CommonGage

ONBOARDING GUIDE

Your first year with CommonGage.

From login to end-of-year report.

PREPARED FOR	DEMO TENANT	TIME TO READ
[Organization Name]	Riverton Unified School District	20–30 minutes

SECTION 1

Orientation

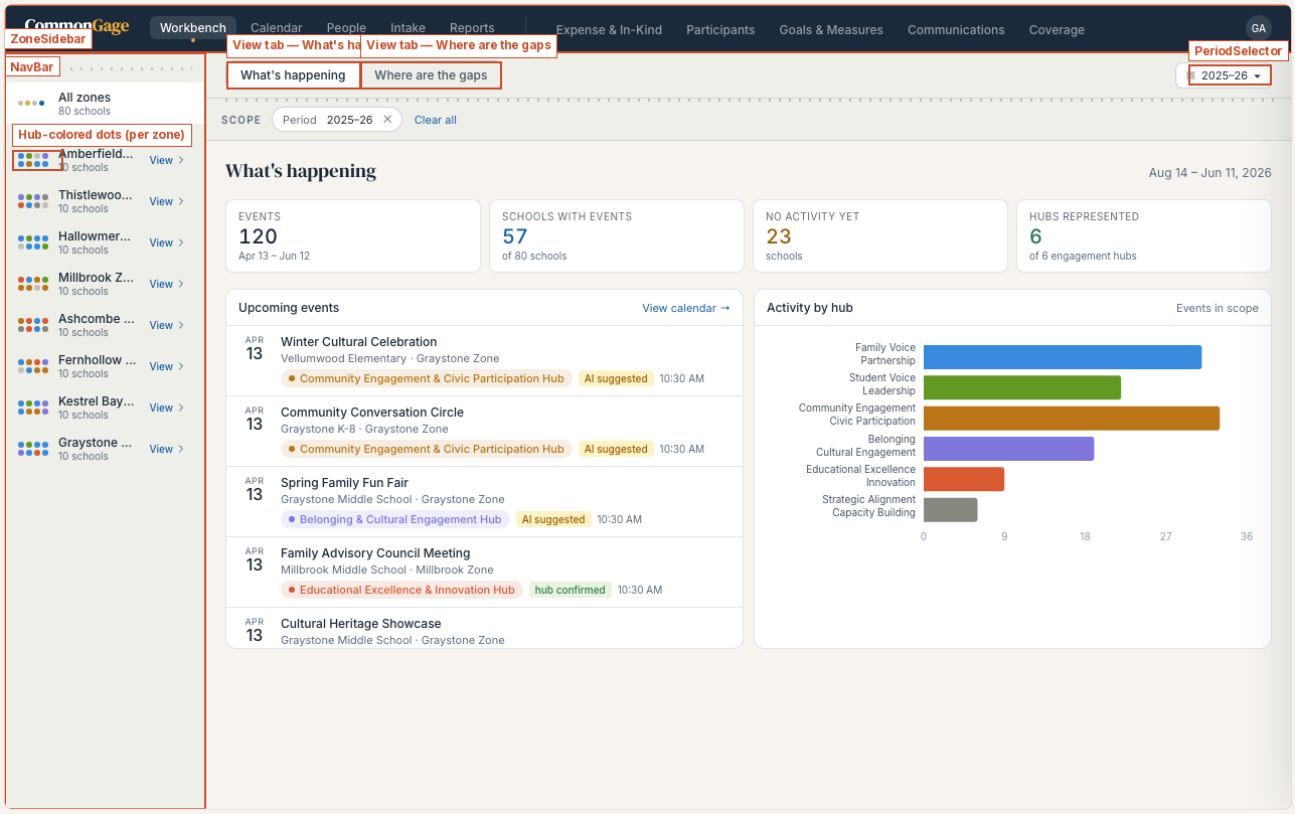
CommonGage is a system of record for engagement work: what your organization did, where the gaps are, and what it cost — across every site, on one screen. It replaces three things that usually live in separate spreadsheets:

- **Obligation tracking** — which sites have met each of your organization's requirements
- **Engagement activity** — events logged across every site, organized by hub and zone
- **Capacity outcomes** — how events map to the Dual Capacity-Building Framework (Mapp, 2019)

This walkthrough gets you from your first sign-in to pulling an end-of-year report. Read it top to bottom once, then come back to any section as a reference.

Know the screen

Here's what things are called. The rest of this guide references these names.

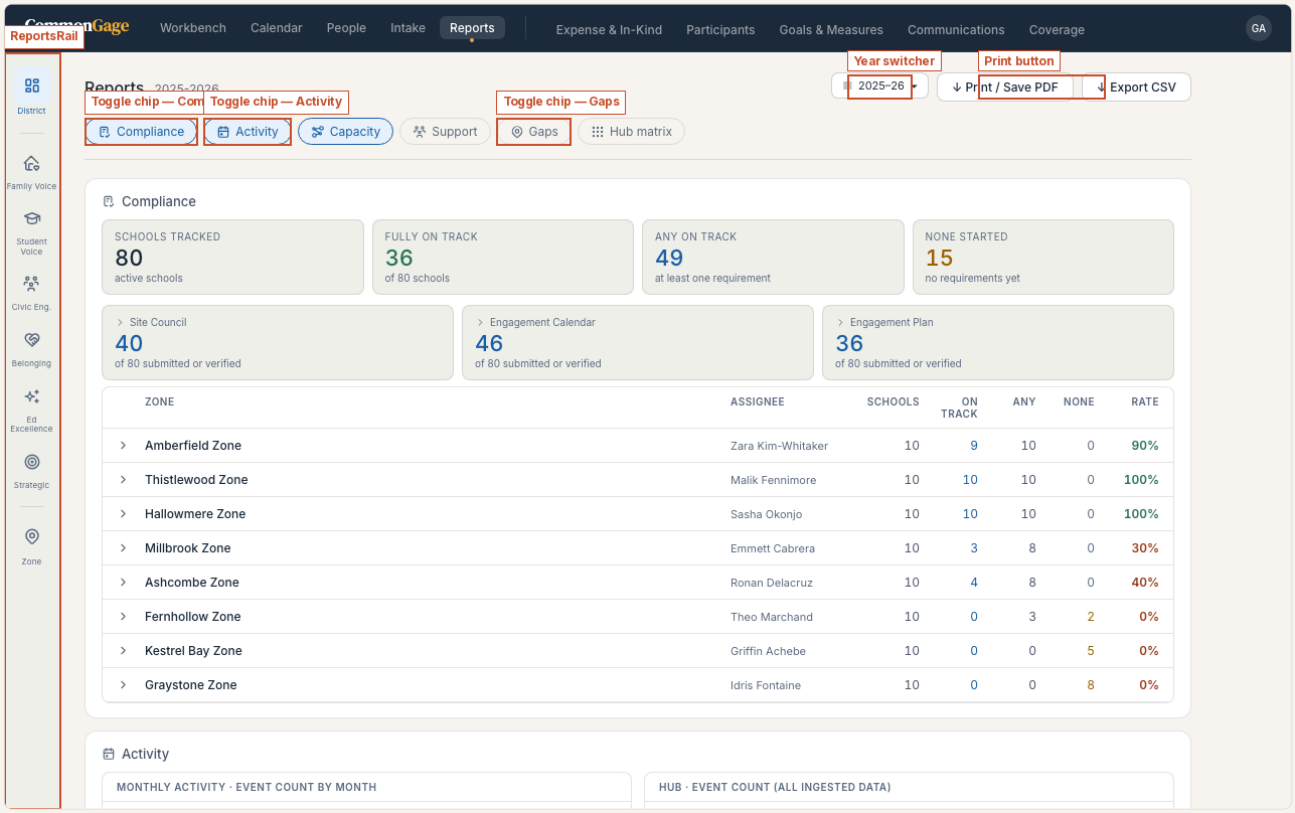


The Workbench — the screen you land on after signing in.

NavBar — The dark bar across the top. Core screens sit on the left (Workbench, Calendar, People, Intake, Reports, Find); a vertical divider separates them from your organization's licensed modules on the right.

ZoneSidebar — The left panel on the Workbench. One row per zone, each with a small cluster of dots — one dot per school.

View Tabs	"What's happening" and "Where are the gaps" — the Workbench's two lenses on the same underlying record.
PeriodSelector	The "2025–26 ▾" control, top right of most screens. Everything on screen is scoped to whatever reporting period is selected here.
ScopeBar	The row of removable filter chips just under the toolbar — Period, Zone, and anything else currently narrowing the view.
AvatarMenu	Your initials, top right. Settings, My Flags, and (if you're an admin) Manage Users all live here.



Reports, District View — the 56px icon rail on the left switches between the district-wide view, hub stories, and zone stories.

One more landmark worth naming here: the **toggle chips** along the top of the District View (Compliance, Activity, Capacity, Support, Gaps, Hub matrix) — each turns a block of the report on or off. Pulling the Report covers these in depth.

Navigation

The top bar has six core links, available to every organization regardless of which modules are licensed:

LINK	WHAT IT'S FOR
Workbench	At-a-glance summary of activity across the organization

LINK	WHAT IT'S FOR
Calendar	Browse and manage individual events by school
People	Staff and person records — what you can edit depends on your role
Intake	Where calendar events come from — iCal feeds, spreadsheets, or document uploads, configured per school or zone
Reports	Deep-dive analytics and exports
Find	Ask a question in your own words and get back the matching records themselves

If your organization has licensed modules — Expense & In-Kind, Participants, Goals & Measures, Communications, Coverage, Partnerships, Projects, or Proof — they appear after a divider on the right side of the same bar. The Modules covers each one.

Click your avatar (top right) for **Settings**, **My Flags** (a personal inbox of data-quality flags raised on records you touch), and — if you're an Org Admin — **Manage Users**.

