The same is true when an Activity Lead [clones an activity](#) that

already has existing faculty/staff partners, those partners would pull into the new activity record, but would appear as "Queued" until the Activity is submitted.

Faculty/Staff

	Mary Kathryn	<input type="checkbox"/> Activity Lead	
	Katie Rain		

Add Another Faculty/Staff

If a proxy creates an Activity on behalf of an Activity Lead, the status of the Activity Lead will appear in Step 2 and Step 6 of Activity creation and have one of the following designations. (Note: If the designated Activity Lead denies the proxy's request to serve as Activity Lead, they will be removed from the proxied activity in both Step 2 and Step 6.)

- **Accepted** - the Activity Lead has approved the proxy's request to assign them as Activity Lead. The activity may be submitted for moderation by either the Activity Lead or proxy, when all required fields are complete.
- **Queued** - the Activity Lead has been identified by the proxy, but has not yet accepted. The Activity Lead will be notified that they have been selected to serve as the Activity Lead once the proxy submits the Activity to the Lead for review. Any other Faculty/Staff partners will also be queued until both the Activity Lead has claimed ownership and the activity has been submitted for moderation.

Strategies for Entering Activities Completed by Students in a Course

Students may be required to complete a community-based activity as part of a course. This supervised student work in community is important to capture for the Institution to understand all the ways in which engagement is occurring, and to fully report on the faculty's teaching role.

Course-based engagement differs tremendously. The Faculty or Instructor needs to determine what data to capture in Collaboratory. Consider the following options:

- If all students in the class are working on the same activity (e.g., taking on one project with one partner), or the same *kind* of activity (e.g., 12 student pairs each conduct a marketing plan for a community organization), then the faculty/staff member overseeing the course can complete one activity record, reporting on the work in aggregate. In the example of the

- student pairs working on marketing plans, the activity could focus on the marketing plan purpose and goals, with each community organization being listed as a collaborator.
- If there are multiple activities involving multiple partners, the faculty/staff member may create multiple activities. So if the course divides into five teams all working with a different partner or on a different project, the faculty or staff member can create five activities.
 - For these separate activities, if the majority of the information entered will be the same or similar, faculty/staff members may [clone activities](#) for quicker data entry.
 - If students are required to find their own activities and partners, you may require students to report data directly into Collaboratory. They can do that through the [Collaboratory's Be a Proxy function](#). If you choose this option, consider including [directions in your syllabus](#).
 - If students are proxy entering their activities, make sure to follow up and ensure that the activity is submitted for publication, make sure that the activity has an Activity Lead and they [claim the activity](#).
 - If course repeats from year-to-year, but activities are entered each year, faculty/staff members may choose to [clone the activity](#), which pulls all data from cloned activity record into a new activity form.

Clone an Activity

Collaboratory users may clone similar activities. This feature allows members to duplicate existing activities in order to help streamline the data entry process.

