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August 15, 2023

Organizations + Transitioning

Kelsey Seale

Software Trainer

The background of the slide is a dark blue color. On the right side, there are several large, overlapping, abstract geometric shapes in a bright orange color. These shapes are sharp and angular, resembling shards or fragments of a larger object. They are scattered across the right half of the slide, creating a dynamic and modern aesthetic.

Webinar Objectives

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Create & Edit an
Organization

Manage
Organization
Members

Manage
Organization
Transition

Agenda

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- I. What Are Organizations?
- II. Create + Edit
- III. Managing Members
- IV. Active Requirements
- V. Transition
- VI. Q+A
- VII. Close

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Poll

**What is your experience
building organizations?**

Elaborate in the chat!



What are Organizations?

Groups!



Clubs



Affinity
Groups

School
Departments



Campus
Services

Greek Life



Anything you
want!

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Create & Edit Your Organization

Section 1



Get Started

Create from Scratch

The screenshot shows the 'Organizations' dashboard. At the top right, a light blue arrow points to a white circular button with a plus sign, labeled '+ Create'. Below the header, there are three summary cards: 'Active Organizations' (12), 'Unique Members' (9), and 'Average Members' (2.33). A search bar and filter options (STATUS, AND, CATEGORY, FILTER) are present. A table lists several organizations with columns for Title, Category, Meeting Time, Meeting Location, Members, and Status.

Title	Category	Meeting Time	Meeting Location	Members	Status
CU Office of Campus Life					Active
CU Office of Health and Wellness					Active
Delta Delta Delta	Greek Life			3	In Transition
Dog Walkers of CU	Club	2pm	The Streets	3	Active
Francais s'il vous plait?	Language			2	In Transition
Friends of Dorothy	Affinity			4	Active

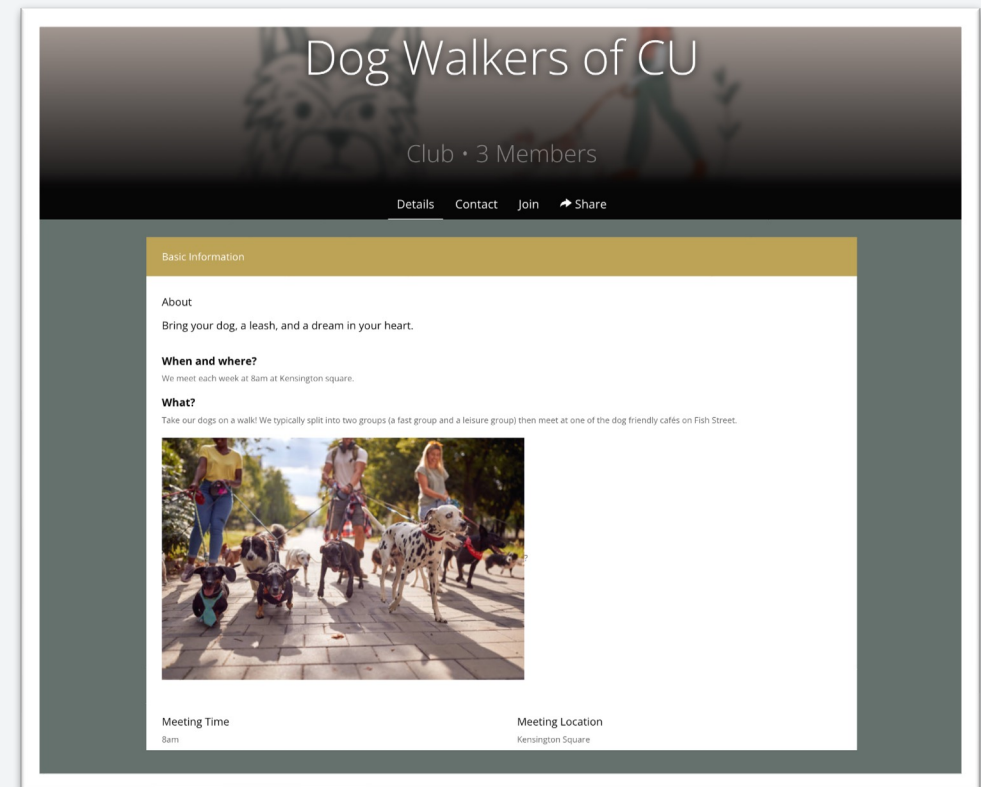
Edit an Existing Organizations

The screenshot shows the edit page for 'CU Office of Campus Life'. At the top right, a light blue arrow points to a white circular button with a pencil icon, labeled '+ Edit'. Below the header, there are two summary cards: 'Meeting Time' (Not Set) and 'Meeting Location' (Not Set). A warning banner states: 'Requirements For Staying Active: The following requirements are not currently being met and your organization is at risk of being deactivated. Need at least 3 members on the roster.' Below this, there is a 'Cover Image' section with a placeholder image of a building.

Tips for a Great Organization

- Have a president and officers for prospective member questions
- Use a cover image
- Rich description
 - What is it?
 - What do you do?
 - When do you meet?
 - Do you do any special trips / events?

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Dog Walkers of CU

Club • 3 Members

[Details](#) [Contact](#) [Join](#) [Share](#)

Basic Information

About

Bring your dog, a leash, and a dream in your heart.

