CampusConnect 101

Last updated July 2012

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*Adapted from the Collegiate Link Student Leader User Guide

Getting Started

Access your organization's site

1. Log in to CampusConnect.
2. In the top bar, click on My Shortcuts to view all current organizations you are a member of.
3. Click on the name of your organization and you will be taken directly to your organization's site.

OR

4. Go to My Involvement at the top of the page, then select My Memberships.
5. Click on the name of your organization to expand the options.
6. Click on "Organization Site" to the far right.

Managing Your Organization's Site

As a student leader, you can manage the appearance of your organization's site, including color scheme and organization logo.

Manage

From your organization's site:

1. Go to Manage on the left side of the page.
2. Click on "Organization Styles".

To update the font type:

3. Select the radio button next to the style you'd like to update the text to.

To update the colors:

4. Enter the hexidecimal number for the color you'd like to update to. (An index of Hexadecimal colors can be found at http://colour.pro/ or http://0to255.com.)

OR

5. Click the colored box and select a color from the 16 color options.
6. Click "Submit" at the bottom of the page to save your updates.

To update the header image:

7. Click on the "Organization Header Images" link in the Manage navigation on the left side of the page.
8. Click the "Add Header Image" button to select the image file.

Managing Your Organization's Interests

Each organization has the ability be associate itself with interests that students can search for.

Manage

From your organization's page:
1. Go to Manage on the left side of the page. Organization Interests are displayed by default
2. Available interests are displayed in the left module. Interests currently associated with your organization are displayed in the right module.
3. Click on an available interest for your organization to add it to the right module.
*** Once interests have been associated with your organization, you can rank those that are the most pertinent to your organization. ***
4. Use the arrows (which will appear when you hover over the interest) on each interest to arrange them in the ranked order most appropriate for your organization.

*** The site updates automatically with every action. ***

Managing Your Organization's Roster

Roster

Access your Organization's Roster
From your organization's page:
1. Go to Roster on the left side of the page.
2. The complete Roster for your organization is now displayed. The Officers are listed at the top with their position identified.

Invite New Members to Join
From the Roster option on your organization's page:
1. Click "Manage Roster" at the top of the page.

Manage Roster
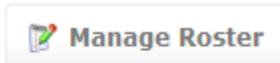
2. Click on "Invite People" at the top of the page.

Invite People

3. Up to 2 tabs may display to invite people from.
   • **Users**: This tab lists out all users within the campus community for you to invite to join your organization.
   • **Email**: This tab allows you to enter individual e-mail addresses for invitations to be sent to.

4. As you select people and add e-mail addresses, they will be moved below the tabbed module to the complete list of people to be sent invitations.
5. Select a position for specific users to join the organization as, including Member.
6. Click "Send Invitations" when all people have been added to this list.

Approve New Members

New members can join by locating your organization on the campus site. You must Approve these new members before they are added to the organization's roster.

1. Go to Roster on the left side of your organization's page.
2. Click "Manage Roster" at the top of the page.
3. Go to the Prospective tab.
** Pending members are those you invited and must accept your invitation. Prospective members are those who found the organization and indicated they wanted to join. **
4. Review the users who are awaiting membership approval.
5. Click "Approve" or "Deny" next to each user.
6. Confirm action.

Create New Positions Specific to your Organization

From the Roster option on your organization's page:
1. Click the "Manage Positions" link.
2. A list of all the current positions available for your organization will be listed. Some of these may be organization created, while others may system-wide positions.
3. Click the "Create New Position" button at the top of the page.

4. Identify the name of the new position.
5. Select the type of position most appropriate for the new position.
6. Set the following options as appropriate:
   - **Show holders of this position on the organization's roster**: The user holding the position is visible on the organization's roster.
   - **Active**: The position is available for a user to hold. If this is not checked, the position will only be available to be added as held in the past.
7. Grant the position *No, All, or Limited* access to the organization's site. Limited access allows you to select each aspect of the organization's site that the position should not access, have Full access to, or only be able to View.
8. Click "Create".

Promote Members to Positions

From the Roster option on your organization's page:

1. Click on "Manage Roster" at the top of the page.
2. Locate the member you'd like to promote to an officer position on the Current tab.
3. Click "Edit Positions" to the right of the member's name.
4. Select each Position that the member should now have.
5. Click "Save".

Update Primary Contact

From the Roster option on your organization's page:
1. Click on "Manage Roster" at the top of the page.
2. Click "Change" to the right of the current Primary Contact.
3. Select the new primary contact from the drop-down menu.
4. Click "Save".