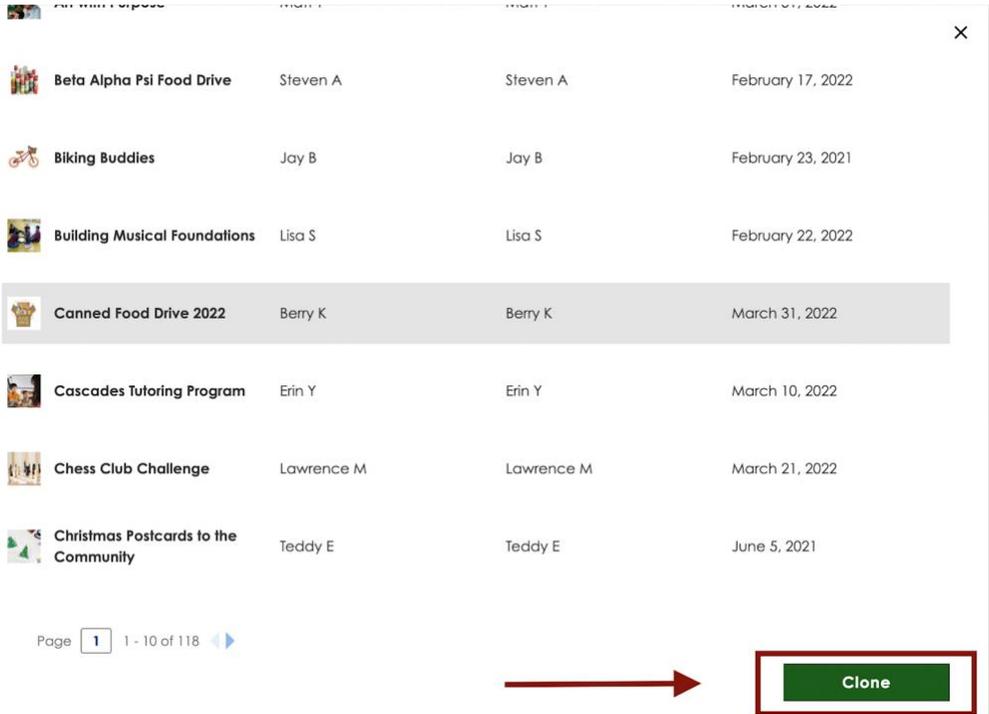
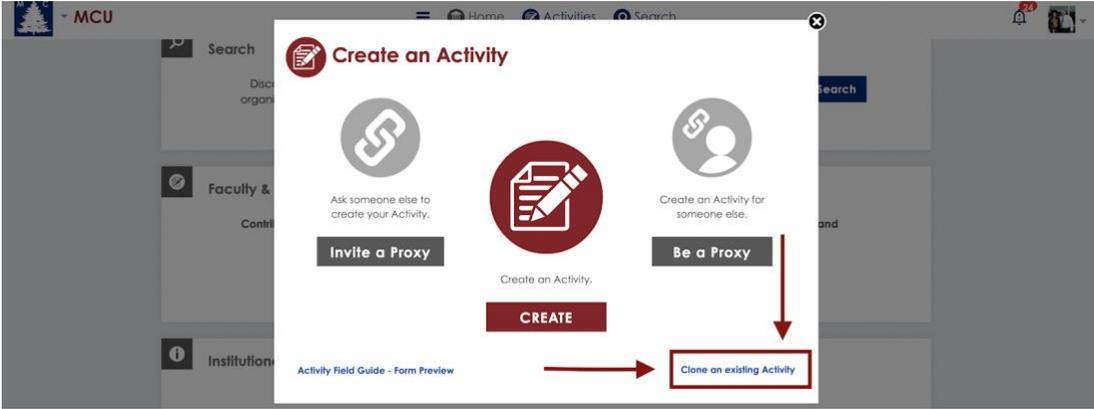
Activities like internships, student teacher placements, or repeating courses or programs are often very similar in content and in many cases faculty, staff, and administrators need to enter lots of similar activities into Collaboratory at once.

Members may clone existing activities that they own, created (as a proxy), or are named as a partner.

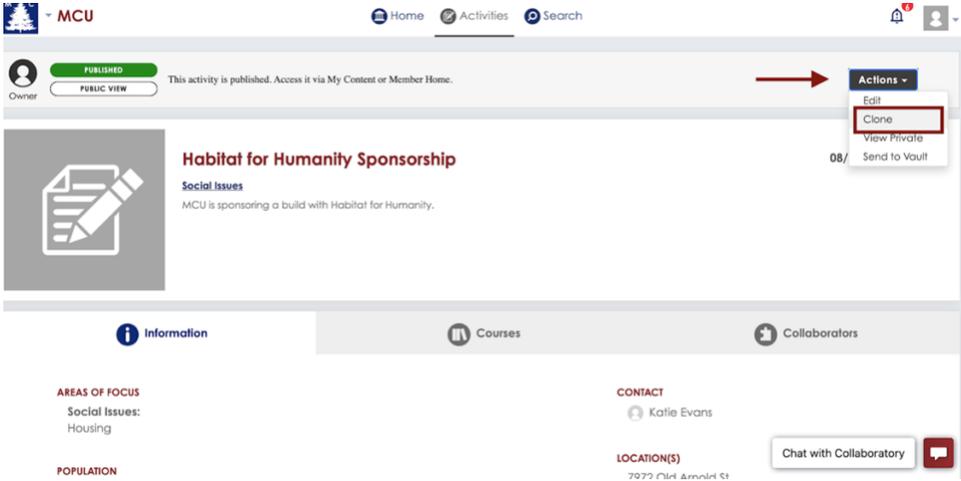
When an activity is cloned, all data within the original activity is copied over into a new cloned activity form, where users can modify any fields that are different from the original activity before submitting it for moderation.