When and where?

We meet each week at 8am at Kensington square.

What?

Take our dogs on a walk! We typically split into two groups (a fast group and a leisure group) then meet at one of the dog friendly cafés on Fish Street.



Meeting Time

8am

Meeting Location

Kensington Square

Create from Scratch

- Use your “Organization registration” form
- 10 • This form is editable, you can add any sections you need!
- Organizations need a name and a cover image

Organization Registration

Basic Information

Organization Name *

About

H1 H2 H3 H4 H5 H6 P PRE **B** *I* U ~~S~~

- ☰
- ☰
- ☰
- ☰
- ☰
- ☰

</> WORDS: 0 CHARACTERS: 0

Categories

Meeting Time Meeting Location

Contact Information

Contact Name

Contact Email

Social Media

Cover Image *

The cover image should represent something about your organization. We recommend NOT including text as the image is resized and text overlaid automatically.

UPLOAD SEARCH

Choose Image

Forms

Search Forms

Title

Description

Apply For Opportunity

Event Registration

Organization Registration

Reflection Form

Reservation Request Form

Want to reserve somewhere on campus? Fill this out!

Travel Request Form



Organization Registration

Basic Information

Organization Name *

Women in Business

About

H1 H2 H3 H4 H5 H6 P PRE ”

B *I* U ~~S~~

- ☰

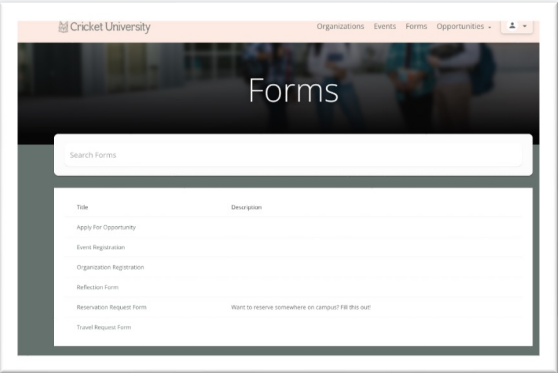
- ☰

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`</>` WORDS: 0 CHARACTERS: 0

SUBMIT FOR APPROVAL ▼

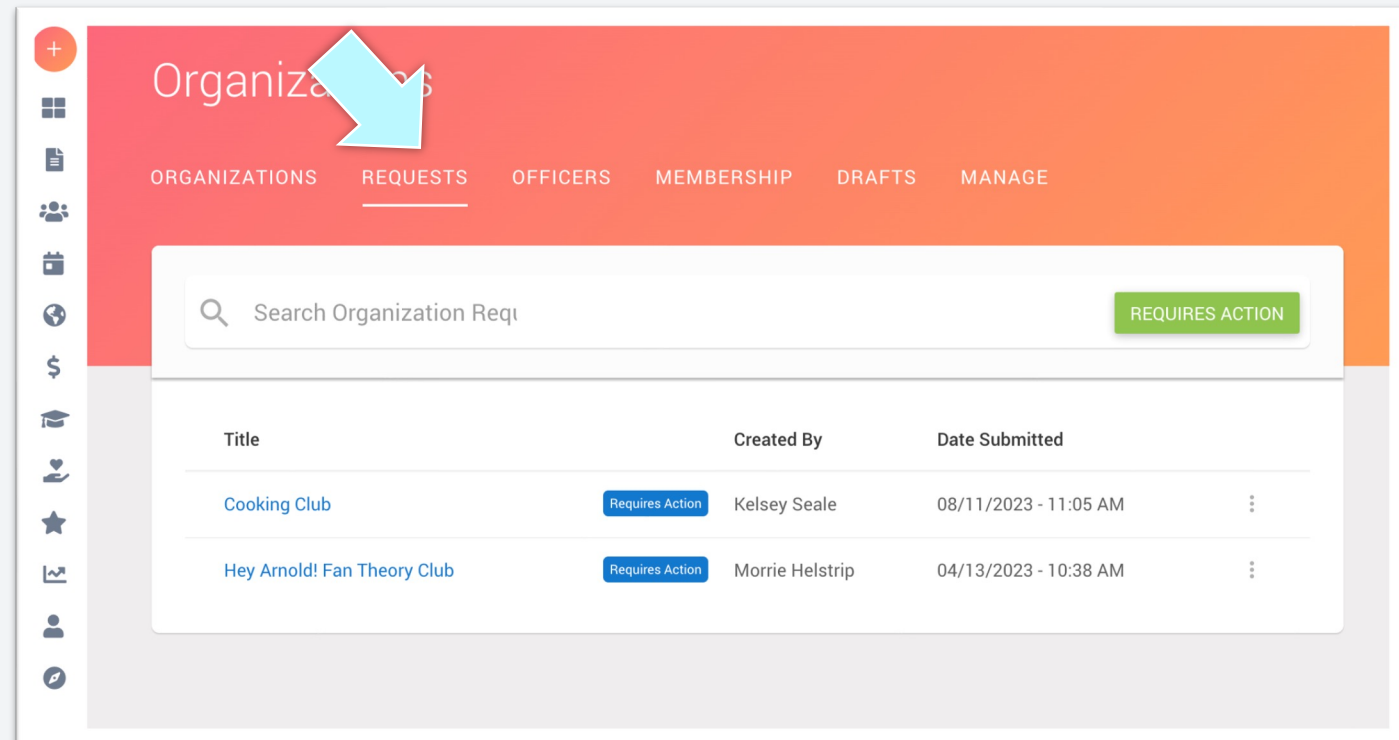
- Preview Response
- Save as Draft
- Submit Without Approval



