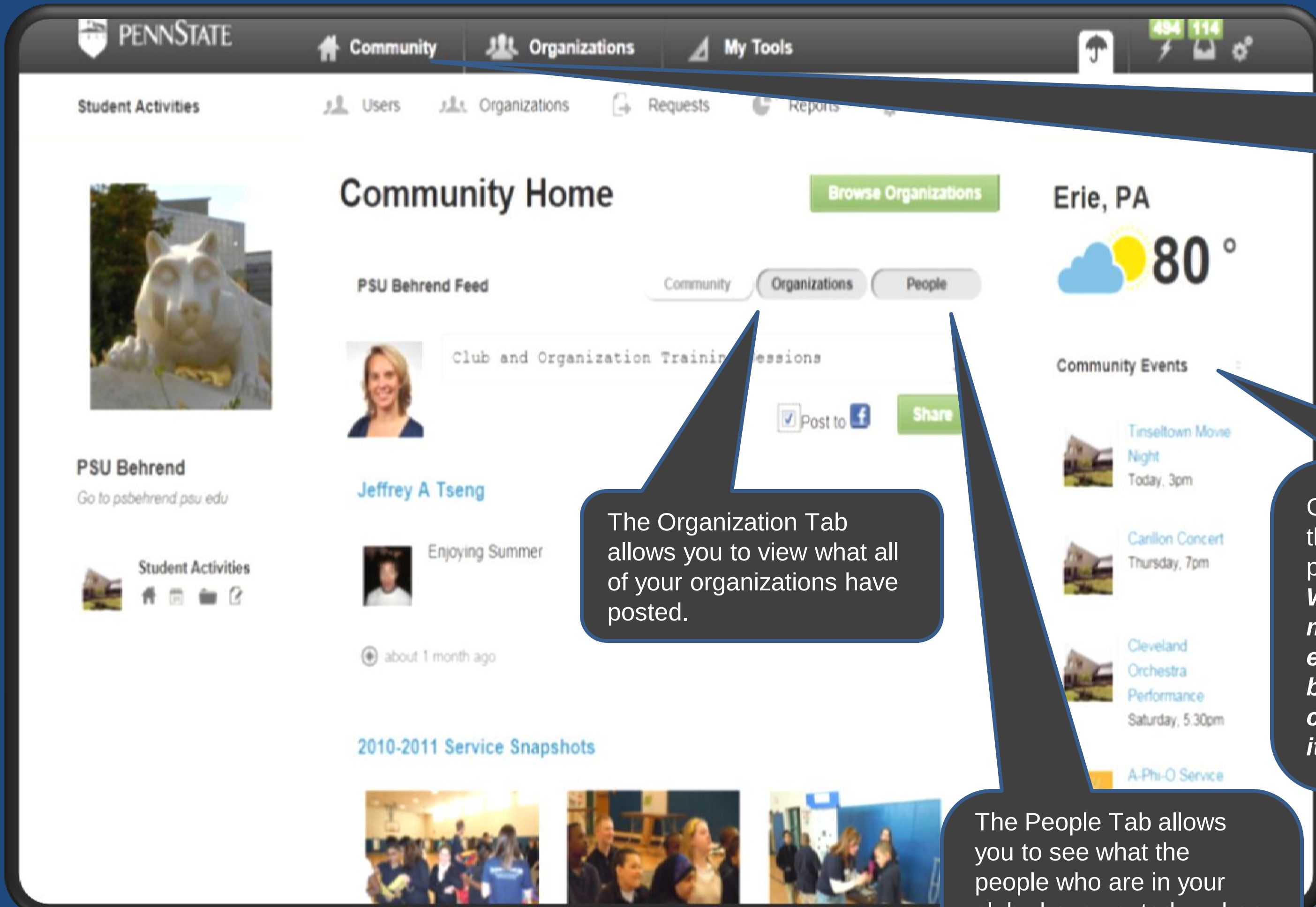
OrgSync Training

The Basics : A Review

- Each club has its own portal – this is your space that allows potential new members to view basic information about your club; contact information, club meeting times, who is welcome
  - Keep this information up to date as this is first impression of the club to new students and potential members

The Basics: Community Home



Your Community Page is similar to a home page; you can post what you are working on and can see what other people who are in the same clubs have posted.

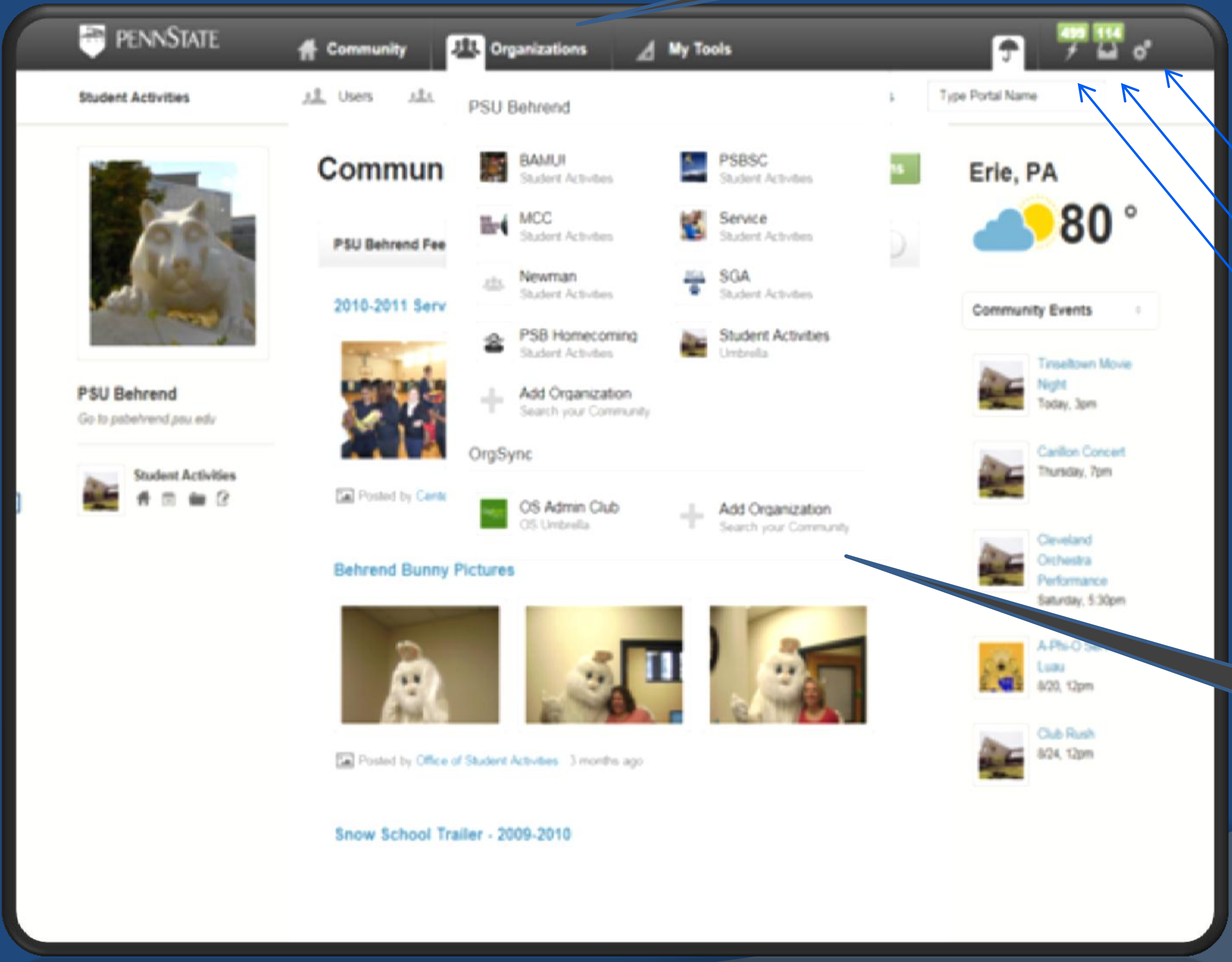
The Organization Tab allows you to view what all of your organizations have posted.

Community Events are listed; these are all the events that are public and open to everyone – ***When you are having a club meeting or sponsoring an event for the entire student body, post your event on the calendar and everyone will see it here!***

The People Tab allows you to see what the people who are in your clubs have posted - when you post you can also post to Facebook – ***This will give you additional advertising for your club events***

Organizations

Organization button will take you to all of the groups you have joined.



Account Manager

E-mail

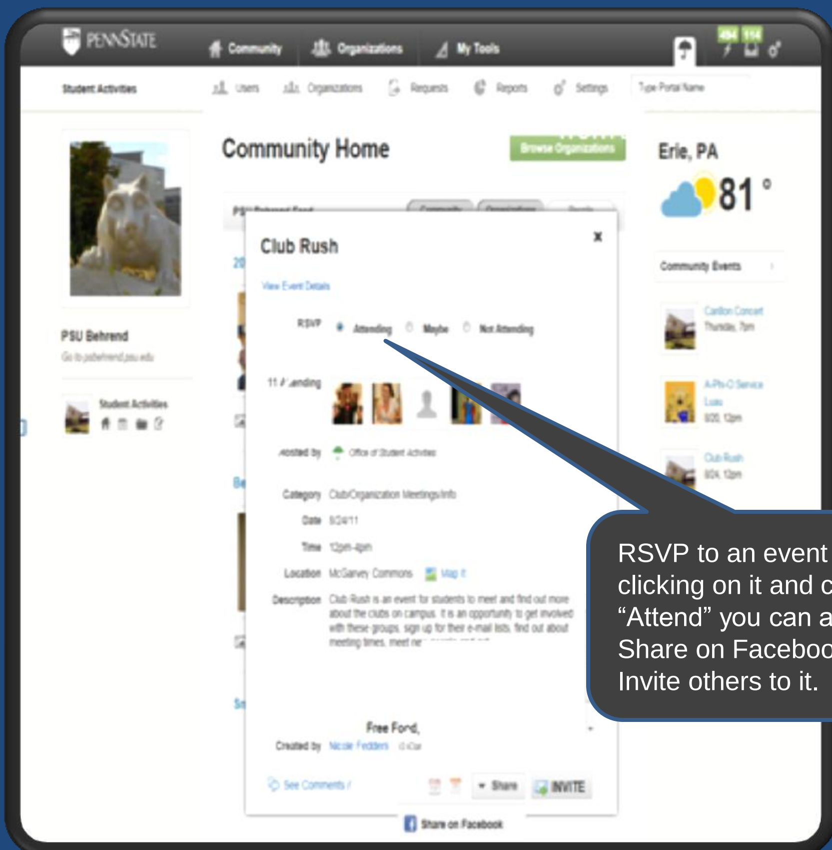
Notifications are now at the lightening bolt

You can join an Organization by clicking on “+ Add Organization”

The Basics: Community Home Page

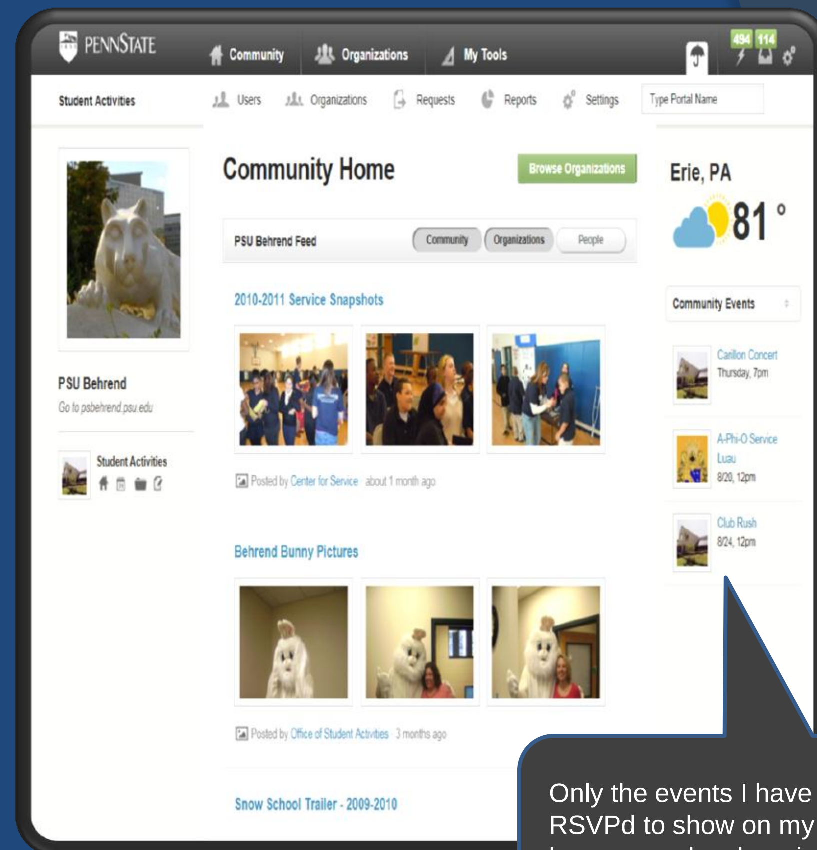
This feature can help with **recruitment** and **attendance** at meetings
a programs if used effectively from the beginning of the year.