Who sees what

What you see depends on your role and scope:

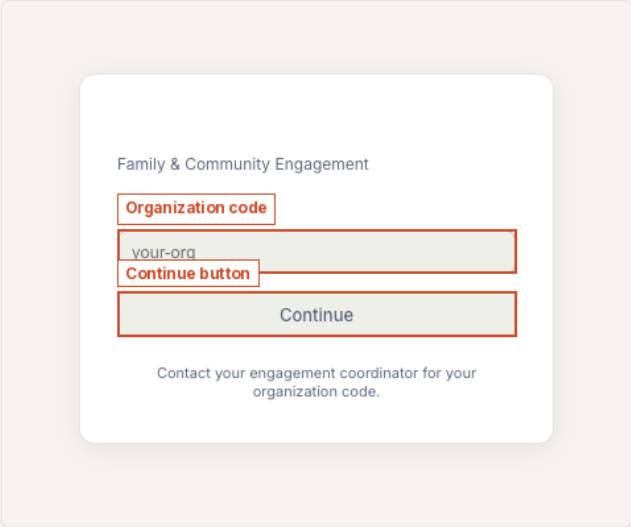
ROLE	SEES
Org Admin	Everything across the organization
Zone Coordinator	Their home zone, plus any zones or schools they've been individually granted
Building Staff	Their home school, plus anything they've been individually granted

Your organization may display different names for these roles, or for "zone" and "school" — the concepts are the same even if the labels differ.

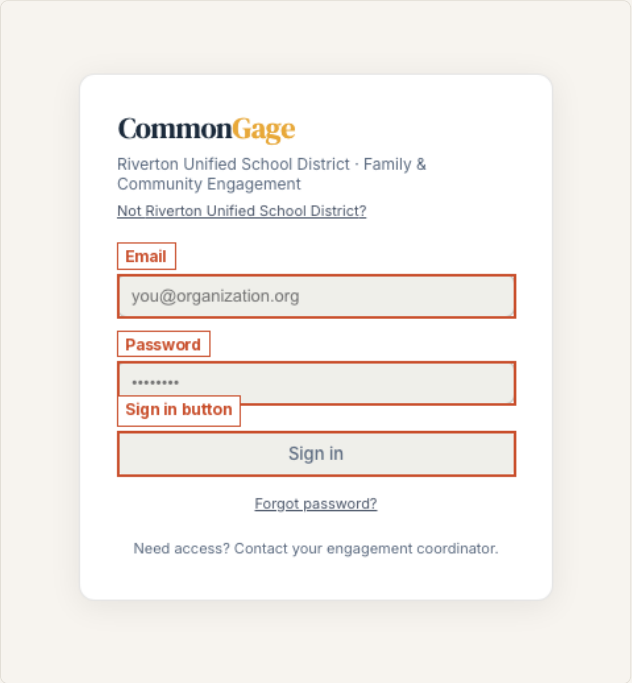
SECTION 2

Signing In

Sign-in is two short screens. Your organization code is provided by your administrator — it's the same for everyone at your organization. Your email and password are yours alone.



Phase 1 — enter your organization code and continue.



Phase 2 — your email and password, scoped to that organization.

If your organization uses Google Workspace SSO, a **Sign in with Google** button appears above the organization-code field — that path skips the code entirely. Use whichever your admin has set up. Forgot your password? The link beneath "Sign in" sends a reset email.

SECTION 3

The Daily and Weekly Rhythm

The things you do as engagement happens — confirming events, classifying capacity, logging support details, reviewing what changed. If these habits are consistent, the record builds itself.

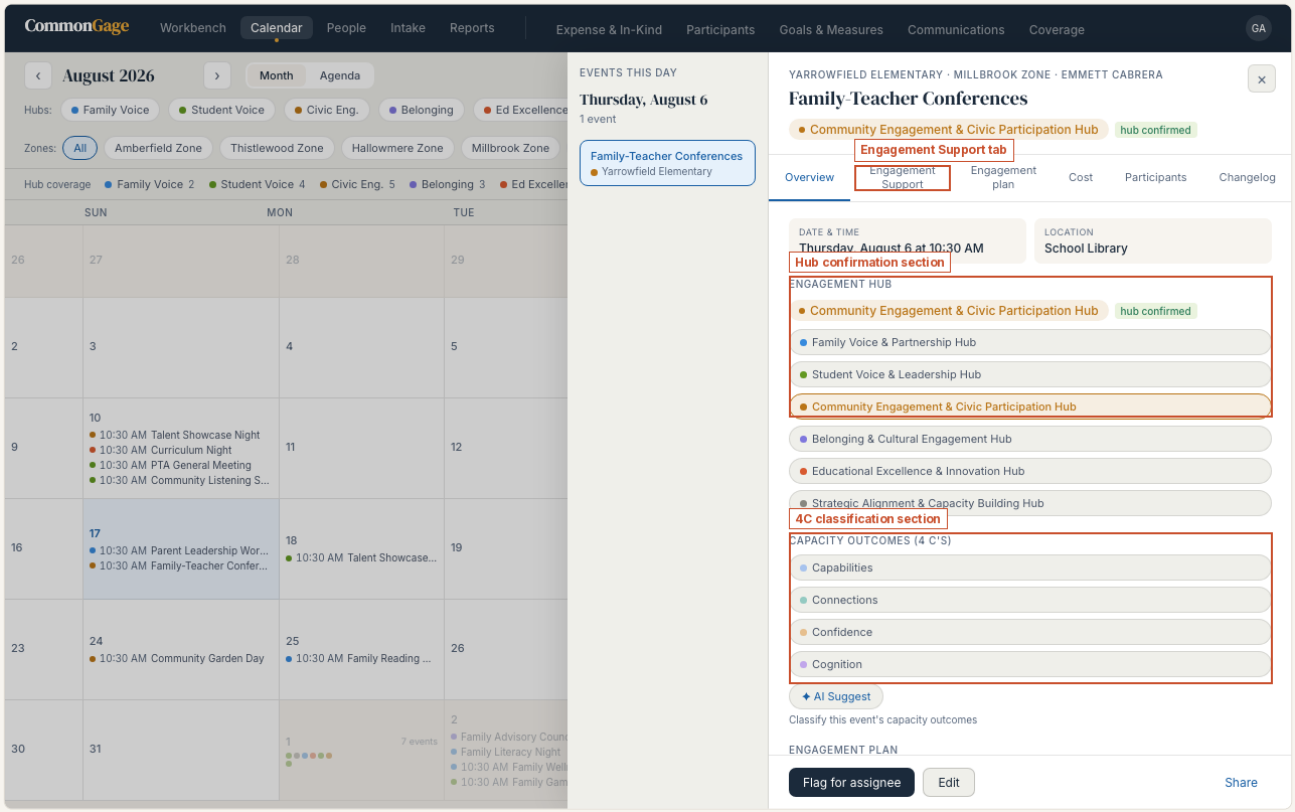
Every event's dossier lets you:

- **Confirm the hub** it belongs to
- **Classify capacity outcomes** against the four C's
- **Log Engagement Support and cost details** — language support, childcare, catering, coordination hours, and event cost

- **Review the changelog** — who changed what, and when

Task — Confirm a hub classification

1. Open **Calendar** and click a day with an event on it. In the day panel that opens, click the event.
2. In the event's dossier, find the **Engagement Hub** section near the top.
3. An AI-suggested hub (marked "AI suggested") is a starting point, not a decision. Confirm it if it's right, or pick a different one from the six hub options if not. AI suggestions are available to anyone with edit access on that event, but a suggestion never counts in reports until you confirm it.



An event's dossier. Hub confirmation and 4C classification sit right next to each other, on the Overview tab.

Task — Classify capacity outcomes (the 4 C's)

1. In the same dossier, find **Capacity Outcomes (4 C's)**, just below the hub list.
2. Check whichever of the four apply to this event. More than one can apply; none is also a valid answer for an event that didn't build any of the four.

All capacity outcome classification uses the same **Dual Capacity-Building Framework (Mapp, 2019)**:

C	COLOR	MEANING
Capabilities	Blue	Building knowledge, skills, and confidence

C	COLOR	MEANING
Connections	Teal	Building relationships and networks
Confidence	Amber	Building agency and sense of efficacy
Cognition	Purple	Building understanding of roles and systems

Task — Log engagement support details

1. In the dossier, click the **Engagement Support** tab.
2. Record what made the event accessible: language support provided, childcare, catering, and any coordination hours or cost that went into making it happen.
3. None of this is required to save the event — but every field left blank is a field the year-end report can't report on.

Why this matters: every hub confirmation, every 4C tag, and every support record you log here flows directly into the reports you'll pull at the end of the year (see Pulling the Report). Skip this step, and those sections of your report will have gaps.

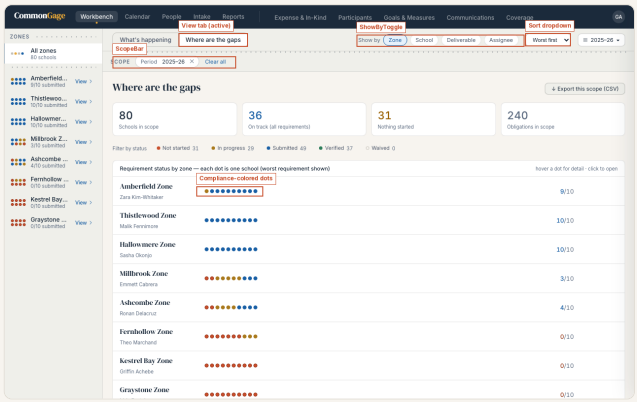
SECTION 4

The Monthly and Quarterly Rhythm

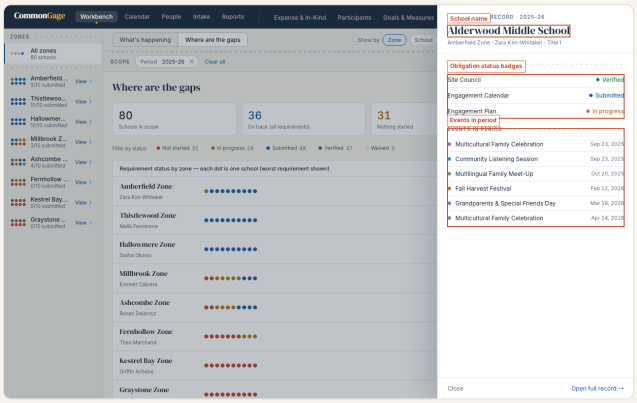
The things you check periodically — obligation status, expense tracking, the gaps view.

