

Introduce yourself in the chat! Which institution are you here with?

Granting User Access

Learn how to grant user access and explore the access permissions you can use!

*This webinar is aimed at **account admin** or users with the “Add/Edit User” permission!*

Granting User Access

Learn how to grant user access and explore the access permissions you can use!

*This webinar is aimed at **account admin** with the “Add/Edit User” permission!*

Agenda

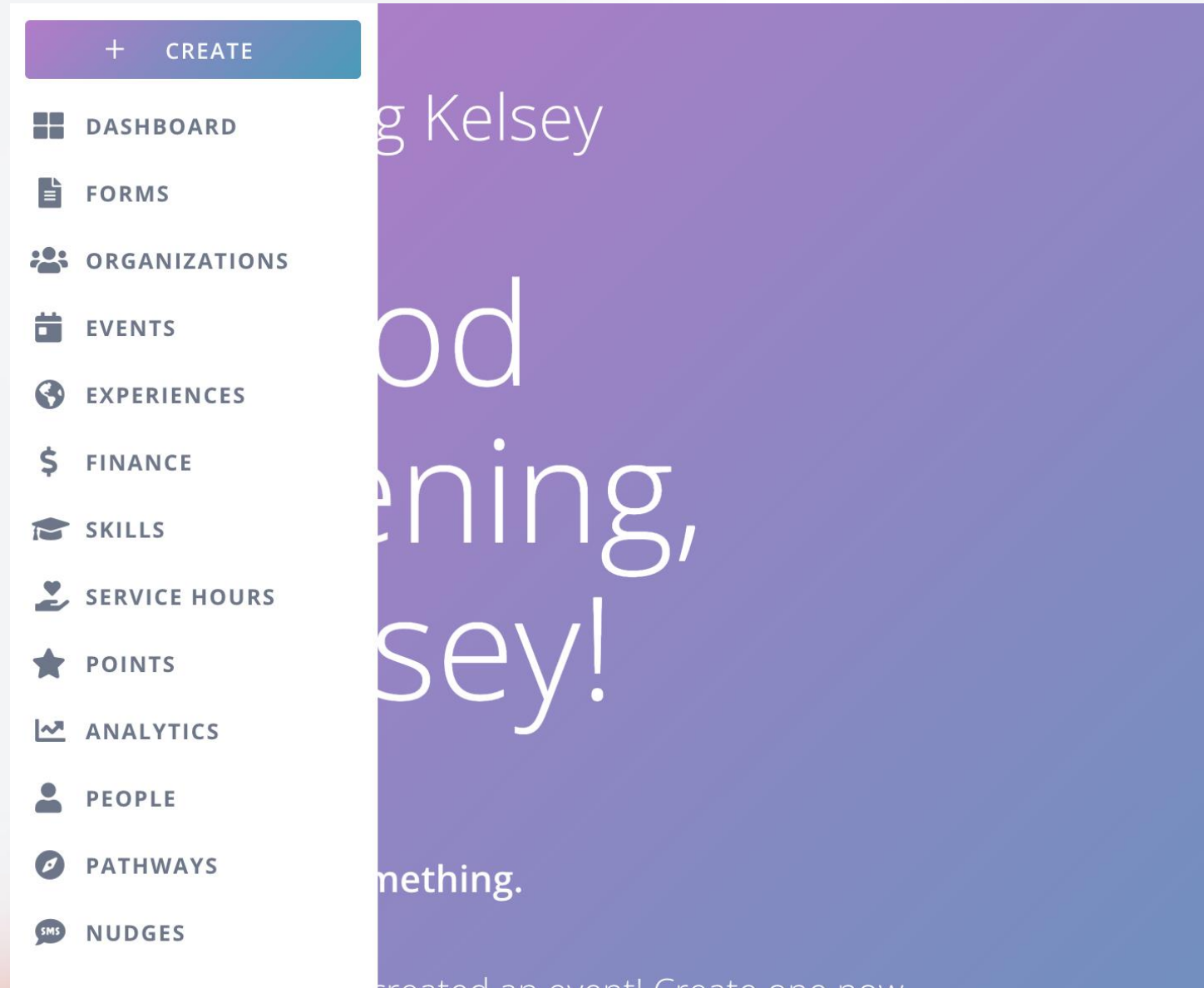
1. Access Quick Facts
2. How to Grant Access
3. Permission Options
4. Student Org Leader Access
5. Q&A
6. Close