Remove Members from your Organization

From the Roster option on your organization's page:
1. Click on "Manage Roster" near the top right corner of the page.
2. Locate the member you'd like to remove.
3. Check the box on the far right of the member's name.
4. Click "Delete" at the top of that tab.
5. Confirm deletion.
** This will remove the user completely from your organization. To remove just a position, go to "Edit Positions" for that user and uncheck the appropriate positions. **

Adding Content to Your Organization's Site

Specific content can be added to round out your organization's site. These include wall posts, news articles, photos, and documents.

Wall posts

1. Log in to your campus site.
2. Go to your organization's page.
3. Type in the text field below "Wall".
4. Click "Post".
** Your post will automatically be added to your organization's wall. Anyone in your organization can post/comment on your organization's wall. However, only primary contacts and other officers can remove any post or comment that is inappropriate or unwanted. **

News articles

1. Log in to your campus site.
2. Go to your organization's page.
3. Go to "News" in the left navigation

4. Click on "Create Article".

Create Article

5. Enter the Title, Summary, and the full Story (text) of the article. You can use the text editing features to customize the style of the Story of your article.

6. Upload an image to be displayed with the Summary in the News ticker.

7. Specify who can view the article.

8. Click "Save Article".

** Only officers of your organization can post News Articles. Your article will automatically post to your organization's wall and will appear in the news ticker on the Home page for members of your organization only. **

Documents, such as your meeting minutes

1. Log in to your campus site.

2. Go to your organization's page.

3. Go to Documents on the left side of the page.

To upload a new document:

4. Click "Upload" in the upper left corner.

To edit the information associated with a document:

1. Locate the document you'd like to update information for.

2. Click the "Edit" icon on the far right side of the document listing.

3. Update the title, description, and/or type of the document.

4. Update the Security options for which positions can view the document.

5. Click "Update Document".

To replace existing documents:

1. Locate the document you'd like to replace.

2. Click "Delete" on the far right side of the document listing.

** Once a document is deleted, it cannot be recovered. **

3. Confirm deletion.

4. Upload the new version of the document you were replacing.

Events

Events can only be created by student leaders and must be associated with an organization. Events that have an image or flyer uploaded along with it will appear on the Event Flyerboard on the Home page. You can set who can see and RSVP to the event during the creation process.

Events

1. Log in to your campus site and go to your organization's page.

2. Go to Events on the left side.

3. Click on "Create Event".
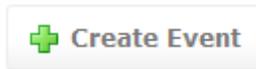
4. Enter the Name, Location, Start Time, and End Time. These fields are required.
5. Enter a brief description of the event.
6. Indicate if you'd like to include a link to Google Map to the location of the event.
7. Indicate if you'd like to include a link to the weather information regarding the event.
8. Attach a flyer to associate with your event. Supported files include image files (jpg, jpeg, tif, tiff, gif, png, bmp), office files (xls, xlsx, ppt, pptx, doc, docx, pub, rtf) and html, htm, mht and pdf.
** *If a flyer is not uploaded, the event will not display on the Event Flyerboard on the Home page.* **
9. Specify the type of event:
   • **Public**: Anyone who accesses the site will be able to view this event.
   • **Campus Only**: Any logged-in user can view this event.
   • **Organization Only**: Only members of your organization can view this event.
   • **Invitation Only**: Only those invited to this event can view it.
10. Identify any Categories that the event falls under. You can add as many Categories as appropriate by continually selecting them from the drop-down menu.
11. Specify the RSVP Option for the event: None, Open, or Invite.
12. Indicate if anyone is able to self-report their attendance to the event.
13. Indicate if you'd like to create a QR code for students to access to receive the details of the event.
14. Add any additional information that your campus requires.
15. Click "Next".
16. Identify who you'd like to invite to the event: by username, or e-mail address.
17. Click "Add" to include those you selected/identified in the invitee list.
18. Click "Send Invitations".

As people RSVP for your event, you can view and manage the attendance.

From the Events option on your organization's page:
1. Click on the name of the event you'd like to manage.

2. Click on the "Track Attendance" button on the right side of the page.
3. The page displays who is attending your event. Click on "Export" to download a file containing a list of people who RSVPd to your event.
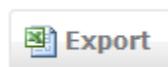
4. Click "Add Attendance" to include additional participants at your event.

5. Each tab allows you to add attendees who had not previously RSVPd, either by typing in the appropriate identifiers or by uploading a CSV (comma delimited) file containing just the identifiers.