1



RSVP to an event by clicking on it and clicking "Attend" you can also Share on Facebook and Invite others to it.

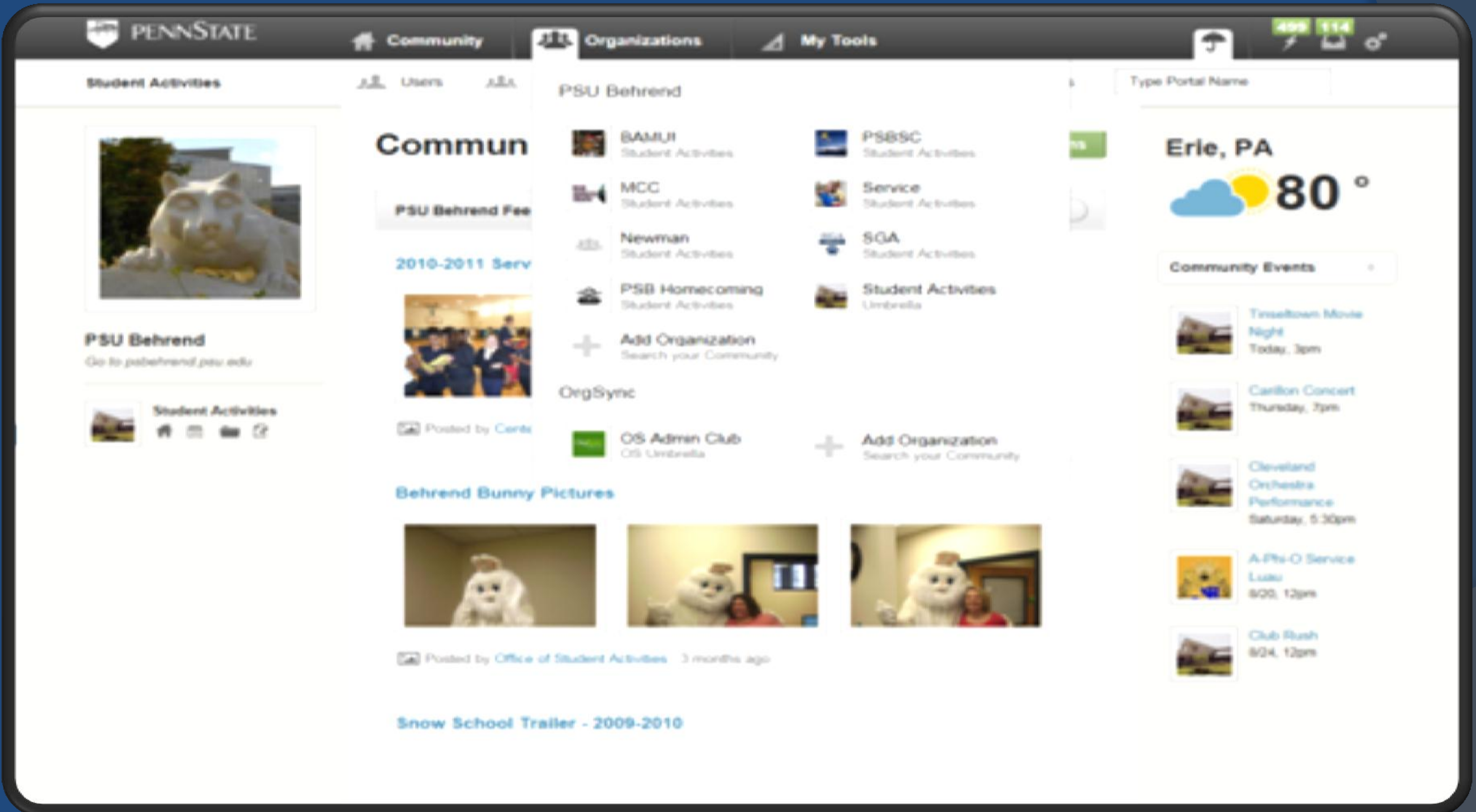
2



Only the events I have RSVPd to show on my home page by changing the drop down box

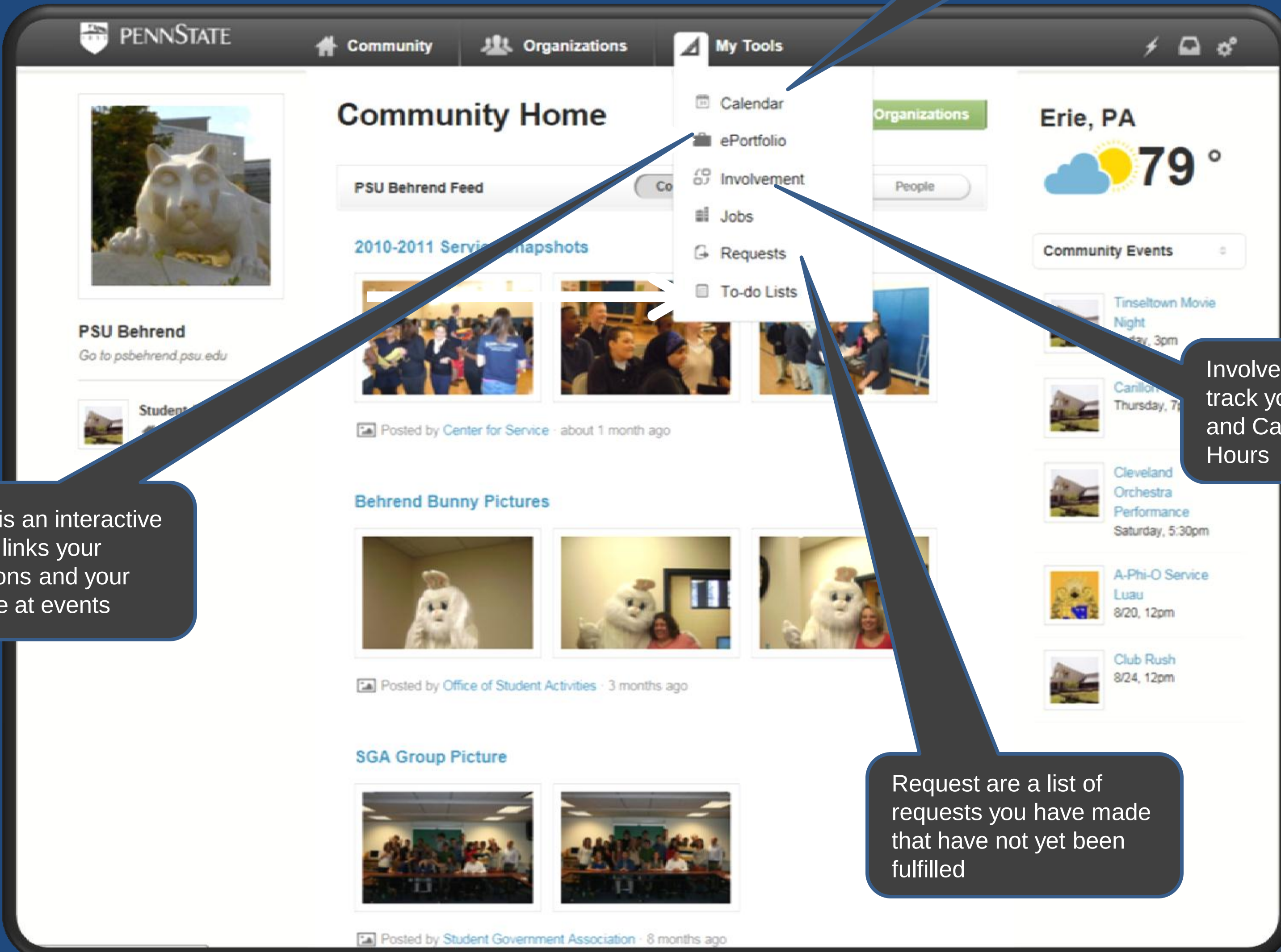
Organization Level

Click on “Organizations” to view clubs you are a member and to search for other groups.



My Tools

Calendar of public events



ePortfolio is an interactive resume; it links your organizations and your attendance at events

Involvement lets you track your Community and Campus Service Hours

Request are a list of requests you have made that have not yet been fulfilled

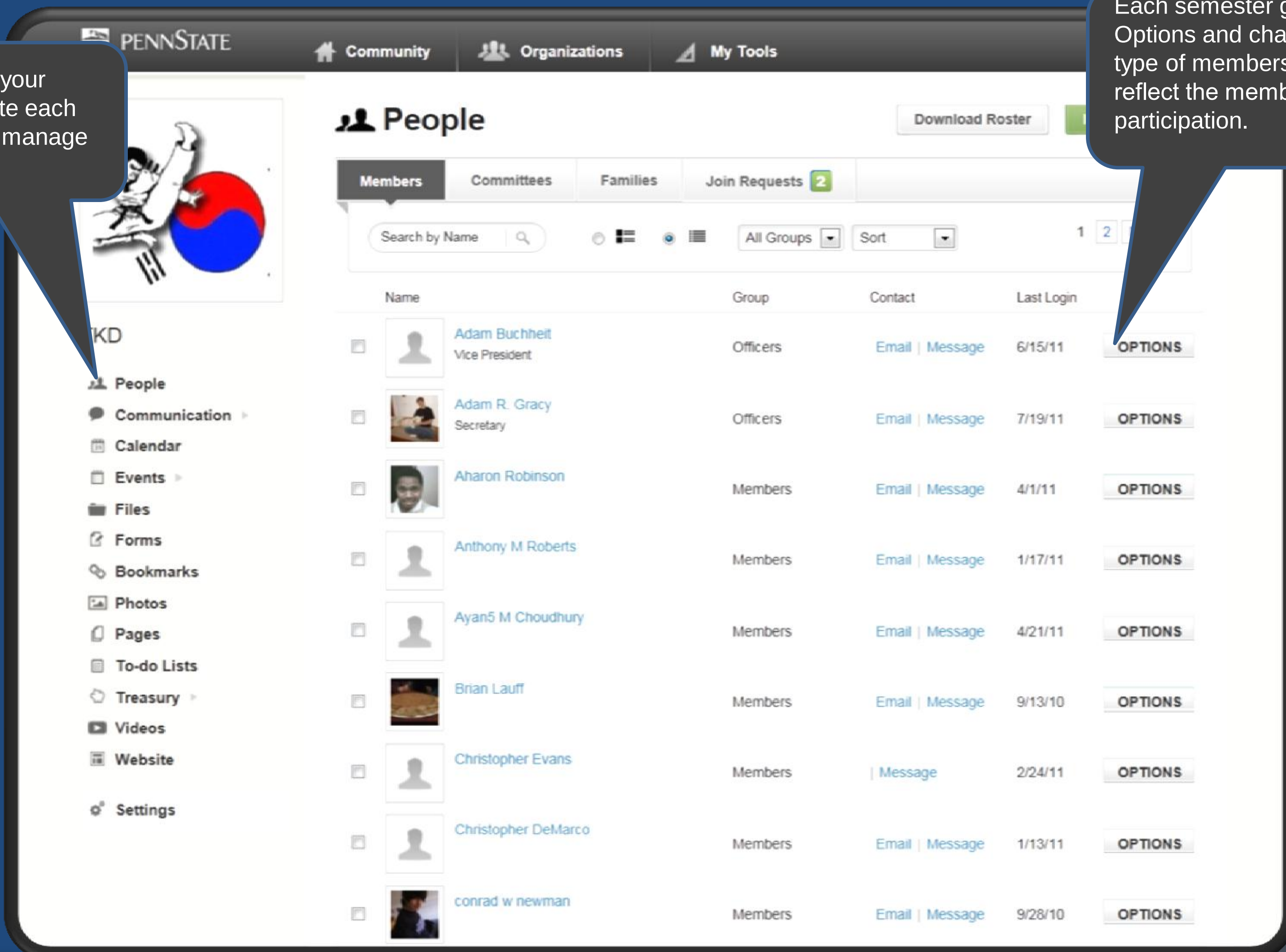
Managing your Organization

- The President can decide who will have Administrative Rights
- If you are the President and you DON'T have administrative rights, please stop in to Student Activities
- Administrative Rights give member 100% access to the OrgSync Portal, to edit, and to determine other member's administrative rights
- Only Administrators can see the "Settings" button on the left hand side
- OrgSync suggests having minimal Administrators