Steps

1. From the Collaboratory homepage, select "Add Activity" (if you will be the owner/lead of the activity) or "Proxy Activities" (if you are creating the activity for someone else).
2. Select "Clone an existing activity".
3. A box will then appear listing all activities you currently own, created, and/or partner on. Select the activity you wish to clone and click the "Clone" button, below all listed activities.

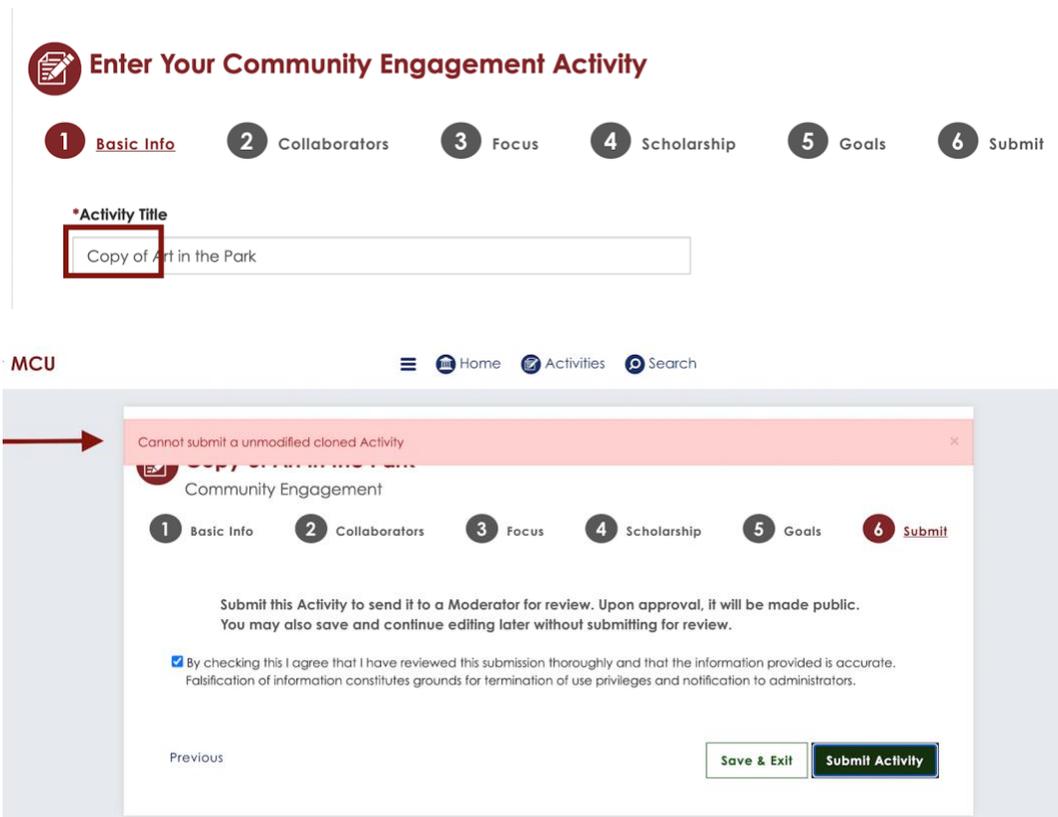


Another way to clone is from the Activity Homepage, as you can see in the below image.



Once you've selected your cloned activity, a new activity form will appear, with all data from the original activity.

From the cloned activity form, all data points can be edited as needed. The activity title will reflect that it is a copy of the original activity. Before submitting the activity for moderation, at least one data point must be changed.



A Collaboratory Administrator must approve any cloned activities before they are publicly displayed. If a proxy clones an activity for a faculty or staff member, that faculty or staff member must still claim the activity before it can be published.

We'd Love to Help!

We are here to support you in creating your profile and adding activities, courses, and community partners. Please do not hesitate to reach out with any questions, concerns, or support requests.

Collaboratory @ CWRU: Kate Klonowski, Local Government & Community Relations
Office: (216) 368-1723 * Mobile: (216) 534-3498 * Email: kak121@case.edu * [Meeting](#)

[Collaboratory Support Articles](#)

FAQs

Defining Community Engagement

Based on criteria established by the Carnegie Elective Classification for Community Engagement:

Community engagement describes collaboration between institutions of higher education and their larger communities (local, regional/state, national, global) for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity. The purpose of community engagement is the partnership of college and university knowledge and resources with those of the public and private sectors to enrich scholarship, research, and creative activity; enhance curriculum, teaching, and learning; prepare educated, engaged citizens; strengthen democratic values and civic responsibility; address critical societal issues; and contribute to the public good.