Quick Facts: User Permissions

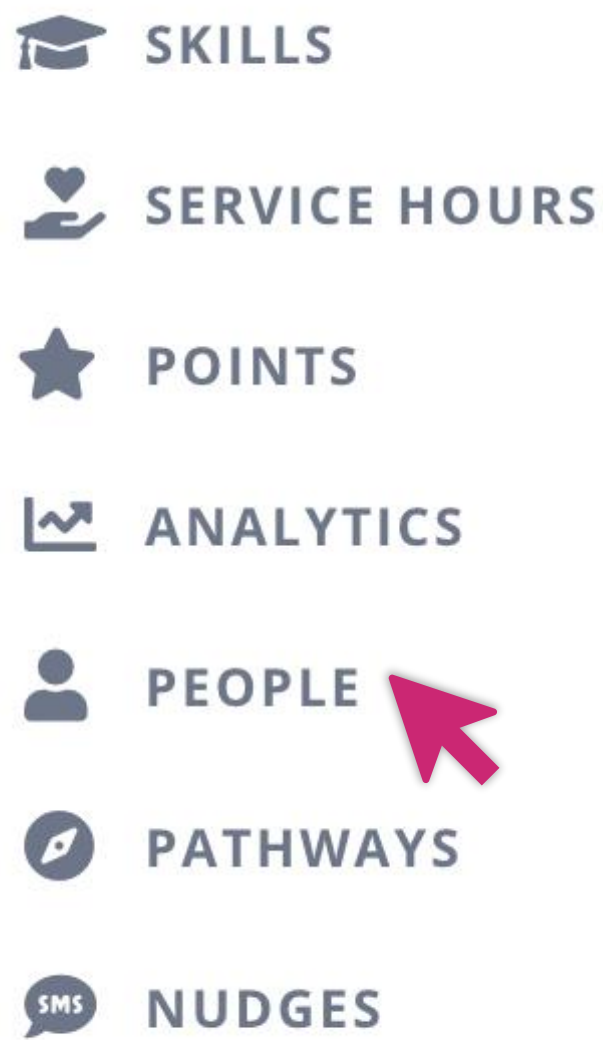
5

Access
determines what
you see on your
menu!



6

User management happens on the “People” dashboard.



You must have “Create User” permission to grant user access.

<input type="checkbox"/>	Delete Events
<input type="checkbox"/>	Event Approval
<input checked="" type="checkbox"/>	Create Users
<input type="checkbox"/>	View Person Profiles
<input type="checkbox"/>	View Student Numbers

Adding a role does NOT automatically add permissions

- All permissions start unchecked
- You **MUST** check off new permissions!
- It's not automatic.

8

Additional Rights

- ☒ Create Categories
- ☒ Create Organizations
- ☒ Edit Organizations
- ☒ Deactivate Organizations
- ☐ Create Events
- ☐ Add Bulk Attendees via Web
- ☒ Add Members Without Invite
- ☐ Set Event Dates in the Past
- ☐ Edit Feature Settings

You cannot edit your own access.

People

PEOPLE CONTACT TRACING

1000
People

10
Users

Search People

TYPE FILTER

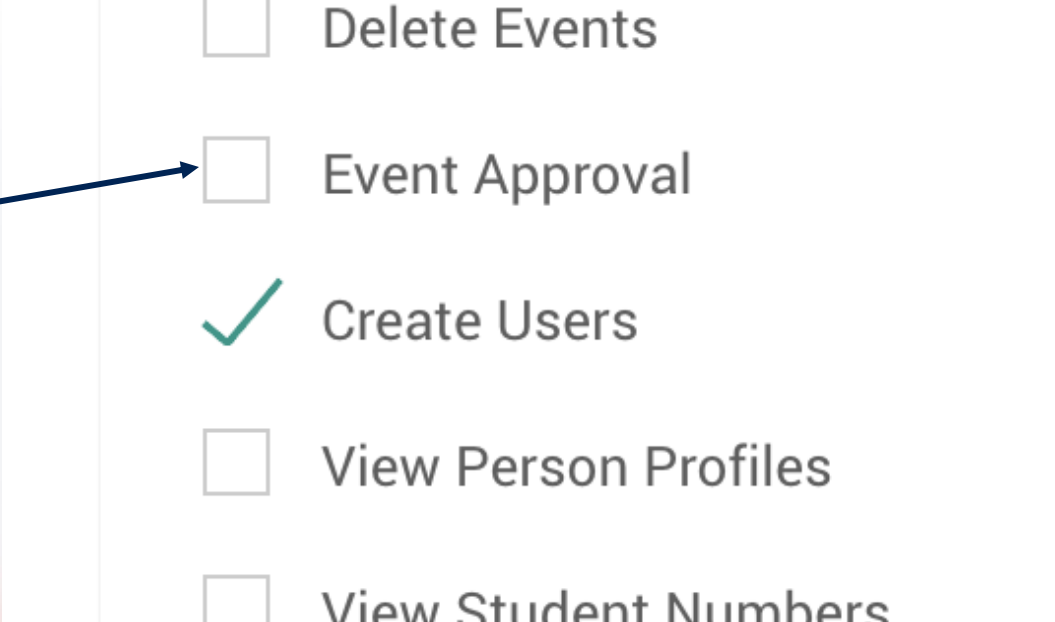
Name	Email	Student Number	Type	
Bucknall, Freemon	kseale+5945397@moderncampus.com	5945397	User	⋮
Dungee, Terrye	kseale+8210268@moderncampus.com	8210268	User	⋮
Chippin, Dael	kseale+4654766@moderncampus.com	4654766		⋮
Seraison, Gibb	kseale+5885057@moderncampus.com	5885057	User	⋮