Managing Members

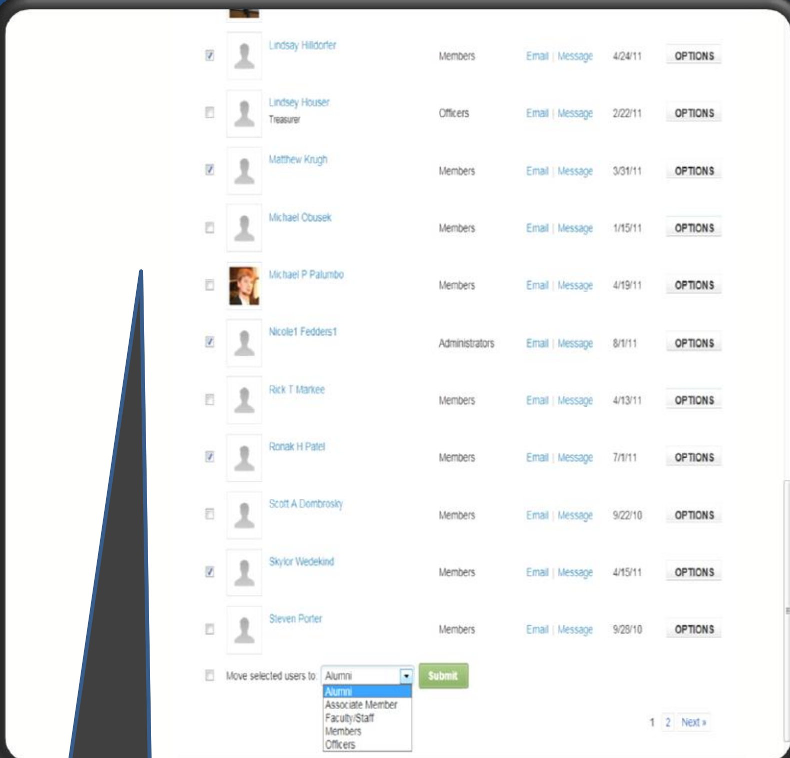
In order to keep your members accurate each year, you should manage members

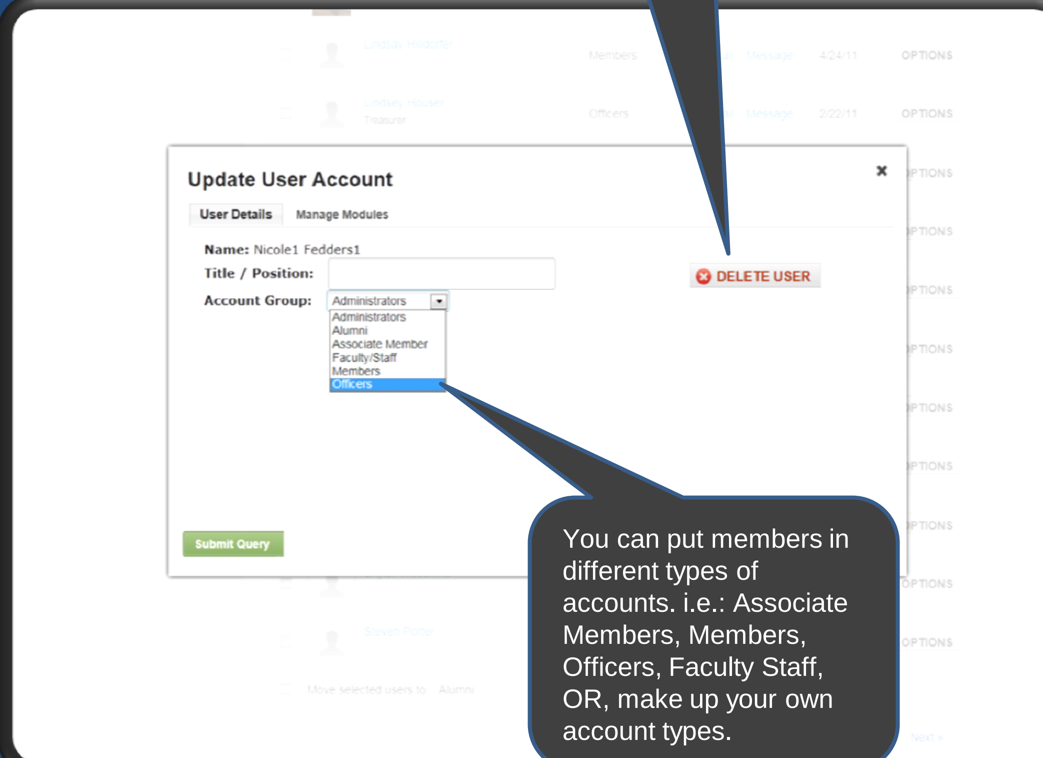
Each semester go to Options and change the type of membership to reflect the member's participation.



Managing Members

You can delete members of people you have never seen participate – you can do this individually.



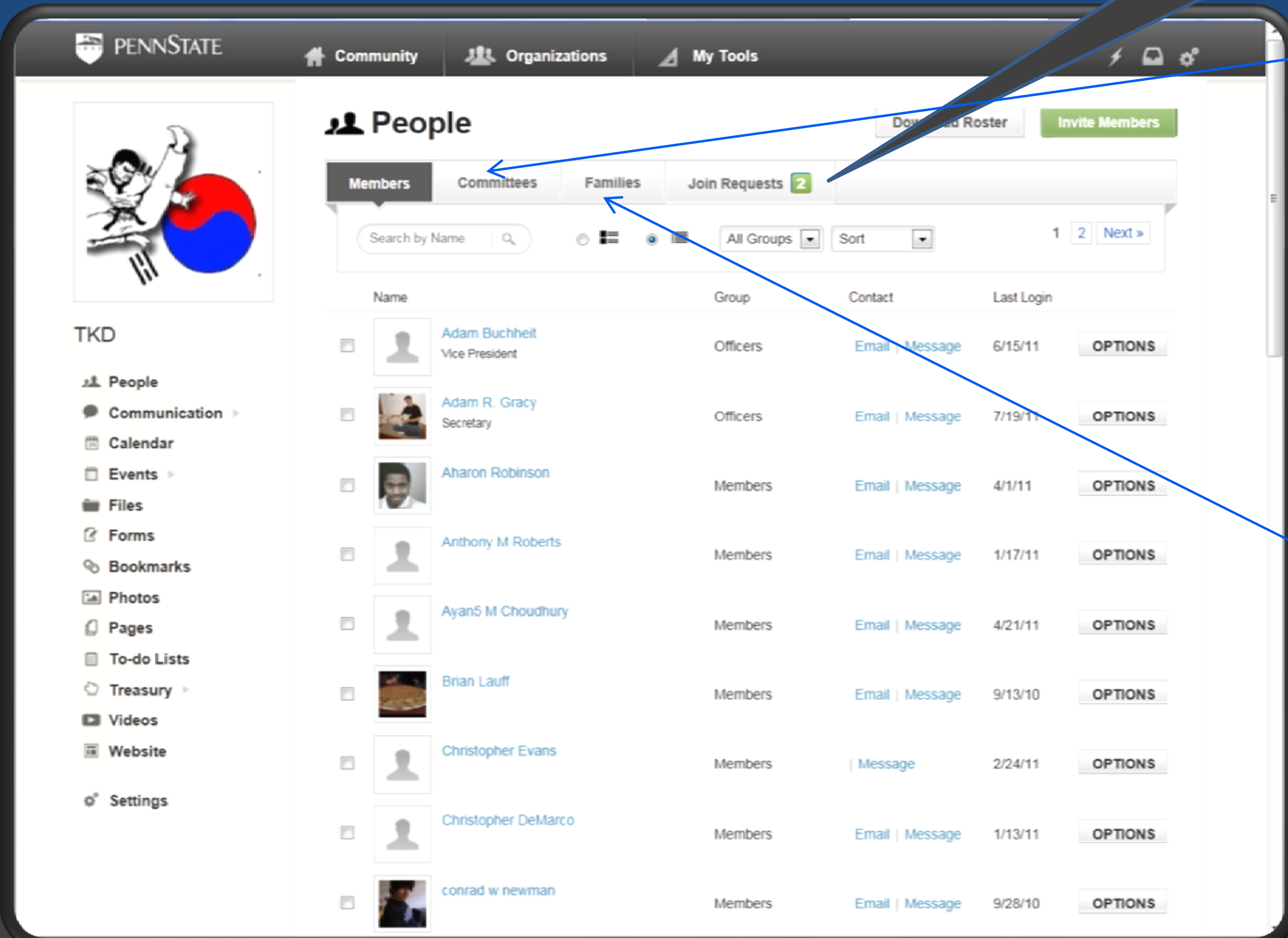


You can put members in different types of accounts. i.e.: Associate Members, Members, Officers, Faculty Staff, OR, make up your own account types.

Manage members at once by checking next to multiple members' names and changing them all to the same account type. i.e.: alumni at the end of each semester

Managing Members

Check “join requests” and utilize this for RECRUITMENT – people requesting to join are already interested, make sure you follow up to keep their attention.



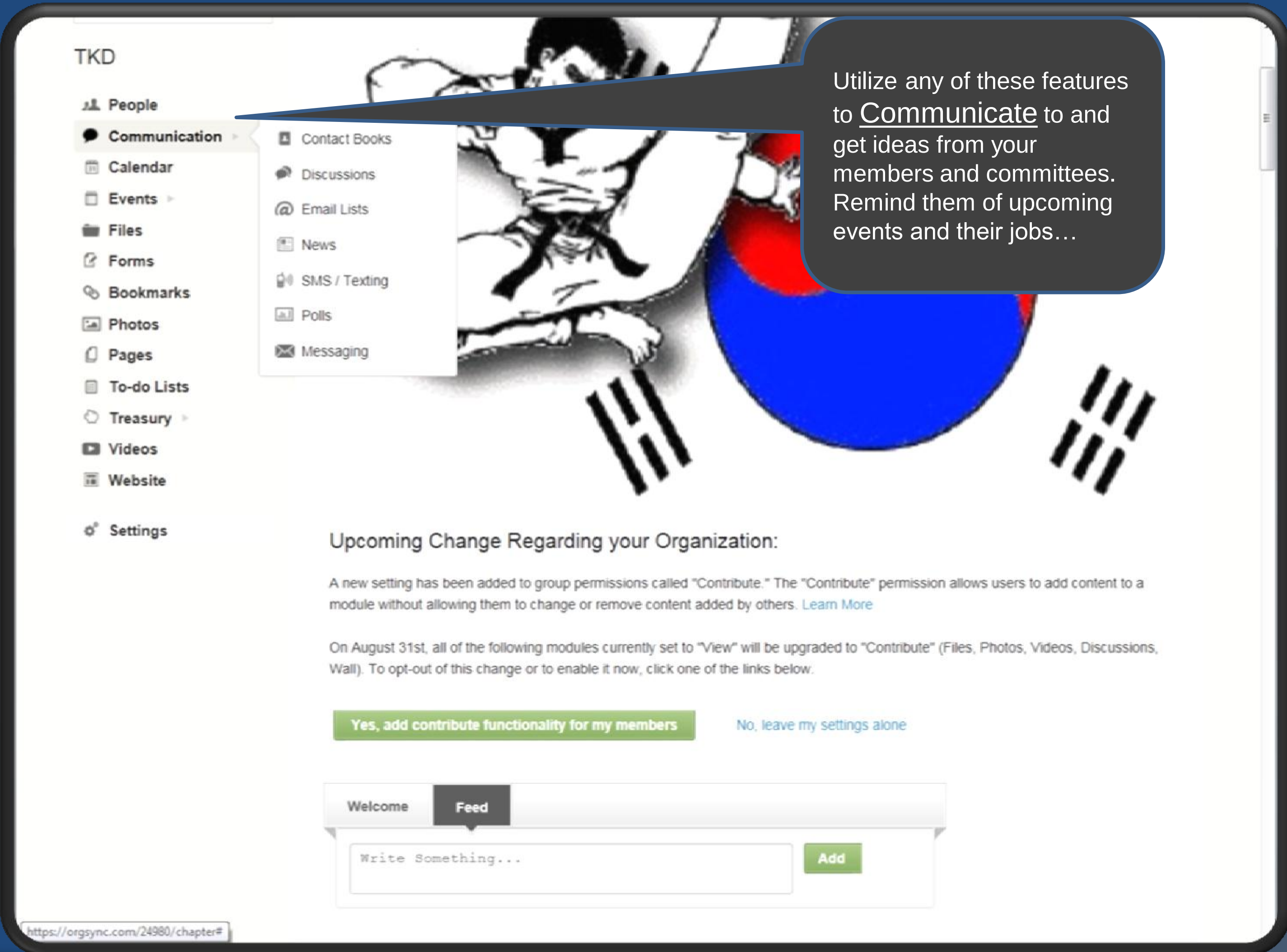
Committees organize and manage your organization’s committees and their members, equip your committees with tools to collaborate and effectively operate,

Leaders can easily message all the members of a particular Committee and you can export a list of your Committees and their members’ contact information into an Excel.