Approve or Deny Organizations

- Make sure you are managing your requests tab
- Approve or deny organization requests
 - Email
 - Organization Dashboard

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Organization Requests

ORGANIZATIONS **REQUESTS** OFFICERS MEMBERSHIP DRAFTS MANAGE

Search Organization Req **REQUIRES ACTION**

Title	Created By	Date Submitted
Cooking Club	Requires Action Kelsey Seale	08/11/2023 - 11:05 AM
Hey Arnold! Fan Theory Club	Requires Action Morrie Helstrip	04/13/2023 - 10:38 AM



Are you sure?

Are you sure you wish to deny this response: 'Cooking Club'?

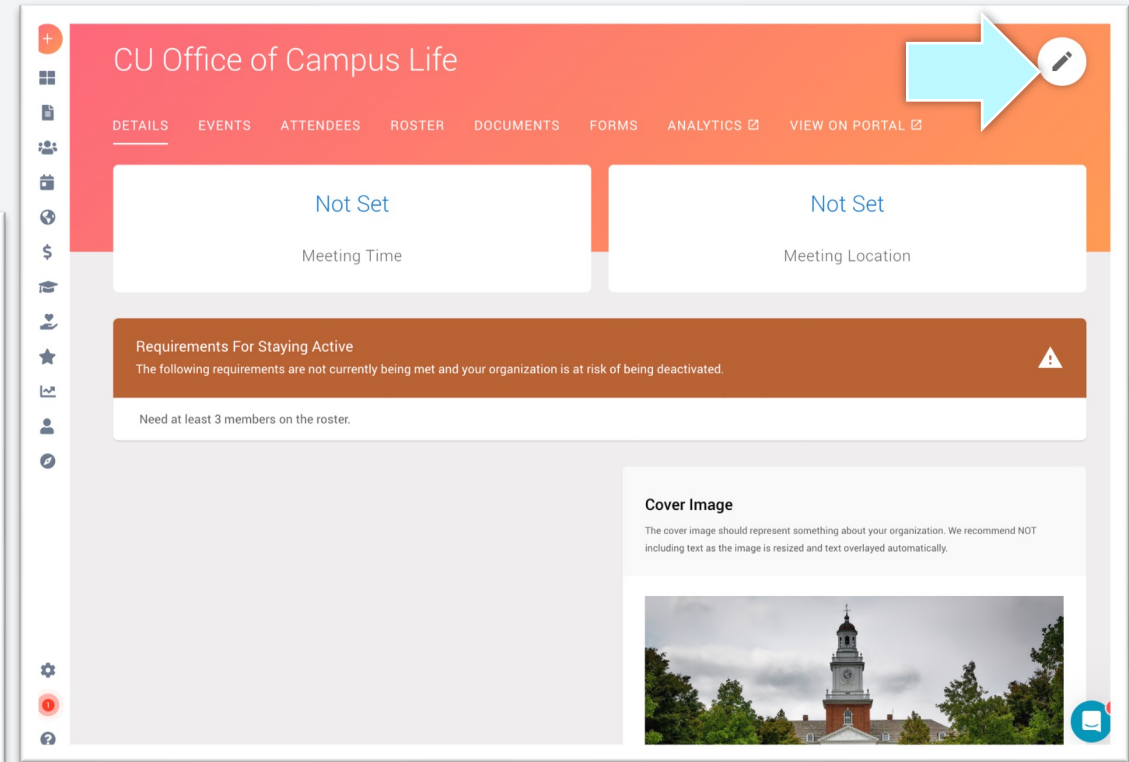
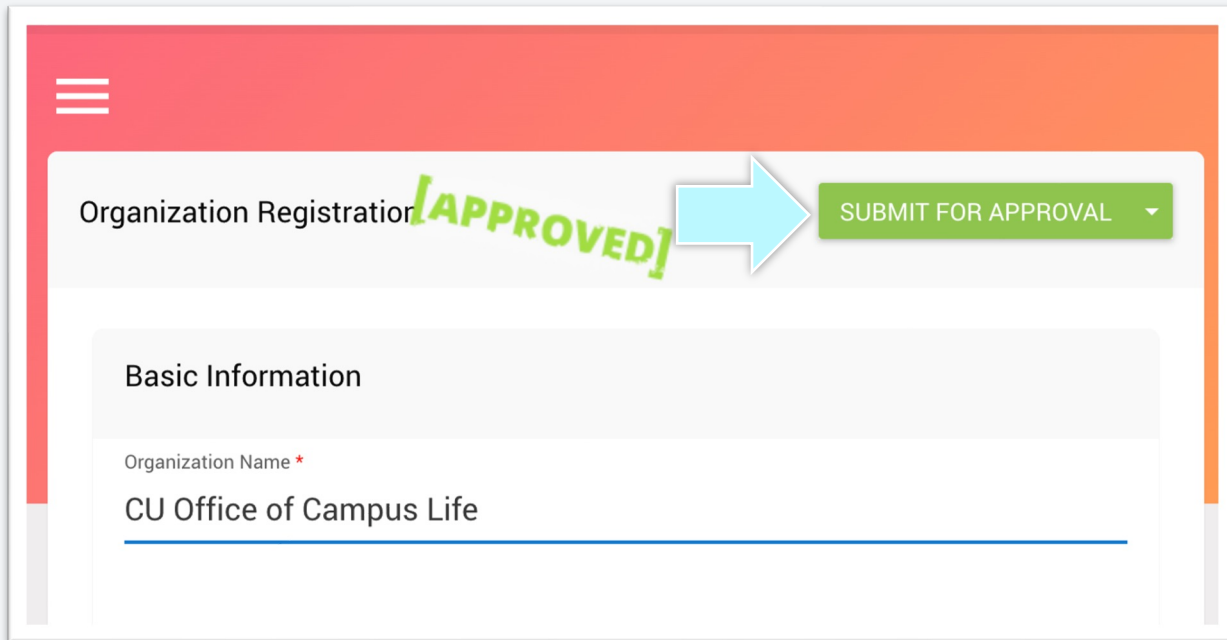
Please provide a reason for denying this response. *

