

Organization Transitioning

Make sure organizations are set up for success during the transition period!

Agenda

1. Welcome
2. Transitioning FAQs
3. Step-by-step
4. Personalization
5. Q&A
6. Close



What is Involve?



Transitioning FAQs

What is organization transitioning?

1. Organization reregistration

1. A time for updating your organization!
2. Org leaders must edit and resubmit for for approval

2. A setting under the Organization “Manage” tab



Why set up transitioning?

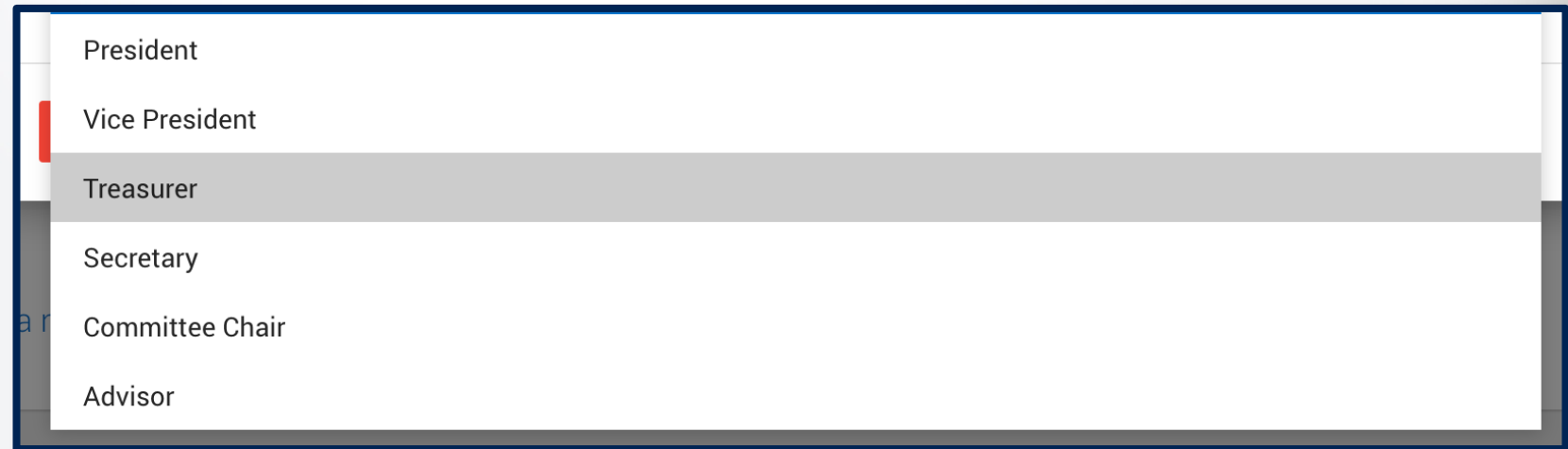
- Lessen your administrative load
- Track the process
- Officers will automatically get privileges
 - Only time that user permissions will auto update
 - No need to go into individual profiles to grant privileges



Who will get the transition notification / email?

- ALL Leaders

- President
- Vice President
- Secretary
- Treasurer
- Committee Chair
- Advisory



- ALL Advisors

Who can set up transitioning?

- Campus Administrator
- WITH Manage Transitioning turned on

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Role
REMOVE

Role

Campus Administrator

Organizations Features

Manage Transitioning

Enables the ability to set and manage transitioning settings for organizations. Additionally enables the ability to notify and deactivate organizations due to transiting.

Manage Active Requirements

Enables the ability to set and manage active requirements for organizations. Additionally enables the ability to notify and deactivate organizations due to active requirements.

Can I disable transitioning?

- No! Once an organization has been placed in the transitioning process, you cannot reverse the process!
- Reminder: You are NOT required to transition all (or even any) of your organizations



What happens if they don't complete transition?