The Family tool carries much of the same functionality as committees, however each member of your organization may only be a part of one family. Families are a great way to divide members into groups and ensure that all members are accounted for.

each semester

Communicating with Members



Utilize any of these features to <u>Communicate</u> to and get ideas from your members and committees. Remind them of upcoming events and their jobs…

Contact Books **serve as an online rolodex that keeps track of important contact information for future officers to access. If your group always uses the same DJ or orders food from the same restaurant, put the information here.**

Create an online **Discussion** for members to discuss

Email Lists allows you to message several people at once from your account list and your contact book. This could be for off campus contacts.

News allows you to post any pieces of information your club needs to know or any new policies that affect your governance.

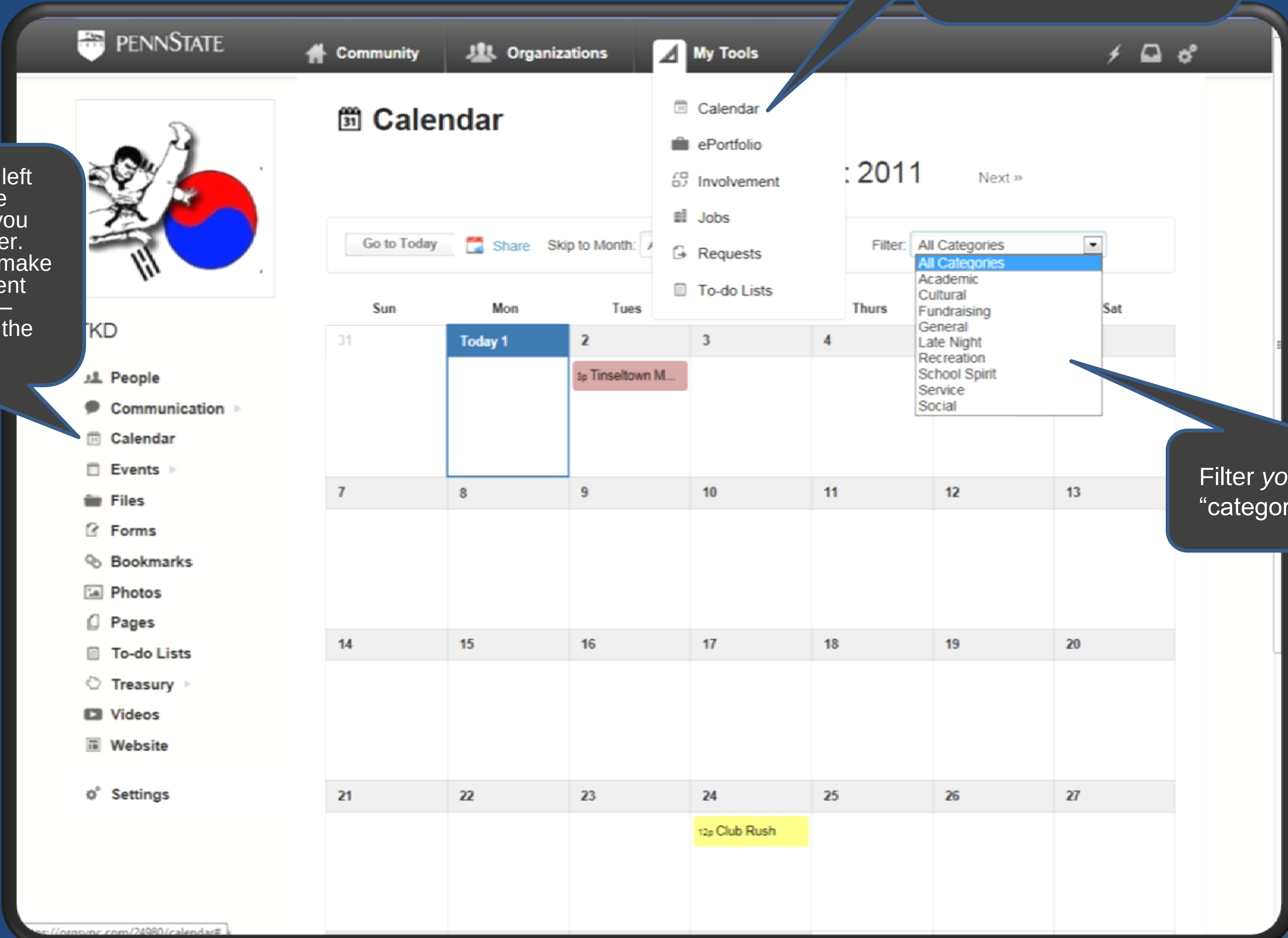
Text your members and remind them of meetings or events. They can opt out of this function per club.

Polls allow you to ask one question and get an answer from your members.

Messaging – you can message/e-mail all your members or different account types. i.e: all the officers + admins.

Calendars

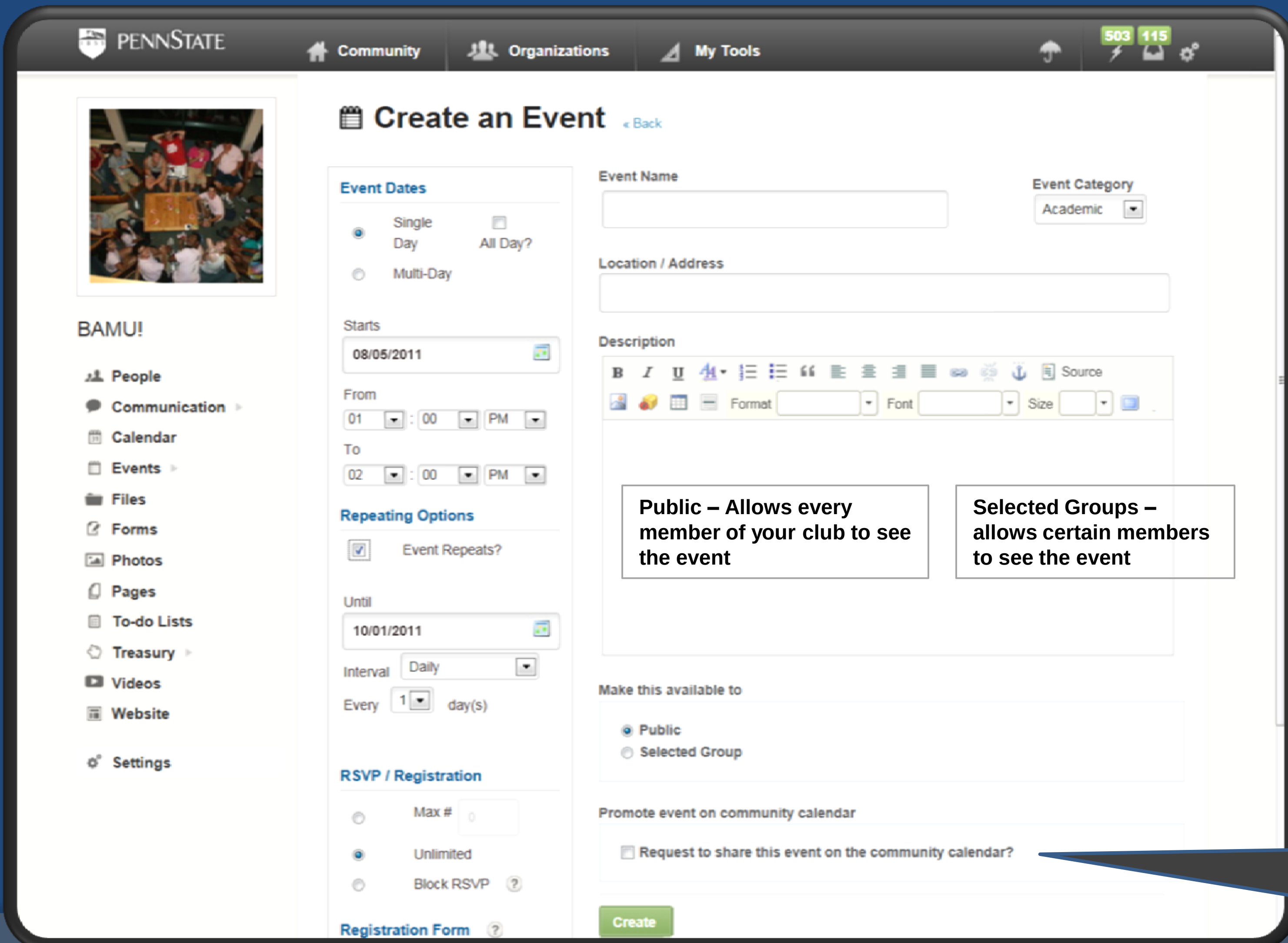
The Calendar under "My Tools" is the PUBLIC Calendar – these events are open to all students. If your club is having a meeting or open event, put the event here.



The Calendar on the left side shows ONLY the events for the clubs you are officially a member. As an administrator, make events open to different categories of people – Only the Officers, All the members.

Filter *your* events by "category"

Creating an Event



Public – Allows every member of your club to see the event

Selected Groups – allows certain members to see the event

This allows the entire campus to see the event, sent out in the BAMU Text service, and it gets put into the weekly e-mail from Student Activities

Putting events on the Calendar

- Default allows only administrators to add to the calendar
- Click “Calendar” on the left side
- Under “Make Available To” will give viewing rights to certain groups
- Click “Community Calendar” to make public to everyone
- Fill in all the information under ALL the drop boxes
- ALWAYS add name and contact information to “description” box – this will allow community events to pull into the ListServe through an RSS Feed properly.