How Do Community Engagement and Public Service Differ?

Collaboratory organizes activities into two categories: **Community Engagement** and **Public Service**. While Community Engagement and Public Service both occur in community settings, involve interaction with the community, and integrate some form of service, they have very distinct goals and processes. As the field of higher education community engagement has developed, important clarification has occurred to help institutions strengthen their work and accomplish the goals intended for their community interactions. Specifically:

- **Community Engagement** is a process by which an institution works with community partners to co-create and implement mutually beneficial activities distinguished by collaboration and reciprocity. The exchange of expertise and ideas between academic and external community partners leads to co-creation of knowledge and activities that generate benefits for the academic institution, as well as community partners. The “community” in community engagement is not defined by sector, such as private or public, for-profit or nonprofit, rather, community is broadly defined to include individuals, groups, and organizations external to campus that use collaborative processes for the purpose of contributing to the public good.
- **Public Service** (sometimes referred to as community service or outreach) occurs when an institution provides expertise, resources, and services to or for community individuals, groups, organizations, and the general public. External entities may invite, host, attend, participate, and benefit from the activity, but the primary responsibility for the design, delivery, and assessment of the activity is shaped by the academic institution.

When a Collaboratory user begins to create an Activity, Collaboratory assists in identifying that Activity as Community Engagement or Public Service through a decision tree.

Vetting Activities for Collaboratory

The following questions should be true for your activity:

- **Does the Activity directly relate to a public priority or issue?**

- Does the Activity involve one or more external community groups, organizations, agencies, or neighborhoods?
- Are mutual benefits articulated by both the institution and the external community group, organization, agency, or neighborhood?
- Does the design or implementation of the Activity include an exchange of knowledge or expertise with the external community group, organization, agency, or neighborhood?

Glossary

Activities

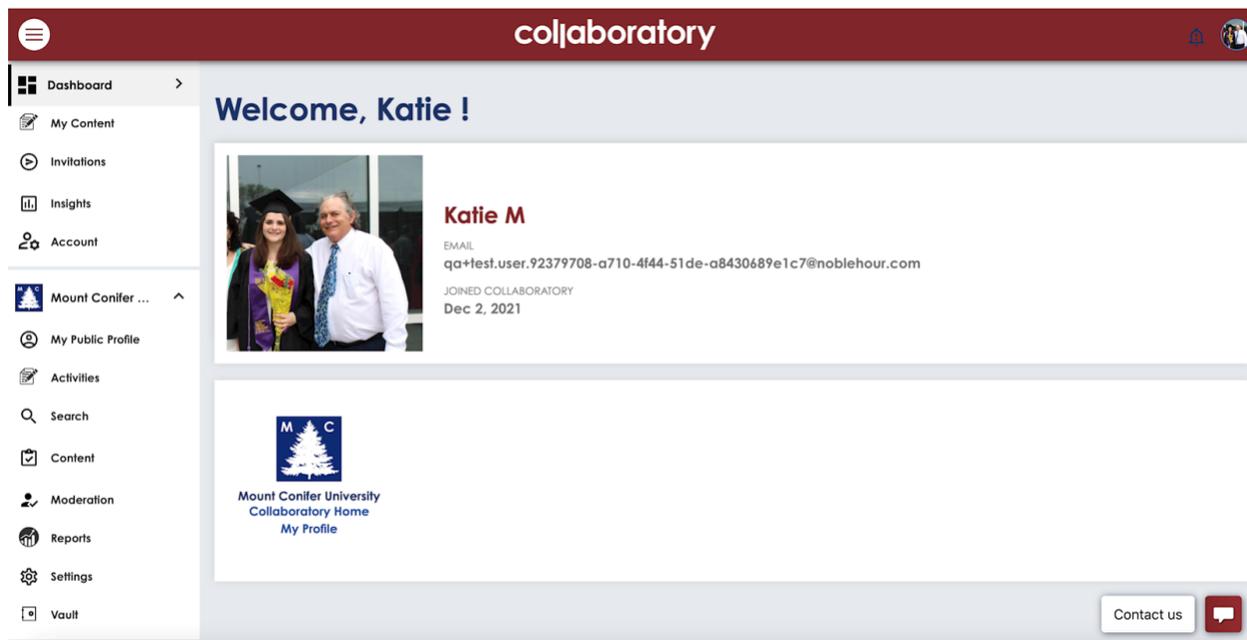
Rather than tracking data at a course or program level, Collaboratory focuses on Activities. An Activity describes the key elements - who, what, where, when, and to what end - of what faculty, staff, and students do in and with community.