Task — Review the gaps view

1. On the Workbench, switch to the **Where are the gaps** tab.
2. Set the sort dropdown to **Worst first** so the zones and schools furthest behind surface at the top.
3. Click a dot, or a school's name once you've drilled into a zone, to open that school's drawer.



Where are the gaps — sorted worst first, one dot per school, colored by obligation status.



A school's drawer — deliverable status and the events on record for the period.

Task — Update obligation statuses

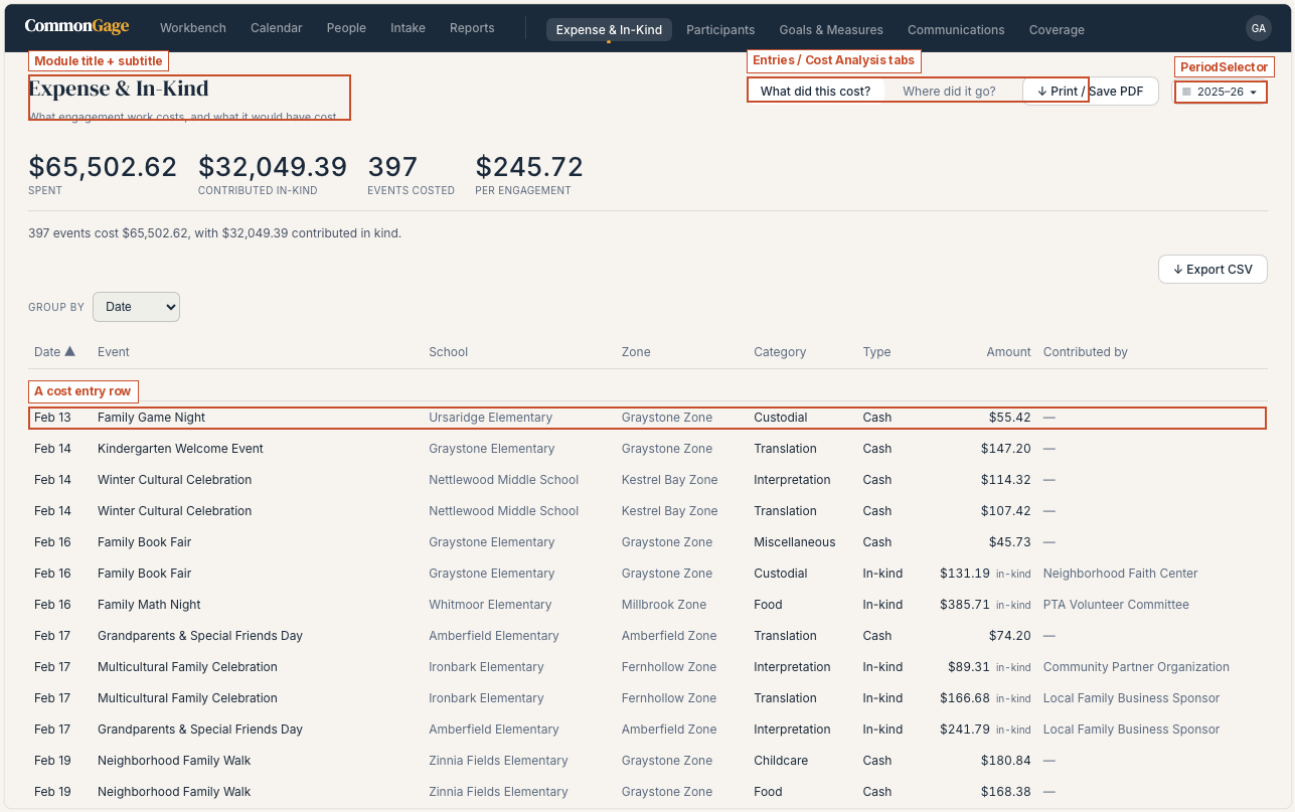
Each school has a set of requirements your organization's admins define — there's no fixed list. A requirement might be a compliance filing, a plan document, or evidence of a meeting. From the school drawer (or a school's own record), click a deliverable to move it through its statuses:

1. **Not started** → **In progress** → **Submitted** → **Verified**. A fifth status, **Waived**, is available where a requirement genuinely doesn't apply, and a school can also be marked exempt from a given requirement entirely.
2. Only an Org Admin can mark something **Verified** — everyone else's write access stops at Submitted.
3. If you have write access, you can update status, notes, and an evidence link inline from the school's Obligations panel.

The Compliance block in the Reports District View (see Pulling the Report) summarizes how schools are doing against these requirements, organization-wide.

Task — Enter expense records

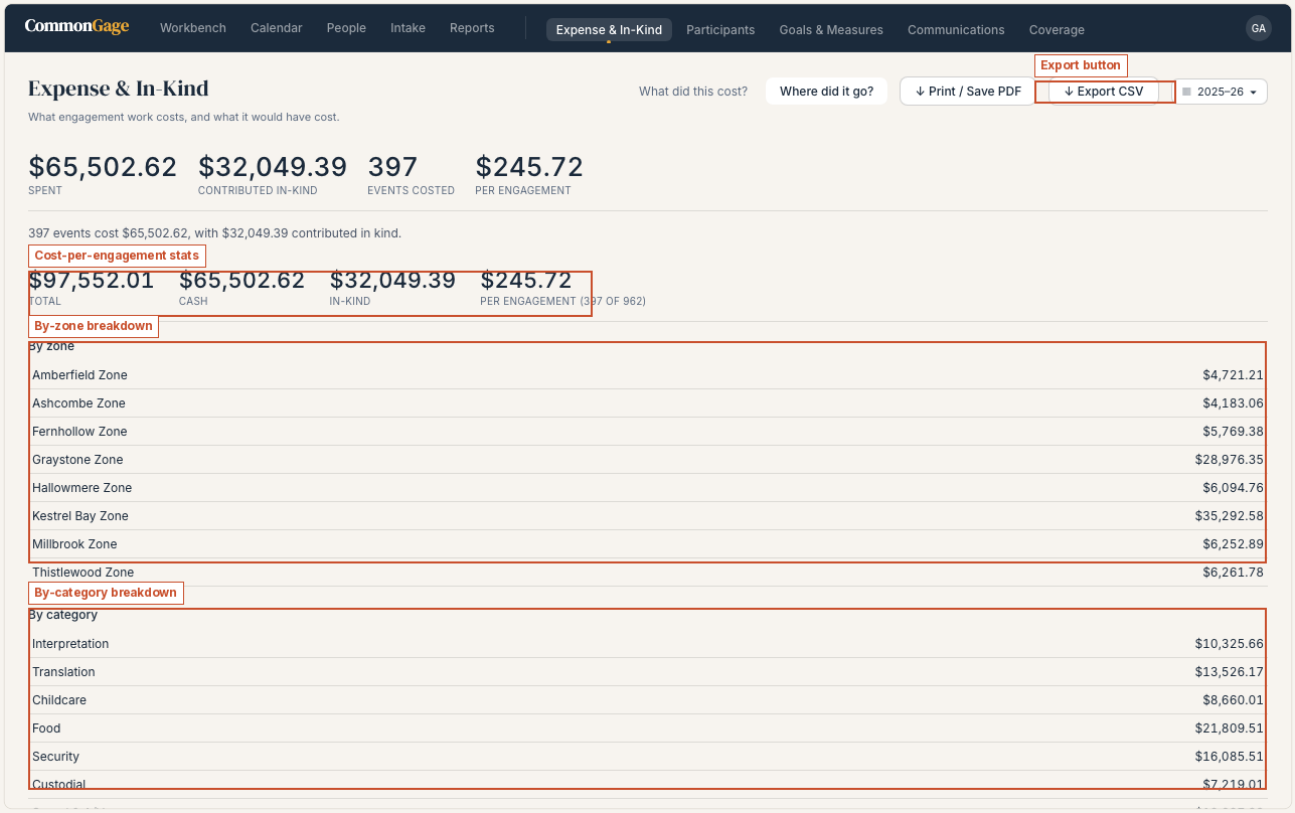
1. Go to **Expense & In-Kind** in the nav bar.
2. On the **What did this cost?** tab, log each entry against the event it belongs to: category, amount, and whether it was paid in cash or contributed in-kind (with who contributed it).



Expense & In-Kind — every cost entry, one row per line item, groupable by date, school, zone, or category.

Task — Check the Cost Analysis

1. Switch to the **Where did it go?** tab.
2. Review total spend against cost-per-engagement, then the same numbers broken down by zone and by category.



Where did it go? — the same record, rolled up by zone and by category.

SECTION 5

The Modules

Modules extend the core platform for specific operational needs, and are enabled per organization — if a module below doesn't appear in your nav bar, it isn't licensed for your organization; ask your admin, or see the Module Catalog.