CANCEL

CONFIRM

Edit an Existing Organizations

- Dynamic editing
- Click the pencil
- ALWAYS SAVE!



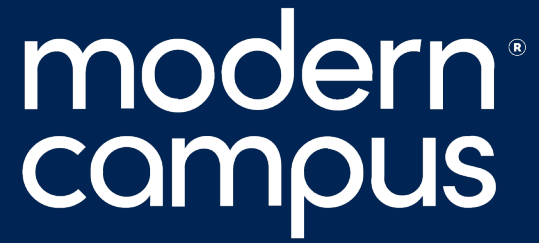
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**What type of
organizations do you
have for your campus?**

What is your most popular organization? Elaborate in the chat!



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Manage Organization Members

Section 2



Adding Members

- Navigate to the org page
- Select Roster
- “Add Members”

CU Office of Campus Life

DETAILS EVENTS ATTENDEES **ROSTER** DOCUMENTS FORMS ANALYTICS VIEW

0 Members

0 New in 30 Days

Officers

Woops! We couldn't find any officers. [Invite a new one.](#)

Advisors

[INVITE ADVISOR](#)

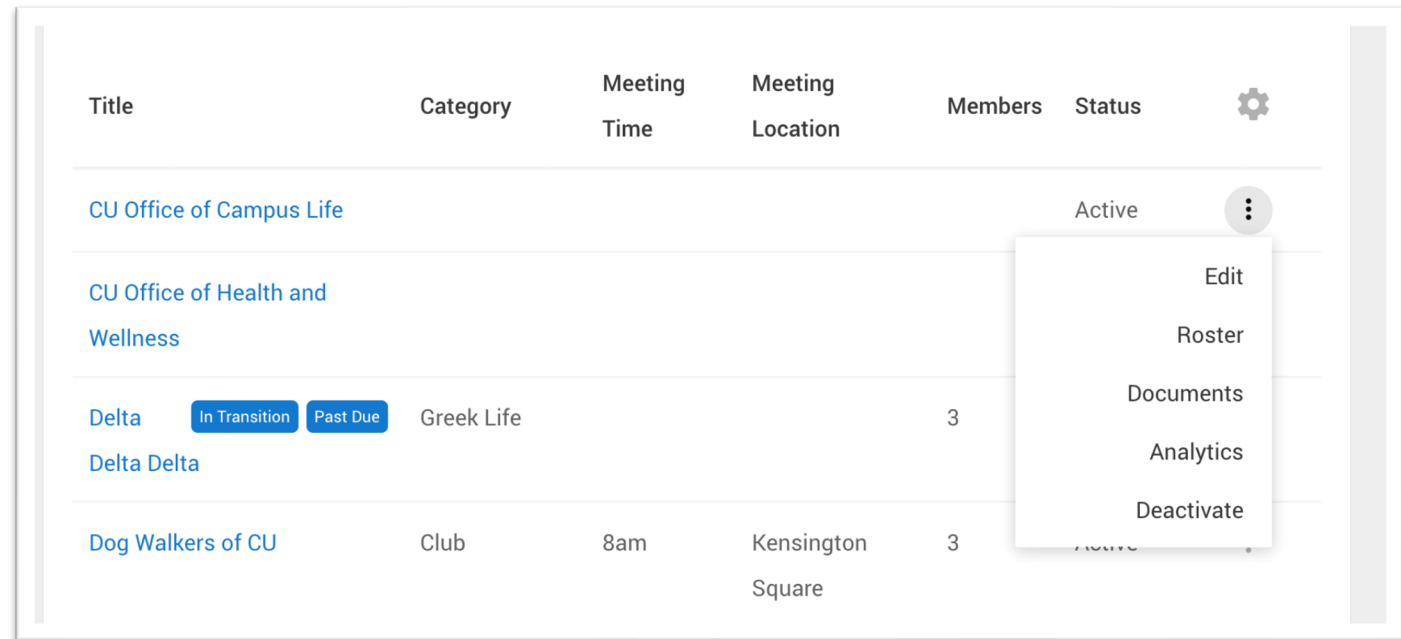
Woops! We couldn't find any advisors. [Invite a new one.](#)

Members

SETTINGS [ADD MEMBERS](#)

Adding Members

- Navigate to the org page
- Find your org
- Click the three dots
- Select Roster
- “Add Members”



The screenshot displays a table of organizations with the following columns: Title, Category, Meeting Time, Meeting Location, Members, and Status. A dropdown menu is open for the 'Delta Delta' organization, showing options: Edit, Roster, Documents, Analytics, and Deactivate.