Activities are at the central unit of analysis in Collaboratory and allow faculty and staff to report on the specific details of what happened while also connecting the Activity to a network of collaborators as well as the course, program, or initiative through which it was offered.

The Collaboratory collects both Community Engagement Activities and Public Service Activities.

Activities can be contributed by Faculty and Staff, and in some special cases, by Students.

Administration Panel



The screenshot shows the Collaboratory interface. At the top, there is a dark red header with the 'collaboratory' logo and a user profile icon. Below the header is a navigation sidebar on the left with various menu items: Dashboard, My Content, Invitations, Insights, Account, Mount Conifer University (expanded), My Public Profile, Activities, Search, Content, Moderation, Reports, Settings, and Vault. The main content area features a 'Welcome, Katie!' message. Below the welcome message is a profile card for 'Katie M' with her email address and the date she joined Collaboratory (Dec 2, 2021). A photo of Katie M and a man is displayed. At the bottom of the main content area, there is a logo for Mount Conifer University and a 'Contact us' button.

The Administration Panel helps Administrators manage their institution's Collaboratory settings and content. The Administration Panel consists of four main sections: Content, Reports, Settings, and Vault.

Accessing Administration

The Administration Panel is accessible through the Collaboratory Manager - select your institution's name in the left-side navigation pane.

Content displays all content that is internal to your institution, including Courses, Units, Members, Programs/Initiatives, and Community Organizations and Institutional Partners.

Settings displays all administrative settings for your institution's Collaboratory, including the homepage content and branding.

Vault displays all content that has been archived from your institution's Collaboratory.

Administrators

Each Collaboratory institution assigns a team of Administrators who:

- Communicates with the Collaboratory team who assists with successful onboarding and implementation
- Identifies unique institutional branding and messaging
- Leads the implementation of Collaboratory on their campus
- Gets to know Collaboratory well enough to answer questions from institutional Members
- Ensures that foundational content (i.e., Units, Programs/Initiatives) is entered before rolling out Collaboratory on campus
- Educates the institution about how to submit content to Collaboratory
- Leverages the data and provides others, i.e., President/Chancellor, Institutional Research, Alumni Relations, with ideas on how to use the data collected

Campus Partner

Faculty and staff can affiliate Units with Activities as Campus Partners. It is common for activities to have more than one affiliated Campus Partner as interdisciplinary collaborations continue to increase.

Collaboratory Home

Each institution's Collaboratory homepage introduces the institution and its commitment to community engagement and is viewable to anyone with the URL. From an institution's homepage, visitors can view Activities that the administrator chooses to feature and can do a search for content of interest (e.g.,

Faculty member, Community Partner, Course, focus area) that is displayed in a traditional or geolocated manner.

Collaboratory Manager

The Collaboratory Manager is a management feature available to Moderators and Administrators in Collaboratory. This feature is accessible by selecting the three horizontal lines on the Collaboratory's top navigation. You can easily switch between the Collaboratory view, Moderation view, or Administration view.

The Collaboratory Manager is divided into two sections:

- **Dashboard:** Navigates back to an institution's Collaboratory Homepage.
 - **Your University:** Allows Administrators to manage content and settings for an institution. Administrators can create Units, Programs/Initiatives, Courses, Community Organizations, and Institutional Partners, and manage the appearance of an institution's Collaboratory homepage.
-

Community Engagement

Community Engagement requires collaborative, reciprocal processes of co-planning and co-implementation that recognize, incorporate, and value the knowledge, perspective, and resources shared among academic and community partners. The exchange of expertise and ideas leads to co-creation of knowledge and activities that generate benefits to teaching, learning and research for the academic institution as well as beneficial outcomes articulated by the external partners.

source: Carnegie Classification for Community Engagement, hosted by the Swearer Center at Brown University.

Community Organization

Community Organizations are broadly defined to include external groups, organizations, agencies, neighborhoods, and other formal and informal collective entities from any sector (such as private or public, for-profit or nonprofit). In Collaboratory other institutions of higher education are recorded separately from Community Organizations.

Community Organizations may be affiliated with Activities as either Community Partners or Community Participants.

Each Community Organization page displays general contact information and Activity affiliations. When a Community Organization is affiliated with an Activity, they receive a [notification](#) that they have been included in your Collaboratory.

