THE UNIVERSITY OF IOWA

OrgSync

OrgSync Implementation Checklist

Please use this guide to get started with OrgSync and set up your organization portal. If you've created your personal OrgSync account, you should have administrative privileges for your organization. If you do not, please contact Kristi Finger, Asst. Director for Student Organization Development (kristi-finger@uiowa.edu). If you encounter any technical difficulties or need further training/assistance from OrgSync, please contact OrgSync Support (support@orgsync.com). Also, you may visit the OrgSync online user guide @ http://help.orgsync.com for step by step instructions on each of the items below.
OrgSync offers weekly online trainings. To register, visit http://www.orgsync.com/media_events/events.
Your OrgSync Campus Consultant is Leanna Laskey (leanna@orgsync.com) and she may be contacted directly for further training or instruction regarding portal setup.

Create your personal OrgSync Account: From the Office of Student Life homepage (imu.uiowa.edu/osl) click the gold **"Sign-In OrgSync" button** in the middle of the page. Enter your HawkID and password. Complete the registration and personal profile information. Request to join your organization (My Orgs->Join an Org->Organizations->your org) then complete the "Request for Administrator Access" (Forms).

Set up and Populate your Organization Portal

Settings:

1. ***Org Profile (under Settings).*** This information will be displayed in the online directory of active UI student organizations. ***This is the section that must be reviewed and updated each semester to maintain recognition!***
2. ***Setup***
    a. ***Upload a banner graphic for your organization***
    b. ***Create a welcome message***
3. ***Members***
    a. ***Create account groups.*** Account groups will allow you to setup different access levels to edit different modules and make it easier to target communications to members within your organization. Create committees based on certain events or initiatives your organization is working on to disseminate even more targeted information to your members.
        i. **Please add an account group for INACTIVE MEMBERS and ALUMNI.**
    b. ***Set up group permissions.*** Setting up group permissions allows you to manage access to tools and modules within OrgSync based on your account groups.
4. ***Invite officers.*** Once your officers have joined your organization, you may assign them to the officers group, and together you can begin to add content to your portal.

Create content:

1. ***Add Files (meeting minutes, agendas, etc.)***
2. ***Communication***
    a. Add News Posts
    b. Create a Poll
3. ***Edit Event Categories*** We recommend the following categories:
    a. Organization Meetings
    b. Social
    c. Service
    d. Educational Programs
    e. Leadership
    f. Sports/Athletic Events
    g. Interest or Recruitment
    h. Risk Management (for Greek Letter organizations)
4. ***Add upcoming events and meetings to your organization's calendar.***
5. ***Build online Forms.***
6. ***Invite your members.*** Although you may invite your members at any point during the process, we suggest populating your organization's portal first so that your members see an established community upon joining, allowing them to get involved quickly and easily.