6. Select the appropriate Status.

7. Click "Upload".

8. Click "Back To Track Attendance" to return to the full attendance list.

9. Click "Back To Event" to return to the event page.

THEN:

1. Click on "Manage Invitations".

2. Indicate which attendees will be hidden from public view as attending the event.

3. View comments made by the attendees.

4. Invite additional people.

Edit Existing Events

From the Events option on your organization's page:

1. Click on the name of the event you'd like to edit.

2. Click "Change" below the name of the event.

3. Update any of the details of the event, including the date, time, or location.

4. Click "Next" at the bottom of the page.

*** If your campus has implemented an Event Form, you will have to update any of the information originally submitted on this form. Click "Next" to continue through the form. ***

5. Click "Submit".

*** Your changes may need final approval before it is posted. ***

Cancel Existing Events

From the Events option on your organization's page:

1. Click on the name of the event you'd like to edit.

2. Click "Cancel" below the name of the event.

3. Include any comments that you'd like sent to any individual who RSVPd to the event.

4. Confirm cancellation.

Tracking Service Hours

Record your personal community service hours

1. Log in to your campus site.

2. Go to My Involvement at the top of the page.

3. Click on My Service Hours from the drop-down menu.

** Your previously submitted service hours will display in the summary information on this page. **

4. Select the organization from the drop-down menu you wish to associate service hours with. You have to be a member of an organization to submit service hours.

5. Enter the date the service hours took place and a brief description of the type or place of the service hours.

6. Indicate the number of hours spent performing the service hours (in the 1:30 format).

7. Type in the name of the person that can verify the service hours. A drop-down menu of all users with those characters will populate. Select the individual from the list.

8. Click "Submit".

** All service hours entries must be approved by an organization officer or campus administrator. **

Record organization members' community service hours

1. Log in to your campus site.

2. Go to your organization's page.

3. Go to Service Hours on the left side of the page.

4. Enter the following information in the top "Record New Entry" module:

   • **Member Name**: Name of the person to receive the service hours (a drop-down menu will appear when characters have been typed)

   • **Date:** when service hours took place

   • **Description**: A brief description of the event

   • **Duration**: The number of hours (in 1:30 format)

5. Click "Submit" just below the fields.

Approve organization members' community service hours

From the Service Hours option on your organization's page:

1. On the "Pending Submissions" tab in the lower module, you will see the member's name, date, description of service event, and duration of service.

2. Click "Approve" or "Deny" on the far right of the person based on the appropriate action.

3. Confirm approval action.

OR

4. Add in an administrator message as to why the hours were denied, and click "Deny" again.

Generate reports of your organization's community service hours

From the Service Hours option on your organization's page:

1. Go to the "Reporting" tab in the lower module.

2. Adjust the date range and users you'd like to see a report for in the fields.

3. Click "Show Report".

** The results based on the criteria you entered will display on the page. **

Changing Leadership

As positions in your organization are filled, you may need to update the campus site with the new student leader information. Due to the way the system operates, there is a specific process that you must follow in order to successfully update your organization's leadership.

Roster

Identify New Leaders
The individual(s) who will be assuming the leadership positions must be members of your organization. If they are not already, have them join the organization first before proceeding.

1. Log in to your campus site.
2. Go to your organization's page.
3. Go to Roster on the left side of the page.
4. Click on "Manage Roster".
5. Locate each individual who will be assuming a leadership position.
6. Click "Edit Positions" to the far right of their name.
7. Select the position(s) the member should now have.
8. Click "Save".

Change Primary Contact:
From the Manage Roster page for your organization:
1. Click the "Change" button next to the current Primary Contact above the full member list.

Change

2. Select the member from the drop-down menu that should be the new Primary Contact.
3. Click "Save".
*** Only the Primary Contact will be able to update roster information for your organization. If this position is not appropriately assigned, contact your campus administrator or CollegiateLink staff to assist you. ***

Remove Current Leaders
Once the new leaders have been identified in the system, the current leaders can be removed from that position in the organization. This can be done two ways.

Individual removal:
Have each current leader that is being replaced follow these steps:
1. Log in to your campus site.

2. Go to My Involvement at the top of the page.

3. Click on My Memberships in the drop-down menu.

*** Your Organization Memberships are displayed by default. ***

4. Click on the organization you are leaving.

5. Click the red X on the far right of the position. You will remain as a member of the organization but will no longer have the leadership position.

6. Click "Leave Organization" to end the membership completely from the organization, if applicable.

Organization removal:

The primary contact of the organization can remove individuals from the organization. You can remove them completely from the organization or just the one position they held, but maintain their membership.