Community Participants

Community Participants describe Community Organizations or members of the general public who receive or benefit from Public Service Activities provided by institutions of higher education. While Community Participants may invite, host, or participate in the activity, the primary activity and its delivery are provided by the higher education institution to or for the community. Public service activities typically serve the public, generally, rather than an organization or population, specifically.

Community Partners

Community Partners describe Community Organizations that have mutually beneficial and reciprocal relationships *with* faculty, staff, and students at institutions of higher education. Community Partners are involved throughout the planning, implementation, evaluation, and dissemination of Community Engagement Activities.

Course

A Course is an academic offering in which students receive academic credit towards an institutional degree or certificate.

Oftentimes an Activity will occur as part of a Course, and it is beneficial for reporting purposes to understand details about that Course (e.g., term offered, format, or level).

Faculty/Staff Partner

Oftentimes Activities are conducted as collaborations between multiple faculty and staff across an institution. Faculty/Staff Partners are identified as part of Activity creation and allow Activity owners to identify other collaborators at the institution involved with the Activity.

Goals: Outputs, Institutional Outcomes, and Impacts on Community

Collaboratory captures the expected and achieved goals from community engagement and public service activities. The goals were intentionally developed to encompass a broad range of engagement outputs, outcomes, and impacts, and encourage faculty and staff to see their engagement within the broad options.

Collaboratory suggests institutions do not tightly define each goal. However, Administrators should consider how they will guide faculty and staff to interpret the goals as they roll out across campus. While many goals are fairly straightforward, Administrators may choose to provide additional definitions or interpretations to specific goals, such as:

- Outputs
 - Policy(ies) - Did the activity generate the creation of new policies for the institution, community partner(s), local government, etc.?
- Institutional Outcomes
 - Interdisciplinary opportunity(ies) - Did multiple disciplines, departments, offices, centers, etc. within the institution work together as part of the activity?
 - Student - Enrollment from partner communities - Did the activity encourage students from specific communities to enroll or take classes at the institution?
- Impacts on Community
 - Public recognition - Did the community partner, or larger community, receive any increased PR due to their partnership with the institution (e.g. news stories, press)?
 - Resource quantities - Did the community partner, or larger community, gain any additional resources from their partnership with the institution (e.g. greater awareness, capacity building)?
 - Resource use - Did the partnership result in the community organization, or larger community, being able to better use or leverage their existing resources?
 - Capacity to serve client(s) - Did the partnership help the community organization build capacity to serve *their* clients (e.g., did a partnership with a local school help the school better serve its students and families?)

Impacts on Community

Collaboratory tracks Impacts on Community in Step 5 of the Activity Form. Community Impacts are changes or benefits in the community that are a direct result of the engagement activity. Examples include public recognition for the community partners, better access to resources for community partners, or increased capacity for partners to serve their community.

Institutional Partner

Institutional Partners include other higher education institutions that collaborate on Activities. Collaboratory collects institutional partners separately from community partners or participants.

Institutional Profile

When a Faculty or Staff Member is successfully authenticated with Collaboratory -- generally the first time they log-in -- a Profile is created for them. The Member can edit the Profile to share contact information and details about their interests and scholarship around Community Engagement and Public Service.

Profiles are viewable and searchable in Collaboratory to showcase engagement and service work to multiple stakeholders.

Institutional Outcomes

Collaboratory tracks Institutional Outcomes in Step 5 of the Activity Form. Institutional Outcomes are changes or benefits to the institution that are a direct result of the engagement activity. Examples include more positive town/gown relations, access to additional/new funding sources, or increased student civic knowledge.

Member

A Member is a faculty, staff, or student affiliated with a higher education institution who has registered for an account with a specific institution's Collaboratory portal.

Faculty and Staff Members can:

- Contribute their own content (e.g., Activities, Courses, Organizations)
- Contribute content on behalf of another Member (Proxy)
- Edit Activities and Courses with which they are affiliated, alongside the content owner
- Manage their Public Profile, if a Faculty or Staff Member

Student Members can:

- Contribute content on behalf of another Member (Proxy)

All Members have a [Dashboard](#) where they can view the status of their efforts.

Members may be given permission by their portal Administrator to assist with administrative tasks as Moderators or Administrators.

Dashboard

Dashboard is your personal workspace in Collaboratory. To access your Dashboard, select Dashboard in the top left corner of the top navigation. To see your activities and other data, select "My Content."