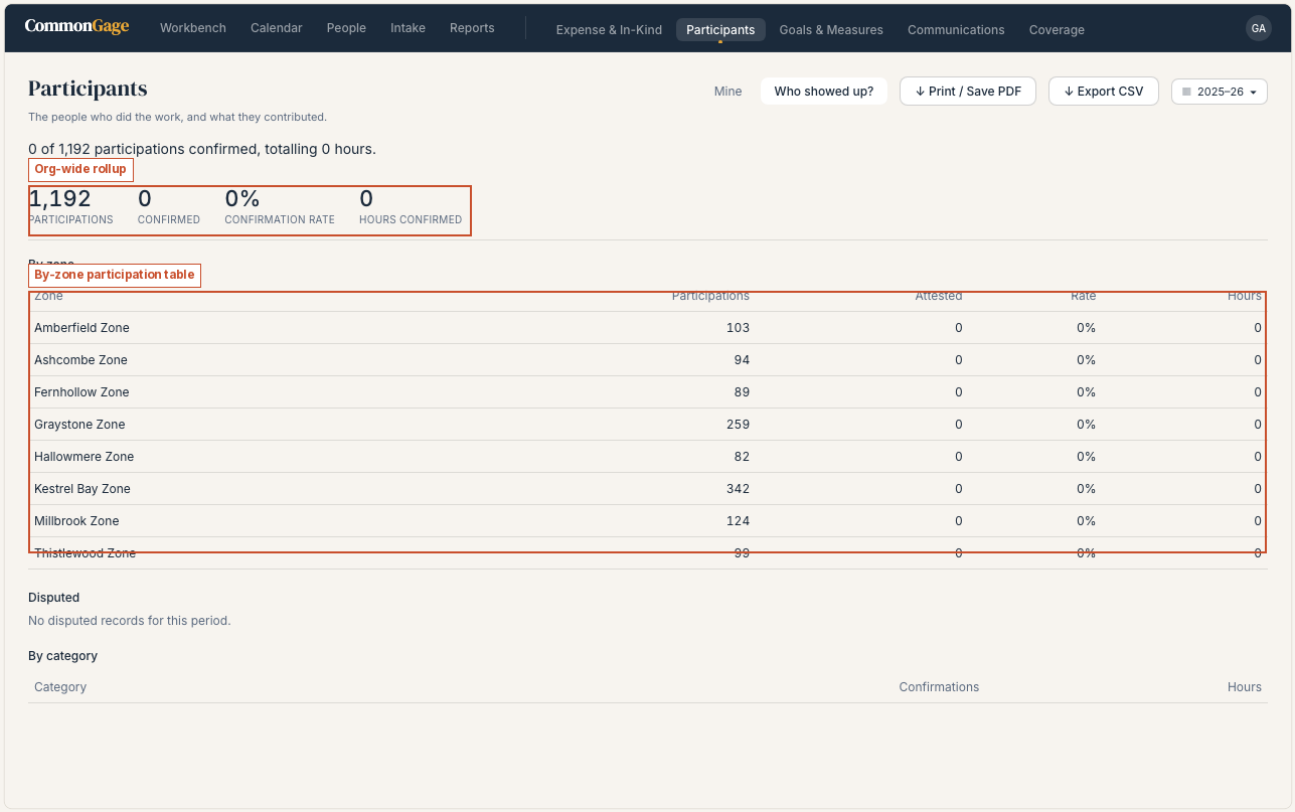
What follows is how you'd use each one day to day. For the full picture of what a module tracks, reports, and who it's built for, follow the "Full reference" link — that's the reference page, and this is the tour.

Expense & In-Kind

Covered above in The Monthly and Quarterly Rhythm — cost tracking, cash and in-kind, per event, rolled up by zone and category. **Full reference →**

Participants

Log who showed up from an event's own Participants tab — attendance and hours, per person, per event. The module's own screen shows the organization-wide rollup, one row per zone, with participation, confirmation rate, and hours. **Full reference →**



Participants — the org-wide rollup, one row per zone, with participation, confirmation rate, and hours.

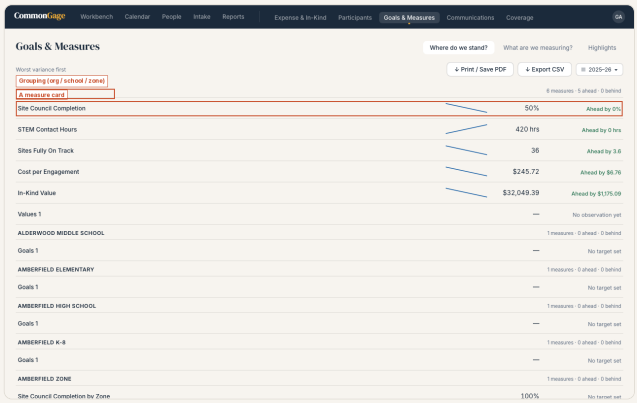
Confirming a participation (RSVP and attestation). When staff record someone's participation, CommonGage can notify that person and give them a way to confirm their own hours — attestation. How this works depends on whether the person has a CommonGage account:

- **With a CommonGage account** — including anyone given a minimal "Participant" seat (Calendar and their own participation records only) — the person gets an email notification and attests from the Participants **Mine** tab.
- **Without an account** — community volunteers, partner staff, anyone not yet invited — the person gets one email with two single-use links: an **RSVP link** to confirm they attended, and a **tokenized attestation link** to confirm their hours. Neither requires login.

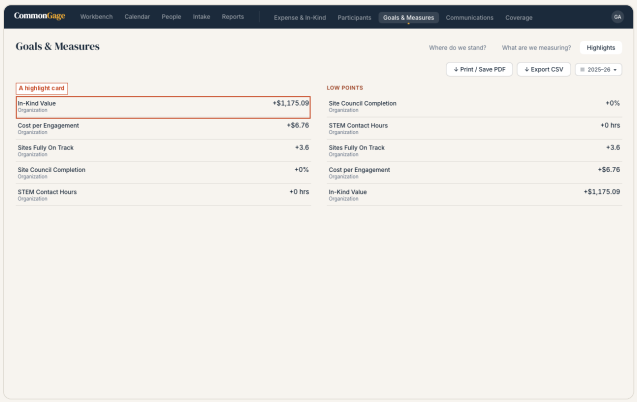
Attestation means the person confirms their own hours. If the self-reported figure differs from what staff recorded, both are kept side by side — neither overwrites the other.

Goals & Measures

Where do we stand? shows every measure against its target, worst variance first — a measure that's **derived** updates itself automatically as new events, expenses, or participations come in; one that's **entered** updates only when someone records a value by hand. Admins define new measures and targets from **What are we measuring?**; **Highlights** is the shareable summary of high points and low points. [Full reference →]



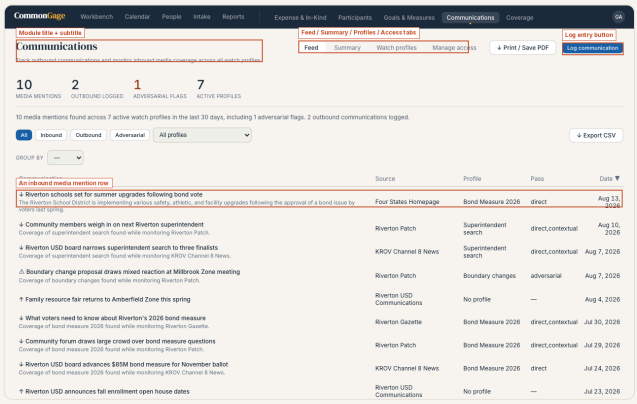
Where do we stand? — sorted worst variance first, grouped by scope.



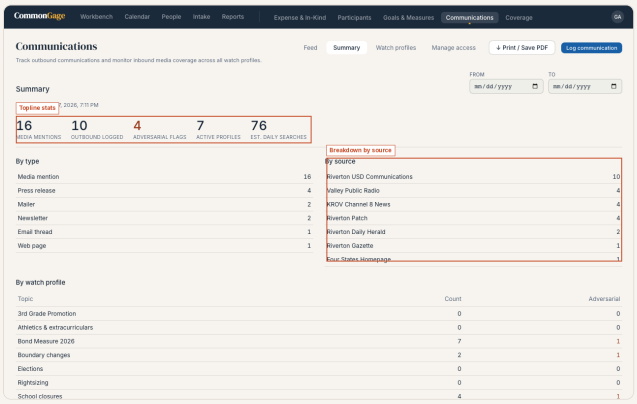
Highlights — high points and low points, at a glance.

Communications

The **Feed** tab lists outbound press and inbound media mentions together, newest first, with an "adversarial" flag for coverage that needs a second look. **Summary** rolls the same record up by type, source, and watch topic. Admins additionally see **Watch profiles** and **Manage access** — Communications is the one module with a per-user access gate on top of the organization-level toggle. [Full reference →]



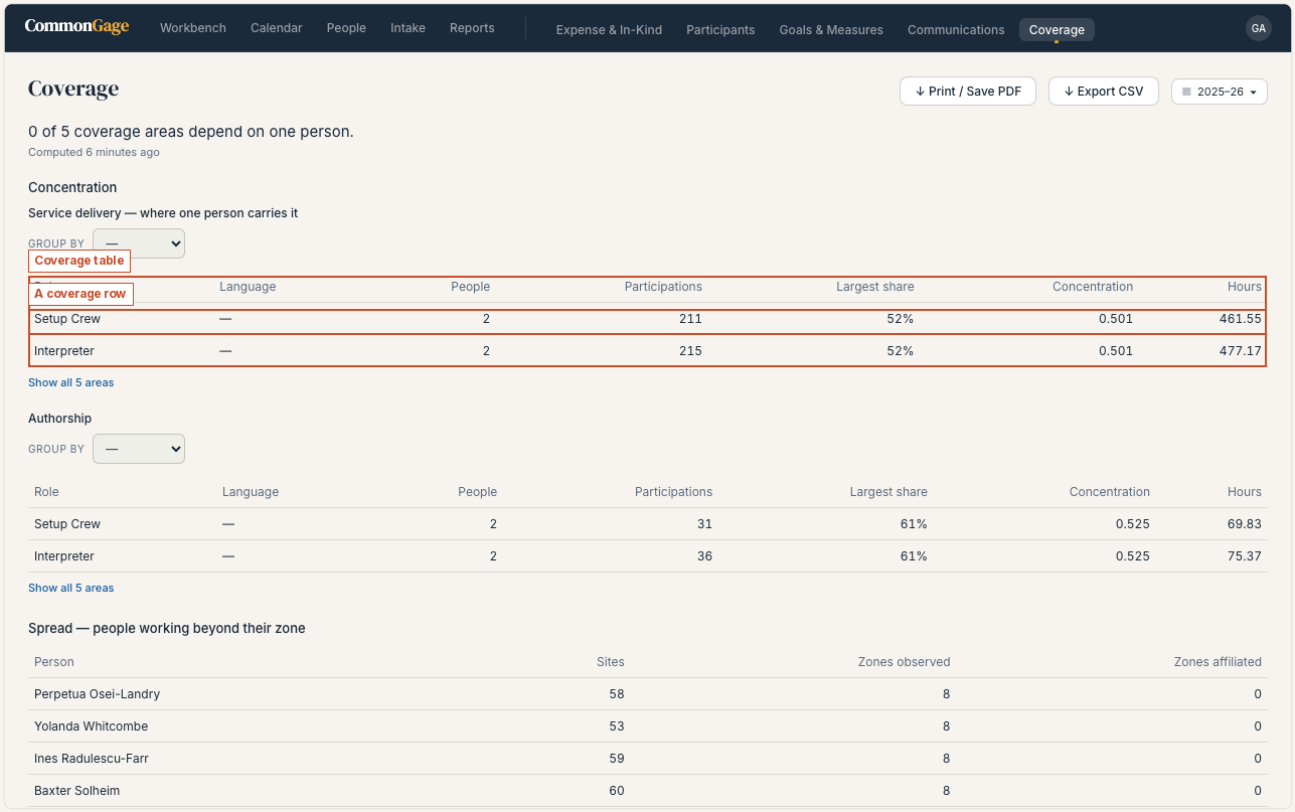
Feed — inbound mentions and outbound entries, one list, newest first.