- They will be unable to add folks to their roster
- They cannot fill out the event registration form
- They will be flagged as

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Your organization's roster cannot be changed while in transition. ×

Delta Delta Delta

In Transition

Past Due

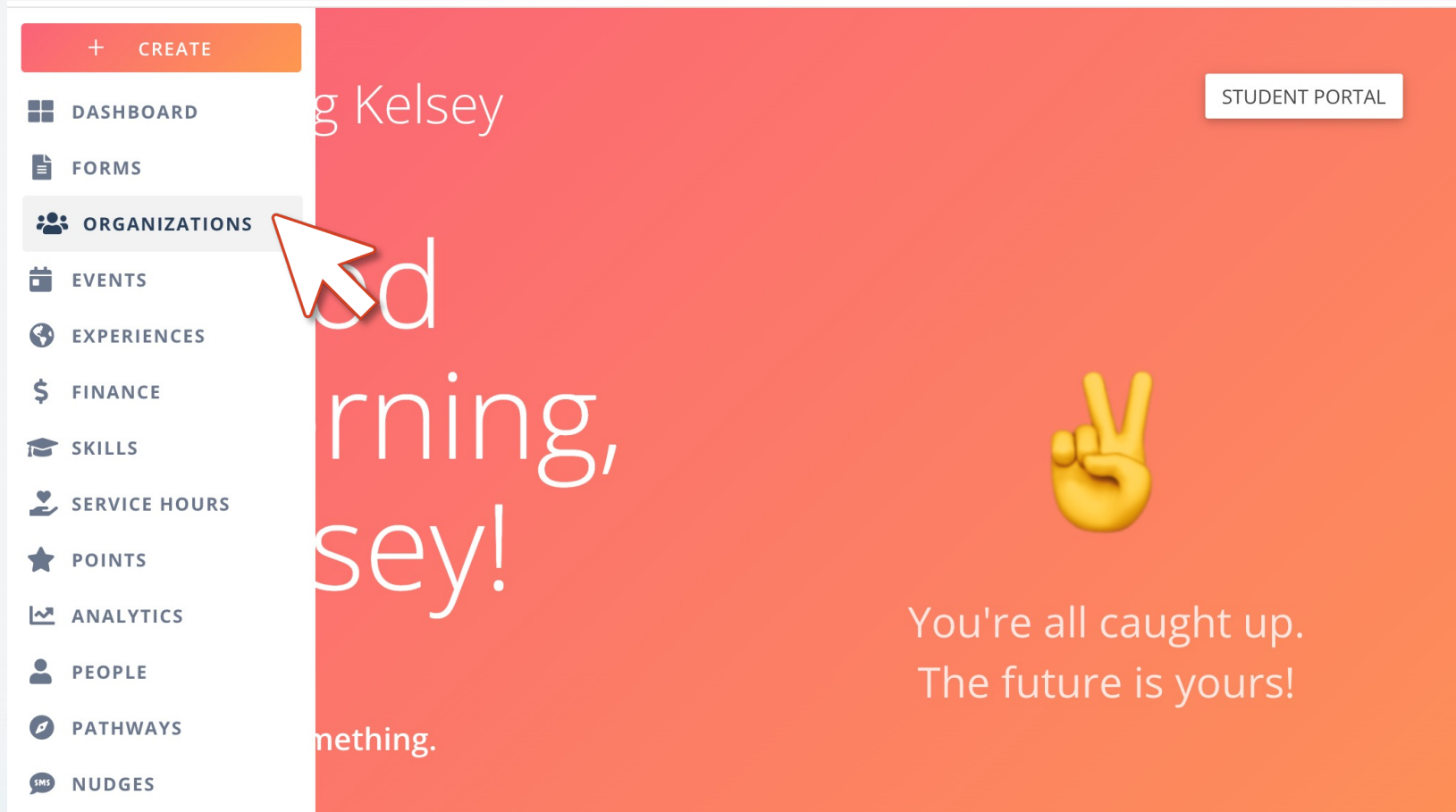
The organization leaders won't do it! 😞

- Follow up
- Provide clear messaging
- Provide instructions (we have an article!)
- Provide incentives!