Help

You can give access UP TO the level you have

- Account admin with “Create User” can create ALL users

E.g. If you do NOT have
“Event Approval” you
will not be able to grant
the “Event Approval”
permission



A screenshot of a permission management interface. It shows a list of permissions with checkboxes. An arrow points from the text 'will not be able to grant the “Event Approval” permission' to the 'Event Approval' checkbox, which is currently unchecked. The 'Create Users' checkbox is checked with a green checkmark.

<input type="checkbox"/>	Delete Events
<input type="checkbox"/>	Event Approval
<input checked="" type="checkbox"/>	Create Users
<input type="checkbox"/>	View Person Profiles
<input type="checkbox"/>	View Student Numbers

One user can have multiple roles.

Access

ADD ROLE

Role

REMOVE

Role

Organization Administrator

Organizations

Bird Watching Club

Additional Rights

☒ Edit Organizations

☒ Create Events

☐ Delete Events

☐ Event Approval

Role

REMOVE

Role

Organization Administrator

Organizations

Anime Club

Additional Rights

☒ Edit Organizations

☒ Create Events

☒ Delete Events

☐ Event Approval

How to Grant Access



```
graph LR; Account --> User; User --> Role; Role --> Permissions
```

Account

User

Role

Permissions

Step 1: Add person as a “user.”

People

PEOPLE CONTACT TRACING

1000
People

10
Users

Search People

TYPE FILTER

Name	Email	Student Number	Type	
Bucknall, Freemon	kseale+5945397@moderncampus.com	5945397	User	⋮
Dungee, Terrye	kseale+8210268@moderncampus.com	8210268	User	⋮
Chippin, Dael	kseale+4654766@moderncampus.com	4654766		⋮
Seraison, Gibb	kseale+5885057@moderncampus.com	5885057	User	⋮

Help

TYPE ▾

FILTER ▾

Student Number

Type



5945397

User



8210268

User



4654766



5885057

User



Already a user.

Not yet a user.

 Help

TYPE ▾

FILTER ▾

Student Number

Type



5945397

User



8210268

User



4654766



5885057

User



 Help

Select the
three
stacked dots.

		TYPE ▾	FILTER ▾
		Student Number	Type
om	5945397	User	⋮
om	8210268	User	⋮
om	465476		⋮
om	588505		

View Profile

Add as a User

Download Smart Transcript

Help

Select “Add as a User”

Add role AND check off permissions

18

The screenshot displays the 'People' management section of the Modern Campus system. It features a sidebar with various navigation icons, a header with the title 'People' and a '+', and two summary cards showing '1000 People' and '10 Users'. Below the summary cards is a search bar labeled 'Search People' with 'TYPE' and 'FILTER' dropdowns. A table lists four users with columns for Name, Email, Student Number, and Type. A 'Help' button is visible in the bottom right corner.

Name	Email	Student Number	Type
Bucknall, Freemon	kseale+5945397@moderncampus.com	5945397	User
Dungee, Terrye	kseale+8210268@moderncampus.com	8210268	User
Chippin, Dael	kseale+4654766@moderncampus.com	4654766	
Seraison, Gibb	kseale+5885057@moderncampus.com	5885057	User

TYPE ▾

FILTER ▾

Student Number

Type



moderncampus.com

5945397

User



moderncampus.com

8210268

User



moderncampus.com

4654766



moderncampus.com

5885057

User



 Help

Select the
three
stacked dots.