Title	Category	Meeting Time	Meeting Location	Members	Status	
CU Office of Campus Life					Active	⋮
CU Office of Health and Wellness						
Delta Delta Delta	Greek Life	In Transition Past Due		3		⋮
Dog Walkers of CU	Club	8am	Kensington Square	3		

Member Roles

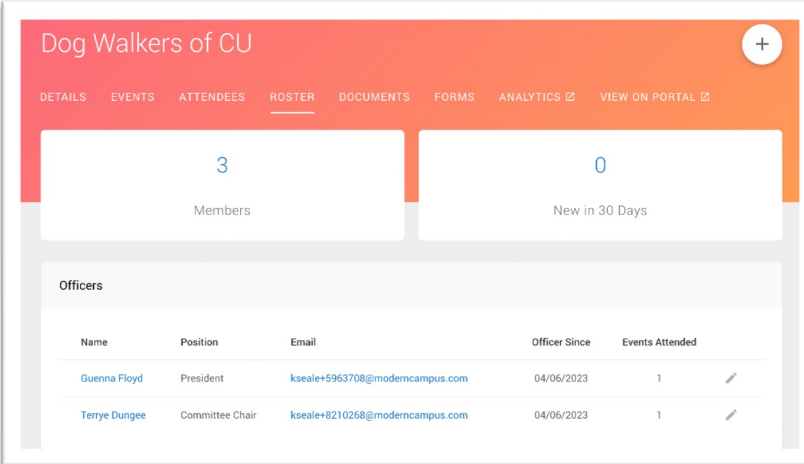
- Member
- President
- Vice President
- Treasurer
- Secretary
- Committee Chair
- Advisor

Meaning of the role is up to you!

Gives new access depending on your settings.

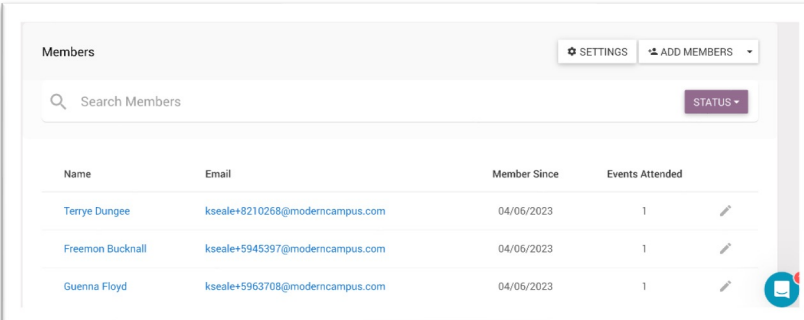
Change Member Roles

- Change when you add the member
- Change when you transition
- Change at point during the year!



The screenshot shows the 'Dog Walkers of CU' dashboard. At the top, there are navigation tabs: DETAILS, EVENTS, ATTENDEES, ROSTER (selected), DOCUMENTS, FORMS, ANALYTICS, and VIEW ON PORTAL. Below the tabs are two summary cards: 'Members' with a count of 3 and 'New in 30 Days' with a count of 0. Below these is a table titled 'Officers'.

Name	Position	Email	Officer Since	Events Attended
Guenna Floyd	President	kseale+5963708@moderncampus.com	04/06/2023	1
Terrye Dungee	Committee Chair	kseale+8210268@moderncampus.com	04/06/2023	1



The screenshot shows the 'Members' page. At the top right, there are buttons for 'SETTINGS' and 'ADD MEMBERS'. Below these is a search bar labeled 'Search Members' and a 'STATUS' dropdown menu. Below the search bar is a table of members.

Name	Email	Member Since	Events Attended
Terrye Dungee	kseale+8210268@moderncampus.com	04/06/2023	1
Freemon Bucknall	kseale+5945397@moderncampus.com	04/06/2023	1
Guenna Floyd	kseale+5963708@moderncampus.com	04/06/2023	1

Already an Officer

23

Dog Walkers of CU +

[DETAILS](#)
[EVENTS](#)
[ATTENDEES](#)
[ROSTER](#)
[DOCUMENTS](#)
[FORMS](#)
[ANALYTICS](#)
[VIEW ON PORTAL](#)

3

Members

0

New in 30 Days

Officers

Name	Position	Email	Officer Since	Events Attended	
Guenna Floyd	President	kseale+5963708@moderncampus.com	04/06/2023	1	
Terrye Dungee	Committee Chair	kseale+8210268@moderncampus.com	04/06/2023	1	

General Member


Members

⚙️ SETTINGS
👤 ADD MEMBERS ▾

🔍 Search Members

STATUS ▾

Name	Email	Member Since	Events Attended	
Terrye Dungee	kseale+8210268@moderncampus.com	04/06/2023	1	✎
Freemon Bucknall	kseale+5945397@moderncampus.com	04/06/2023	1	✎
Guenna Floyd	kseale+5963708@moderncampus.com	04/06/2023	1	✎



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Active Requirements

Section 3



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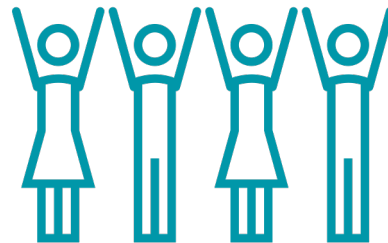
**Does your institution use
active requirements and
transitions?**

Elaborate in the chat!