Enable Transitions

(as an administrator)

1. Select “Organizations” from the admin portal



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2. Select “manage”

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The screenshot displays the 'Organizations' dashboard in the Modern Campus system. The top navigation bar includes tabs for ORGANIZATIONS, REQUESTS, OFFICERS, MEMBERSHIP, DRAFTS, and MANAGE. The 'MANAGE' tab is currently selected, indicated by a red mouse cursor. Below the navigation bar, there are three summary cards: 'Active Organizations' with a value of 20, 'Unique Members' with a value of 16, and 'Average Members' with a value of 2.30. Below these cards is a search bar labeled 'Search Organizations' and filter options for STATUS, AND, CATEGORY, and FILTER. At the bottom, a table lists organizations with columns for Title, Category, Meeting Time, Meeting Location, Members, and Status. The first row shows 'Career Services' as the title, 'Department' as the category, and 'Active' as the status.

Title	Category	Meeting Time	Meeting Location	Members	Status	
Career Services	Department				Active	⋮

3. Scroll to “Transitioning”

4. Choose “Enable & Setup Transitioning”

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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.

Categories CREATE

Search Organization Categories

Title	Organizations	
Affinity	1	⋮
Club	10	⋮
Department	3	⋮
Faith Based	1	⋮
Gaming	1	⋮
Greek Life	1	⋮

Help

- 5. Hit the check mark
- 6. Select all organizations you want to complete the process.

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Organizations Failing The Transition Required Requirement NEXT STEP

Select organizations you would like to notify or deactivate. By default, all are selected. Currently selecting 5 organizations.

Search Organizations TRANSITION STATUS CATEGORY

<input checked="" type="checkbox"/> Name	Last Notified	Members	Categories	Transition Date
<input checked="" type="checkbox"/> Delta Delta Delta Past Due	Never	3	Greek Life	8/31/2023, 1:41:33 PM
<input checked="" type="checkbox"/> Koller Derby Past Due	Never	3	Intramural Sports	8/31/2023, 1:41:33 PM

6. OR select by organization category!

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Organizations Failing The Transition Required Requirement

Select organizations you would like to notify or deactivate. By default, all are selected. Currently selecting 3 organizations.

NEXT STEP

TRANSITION STATUS ▾

CATEGORY ▾

✓ Name		Last Notified	Members	Categories	Tra
✓ The Creme de Bananas	Past Due	Never	3	Club	8/31/2023, 1:41:33 PM
✓ Trashy Cricketinis	Past Due	Never	0	Club, Service	8/31/2023, 1:41:33 PM
✓ Walking Around	Past Due	Never	4	Club	8/31/2023, 1:41:33 PM

Club
✓

Greek Life

Intramural Sports

Service

- 7. Select your deadline
- 8. Write a custom message
- 9. Select “Next Step”

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Transition Setup

ORGANIZATIONS > DATE & MESSAGE > PREVIEW

Transition Deadline NEXT STEP

Choose the date to use as the transition deadline for the selected organizations. You will be able to update this at a later time.

Transition Deadline
04/18/2024 - 3:27 PM

Custom Message

Add a custom message to the email notification that will be sent to the organization officers and advisors.

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

</> WORDS: 46 CHARACTERS: 251

Transitioning period is about to begin! You will have 2 weeks to complete the process. Answer a few questions to let us now how this year went and how we can support you in the coming semester. Make sure to update your roster and leadership positions!

[Help](#)

8. Confirm your information

9. Select “Enable Transition For Selected”

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Transition Setup

ORGANIZATIONS > DATE & MESSAGE > PREVIEW

Preview

ENABLE TRANSITION FOR SELECTED (1)

Confirm the organizations you have selected and custom message you're sending.