Tracking Attendance

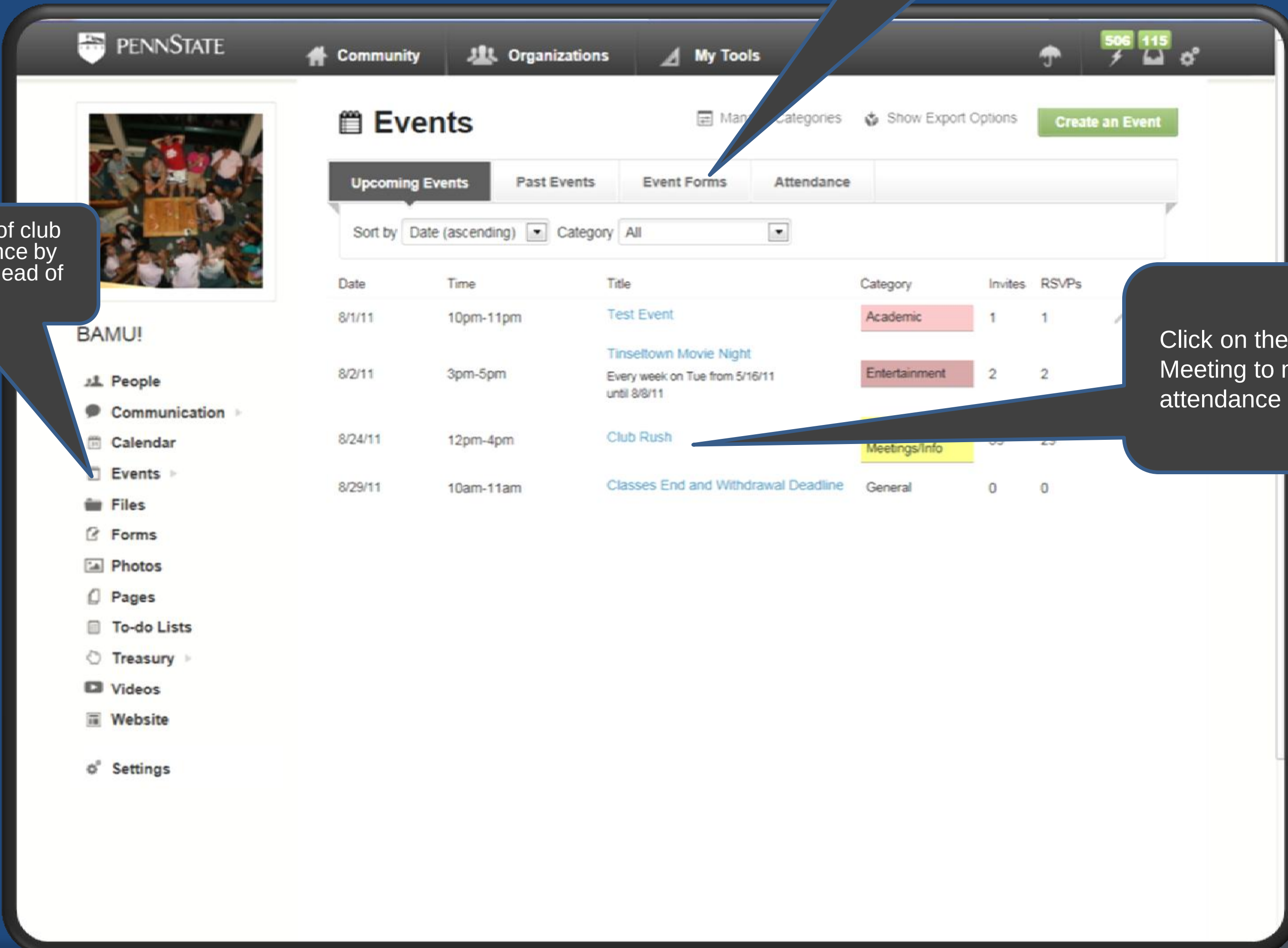
- After putting events on the calendar
- Have members “RSVP” to the meeting/event
- They can Share on Facebook for additional marketing/publicity
- Secretaries can manage attendance and keep records of people attending
- Attendance is tracked for future reference

Events

If members need to fill out a form before attending the event. They won't be able to "RSVP" until the form is filled out.
i.e: CPR Training, Behrend's Leadership Conference -

Events; Keep track of club events and attendance by posting meetings ahead of time

Click on the title of the Event / Meeting to manage attendance



Managing Members’ Attendance

- Click on “Events”
- Click on the title of the event
- Click the “Participation” tab
- Click “Manage Participation”
- Click on the members that attended
- Click “Create List”
- Click Details
- Mark the attendee as: Attended, Partial, Excused, Absent, or leave as unmarked

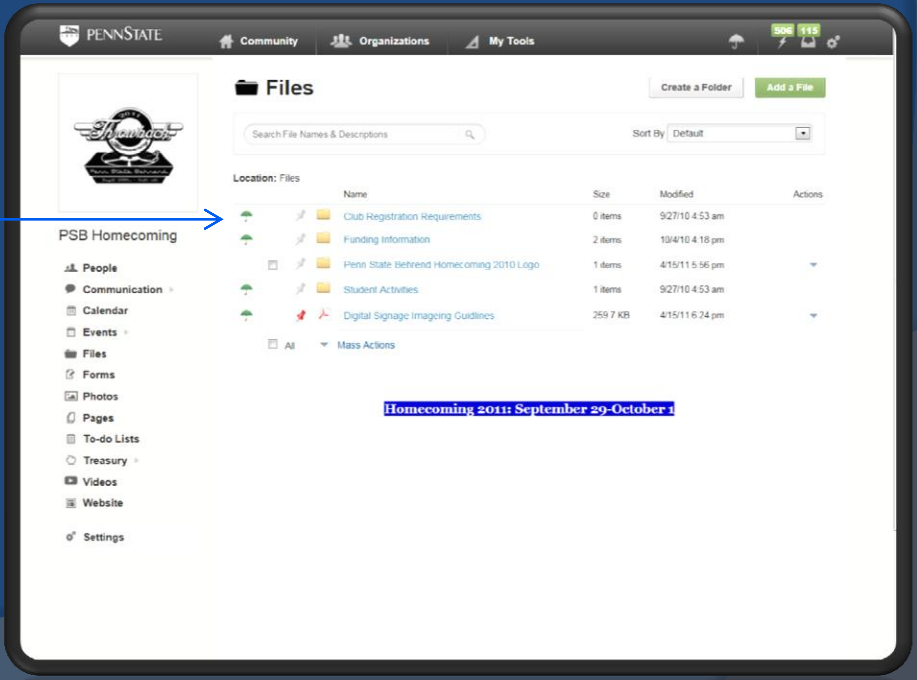
Managing Members’ Attendance

- Timesheets can be used for managing required attendance for club
- If it is Community or Campus Service/Philanthropy, please use Involvement under “Tools” so it can be traced campus wide – this will hopefully be connected to e-Portfolio in the near future

Files

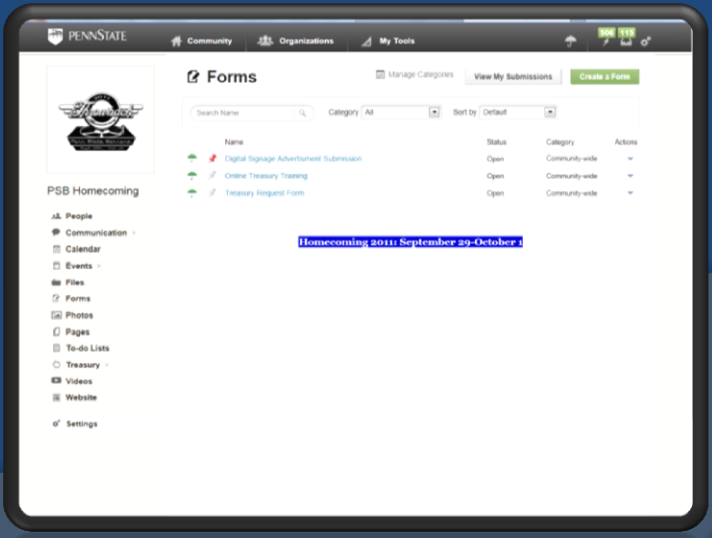
- Upload Files for your club members to see
- View Files from The Office of Student Activities Umbrella

The green umbrella lets you know the information comes from The Office of Student Activities



Forms

- Create a Survey for your members by using Forms
- Complete Treasury Request Form online: an e-mail gets sent to Dianna, Justin and myself
- Upload a Digital Signage advertisement



To Create your own Survey/Form

- Click Forms on the left hand side
- Click “Create a Form”
- Create “Settings”
- “Design” the Form
- “Approve” the Form
- DOUBLE CHECK YOUR FORM FOR ACCURACY!!!

Photos

- Upload Photos or graphics
- Create an Album for your members to share
- Tag members in the photos

Pages

- Provide your organization, or selected groups within your organization, with information and knowledge to enhance their experience.

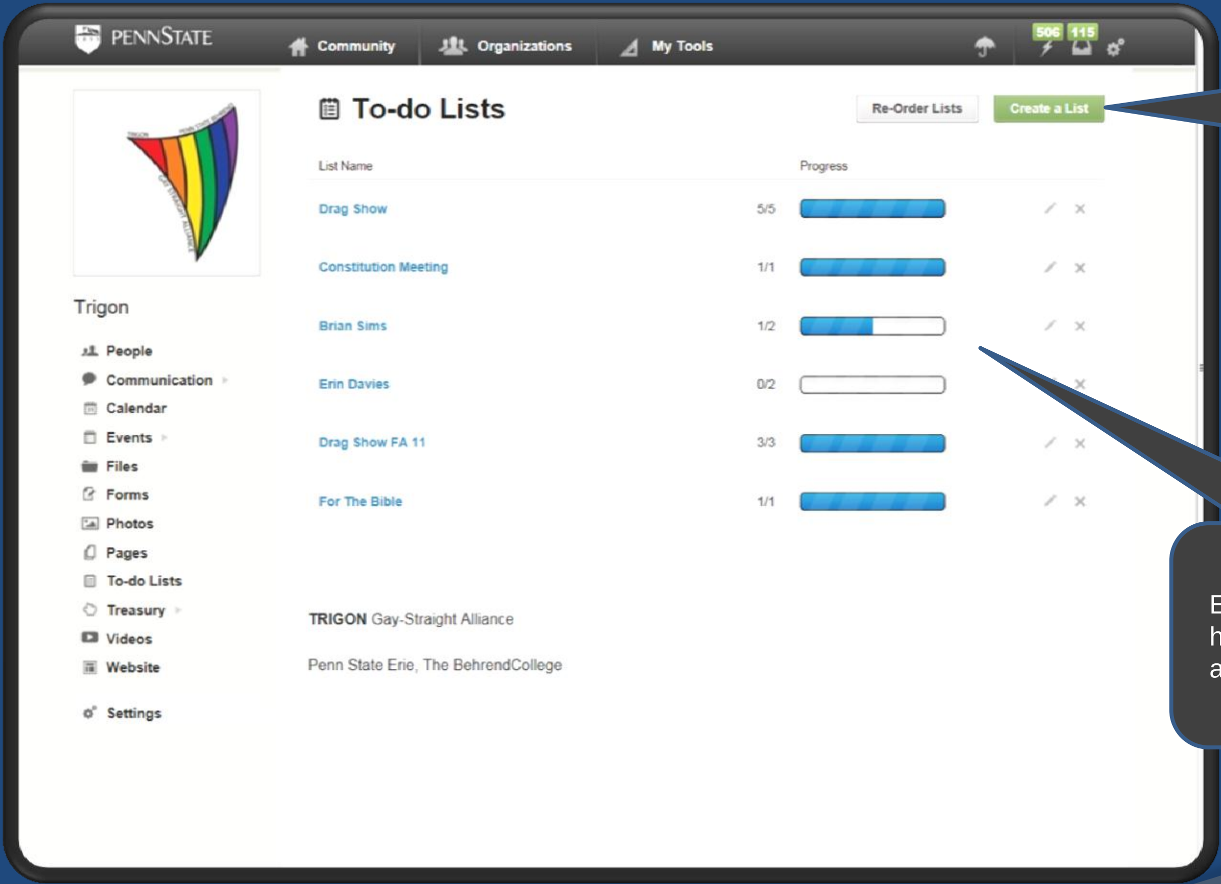
How to create a custom Page:

- Go to Pages > “Create a Page”
- Enter a **Name** and then your content and customize the look and feel of the page using the Rich Text Editor, which is similar to Microsoft Word.
- Select **Public** to publish this page and create the custom URL, or select specific account groups and/or Committees to share the page with internally.
- Click “Submit”
- Click Edit to edit contents of current page and click Delete to remove entire page

Having difficulty delegating?

- Or difficulty with people completing tasks?
- Use “To Do Lists”
- At the meeting discuss upcoming projects and ideas
- Have people volunteer for task
- Use the to-do-lists at the meeting as a visual and follow up reminders later!!!