TYPE ▾

FILTER ▾

Student Number

Type



moderncampus.com

5945397

User



moderncampus.com

8210268

User



moderncampus.com

4654766

View Profile

Edit

moderncampus.com

5885057

Download Smart Transcript

Select "Edit."

Help

Under Access --> Role, select the correct role

Edit User

✓ SAVE

Basic Information

Email
kseale+9723782@moderncampus.com

First Name

Last Name

Rick

Christal

Access

ADD ROLE

Role

REMOVE

Role

Help

Used drop
down menu

Select the correct role.

22

The screenshot displays the 'Access' management section of the Modern Campus interface. At the top right is an 'ADD ROLE' button. Below it is a table with a header row labeled 'Role' and a 'REMOVE' button. The table body shows a dropdown menu with four options: 'Campus Administrator', 'Campus View', 'Category Administrator', and 'Organization Administrator'. An arrow points from the text 'Choose from 4 roles.' to the 'Campus Administrator' option. Below the table, the text 'Co-curricular features' is partially visible.

Remove access

Role

REMOVE

Role

Organization Administrator

Organizations

Bird Watching Club

Update a User

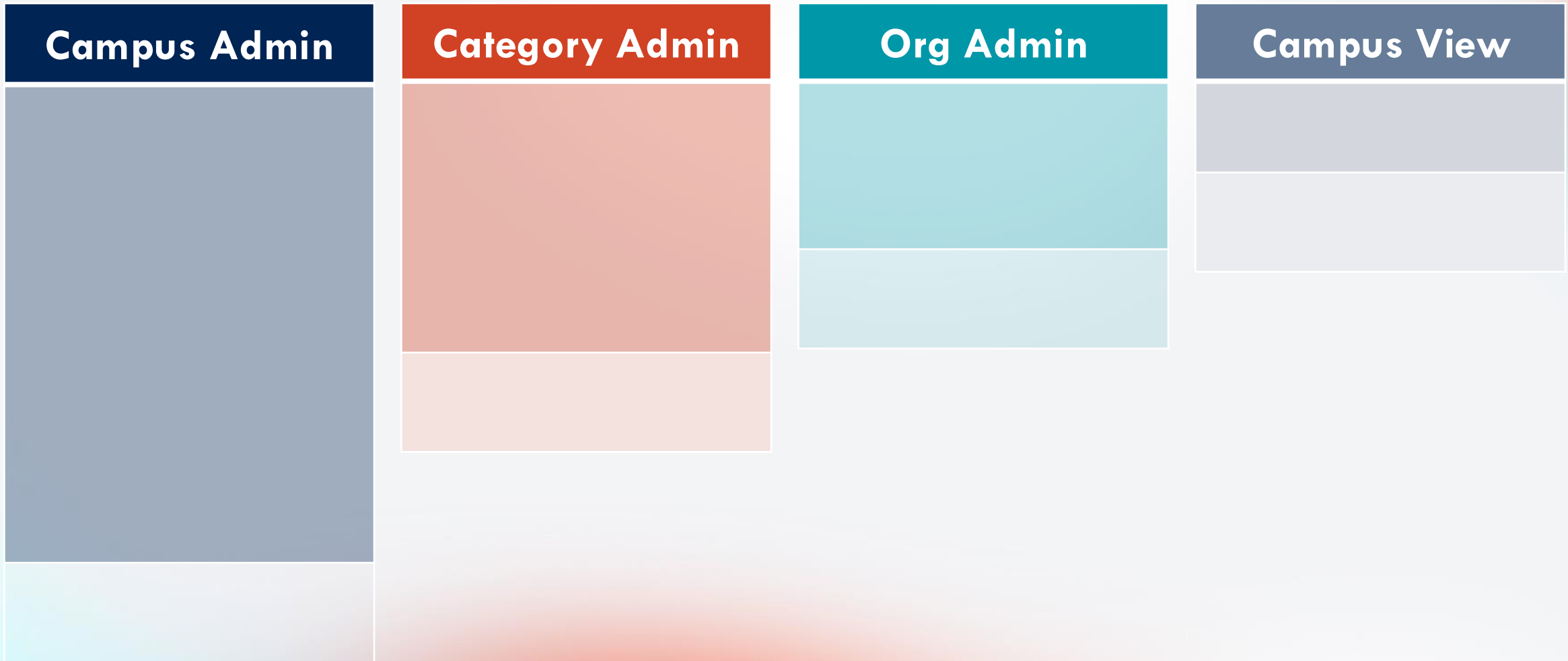
- People
- Choose User
- Click the “Pencil”
- Change Permissions
- “Save”