From Dashboard, you will see an overview of your Collaboratory memberships, and any content that is in progress or that has been submitted. You will know when you are in your Dashboard by the three lines denoting the Navigation Pane in the top left corner and the burgundy color in the top navigation.

Dashboard contains My Content and Invitations, which helps Members review the status of and manage their content submissions and invitations.

Dashboard also contains Account, which helps Members manage their Collaboratory account information.

There are two ways to quickly navigate back to your institution's Collaboratory Portal at any time:

- Select Collaboratory Home or My Public Profile under your university's name in the left-side dashboard.
- From the top left corner of the top navigation, select My Account and then My Public Profile.

Moderate

Moderate allows a Moderator to quickly approve or deny content contributed to their institution's Collaboratory.

There are different types of content a Moderator can approve:

- Activities
- Courses
- Community Organizations
- Institutional Partners

Moderation Panel

Moderation helps Moderators review and approve or deny content contributed to their institution's Collaboratory.

The Moderation Panel is accessible through your institution homepage on the left-hand pane and then by selecting Moderation.

The Moderation Panel consists of two main sections: Moderate and History.

Moderate displays all content that is currently pending review and approval. Content is filterable by type using the left-hand sidebar.

History displays all content that has already been moderated for your institution's Collaboratory.

Moderators

Moderators are approved by Collaboratory Administrators to assist with managing the content for an institution's Portal. Moderators can review and approve or deny content submitted by Members.

If you believe you should be a Moderator at your institution, contact your Collaboratory Administrator.

Mutual Benefit

In mutually beneficial relationships, each party articulates intended benefits, and the activities are jointly designed in ways meant to deliver on those intended benefits. Each party also has the opportunity to report on the degree to which the interaction contributes to the goals or outcomes that they were expecting from their shared effort or benefits from its involvement. We often frame mutual benefit as a “win-win” relationship.

My Alerts

My Alerts helps Members access and manage important Collaboratory notifications. From the right corner of the top navigation, select the My Alerts icon to review or take action on an alert.

My Content

My Content is a shortcut to your data that is accessible from any part of Collaboratory by clicking below dashboard on the top left navigation. My Content consists of all content that you own and can be filtered by type. Note that Members will not see content contributed by others at their institution in this space.

A quick search allows Members to query their Content for specific data.

If you are acting as a proxy for an Activity, the Activity will appear in your Content until the Activity is approved by an Administrator for publication. The Activity will remain in the proxy's Content after it is claimed by the Activity lead, as the Proxy retains the ability to edit and publish the Activity.

If you are acting as a proxy for a Course or Organization, the Course, or Organization will appear in your Content until it is claimed by the owner. Once claimed, the ownership is transferred to the owner, and the Course or Organization will then appear in the owner's Content and be removed from the proxy's Content.

If you are an Administrator and would like to see a complete list of published content associated with your portal, navigate to Content, underneath your institution in the left side navigation panel.

My Information

There are multiple places throughout Collaboratory for members to manage different aspects of their personal information:

- **Account:** Members can manage their log-in information, update email preferences, and provide demographics.
- **My Public Profile:** Profiles are publicly viewable and searchable in Collaboratory to showcase engagement and service work to multiple stakeholders. They display information about your position at your institution and provide a space for you to talk about your approach to your work.

Outputs

Collaboratory tracks activity Outputs in Step 5 of the Activity Form. Outputs are results and/or resources produced through or as a result of the activity. An activity could produce outputs that themselves could be additional activities in Collaboratory (e.g. events, community programs).

Programs/Initiatives

Collaboratory enables faculty and staff to track the Programs and Initiatives through which Activities take place. These Programs and Initiatives are customizable, identified by your institution to reflect your unique programming and priorities, and can be selected by those completing Activities in Collaboratory. This allows Administrators to report data on a program-by-program basis, without losing the specific details of each individual Activity.

For example, interdisciplinary teams may collaborate on community-based research grants, which are reported in Collaboratory as five separate Activities, each of which provide the specific details of who participated, who was served, and what impact areas were addressed. Each of those five Activities may be affiliated with the Community-Based Research Grant Program.

Activities may also be affiliated with Initiatives, such as a Quality Enhancement or Strategic Plan, Capital Campaign, or curricular tracks.

Proxy

A Proxy is a faculty, staff, or student Member who completes an Activity on behalf of another Member that owns the Activity.