1. Log in to your campus site.

2. Go to your organization's page.

3. Go to Roster on the left side of the page.

4. Click on "Manage Roster".

5. Locate each individual that needs to be removed from the organization with the appropriate position labeled. Each individual will be listed for their position and as a member.

6. Click "Edit Positions" to remove the user from a position in the organization.

7. Uncheck the appropriate positions.

8. Click "Save".

OR

9. Check the box to the far right of each individual.

10. Click "Delete".

11. Confirm deletion.

*** Deleting a user will remove them completely from the organization. ***

Organization Registration

1. Log in to your campus site.

2. Go to your organization's site.

*** If your organization must register, a Register button will display during the appropriate time period in the top right corner of the Home page for your organization. ***
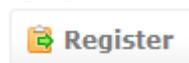
3. Click "Register".

4. Follow the steps outlined by your campus, updating any information as needed.

5. Click "Next" at the bottom of each page to continue to the next step.

6. You will have the opportunity to review each step prior to submitting the completed registration.

7. Click the link associated with each step to review and update the information.

8. Click "Submit for Approval" when all information has been included.

*** All registration submissions must be reviewed and approved by a campus administrator. You can view the status of your submissions and/or update any submissions still in "InProgress" status. ***

View/Update Submissions

1. Log in to your campus site.

2. Go to the My Involvement tab at the top of the page.

3. Go to the My Submissions option on the left side of the page.

4. Select the Organization Registrations tab.

5. Locate the submission you'd like to view/update in the list.

6. The current status is listed in the second column.

7. Click "View" to the far right of the submission to review your submission and/or any comments a campus administrator made regarding your submission.

OR

If still "In Progress":

8. Click "View" to the far right of the submission.

9. You will be taken to the final review screen where you can return to any step to make the appropriate updates.

10. Once all steps have been updated, click "Submit for Approval".

Forms

Create a form for your organization to gather specific information, such as application information.

Forms

Create a Form

1. Log in to your campus site.

2. Go to your organization's page.

3. Click on Forms on the left side of the page.

4. Click on the "Manage Forms" link in the left side navigation.

5. Click the "Create Form" button.

Create Form
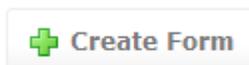
6. Identify the Name of the form, if it should be Active, and the date range you'd like the form to be available during.
*** The form will only be accessible if Active and during the specified date range. ***
7. Identify if the form should accept multiple submissions from the same user.
8. Identify any access restrictions based on positions in your organization that should be in place for this form.
9. Click "Save".

Elections

Elections

Create an Election for your Organization
1. Log in to your campus site.
2. Go to your organization.
3. Click on Elections on the left side of the page.

4. Click the "Create Election" button.

Create Election

5. Identify the Name of the election, if it should include instructions, and any additional instructions that should be included.
6. Indicate if the election should be active and the date range you'd like the election to be available during.
*** Once the election is set to Active and it falls within the date range, a prompt will display on the Home page of your organization's site for eligible users to vote. ***
7. Indicate if the election is for Members Only.
8. Click "Save".

You can create as many ballots as needed. Each ballot can be accessible to the general user population or any number of the eligibility lists. A user will see each ballot they are designated to see.

9. Click "Create Ballot".

Create Ballot
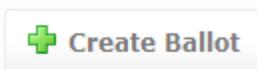
10. Enter the name of the ballot.
11. Indicate if this ballot should be available to all users by clicking on Enable or Disable.

Enable Disable

IF you Disable the General access, THEN:

12. Indicate for each Eligibility List who should access this ballot:

Allow | Deny | **Ignore**
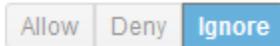
- **Allow**: allows the users on the list can access the ballot
- **Deny**: users cannot access the ballot and supersedes an allow list
- **Ignore**: the list will not be used for the ballot

13. Click "Save" when all access has been identified.

View Ballot Results

1. Log in to your campus site.
2. Go to your organization.
3. Click on Elections on the left side of the page.
4. Click on the name of the election.
5. Go to the Results tab.
6. A snapshot of the current results will display, including the total number of eligible voters, the number of current entries, and the current percent of completed entries.
7. Click the "Export" button to download an Excel file of all the ballot entries.

<u>Messaging Members</u>

Messages can be sent to all members of your organization, excluding specific individuals as appropriate.

To create a message:
1. Log in to your campus site.
2. Go to your organization's page.
3. Go to Roster on the left side of the page.
4. Click on the "Messaging" link.
5. Click "Send Message" under the appropriate delivery method.
6. Create a delivery statement using the criteria lists by clicking "Edit" on each component.