Summary — the same record, rolled up by type and by source.

Coverage

Coverage answers a different question than the other modules: not what happened, but who made it happen, and how evenly that work is spread. The concentration table shows, per role, how many people are doing the work and what share falls on just one or two of them. Coverage is an Org Admin view only — a coverage area is a person, and a person can cross zones, so the analysis only makes sense looked at organization-wide. [Full reference →]



Coverage — concentration by role, and how far people range beyond their home zone.

Partnerships

Add a partner from the module's own screen, log the agreement you hold with them (an MOU, a contract, or something more informal), and link the people they send to specific events. A partner can also submit their own roster and hours directly through a one-time link an admin generates — nothing counts until staff review it. **Full reference →**

Projects

Work plans in 30, 45, 60, or 90-day horizons, each with an owner and a list of items. When a planned item becomes a real event, you record which event it became right on the item, so "did we do what we planned?" is answered by the record. **My work** is your own plans and assigned items; the module's main screen is the roll-up a supervisor uses. **Full reference →**

Proof

Names an external requirement — a funder's checklist, a grant condition — and points at the CommonGage records that already satisfy it. Every item reports one of three states, never a bare pass/fail: **met**, **not yet met**, or **not yet configured**. Click **Issue a snapshot** for a dated, frozen copy to hand to an auditor or program officer. **Full reference →**

Want to see how these eight fit together — what every module reads from, and which ones feed numbers into Goals & Measures? See How the Modules Connect.

SECTION 6

People, Intake, and Flags

People

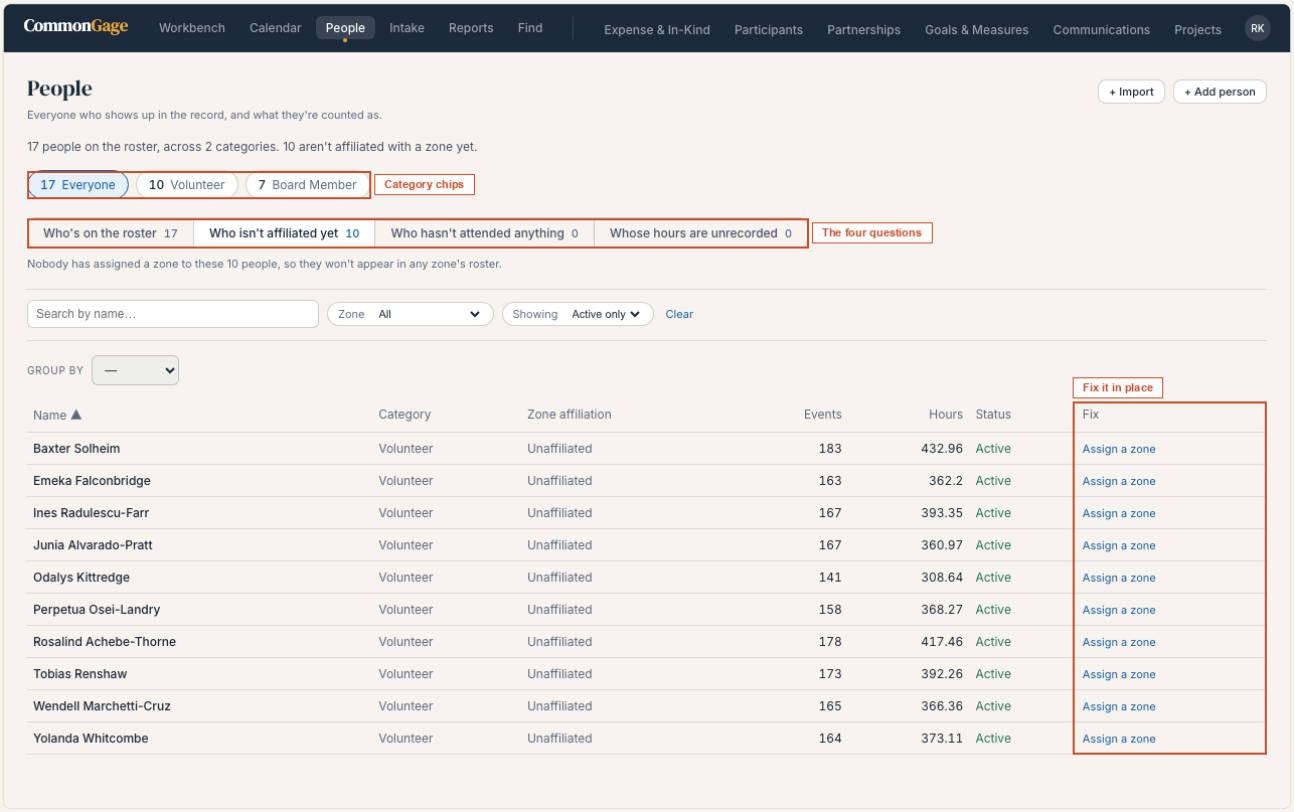
Every person who shows up in the record — volunteers, board members, and anyone else your organization tracks — with a category, an active/inactive status, and zone affiliation. This is core to the platform, not a module, so it's available regardless of what's licensed.

The screen is organized around four questions, each with its own tab:

TAB	WHO IT SHOWS
Who's on the roster	Everyone. The default view.
Who isn't affiliated yet	People with no zone assigned — they won't appear in any zone's roster until someone assigns one
Who hasn't attended anything	People on the roster with nothing in the record connecting them to an event
Whose hours are unrecorded	People whose participations carry no hours, or only some — any hours total including them understates the real figure

The category chips above the tabs narrow everything below them, and the tab counts follow the chips. The sentence at the top of the screen does not: it always reports the full active roster and how many people have no zone yet, so the headline number doesn't move around as you filter.

On the **Who isn't affiliated yet** tab, each row carries a **Fix** column — assign a zone inline, without opening the person. The column only appears if your role can edit people; if it can't, you still see who's unaffiliated, just no control to change it. Fixing one there removes it from the tab immediately.



People — category chips, the four question tabs, and the Fix column for assigning a zone in place.

Intake

Intake is where calendar events come from. Most sites connect a single iCal feed; a smaller number of events arrive through uploaded documents (PDFs, including scanned ones, Word documents, spreadsheets, PowerPoint slides, CSVs, or text). A repeating event in a feed arrives as its individual dates, and times are read in your organization's timezone. Events in a document's tables and calendar grids are read directly; only dated passages of ordinary text are read by AI. A long or scanned PDF can take a few minutes, and you can close the upload window while it works. The result lists any events that could not be brought in, and why, and each imported event shows the file and page it came from. If an upload brought in more than you meant to — a whole-school or staff schedule, say — **Undo this upload** in the result takes every event it added back out in one step, and the result warns you plainly when an upload adds more than 50. It is laid out as a board with problems first, so you can fix what's broken without leaving the screen.