1 Organizations Selected EDIT

Career Services

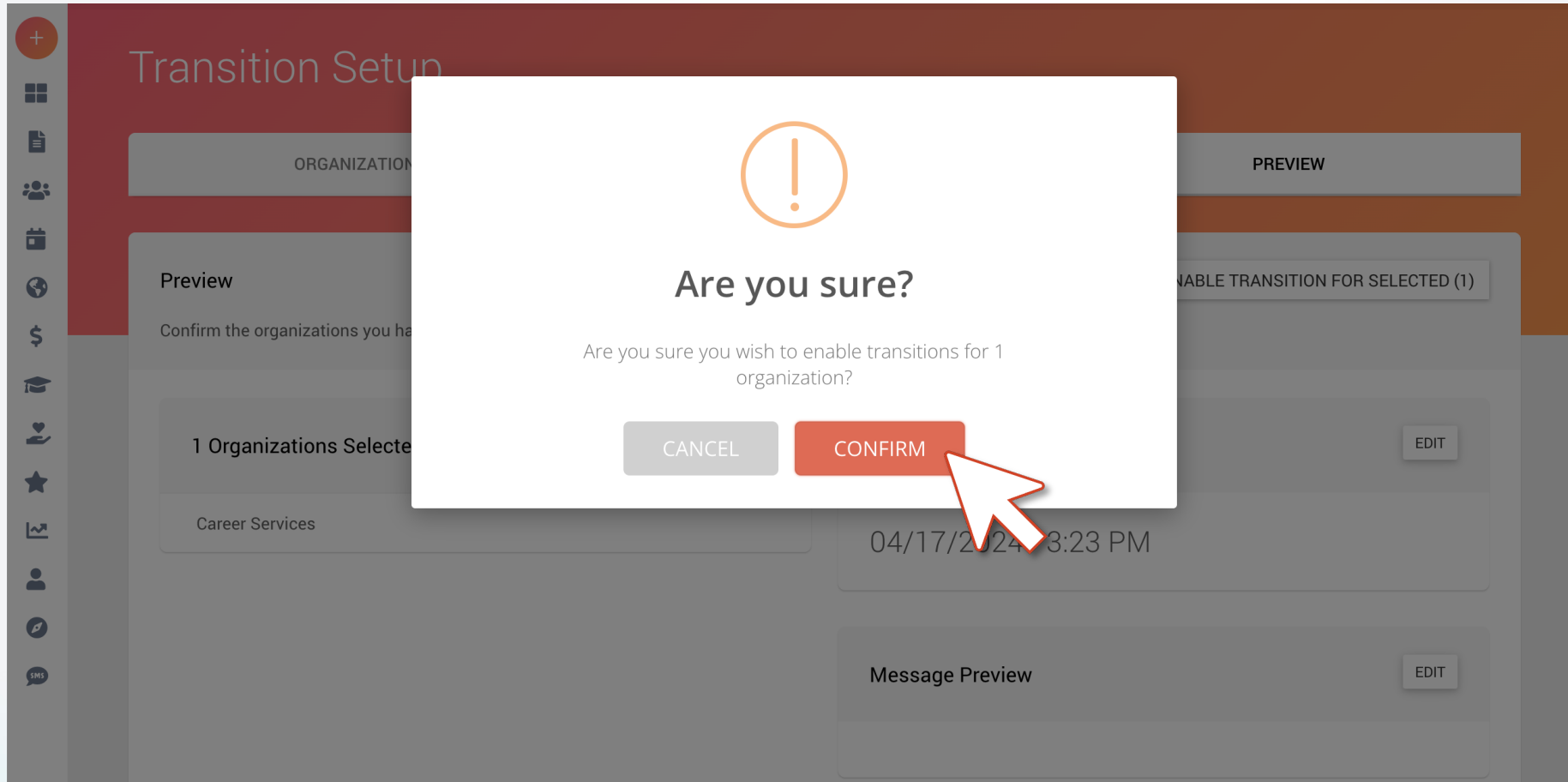
Transition Deadline EDIT

04/17/2024 - 3:23 PM

Message Preview EDIT

10. Confirm and you are all done!

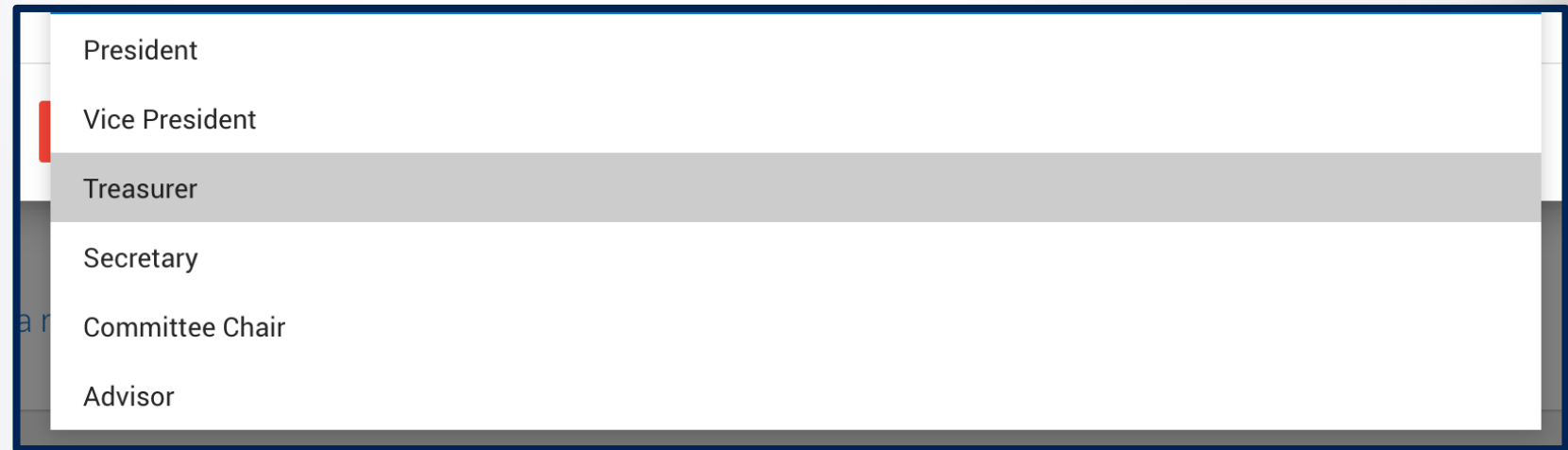
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Reminder: Notification goes to...

- ALL Leaders

- President
- Vice President
- Secretary
- Treasurer
- Committee Chair
- Advisory



Complete Transitions

(as an organization leader)

1. Go to the Organization Landing Page
2. Find your organization

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The screenshot displays the 'Organizations' landing page in Modern Campus. The page features a navigation bar with tabs for 'Organizations', 'Requests', 'Officers', and 'Manage'. Below the navigation bar, there are three summary cards: 'Active Organizations' (25), 'Unique Members' (86), and 'Average Members' (6.20). A search bar is located below the summary cards, with filters for 'Status', 'Category', and 'Filter'. A table lists organizations, with the first row for 'Computer Club' showing 'In Transition' and 'Past Due' status. A dropdown menu for the 'Computer Club' row is open, showing options for 'Transition', 'Roster', and 'Documents'.

Title	Category	Meeting Time	Meeting Location	Members	Status
Computer Club	Social	Everyday 10:00 PM	Computer Lab #3	4	In Transition

3. Click the three stacked dots
4. Select “Transition”

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The screenshot shows the 'Organizations' dashboard in Modern Campus. At the top, there are three summary cards: 'Active Organizations' (25), 'Unique Members' (86), and 'Average Members' (6.20). Below these is a search bar and filter options. A table lists organizations, with the first row for 'Computer Club' highlighted. An orange arrow points to the 'In Transition' and 'Past Due' buttons for this organization. A second orange arrow points to the three stacked dots menu icon, which has opened a dropdown menu with 'Transition', 'Roster', and 'Documents' options. The 'Transition' option is circled in orange.