To-Do-Lists

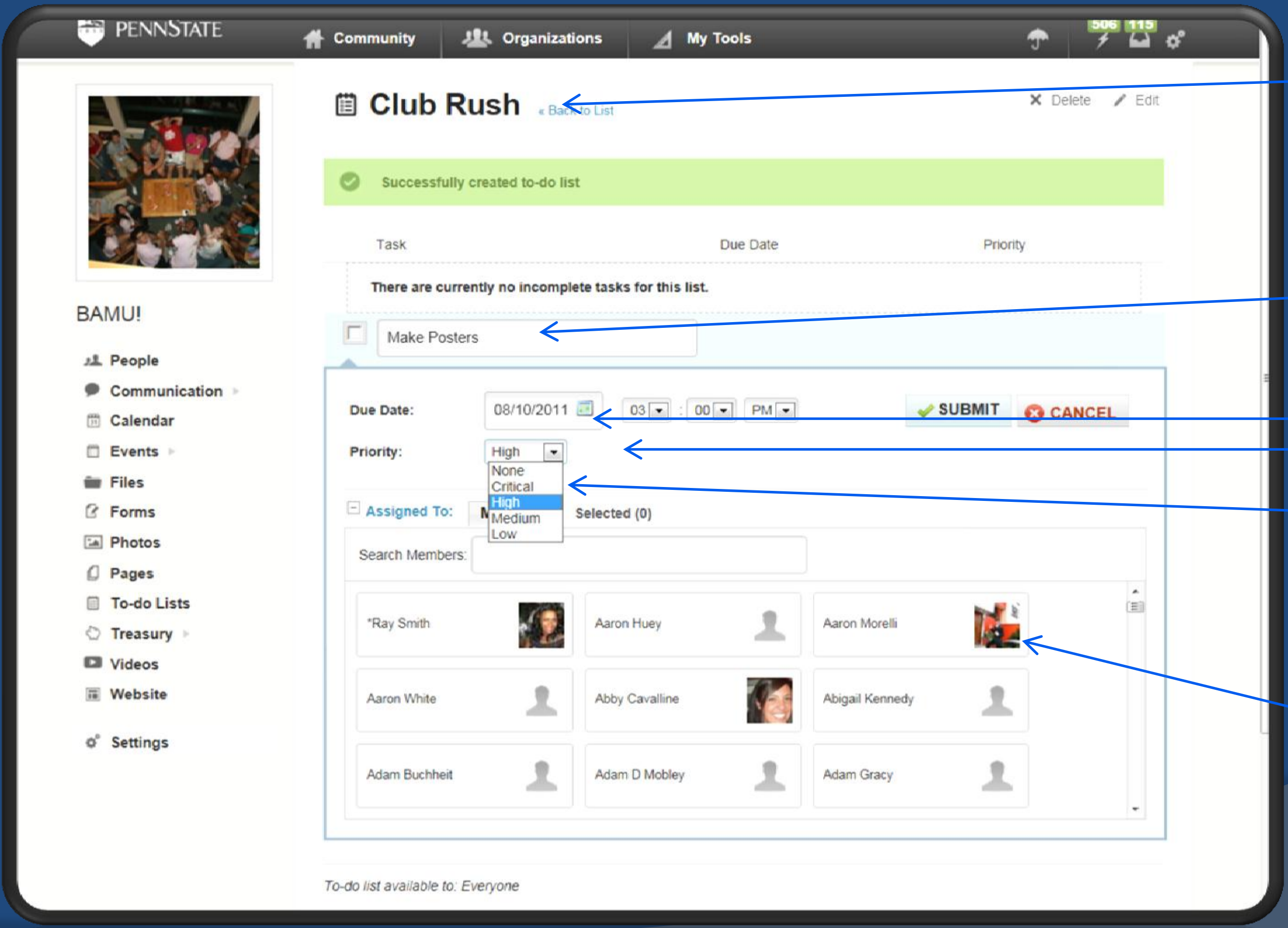


Create lists based on all your different projects; Make lists open to the Public (your club members) or to Selected Groups

Easily look to see what events have had their task completed, and what events still need work!

To-Do-Lists

- Notifications are now at the lightening bolt



Name of the event

Name of the task

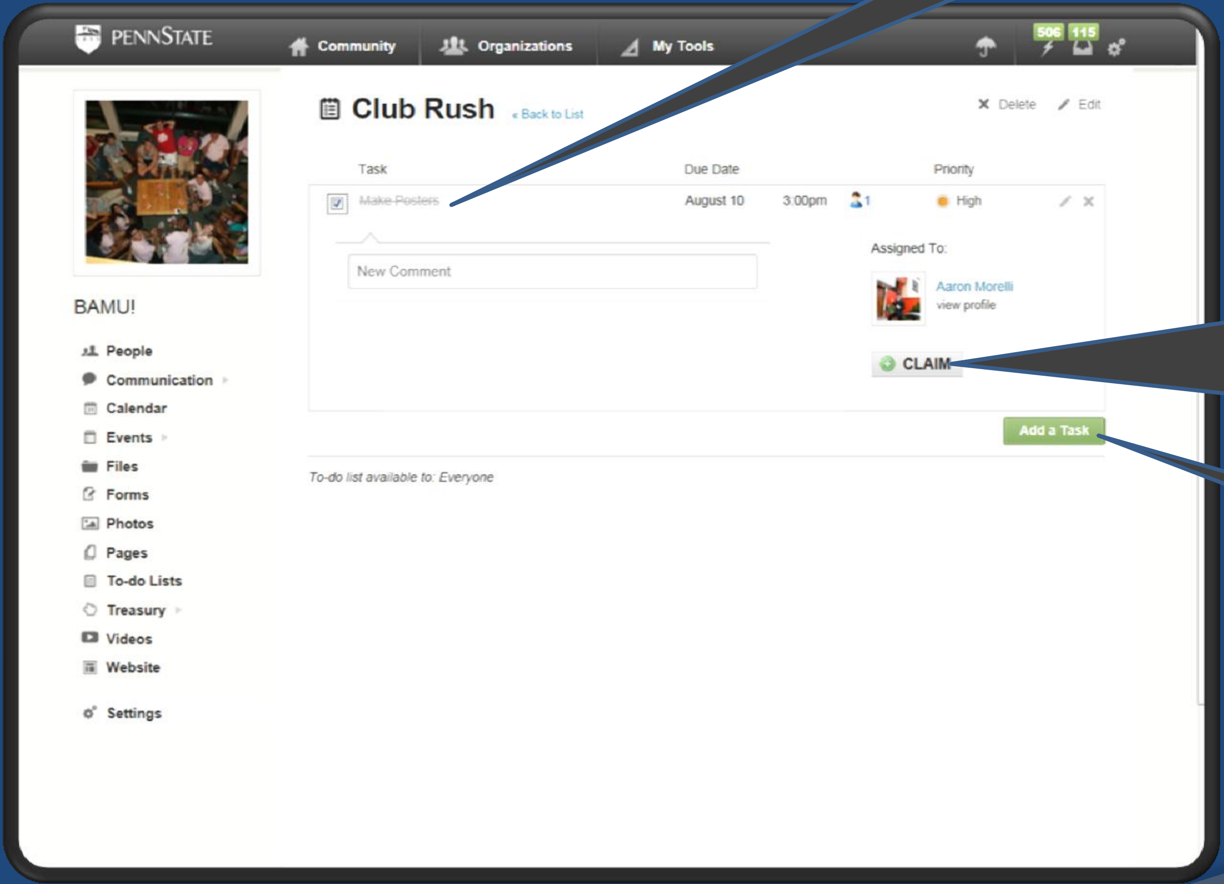
Due Date/Time

Importance of Task

Select who will be completing the task

To-Do-Lists

Once the task has been competed the member can check it off of the "to-do-list"

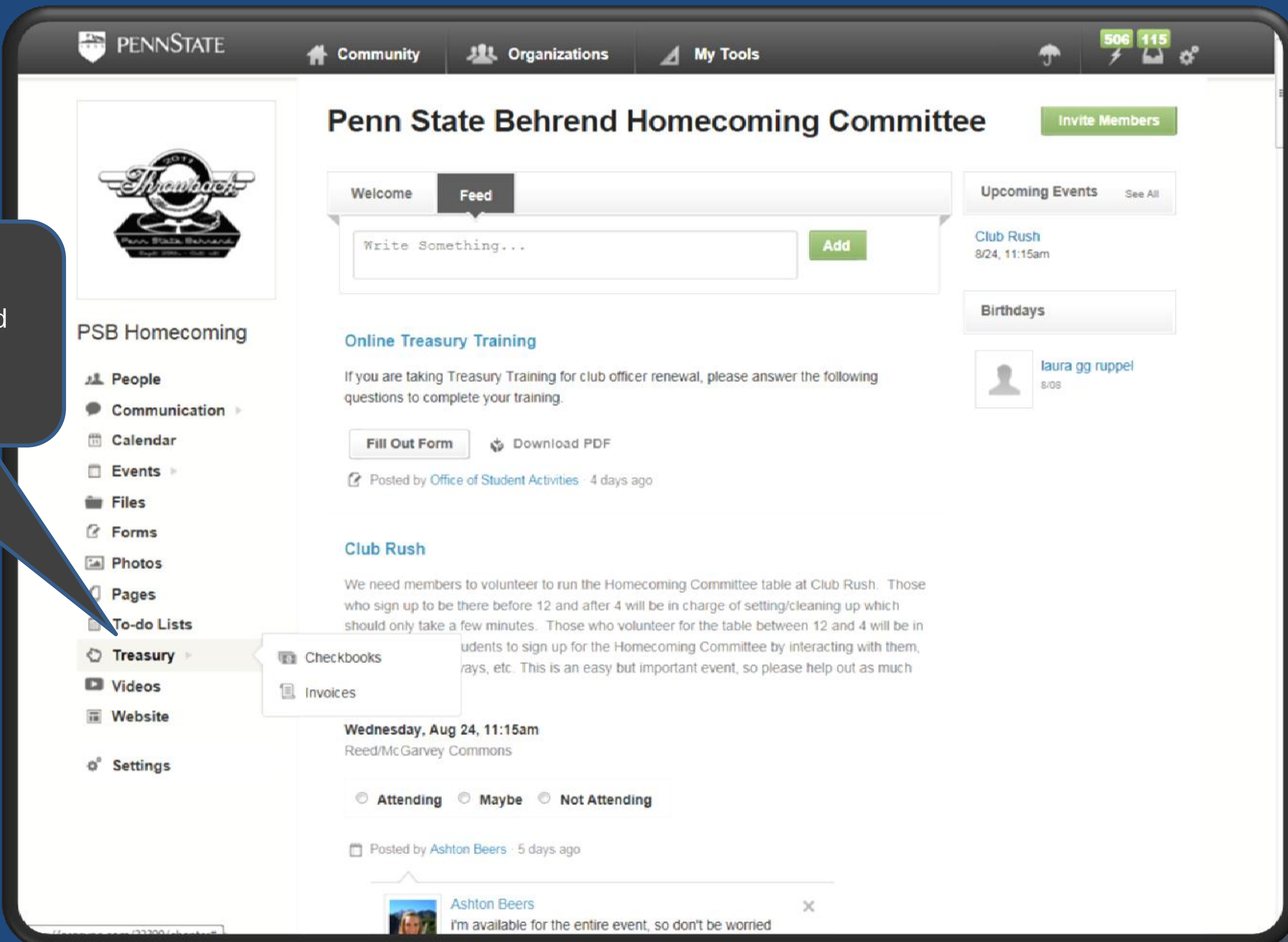


If the assigned student did not complete the assignment another member can "claim" and complete the task – this could be useful at meetings for those members who always volunteer, but never follow through.

There can be as many tasks as necessary under each Event.