24

The screenshot shows the Modern Campus interface for a user named Kelsey. The header includes the title "Training Kelsey" and a "STUDENT PORTAL" button. The main content area has a large greeting "Good morning, Morrie!" and a section titled "Let's do something." with three prompts: "It's been 305 days since you've created an event. [Create one now.](#)", "Looks like you haven't made a form yet. [Create one now.](#)", and "The 'Food Pantry' organization doesn't have any members. [Invite someone.](#)". On the right, an "Action Items" section lists five items, each with a right-pointing arrow: "The organization 'Dog Walkers of CU' needs your approval.", "The timeline '5 Service Hours' needs your approval.", "The organization 'Cricket Watercolor Club' needs your approval.", "The organization 'Delta Delta Delta' needs your approval.", and "The organization 'Walking Around' needs your approval.". A vertical sidebar on the left contains various icons, including a plus sign, a grid, a document, a bell, a calendar, a dollar sign, a bar chart, a person, and a speech bubble. At the bottom left of the sidebar are a gear icon, a red circle with a white 'S', and a question mark icon. At the bottom right of the main content area is a dark blue "Help" button with a question mark icon.

User Access Levels

User Permissions



26

Campus Administrator

- View all dashboards
- Additional rights available
- Examples:
 - Main contact
 - Secondary contact
 - IT (only if main contact does not monitor the Student Imports page)

Campus View

- View all dashboards
- No additional rights available
- Examples:
 - Vice President
 - Dean of Students
 - IT (who does NOT need to monitor the Student Imports page)

Category Administrator

- View all dashboards relative to a **specific category**
- Additional rights available
- Examples:
 - Department heads
 - FSL Director
 - Intramurals Director
 - Leader of Religious and Spiritual Life
 - Student Government Leaders

Organization Administrator

- View all dashboards relative to **selected organization**
- Additional rights available
- Examples:
 - Organization officers
 - Organization advisors

User Permission Options

Create User

- Add a user
- Edit user access

<input type="checkbox"/>	Delete Events
<input type="checkbox"/>	Event Approval
<input checked="" type="checkbox"/>	Create Users
<input type="checkbox"/>	View Person Profiles
<input type="checkbox"/>	View Student Numbers

Organization Permissions

- **Create Categories:** Add and change Categories. *Campus Admin only.*
- **Create Organizations:** Create new organizations. *Not available for Organization Administrators.*
- **Edit Organizations:** Edit details of organizations they have access to.
- **Deactivate Organizations:** Deactivate organizations they have access to.

Additional Rights

- ☒ Create Categories
- ☒ Create Organizations
- ☒ Edit Organizations
- ☒ Deactivate Organizations
- ☐ Create Events
- ☐ Add Bulk Attendees via Web
- ☒ Add Members Without Invite
- ☐ Set Event Dates in the Past
- ☐ Edit Feature Settings

Event Permissions

- **Create Events:** Submit and edit events for organizations they have access to.
- **Delete Events:** Delete events they have access to.
- **Add Attendees via Web:** Check students into events using the web portal one at a time. *(Note: Anyone with the pin can check in using the mobile app!)*
- **Add Bulk Attendees via Web:** Bulk add students into events using the web portal.
- **Set Event Date in the Past:** Backdate an existing event or create a new event with a start date in the past.

- ✓ Create Events
- ✓ Delete Events
- ✓ Event Approval
- ☐ Create Users
- ☐ View Person Profiles
- ☐ View Student Numbers
- ✓ Add Attendees via Web
- ✓ Add Bulk Attendees via Web
- ☐ Add Members Without Invite
- ✓ Set Event Dates in the Past

Profile Permissions

- **View Person Profiles:** See student profiles
 - Name
 - Email
 - membership information
 - events attended
 - If the user has the add/edit users right, they will also see what the user has access to.

Note: "View Person Profiles" is the only user permission that can be granted to those who have **Campus View access**. They will not have the ability to make any changes.

- ✓ View Person Profiles
- ✓ View Student Numbers
- ☐ Add Attendees via Web
- ☐ Add Bulk Attendees via Web
- ☐ Add Members Without Invit
- ☐ Set Event Dates in the Past
- ☐ Edit Feature Settings
- ☐ Manage Finance
- ☐ Edit Finance
- ✓ Download Smart Transcript

Profile Permissions

- **View Student Numbers:** See Student ID Numbers on the Student List page as well as Event Attendee Exports.
- **Download Smart Transcript:** Download the Smart Transcript of the people they have access to.