Title	Category	Meeting Time	Meeting Location	Members	Status
Computer Club	Social	Everyday 10:00 PM	Computer Lab #3	4	In Transition

5. This will bring you to your organization form.
6. You have to change **SOMETHING** to show the “Submit Button”
6. Fill out all required fields, make updates to information and roster!

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The screenshot shows a web form for creating an organization. On the left is a vertical sidebar with various icons. The main form area has the following sections:

- Transition**: A section with a text input field containing the placeholder text "How was the year?". A red mouse cursor is pointing at this field.
- Contact Information**: A section with two text input fields labeled "Contact Name" and "Contact Email".
- Social Media**: A section with a text input field.
- Cover Image ***: A section with a text input field containing a placeholder image. The image shows a dog's head on the left and three black triangles on the right. Below the input field is a note: "The cover image should represent something about your organization. We recommend NOT including text as the image is resized and text overlaid automatically."

7. Scroll back up, hit “Submit for Approval”

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The screenshot shows a web form interface for 'Organization Transition'. At the top right, there is a green button labeled 'SUBMIT FOR APPROVAL' with a dropdown arrow, which is being pointed to by a white mouse cursor. The form is divided into sections: 'Basic Information' and 'About'. Under 'Basic Information', there is a text input field for 'Organization Name' containing the text 'Delta Delta Delta'. Under 'About', there is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and list. Below the toolbar, the text 'Can I help ya, help ya, help ya?' is visible in the editor area. On the left side of the form, there is a vertical sidebar with several icons representing different functions like home, documents, people, calendar, and settings.

Personalize the Process!

Why are you asking organizations to complete the transition process?

Do you want to
gather
information?

Do you want to
have leaders
reflect?

?

Do you want to
gather
information?

Do you want to
have leaders
reflect?

?

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What are you LEARNING?

Possible custom questions

- Did you update your officers? YES/NO
 - This is HUGE because it automatically updates permissions
- Did you add new constitution? YES/NO
- Ask students what their goals are
- What success they had this year
- What challenges they had this year
- How can your office offer support to their organization this year...
- *Ask for more suggestions in the comments?*

Customize your organization registration form

1. Navigate to the forms page on your admin portal

The screenshot displays the Modern Campus admin portal interface. On the left is a vertical navigation menu with the following items: + CREATE, DASHBOARD, FORMS (highlighted with a red mouse cursor), ORGANIZATIONS, EVENTS, EXPERIENCES, FINANCE, SKILLS, SERVICE HOURS, POINTS, ANALYTICS, PEOPLE, PATHWAYS, and NUDGES. The main content area is titled 'Organizations' and features a header with sub-links: REQUESTS, OFFICERS, MEMBERSHIP, DRAFTS, and MANAGE. Below the header are three summary cards: 'Organizations' with a value of 20, 'Unique Members' with a value of 17, and 'Average Members' with a value of 2.40. A search bar is present with filters for STATUS, AND, CATEGORY, and FILTER. At the bottom, a table lists organizations with columns for Category, Meeting Time, Meeting Location, Members, and Status. One entry is visible: 'In Transition' under Category, 'Department' under Meeting Time, and 'In' under Status.

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2. Select “Edit” on your Organization Registration Form

Search: organi

Title	Created by	Content Type	Responses	Views	Status
2023 Student Leader Excellence Award Nomination	Kelsey Seale		13	31	⋮
Event Registration	Mike Janofsky	Event	17	48	⋮
Organization Registration	Mike Janofsky	Organization	21	40	⋮

- Edit
- View Responses
- View Response Summary
- Respond From Admin
- Respond From Portal
- Deactivate

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3. Add a **field group** and name it “Transition”

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The image shows a split-screen view of the Modern Campus Form Builder. On the left, a form titled "Organization Registration" is displayed with fields for "Categories", "Meeting Time", "Meeting Location", "How was the year?", and "Contact Information". A red rounded rectangle highlights a "Transition" field group added to the form. On the right, the "Form Builder" sidebar is open, showing the "FIELDS" tab. Under the "Layout" section, the "Field Group" widget is highlighted with a red mouse cursor. Other widgets visible include "Date/Time", "DateTime", "Email", "File Upload", "Signature", "Image Search", "Content", "Image", and "Header".