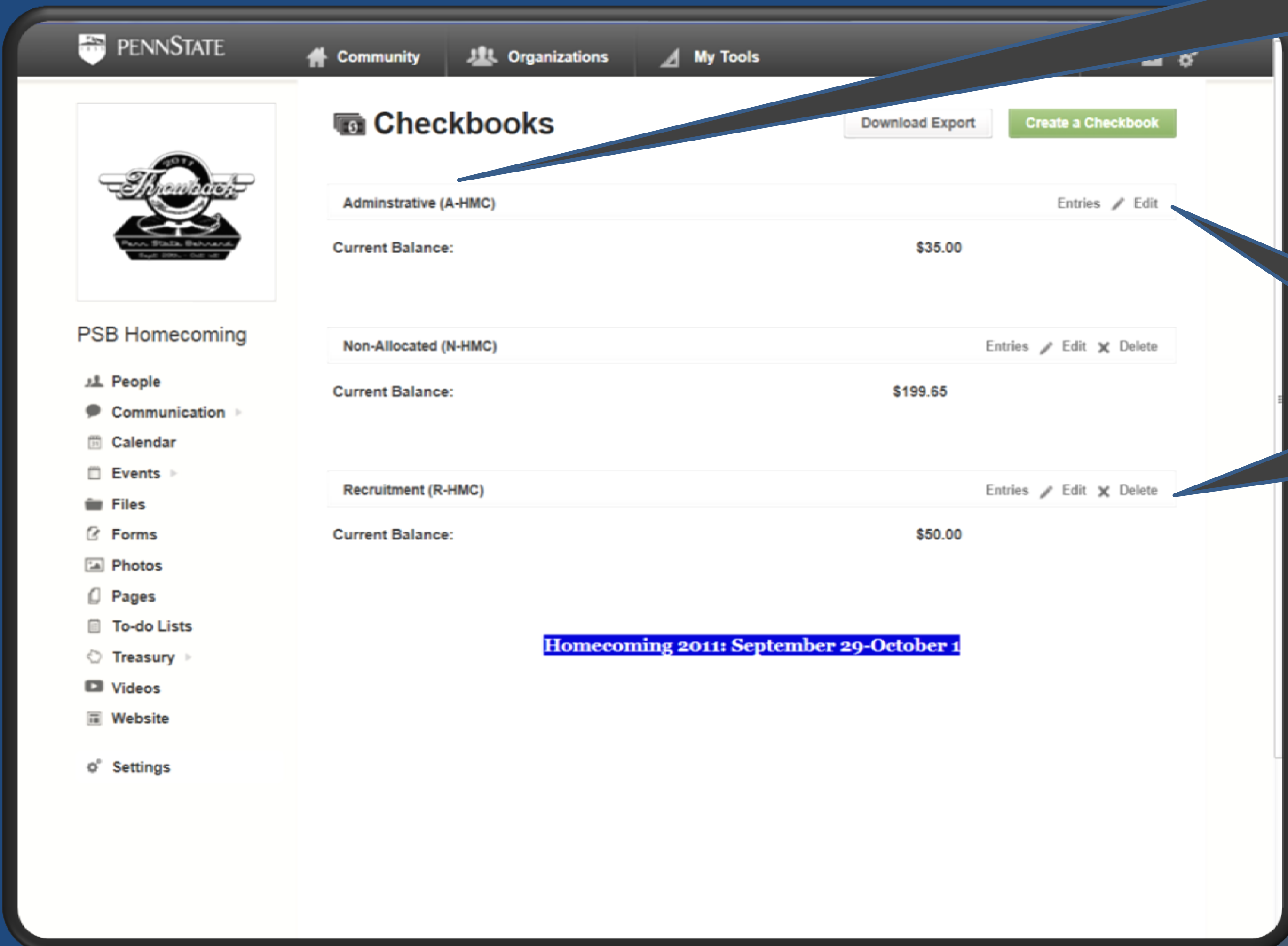
Treasury: Checkbook

Treasurers can EASILY keep track of all their payments and expenses by using the Checkbooks



Treasury: Checkbook

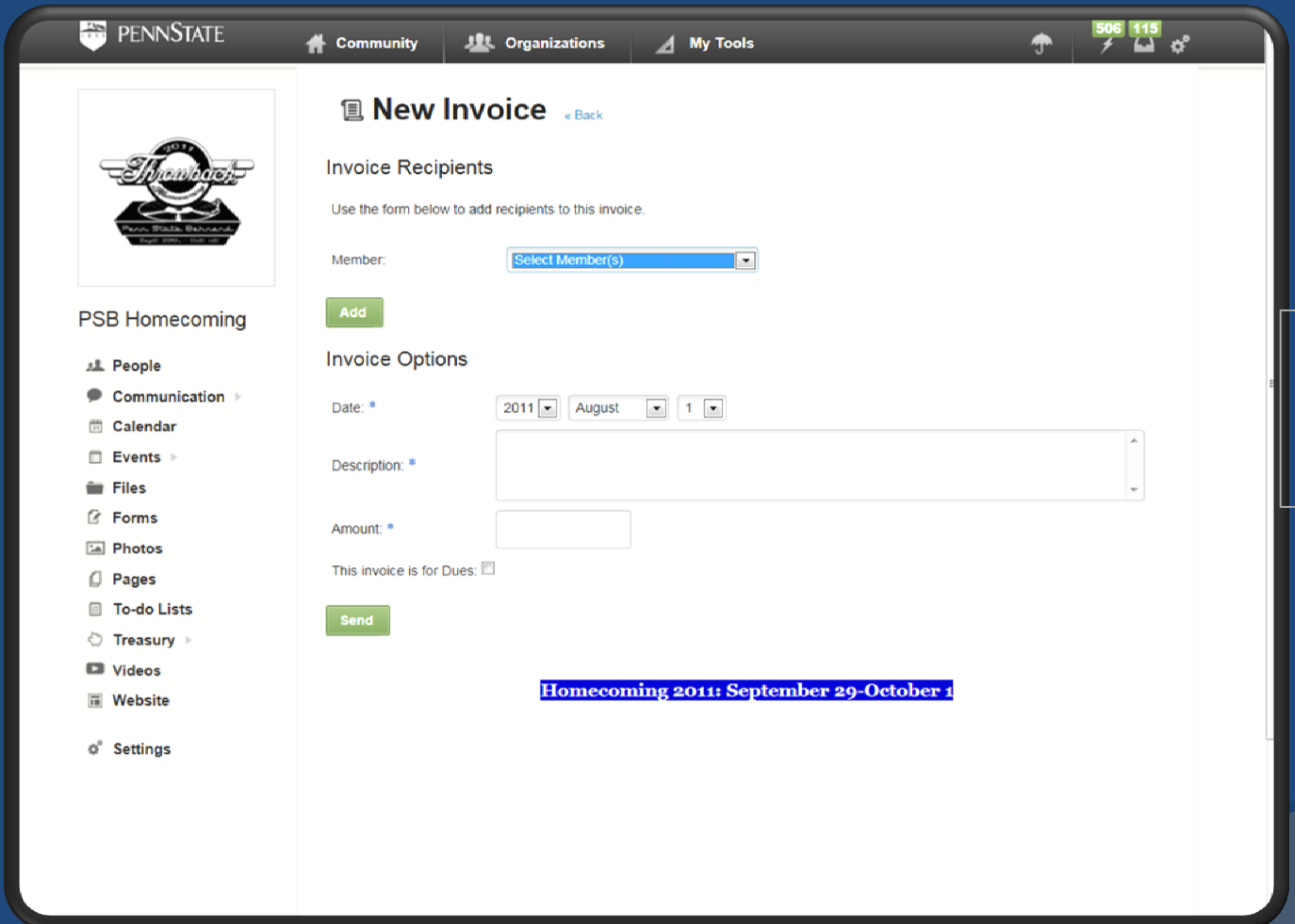
Your 3 accounts are listed for you and are up to date as of July 1, 2011



Treasurers will be responsible for keeping track of what is spent or earned throughout the year.

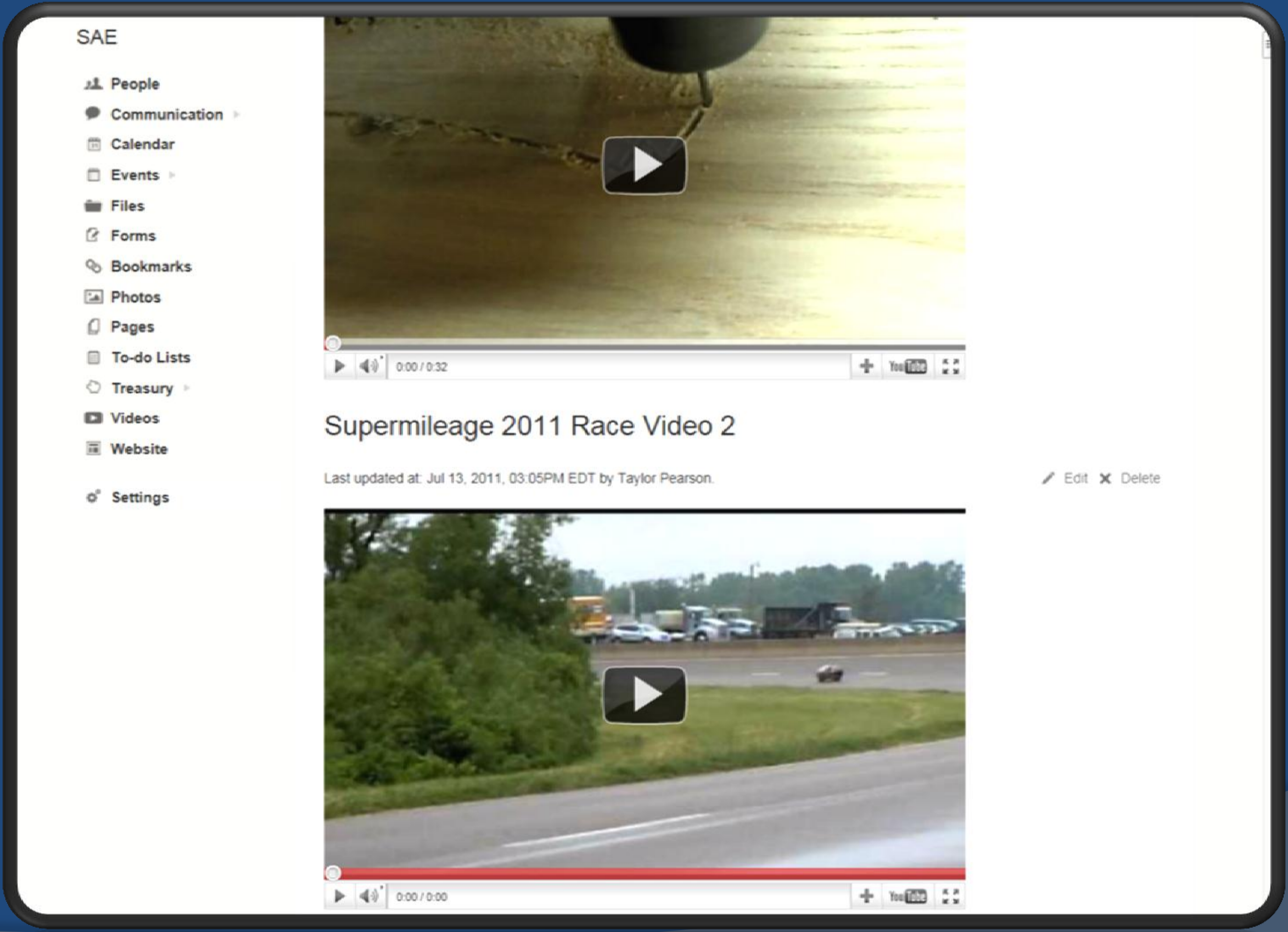
See Justin Wheeler for up to date information and Treasury Training for details on tracking!

Treasury: Invoice



If your group collects dues, this is a way to manage who owes how much

Videos

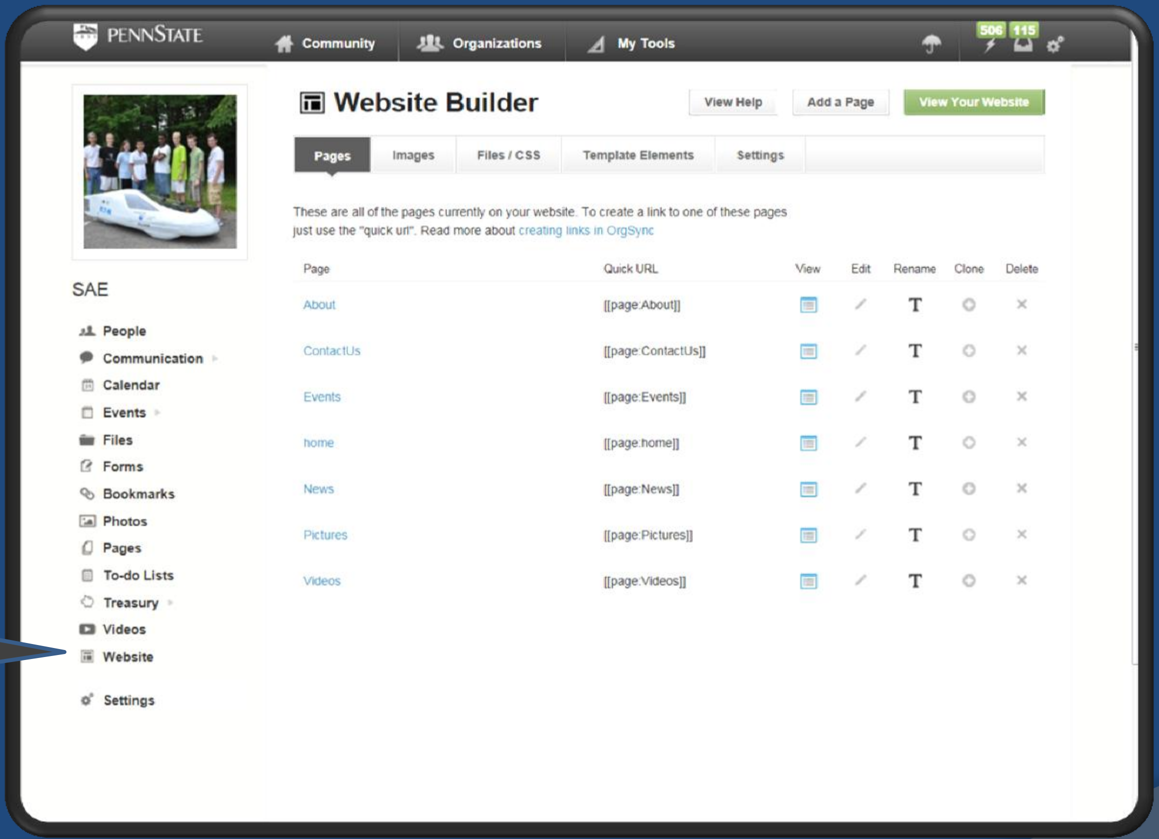


Upload videos of competitions or events. Make videos open to the public or to certain groups in your portal.