- ☒ View Person Profiles
- ☒ View Student Numbers
- ☐ Add Attendees via Web
- ☐ Add Bulk Attendees via Web
- ☐ Add Members Without Invite
- ☐ Set Event Dates in the Past
- ☐ Edit Feature Settings
- ☐ Manage Finance
- ☐ Edit Finance
- ☒ Download Smart Transcript

Finance Permissions

- **Manage Finance:** View their organizational budget and submit forms against this budget.
 - Student Org Leaders
- **Edit Finance:** See their organization's upper level budget and make changes and view their own organizational budget.
 - Account or Category Admin

- ☐ Set Event Dates in the Past
- ☒ Manage Finance
- ☒ Edit Finance
- ☐ Download Smart Transcript

Protecting Student Data

Personal Information Management

39

Profile
Restriction



View Person Profiles

Student
Number
Restriction



View Student Numbers

Smart
Transcript
Restriction



Download Smart Transcript

Student Organization Leader Access

Student organization leaders

- The **FIRST** student organization leaders' permissions = **manual**
- Student organization leaders **appointed during transition** = **automatic**

Access

Role REMOVE

Role

Organization Administrator

Organizations

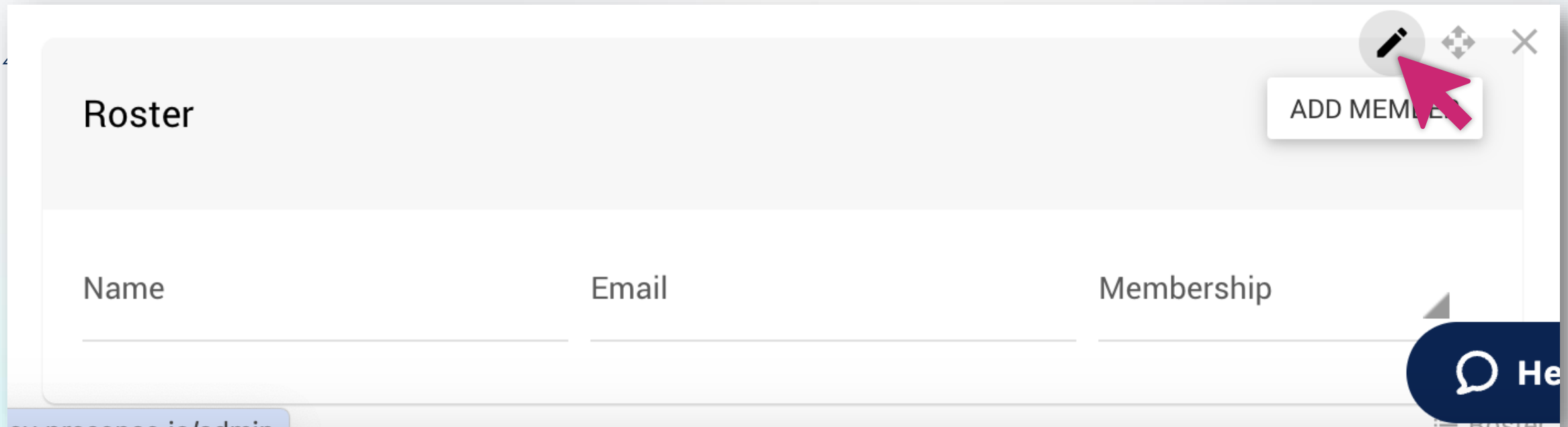
Bird Watching Club

Additional Rights

- ☒ Edit Organizations
- ☒ Create Events
- ☐ Delete Events
- ☐ Event Approval

Enable “Create officers as Users”

- Check your organization registration form if you are having trouble with permission transfer