Faculty and staff can volunteer to proxy an Activity for another Member ("Be the Proxy"). They can also invite other faculty, staff, or students to complete an Activity on their behalf ("Invite a Proxy"). Lastly, they can invite multiple proxies at once to complete Activities on their behalf (Invite Multiple Proxies).

All content contributed by proxies must be claimed by the Activity Lead before it is made public in Collaboratory. After the Activity Lead claims the content, Proxies may continue to edit the content and submit it to the Activity Lead for further review and publication, or the Proxy may submit the Activity directly to the portal for moderation once all required fields are complete.

As an administrator you'll have access to Proxied Activities from Administration | Internal | Activities. Since administrators have access to all activities it's important that each Proxied Activity is started and submitted by only one account. We highly recommend that administrators interact only with the content that they create - which can easily be identified via the My Content dropdown.

If you are unsure of who owns a particular piece of content, you can confirm the owner via Content.

Public Service

Public Service (also known as Outreach or Community Service) intends to serve a public purpose by providing expertise, resources, and services to or for community individuals, groups, organizations, and the public in general. While these organizations may invite, host, or participate in the activity, the primary source of expertise, delivery of content, and form of the activity is shaped by the academic institution which is providing services and expertise to others.

Reciprocity

Reciprocity is the recognition, respect, and valuing of the knowledge, perspective, and resources that each partner contributes to the collaboration. This is achieved through an exchange of knowledge and/or expertise between community and institutional partners throughout the activity, and through a sense of equity and fairness in the level of effort and contribution each party contributes to the shared work.

Track

Track is accessible via your Member Home and provides a centralized view of your submissions and contributions within Collaboratory. Listed below are the tabs located within Track.

- **My Content:** My Content shows all of the content that you have added or created. From My Content, you can view, submit, edit, or delete content. Content is filtered by type.
- **Invitations:** Invitations shows all of the content on which you have been asked to be a partner on, either as a proxy, or as a faculty/staff partner. From Invitations you can accept invitations to be a proxy, claim proxied content, and be listed as a partner on an activity if you are faculty or staff.

As you contribute content for approval, you can view and track its progress here in a single, concise view.

Units

Units are the organizational structures that comprise your institution:

- **Academic departments/program:** A teaching or interdisciplinary unit with a faculty which performs the regular duties of instruction, research, and service.
- **Office:** An administrative or co-curricular entity that provides support and programs to the academic core of the institution. These are typically service-learning offices, provost's/chancellor's offices, offices within Student Affairs, offices within Research and Economic Development, etc.
- **Center/institute:** Interdisciplinary programs typically involving faculty, students, and staff from various academic departments or other structural units. Often a center's or institute's activities involve the general public or public agencies.
- **Division:** An institution's highest organizational level (e.g., Academic Affairs, Student Affairs, Financial Affairs). They are comprised of other institutional Units - such as colleges, schools, offices, co-curricular units, etc. - which generally manage and host community engagement and public service activities.
- **Museum:** Permanent cultural, artistic, historical, or scientific exhibitions within the institution that are made available to the general public.
- **Clinic:** Specialty services facilities within the institution that are offered to the general public. Services often focus on healthcare, mental health, counseling and consulting, education, clinical research, and/or practice training.
- **Network/coalition:** Often formed around a common theme, such as STEM education, children and families, or violence prevention.
- **Co-Curricular:** Programs, services, or groups that complement curricular activities, and facilitate intellectual, emotional, social, and moral development in students. Examples may include formally recognized student organizations, Greek life, or athletic teams.
- **College/School:** These units are the highest organizing level within a division dedicated to Academic Affairs or Programs. They are comprised of academic departments and programs, centers/institutes, and other supporting institutional units.

Units may be nested to reflect hierarchical relationships (for example, 9 departments, 3 offices, and 1 center report to a Division).

Units are set up by Administrators and are made available to faculty and staff in Collaboratory. They have publicly visible landing pages that automatically aggregate and share activities, courses, and collaborators that are affiliated with that Unit.

- Any Unit an Admin creates (including colleges/schools, which are likely created as divisions) will have a landing page created for it.
- A Unit landing page will only appear publicly in the Search once that Unit has been affiliated with an active, published Activity.
- The Activities that appear on a Unit landing page will reflect where a Member has identified that Unit *specifically* as a Campus Partner on step 2 of the Activity edit flow
- There isn't a nested view to reflect the hierarchical organizational structure that is set up using the reports to field on the Unit Form.