Website Builder

- If your club wants a personal website OrgSync is an easy way to do it
- If you have a webmaster or anyone who has coding/html background, it should be fairly easy
- Make sure all material on the website follow Penn State Policy and is appropriate to the public
- It is “fair” it is the WORLD WIDE WEB

Website



The website builder allows you to create pages, contact page, event list and more!

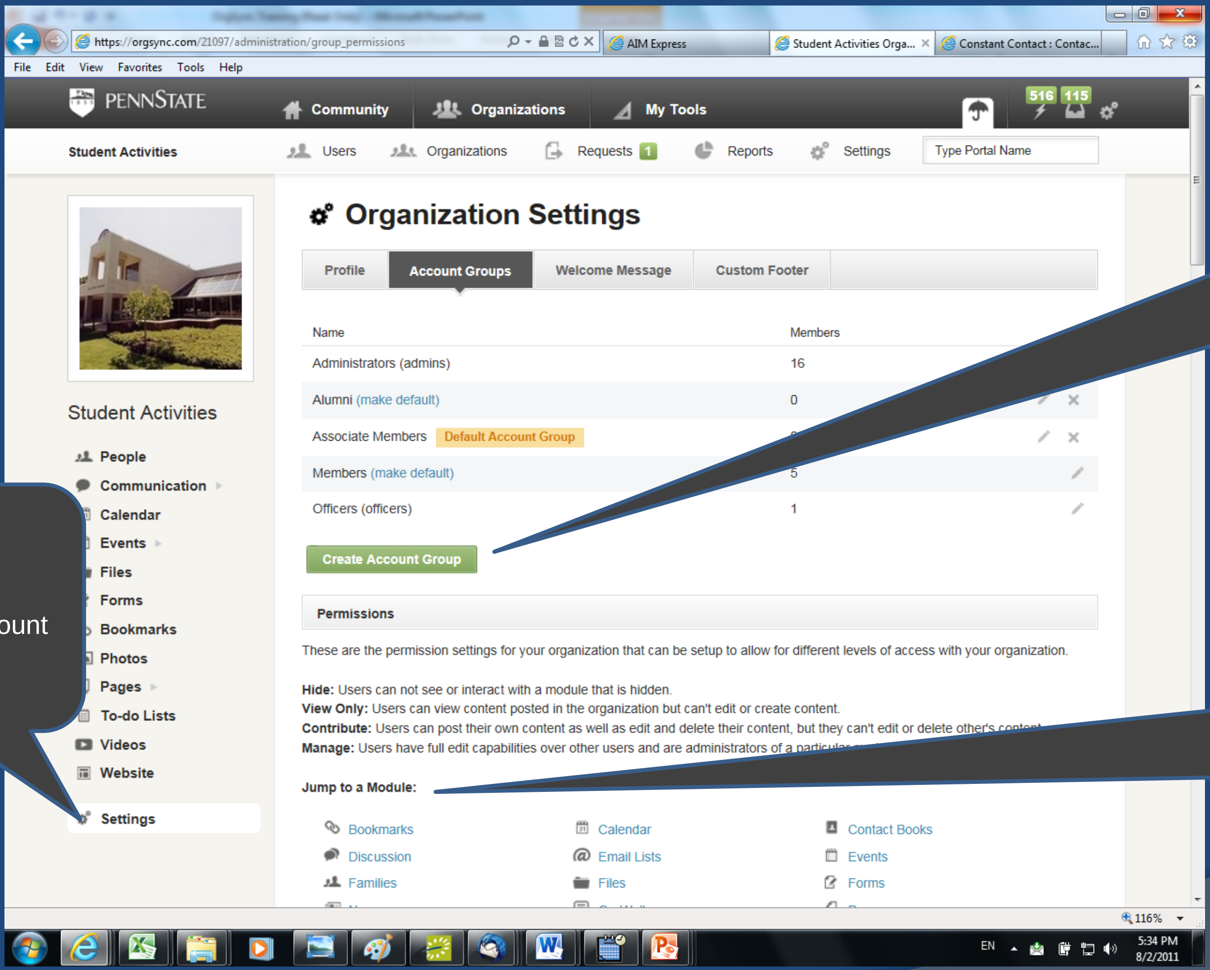
Website

- Your club wants a website and doesn’t have anyone who knows how to create it???!!!
- Don’t worry – Student Activities is here to help –
- Stop by “The Drawing Board” and set up an appt. with Ben Strunk
- It is Ben’s job to help clubs create websites!

Settings: Account Groups

- Only Administrators have the authority to change settings
- Allows privileges to varying Account Groups
- Allows viewable rights to varying Account Groups
- This is why OrgSync creators suggest minimal number of Administrators

Settings: Account Groups



Use the Account Group names set by OrgSync OR Create your own!

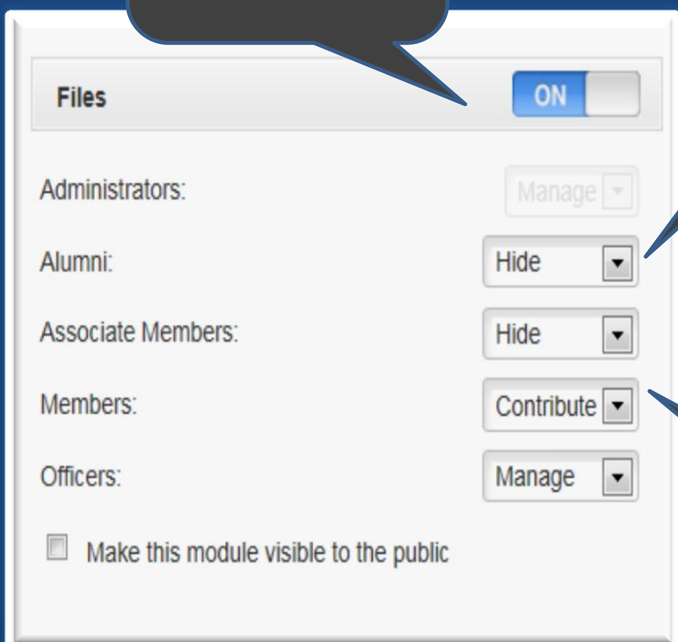
Just don't delete/change Administrator!

Go to Settings to adjust rights / privileges to Account Groups

Choose the Setting you would like to adjust, turn on or turn off.

Settings: Account Groups

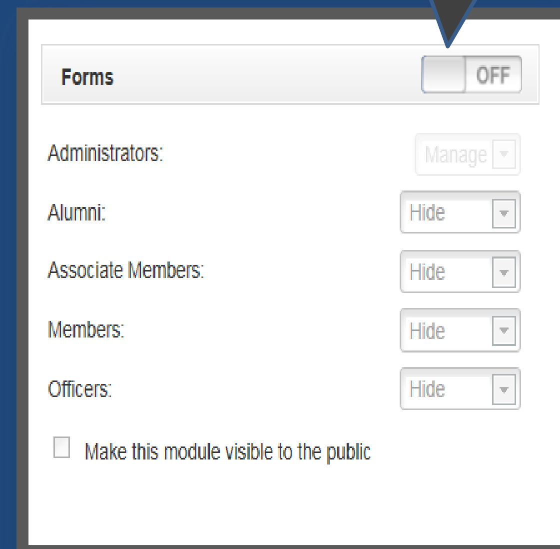
"Files" is turned ON – that means your club can upload, view and read files



Administrators have editing privileges for all Settings – this is the default and can't be changed.

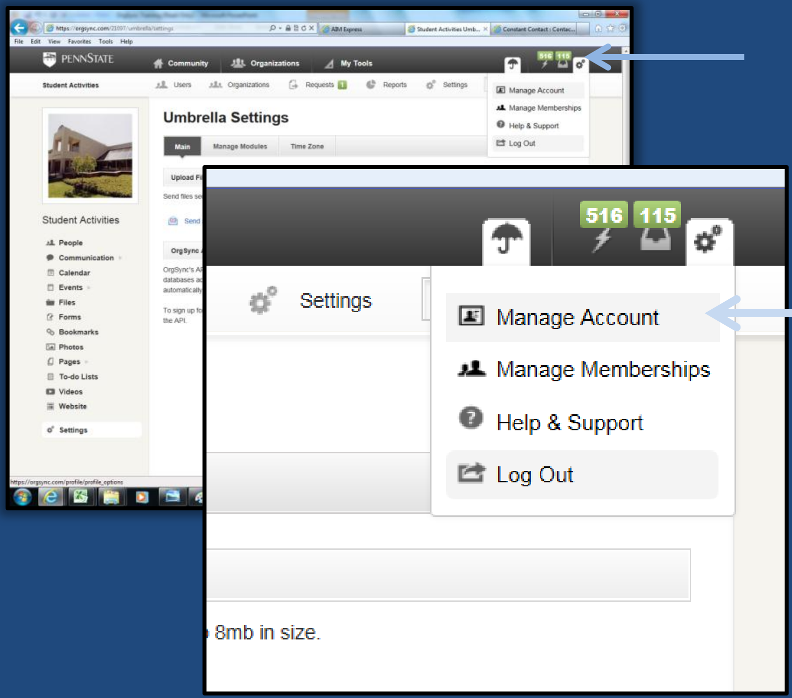
Manage members by giving them access to Manage, Contribute, View Only, or Hide the information from them all together

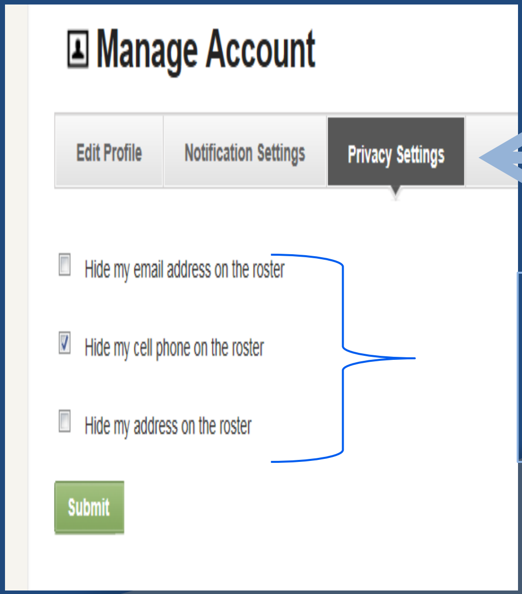
"Forms" is turned OFF – this means no one can upload, view, or contribute to form, including the Administrator of the group.



Privacy!!!!!

Help protect your members by passing along this information!





You can display or hide your e-mail, cell phone or address – you choose!

Highlights

- e-Portfolio
  - Track your Involvement
  - Track your Academics

- **Utilize: Academic and Career Planning Center**
  Reed Union Building, Room 125, (Second Floor)

  Phone: 814-898-6164
  http://psbehrend.psu.edu/Academics/academic-services/acpc/acpc-services-1
- Internship Coordinator: Courtney Steding cns14@psu.edu

By tracking your leadership now, when you are ready to interview, there will be compilation of skills you have acquired, but more importantly you will be able to explain them at an interview!

Highlights

- Involvement
  - Track your Community Service as an individual
  - Track your Community Service as part of a club
  - Track Donations to Philanthropic Agencies
  - Track your Campus Service

- **Utilize: Center for Service**
  Smith Chapel

  Phone: 814-898-6609
  http://psbehrend.psu.edu/student-life/student-activities-1/service-learning
- Coordinator of the Center for Service and Smith Chapel; Ian McGinnity ism108@psu.edu.
- By tracking your service now, when you are ready to interview, there will be compilation of skills you have acquired, but more importantly you will be able to explain them at an interview!

Things to do

- Each semester, manage member types and move recently graduated students to “alumni status”
- Put all meeting dates on the Public Calendar (single day, repeating)
- Put all open Programs on the Public Calendar
- Update Club Settings
- Make sure your members know how to set privacy settings!
- Get other members involved: Service Chair, Webmaster… keeping members engaged, keeps members!