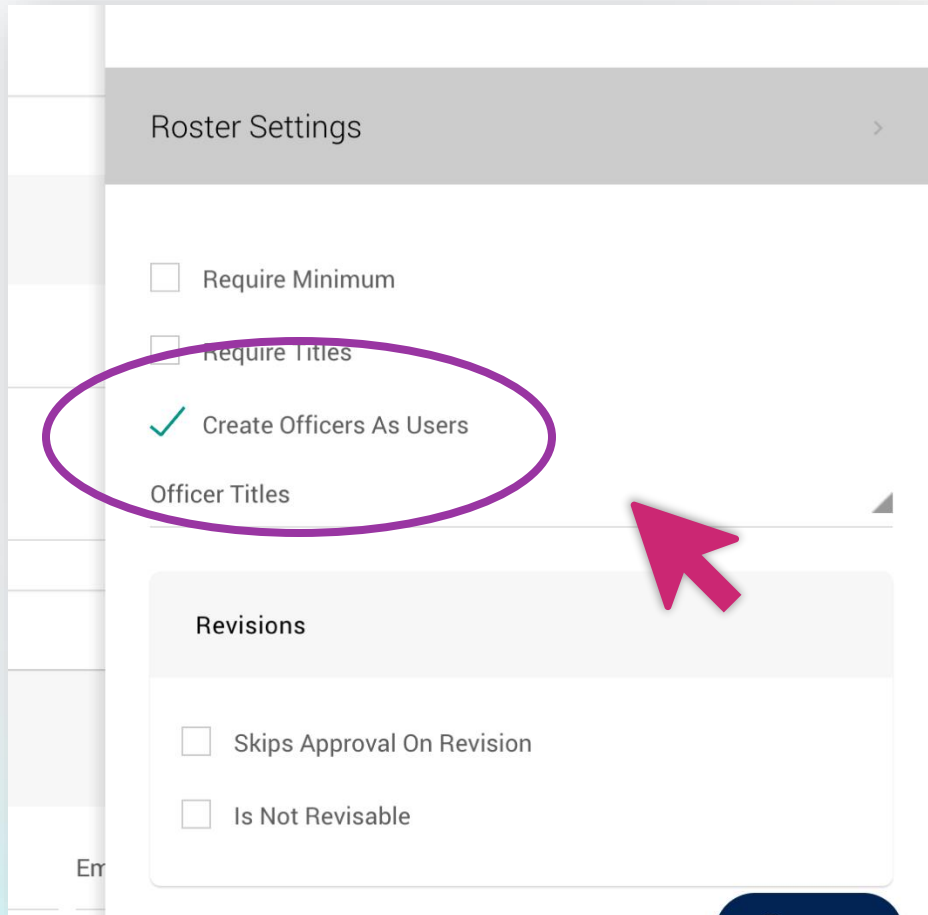


The screenshot displays the 'Roster' management interface. At the top, there is a header bar with the title 'Roster' on the left and a toolbar on the right containing an edit icon (pencil), a refresh icon (circular arrow), and a close icon (X). Below the header is a table with three columns: 'Name', 'Email', and 'Membership'. Each column has a corresponding input field below it. In the top right corner, a pink arrow points to a button labeled 'ADD MEMBER'.

Name	Email	Membership
<input type="text"/>	<input type="text"/>	<input type="text"/>