4. Add your custom transition questions and information.

Organization Registration

Register your campus group.

Categories *

Meeting Time Meeting Location

Transition

You will need to complete the campus safety training before the start of next semester. [Sign up here](#)

What are your goals for next year? * How was the year?

How do you rate support from the Student Affairs office?

1 2 3 4 5

Form Builder

FIELDS FORM SETTINGS

Basic

△ Text 1 Number ≡ Choice

Advanced

🕒 Date/Time 🕒 DateTime ✉ Email

📎 File Upload ✍ Signature 🔍 Image Search

Layout

△ Content 👤 Field Group ⤴ Header

🖼 Image

5. Make them “required” if you want to make sure they’re answered.

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Transition

What are your goals for next year? *

How was the year?

How do you rate support from the Student Affairs office?

1 2 3 4 5

Field Description

Field Size

X-SMALL MEDIUM

Required

Hide Response From Admin

Hide Response From Portal

6. Select “Conditionals”

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The image shows a screenshot of the Modern Campus form editor interface. On the left, a form titled "Transition" is visible, containing two questions: "What are your goals for next year?*" and "How was the year?", followed by a rating question "How do you rate support from the Student Affairs office?" with a 1-5 scale. Below this, a "Contact Information" section is partially visible with a "Contact Name" field. On the right, a settings panel is open, showing "Field Description", "Field Size" (with "MEDIUM" selected), and checkboxes for "Hide Response From Admin" and "Hide Response From Portal". The "Field Group Settings" and "Conditionals" sections are also visible, with a red mouse cursor pointing to the "Conditionals" link. An "UPLOAD" button is visible at the bottom of the settings panel.

7. Select “Show” if “All” of the following match. “Registration Status” “Is” “Transition.”

Conditional Logic

ADD LOGIC

Create conditional rules to show and hide fields based on the responding user and other fields.

Show if All of the following match.

ADD

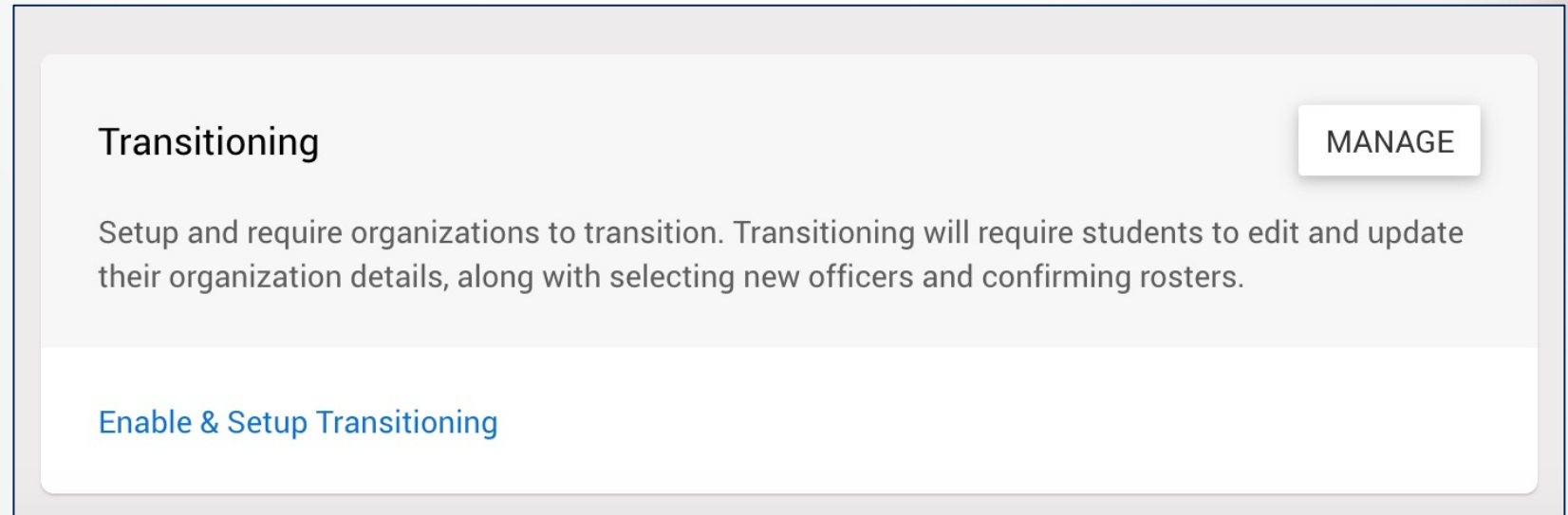
Target	Operators	Registration Statuses
Registration Status	Is	Transition