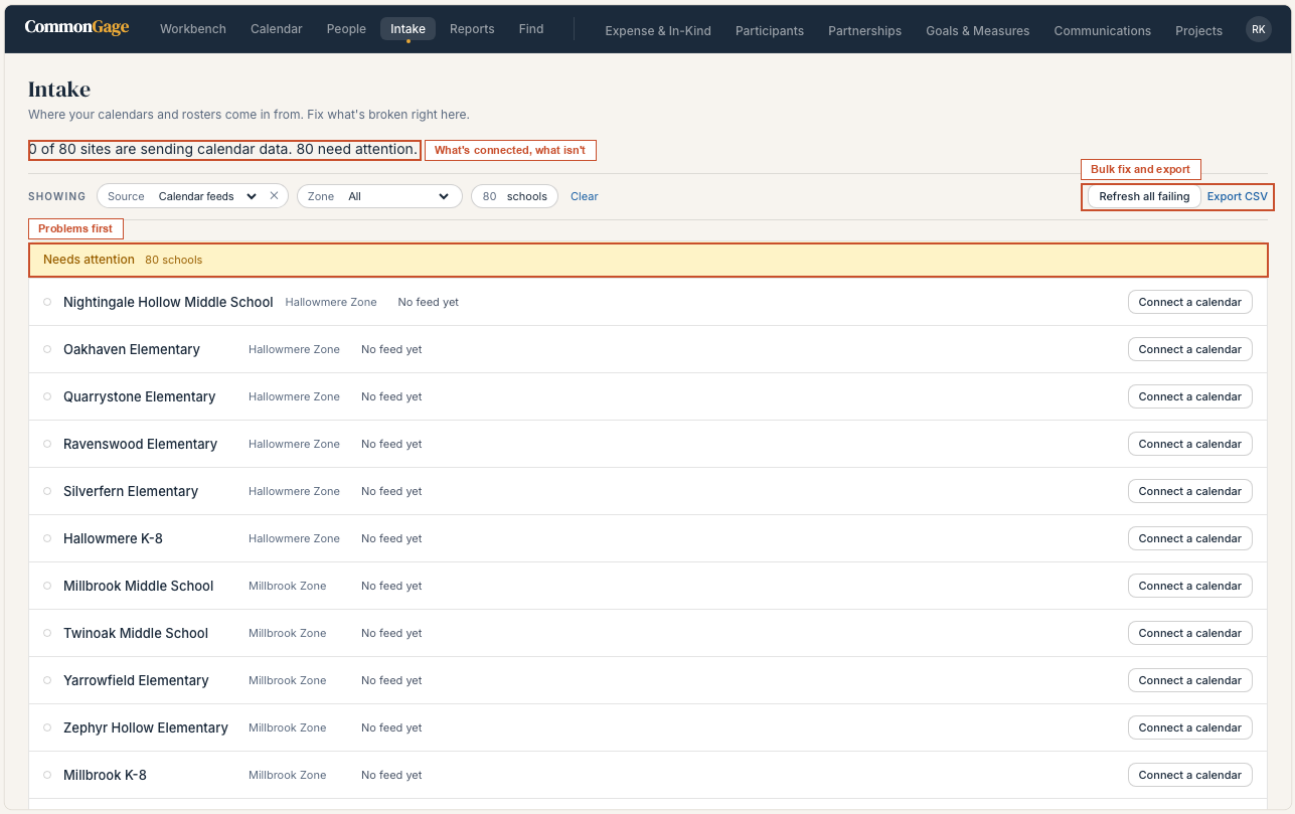
Needs attention sits at the top, worst first:

STATE	WHAT IT MEANS
Failing	The feed is connected but the last fetch failed — shown with when it was last tried
Connected, never synced	The feed is configured but has never successfully brought anything in
No feed yet	The site has no intake source at all
Feed turned off	A source exists but is inactive

Each row carries its own actions — refresh it, repoint it at a corrected feed address, remove it, or connect one for the first time. Removing a feed asks for confirmation inline, and events already brought in stay. **Refresh all failing** runs every failing feed in one pass, one at a time, reporting progress as it goes; a feed that fails partway doesn't stop the rest, and the summary at the end tells you how many succeeded and how many didn't.

Below that, **Working** collapses everything syncing normally into a single line — open it when you want the detail — and **Bring in more** is where you add a new connection or upload a document.

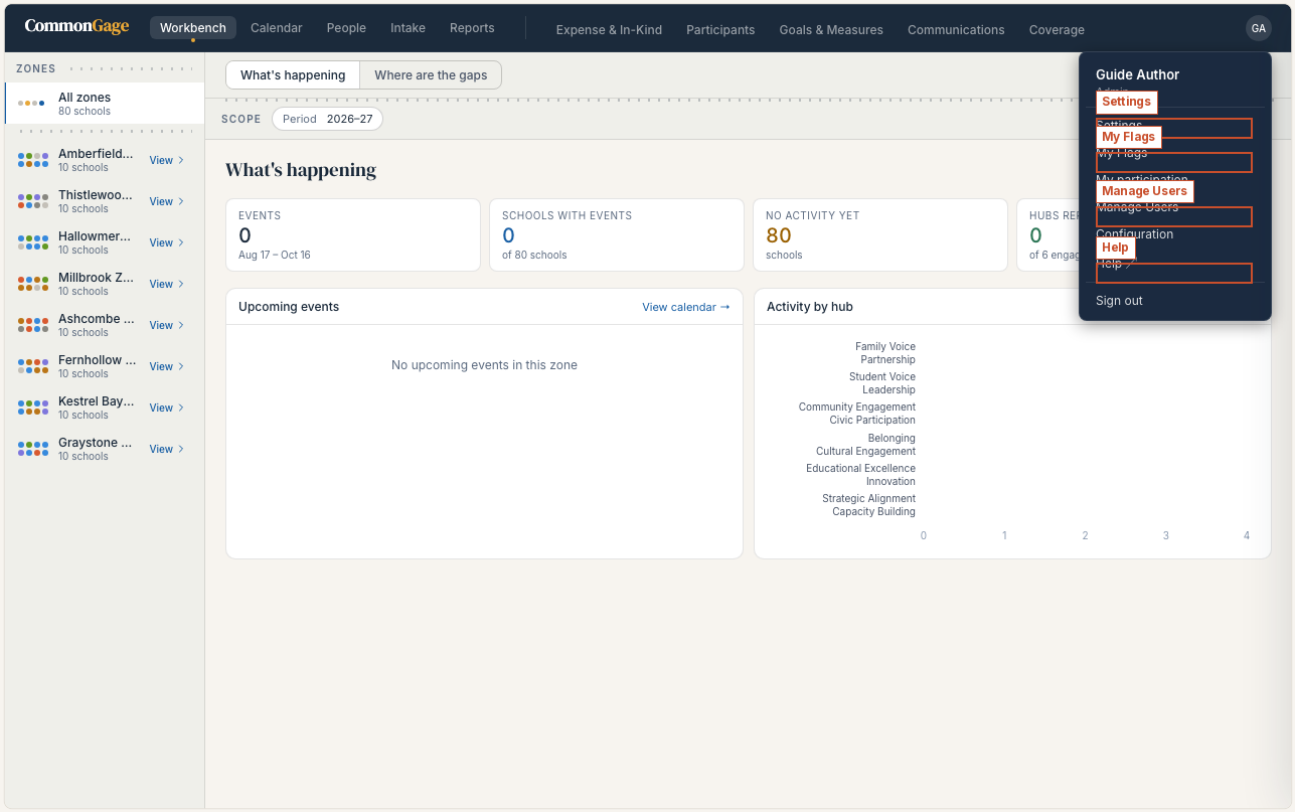
The **Showing** bar narrows the board by source type and by zone, and **Export CSV** exports whatever the bar has you looking at, grouped the way it's grouped on screen. Clicking into any site opens a drawer on the right with that connection's history.



Intake — Needs attention first, with per-row fixes and a bulk refresh for everything failing.

My Flags

A personal inbox of data-quality flags — things the system noticed that might need a second look, addressed to you specifically. Find it under the avatar menu, top right.



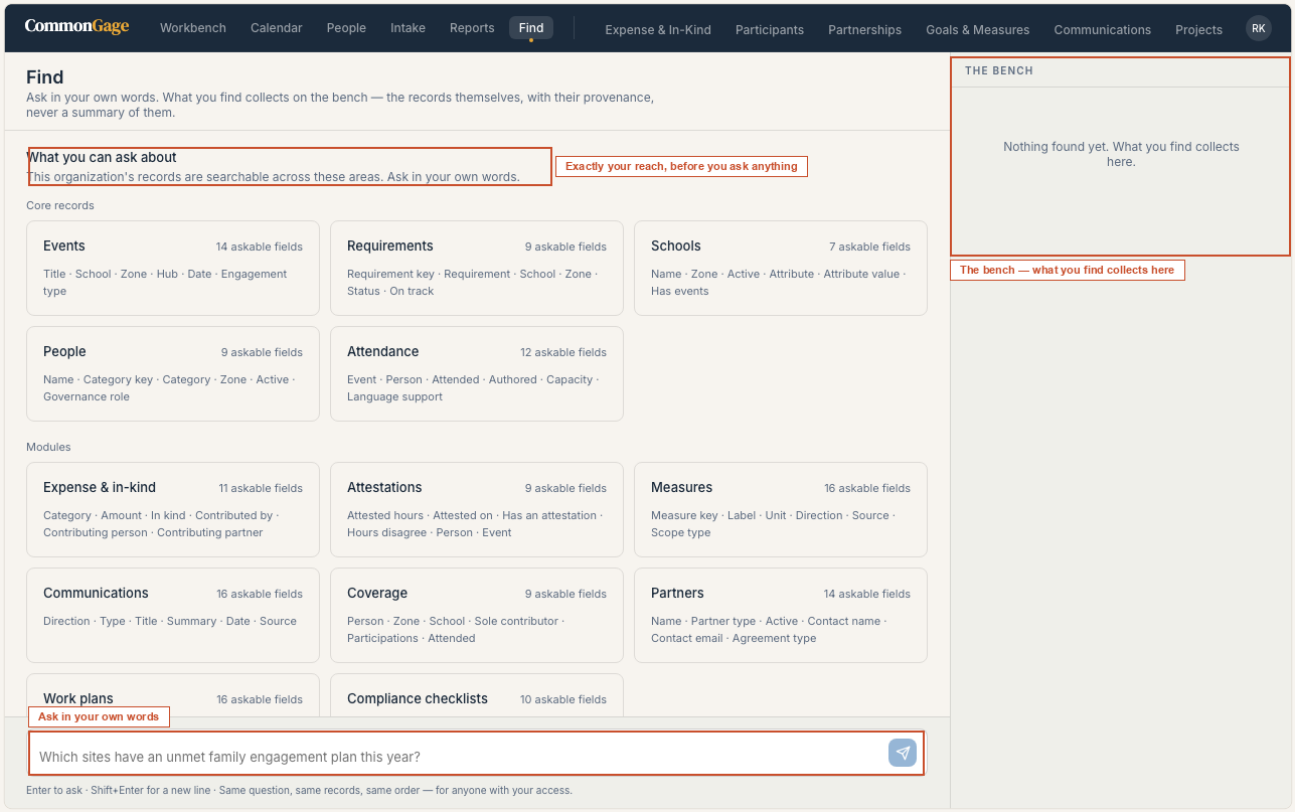
The avatar menu — Settings, My Flags, and (for admins) Manage Users, all in one place.