Active Requirements

- The minimum requirements all organizations need in order to stay active
- Optional
- Editable



Active Requirements

Events



Minimum
Members

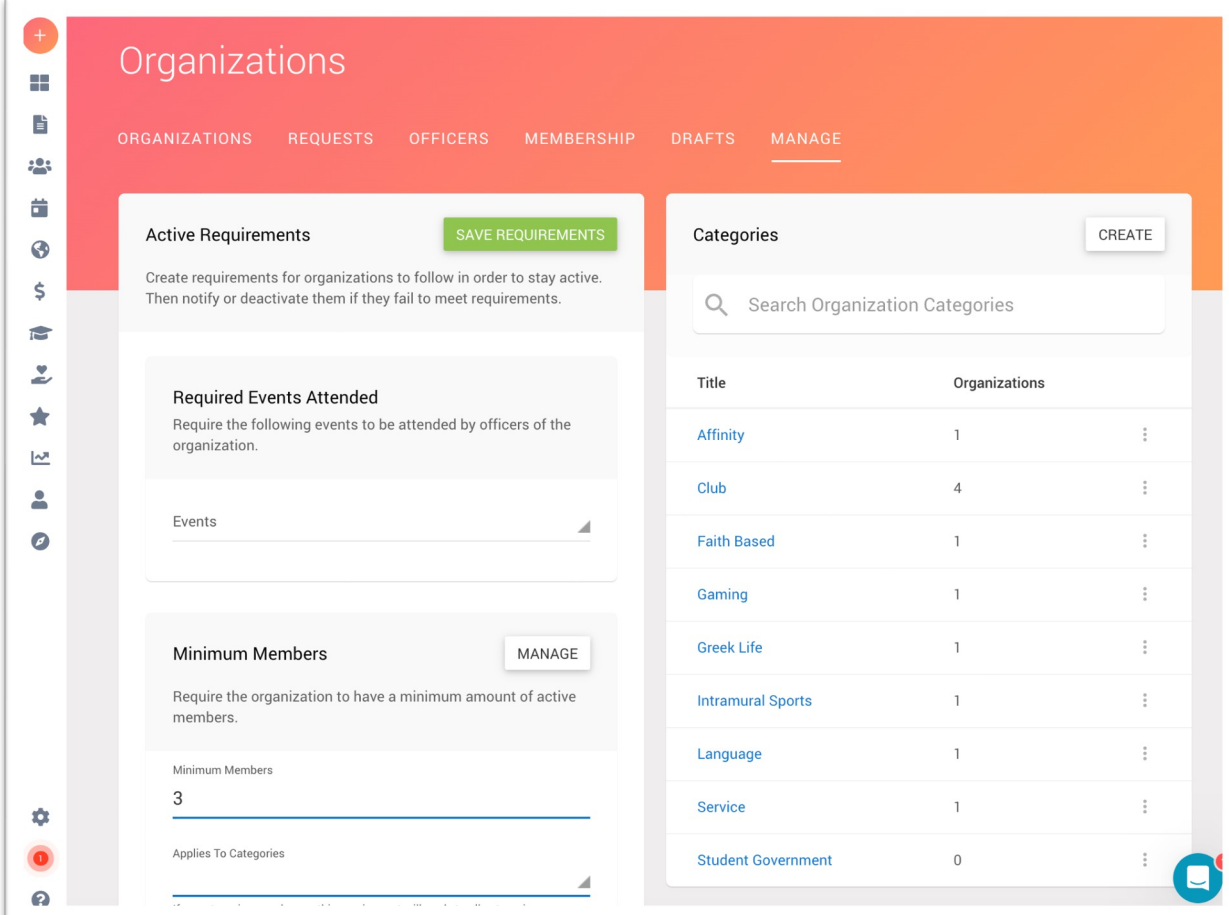


Officers



Setting Requirements

- Select organizations
- Select “Manage” tab
- Change requirements
- Select categories
- “SAVE REQUIREMENTS



The screenshot displays the 'Organizations' management interface. The top navigation bar includes tabs for ORGANIZATIONS, REQUESTS, OFFICERS, MEMBERSHIP, DRAFTS, and MANAGE. The 'MANAGE' tab is active. The main content area is divided into two panels. The left panel, titled 'Active Requirements', contains a 'SAVE REQUIREMENTS' button and a description: 'Create requirements for organizations to follow in order to stay active. Then notify or deactivate them if they fail to meet requirements.' Below this, there are sections for 'Required Events Attended' (with a description and an 'Events' dropdown) and 'Minimum Members' (with a 'MANAGE' button, a description, and a 'Minimum Members' input field set to '3'). The right panel, titled 'Categories', contains a 'CREATE' button and a search bar labeled 'Search Organization Categories'. Below the search bar is a table listing categories and the number of organizations associated with each.