Check in on transitions

Check on Transitions

- Go to “Manage”
- Scroll to “Transitioning”
- Click “Manage”

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The screenshot shows a user interface for 'Transitioning'. At the top left, the word 'Transitioning' is displayed. In the top right corner, there is a white button with the text 'MANAGE'. Below the title, a paragraph of text reads: '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.' At the bottom of the section, there is a blue link that says 'Enable & Setup Transitioning'.

Check on Transitions

- You will see all organizations in the transitioning process
- Select those you would like to message / deactivate

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Organizations Failing The Transition Required Requirement

Select organizations you would like to notify or deactivate. By default, all are selected.

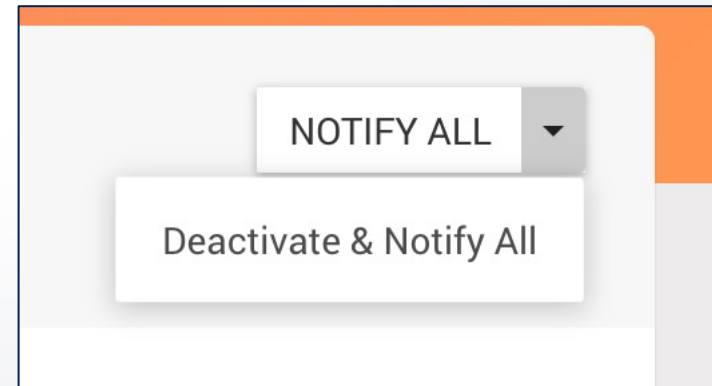
NEXT STEP

✓
TRANSITION STATUS ▾
CATEGORY ▾

Name	Last Notified	Members	Categories	Transition Date
Career Services	Never	0	Department	4/17/2024, 3:23:31 PM
Cooking Club	Never	2		4/12/2024, 2:01:46 PM
Delta Delta Delta	Past Due Never	3	Greek Life	8/31/2023, 1:41:33 PM
Roller Derby	Past Due Never	3	Intramural Sports	8/31/2023, 1:41:33 PM
The Creme de Bananas	Past Due 4/10/2024, 11:28:45 AM	3	Club	8/31/2023, 1:41:33 PM
Trashy Cricketinis	Past Due Never	0	Club, Service	8/31/2023, 1:41:33 PM
Walking Around	Past Due Never	4	Club	8/31/2023, 1:41:33 PM

Check on Transitions

- When you select organizations with “Past Due” you have two options
 - Deactivate: Will deactivate their organization
 - “Come see us if you think this was an error.”
 - Notify All: Send a follow up or reminder



Incentivize the Process!

Incentives

- Tie transitioning to SGA funding
- Additional funding
- First pick for a table at the Org Fair
- Get creative!



What can you put into
practice TODAY?

Q&A

Please put your questions in the Q&A box.
I'll get to as many as possible and follow up via
email if more research is needed!

Thank You

See you next month!