Organization Registration Form --> Roster Settings

43



Roster Settings >

☐ Require Minimum

☐ Require Titles

☒ Create Officers As Users

Officer Titles

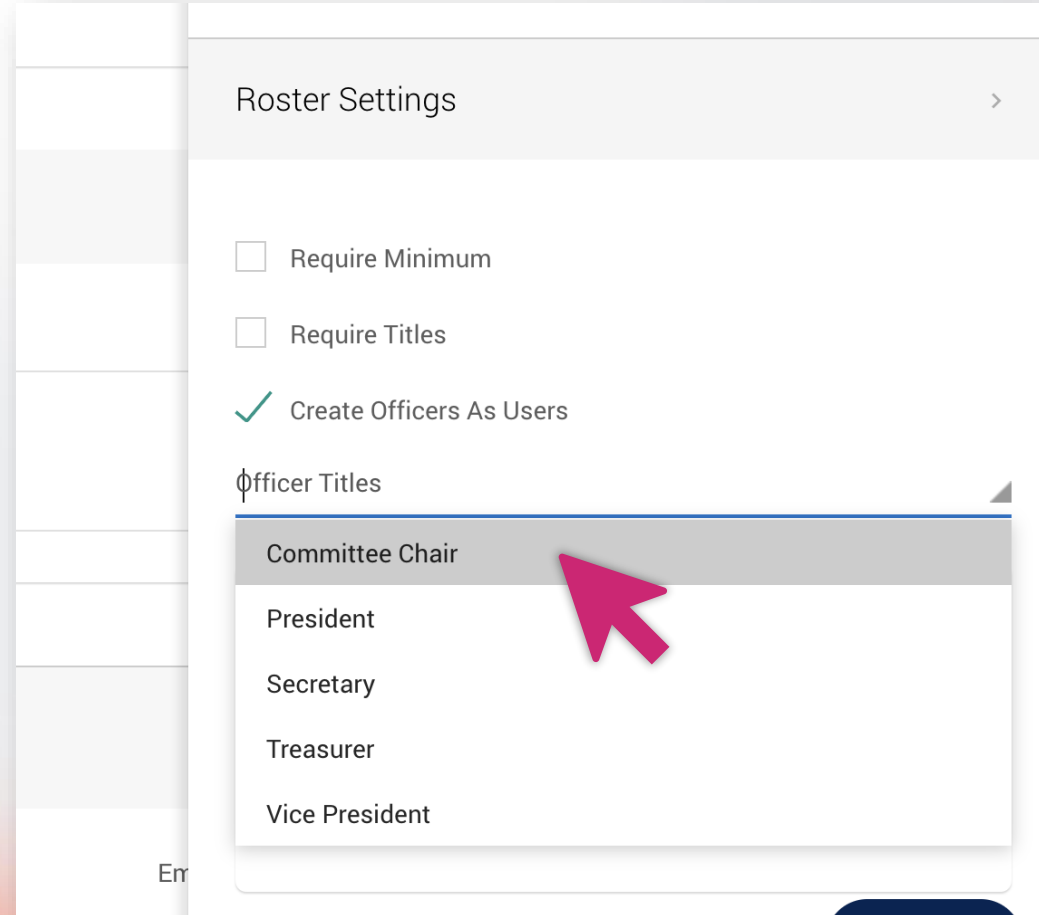
Revisions

☐ Skips Approval On Revision

☐ Is Not Revisable

En

A purple oval highlights the 'Create Officers As Users' option, and a pink arrow points to the 'Officer Titles' section.



Roster Settings >

☐ Require Minimum

☐ Require Titles

☒ Create Officers As Users

Officer Titles

Committee Chair

President

Secretary

Treasurer

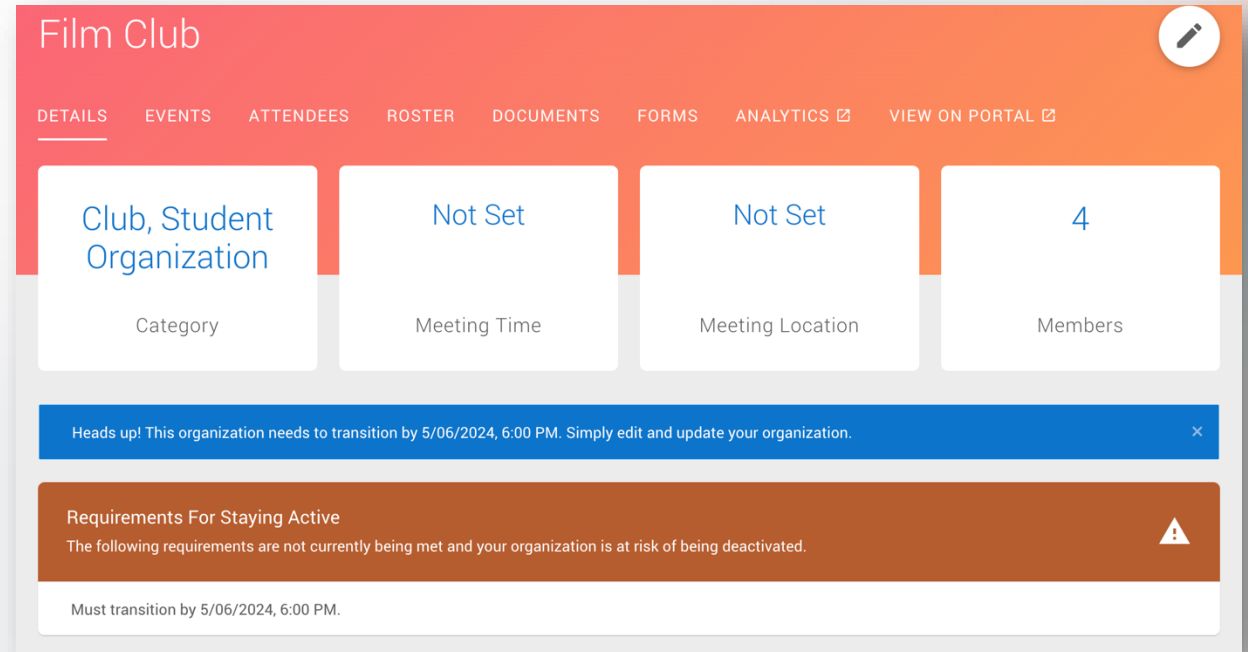
Vice President

En

The 'Officer Titles' dropdown menu is open, showing a list of roles. A pink arrow points to the 'Committee Chair' option, which is currently selected.

Access transfer during transition

- Standard Privileges
 - Edit Organizations
 - Create Events
 - Add Attendees via Web
 - Add Bulk Attendees via Web



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!