Title	Organizations	
Affinity	1	⋮
Club	4	⋮
Faith Based	1	⋮
Gaming	1	⋮
Greek Life	1	⋮
Intramural Sports	1	⋮
Language	1	⋮
Service	1	⋮
Student Government	0	⋮



Organizations

ORGANIZATIONS

REQUESTS

OFFICERS

MEMBERSHIP

DRAFTS

MANAGE

Active Requirements

SAVE REQUIREMENTS

Create requirements for organizations to follow in order to stay active. Then notify or deactivate them if they fail to meet requirements.

Required Events Attended

Require the following events to be attended by officers of the organization.

Events

Minimum Members

MANAGE

Require the organization to have a minimum amount of active members.

Minimum Members

3

Applies To Categories

If no categories are chosen, this requirement will apply to all categories.

Categories

CREATE

Search Organization Categories

Title	Organizations	
Affinity	1	⋮
Club	4	⋮
Faith Based	1	⋮
Gaming	1	⋮
Greek Life	1	⋮
Intramural Sports	1	⋮
Language	1	⋮
Service	1	⋮
Student Government	0	⋮




1

Failing Requirements



- Alert banner for admin
- Also found on Organization page
- They DO NOT auto deactivate
- Notify officers
- Take appropriate action

Organization Requirement Failures 
CU Office of Campus Life
Need at least 3 members on the roster.
CU Office of Health and Wellness
Need at least 3 members on the roster.
Delta Delta Delta
Must transition by 4/07/2023, 12:01 PM.
Francais s'il vous plait?
Need at least 3 members on the roster.

Organization Requirement Failures



CU Office of Campus Life

Need at least 3 members on the roster.

CU Office of Health and Wellness

Need at least 3 members on the roster.

Delta Delta Delta

Must transition by 4/07/2023, 12:01 PM.

Francais s'il vous plait?

Need at least 3 members on the roster.

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Transitioning an Organization

Section 4



Transitions

- Confirm organizations are up to date
- Update member positions
- Adding new members

Organization Requirement Failures 
CU Office of Campus Life
Need at least 3 members on the roster.
CU Office of Health and Wellness
Need at least 3 members on the roster.
Delta Delta Delta
Must transition by 4/07/2023, 12:01 PM.
Francais s'il vous plait?
Need at least 3 members on the roster.

Transitions

- Not mandatory, you chose to set them up
- Once an Org is in transition, you cannot manually take them out