SECTION 7

Find

Find is the sixth core screen, alongside Workbench, Calendar, People, Intake, and Reports. Every organization has it, regardless of which modules are licensed.

You ask a question in your own words. What comes back is **the records themselves, with their provenance** — never a summary of them, and never a number you can't trace. If Find says eleven sites are behind, you get the eleven sites, each one openable.



Find, before you've asked anything — every area of the record open to you, and the bench waiting on the right.

Asking

Type the question and press Enter. Shift+Enter gives you a new line.

> Which sites have an unmet family engagement plan this year?

Before Find searches anything, it tells you how it read the question — a plain sentence restating the collection it's looking in and the conditions it applied. Read that line. If it doesn't match what you meant, rephrase and ask again; you'll never have to guess whether the number you're looking at answers the question you asked.

Two things can happen instead of a search:

- **Find asks you to clarify.** If a question can be read more than one way — the usual culprit is mixing and with or in a single sentence — Find shows you the reading it would have taken and asks whether that's what you meant. **Nothing is searched.** It will not quietly pick one interpretation and hand you results from it.
- **Find says the question can't be turned into a search**, and tells you specifically why: there's nothing here by that name, that module isn't enabled for your organization, your role doesn't reach that area, that field doesn't exist, or that field can't be compared the way the question asked. Each message names the actual problem rather than returning an empty result set you'd have to interpret.

Narrowing

After a result, ask a follow-up to narrow it. The constraints stack, and each one shows in the trail above the results — remove any of them to widen back out.

Follow-ups can only ever narrow. If a follow-up would have widened the search rather than narrowing it, Find declines to apply it and leaves your existing constraints untouched, rather than silently handing you a bigger result set than the one you were working with. Clear the trail when you want to start a new search.

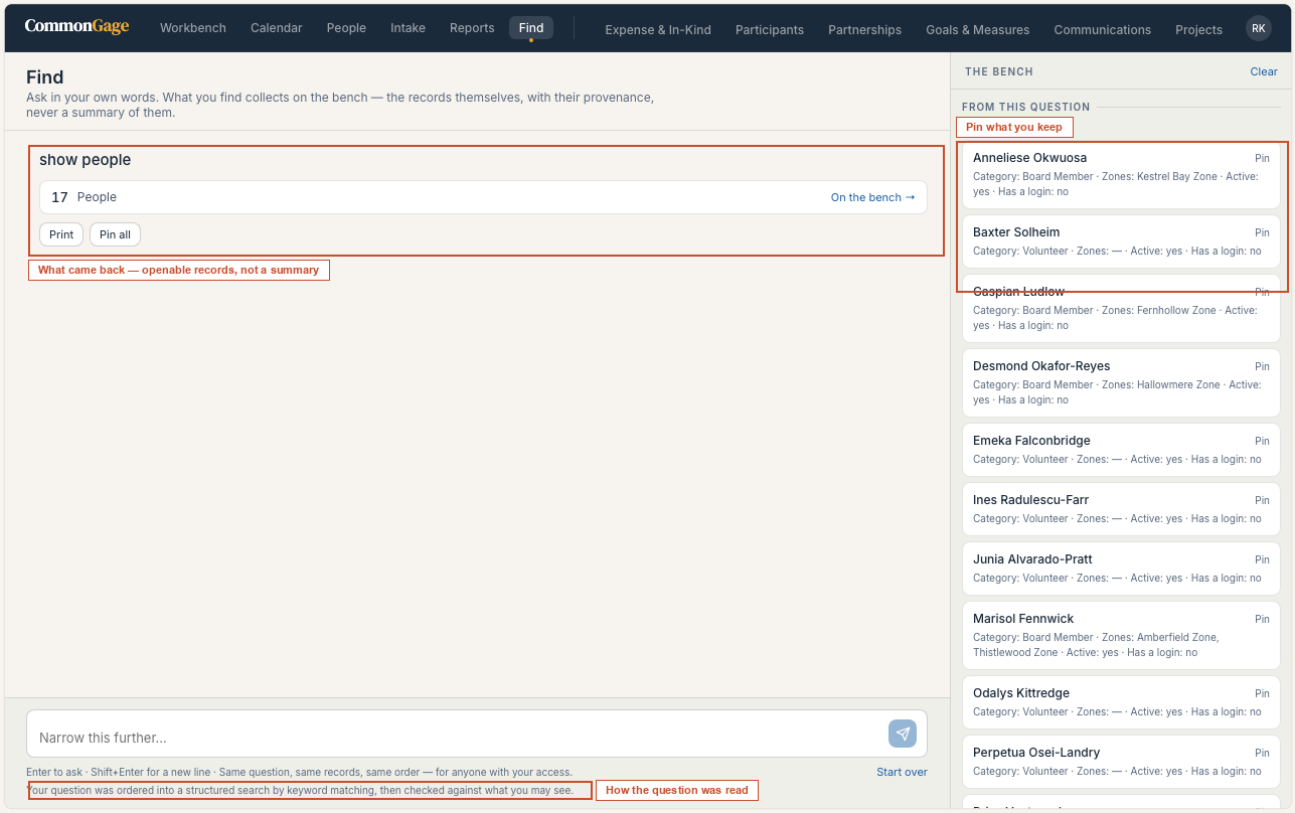
Some questions span more than one area — which partners sent people to events at sites that are behind? — and Find chains the steps, showing each one and how many records it matched.

The bench

Results collect on **the bench** on the right, across the whole session. It's a working surface: ask several questions, keep what's useful, discard the rest.

- **Pin** a result to keep it. Pinned items stay on the bench as you ask new questions; unpinned ones fall away under Earlier.
- **Pin all** / **Unpin all** for a whole batch, and **Clear** to empty the bench.
- **Print bench** produces one document of everything you've kept — the working record of an investigation, not a screenshot of a screen.

Any single result can also be turned into a **Report**, a **Calendar** (if the records carry a date), printed, or exported.



A question asked and answered — the result on the left, the records collecting on the bench, and a narrowing box ready for the follow-up.

What you can ask about

Before you've asked anything, Find lists every area of the record open to you, split into **Core records** and **Modules**, with the number of askable fields in each. That list is exactly your reach and nothing more:

- **Modules your organization hasn't licensed do not appear**, and naming one gets you a clear "not enabled for this organization" rather than an empty result.
- **Fields above your role do not appear either.** A building staff member searching people can ask about names, categories, and zone affiliation, but email addresses and external references aren't in the language for that seat at all — they can't be asked about, filtered on, or inferred to exist.

Licensing and role are what determine Find's reach. There is no separate Find permission to configure.

Why the same question gives the same answer

Two people with the same access, asking the same question, get the same records in the same order. Find is a search over your record, not a generative answer about it: the wording of your question determines what to look at and how to narrow it, and the records that come back are read straight from the database and checked against your permissions afterward.

Every result carries its provenance — who ran it, what scope it was run under, and when.

:::note How the question is read Turning your sentence into a structured search uses a language model where one is configured, and falls back to keyword matching where one isn't. Find tells you which path it took.

Either way, the model has no authority over what you can see. It only proposes which collection to look in and how to narrow it; the resulting search is then checked against your organization's licensed modules and your own role before it runs, and a search that fails that check is refused no matter what produced it. No record from your database is ever sent to the model — only your question, the names of the collections and fields your role can reach, and, on a follow-up, the structured form of the search you're narrowing. See Security Overview for the full data path. :::

SECTION 8

Pulling the Report: the Payoff

If you've been doing the daily/weekly and monthly/quarterly habits all year, this section is trivial. The report builds itself from the record.

The Reports screen has a 56px icon rail on the left edge, with three tiers:

```
[ District ]  ← composable analytics canvas
──────────────
[ Hub 1     ]  ← your organization's hubs, in the order it defines them
[ Hub 2     ]
[ Hub 3     ]
...
──────────────
[ Zone      ]  ← geographic cut
```

Click any icon to switch views. The active lens is highlighted. Hub names, colors, and order are set per organization — the ones above are just an example.

District View — the composable canvas

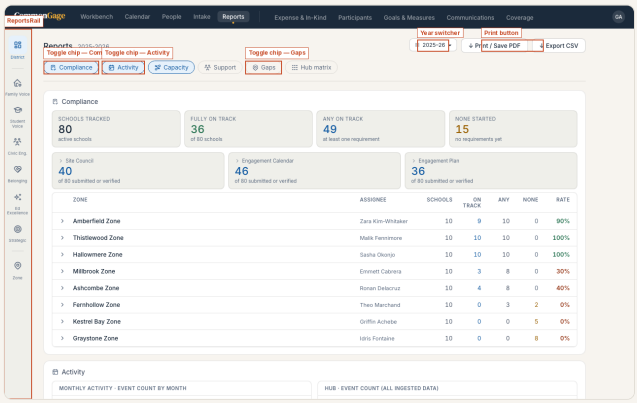
Task — Pull a district-wide report

1. Go to **Reports**. The District icon at the top of the rail is selected by default.
2. Toggle on whichever chips you need. **Compliance**, **Activity**, and **Capacity** are on by default.
3. Review, then click **Print / Save PDF**.