Transitioning

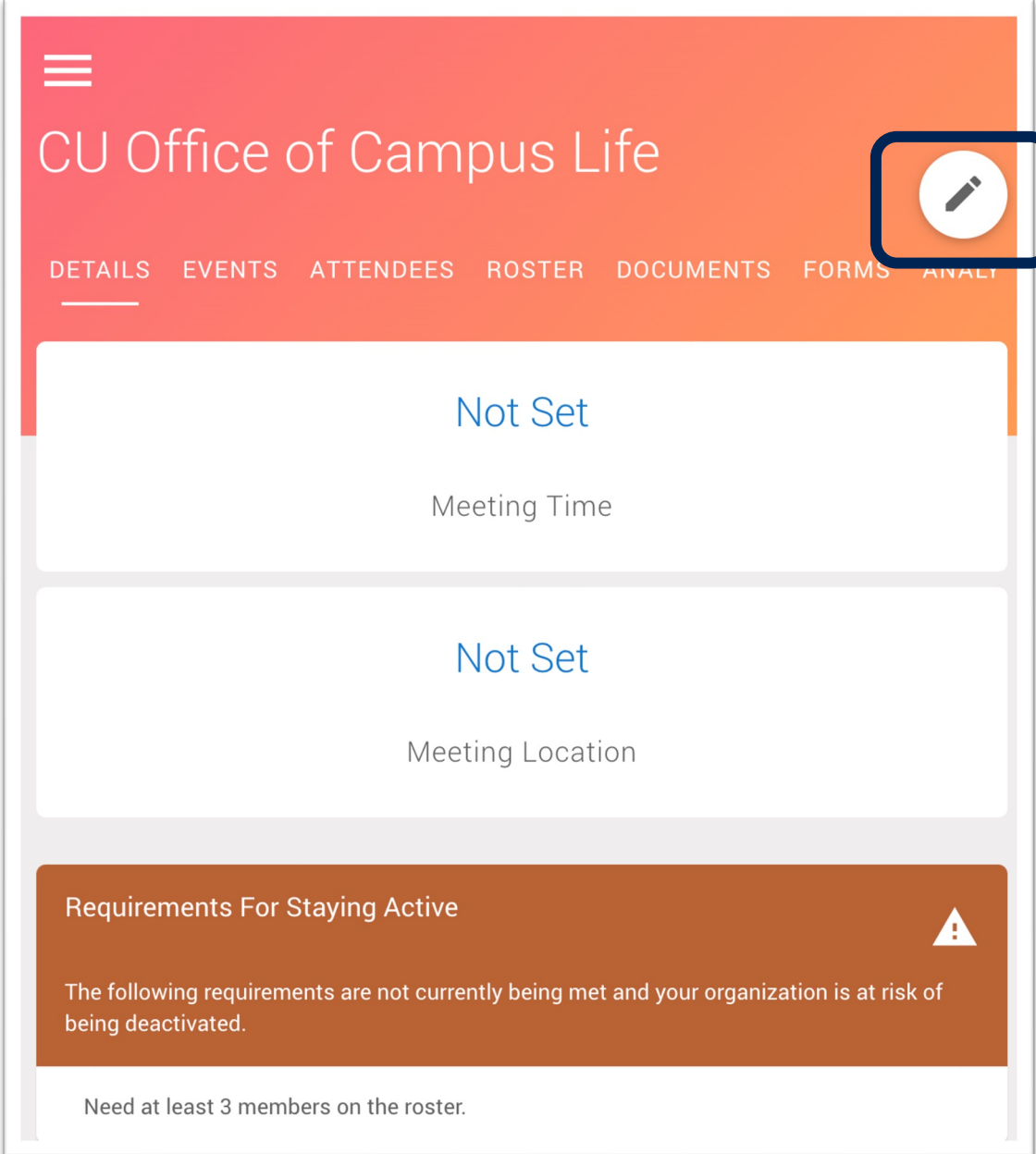
MANAGE

Setup and require organizations to transition. Transitioning will require students to edit and update their organization details, along with selecting new officers and confirming rosters.

[Enable & Setup Transitioning](#)

Transitions

Organization officers simply need to edit and save their org page to transition.



The screenshot displays the CU Office of Campus Life interface. At the top, there is a red header with a hamburger menu icon on the left and the text "CU Office of Campus Life" in the center. On the right side of the header, there is a circular icon with a pencil, which is highlighted by a blue rounded rectangle. Below the header, there is a navigation bar with the following items: "DETAILS", "EVENTS", "ATTENDEES", "ROSTER", "DOCUMENTS", "FORMS", and "ANALYTICS". The main content area is divided into two sections. The first section is titled "Not Set" and contains the text "Meeting Time". The second section is also titled "Not Set" and contains the text "Meeting Location". At the bottom of the interface, there is a brown warning box with a white exclamation mark icon. The text inside the warning box reads: "Requirements For Staying Active" followed by "The following requirements are not currently being met and your organization is at risk of being deactivated." Below the warning box, there is a white box containing the text "Need at least 3 members on the roster."

Transitions

While in transition...

1. Can't submit events
2. Can't submit finance transitions
3. Can submit any forms with the org widget



I want some orgs to transition and others not

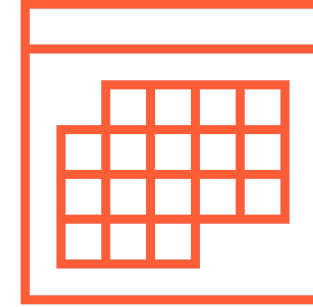
You can filter to require certain orgs to transition and others to not transition!

The screenshot shows the 'Transition Setup' interface. At the top, there are three steps: 'ORGANIZATIONS', 'DATE & MESSAGE', and 'PREVIEW'. Below this is the 'Organizations Transitions' section with a 'NEXT STEP' button. A search bar is present with the text 'Search Organizations'. There are three filter buttons: a checkmark, 'STATUS', and 'CATEGORY'. The 'CATEGORY' dropdown menu is open, showing options: Affinity, Club, Faith Based, Gaming, Greek Life, Intramural Sports, Language, and Service. Below the filters is a table with the following data:

<input type="checkbox"/>	Name	Transition Date	Status	Members	Categories
<input type="checkbox"/>	CU Office of Campus Life	Not Set	Active	0	
<input type="checkbox"/>	CU Office of Health and Wellness	Not Set	Active	0	
<input type="checkbox"/>	Delta Delta Delta	4/7/2023, 12:01:45 PM	In Transition	3	Greek Life
<input type="checkbox"/>	Dog Walkers of CU	Not Set	Active	3	Club

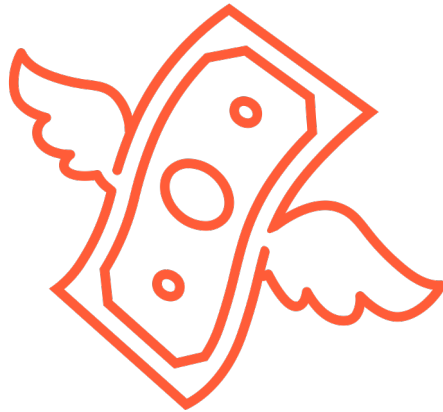
When should we transition?

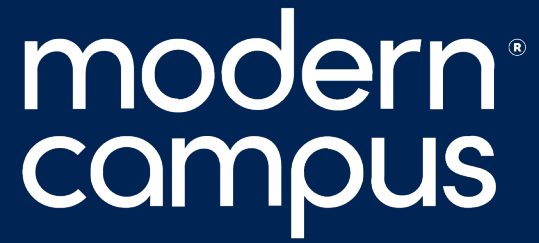
- What time will students still be on campus?
- Did last year's officers graduate or leave?



How can I get them to transition???

- Reminders
- Incentives



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Q&A



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Engagement
Evolved[™]

Thank you!

Modern Campus and your
CSM are here to help, reach
out!

Kelsey Seale

Software Trainer



Kseale@moderncampus.com