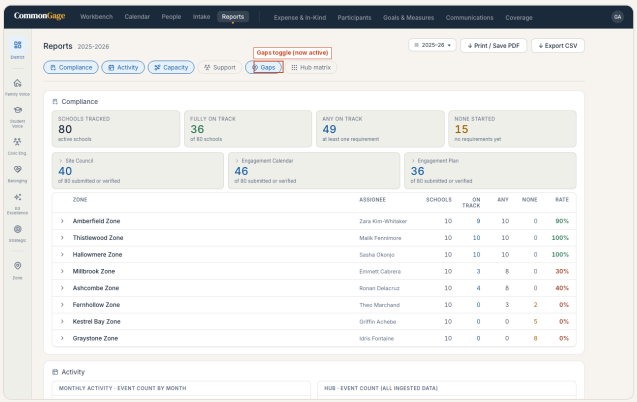
TOGGLE	WHAT APPEARS
Compliance	Obligation stat cards, requirement counts, and a zone-by-zone table
Activity	Monthly event chart, hub distribution, and zone breakdown

TOGGLE	WHAT APPEARS
Capacity	4C summary, by-zone and by-hub cross-tabs, and batch AI classify (Org Admins only)
Support	Engagement Support records — languages, childcare, coordination hours
Gaps	Schools with zero events logged
Hub matrix	Hub × zone coverage grid

Toggle chips on or off to build the view you need — **your layout is remembered** across sessions. Use the **year switcher** (top right) to flip between academic years; every view on this screen responds to whatever year is selected. **Print / Save PDF** prints only the blocks currently toggled on; District View also has a separate **Export CSV** button for a raw data export, respecting whatever period and filters are active.



District View — toggle chips control which blocks of the report are included.

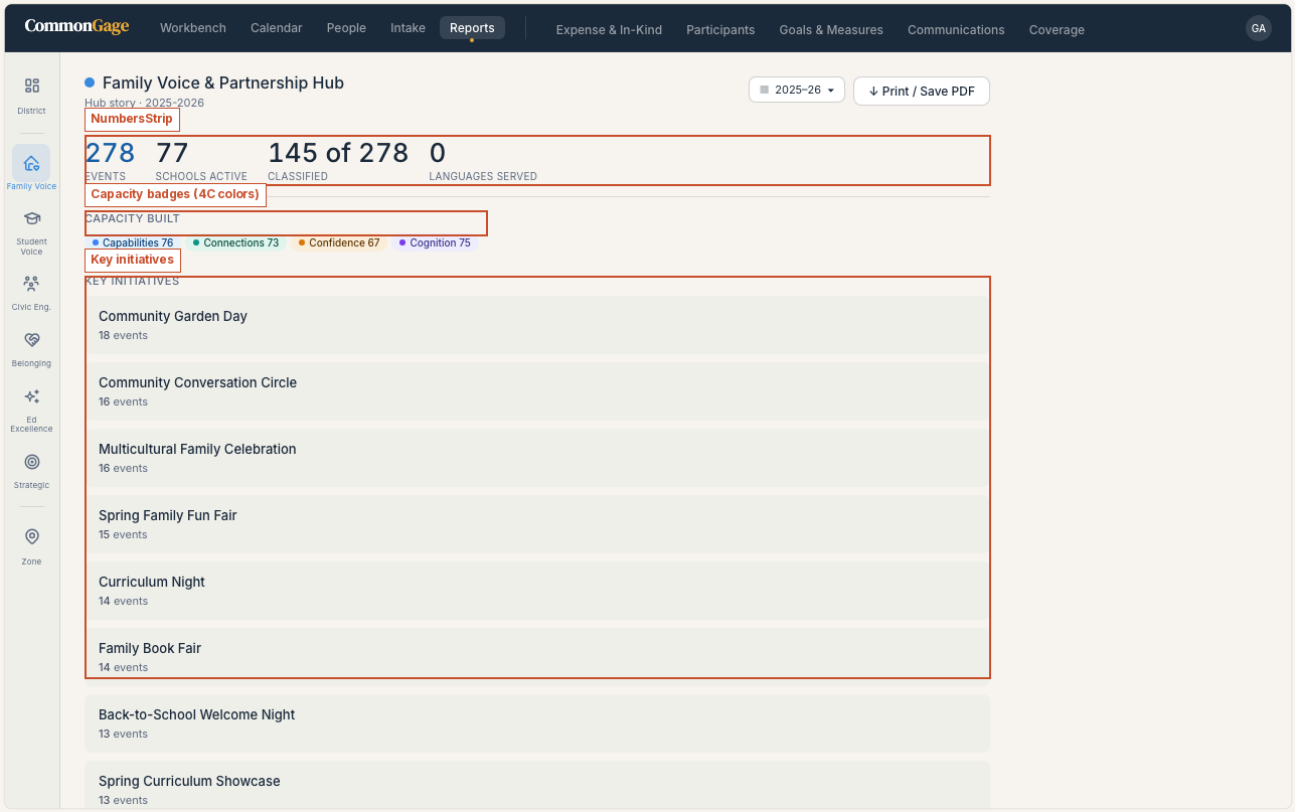


The same view, with Gaps also toggled on.

Hub stories

Task — Pull a hub story for a report chapter

1. In the rail, click one of the hub icons.
2. Review its numbers strip (events, schools active, events classified, languages served), its capacity badges (the 4C's, aggregated), and its key initiatives — event clusters grouped by recurring title pattern (e.g. "The Village Table — 12 sessions").
3. Click **Print / Save PDF** for a standalone chapter on that hub — the format matches an end-of-year report chapter.

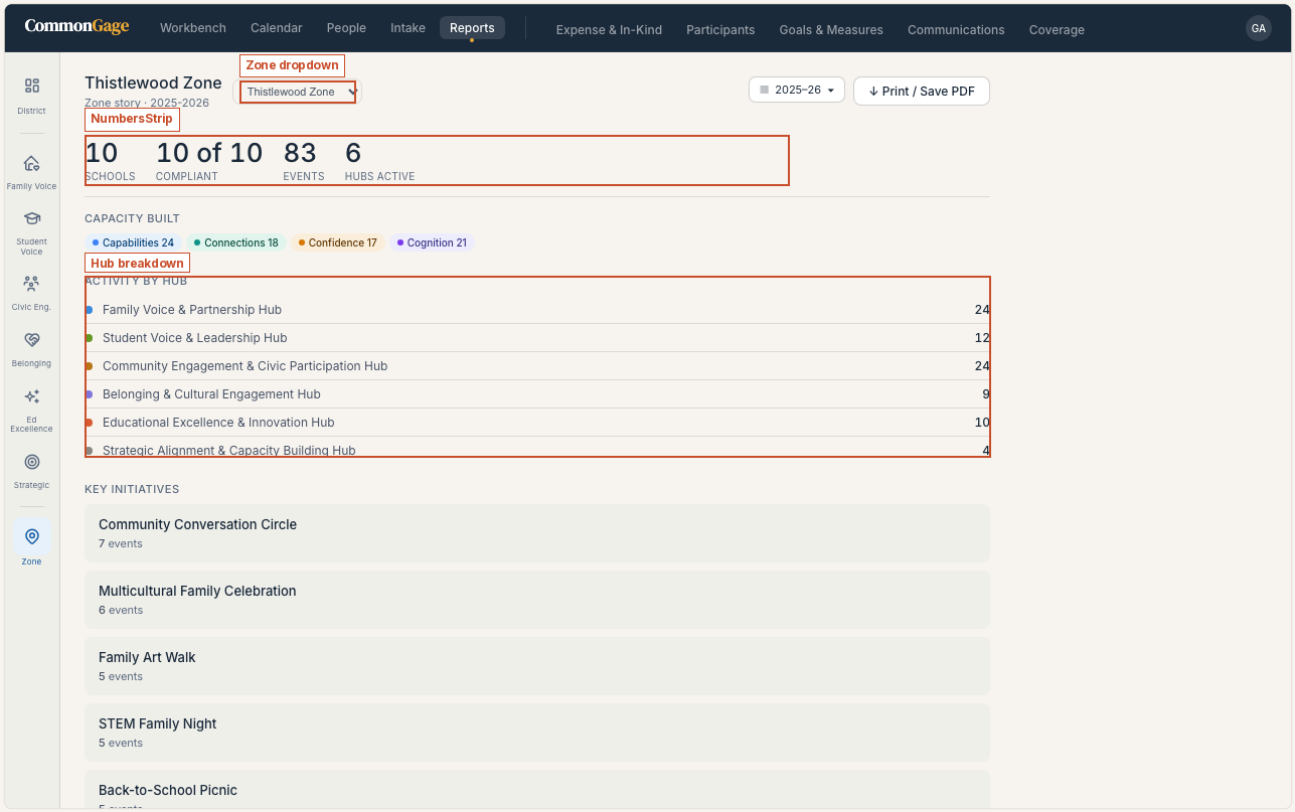


A hub story — one hub's full narrative, ready to print on its own.

Zone view

Task — Pull a zone-level report

1. In the rail, click the **Zone** icon (bottom of the rail), then choose a zone from the dropdown that appears.
2. Review that zone's numbers strip (schools in zone, requirement completion rate, total events, hubs active), its capacity built, its activity by hub, its key initiatives, and any schools with no events — a gaps list scoped to that zone only — then print or save as above.



Zone View — one zone, its own numbers strip and hub breakdown.

Every section of your end-of-year report maps to a surface in CommonGage. Hub-by-hub narratives come from hub stories. Compliance rates come from the District View. 4C capacity breakdowns come from the Capacity toggle. Engagement support data comes from the Support toggle. Zone-level activity comes from zone views. Cost data comes from Expense & In-Kind. The record is only as complete as the work you put in during the year — but if you've done it, the report is already written.

SECTION 9

Tips

A few things that aren't obvious the first time through.

- **Printing a hub story** for an end-of-year report: click the hub icon → click Print. The icon rail and toggle strip won't appear in the printed output.
- **Finding a specific school**: go to Workbench and click the school name, or use the Calendar filtered by school.
- **Checking gaps before a deadline**: open the District View → toggle on Gaps to see every school with zero events.
- **Year-over-year comparison**: use the year switcher in any Reports view — all views respond to the selected year.

- **Managing notifications**: Settings has a Notifications card with three toggles — Flag received, Flag resolved, and Participation recorded. Each saves immediately when toggled.
- **Can view but not edit?** Some Org Admin accounts are read-only by design — a "wide-read" seat that sees everything but can't make changes. If that's you, it's expected, not a bug.

CommonGage

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Engagement, on the record.