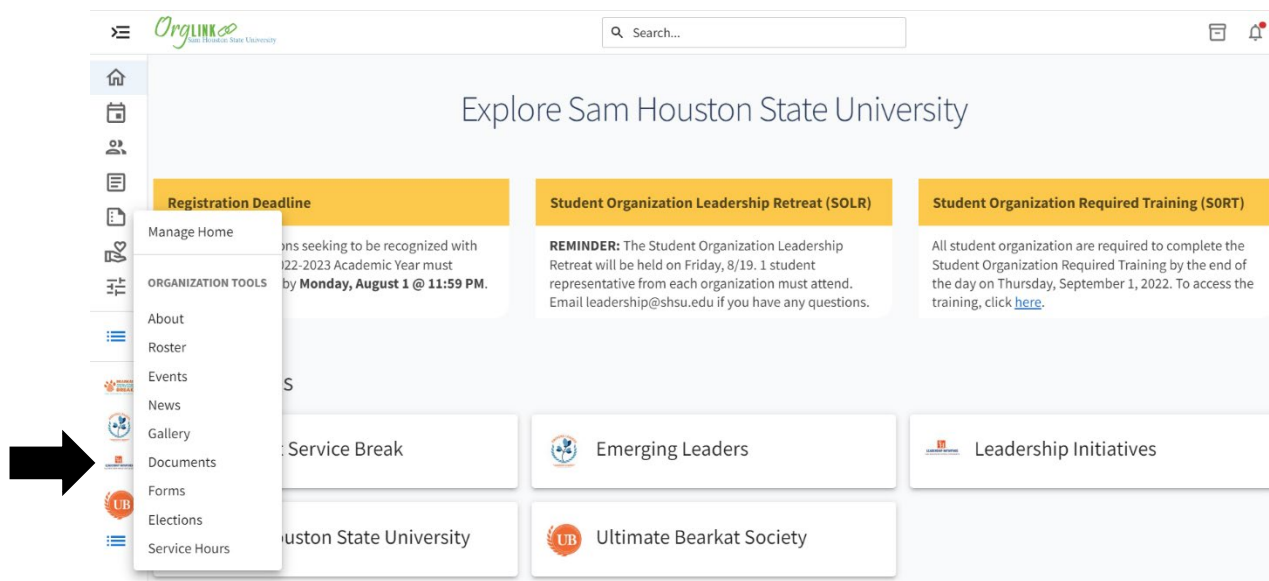


Organization Tool Menu Walkthrough

The **Organization Tool Menu** allows you to create and manage content for your organization. Access the Organization Tool Menu by following the steps below:

1. Log into [OrgLINK](#)
2. Click your organization's icon on the left to open the Organization Tool Menu. You may only see certain tools in the Organization Tool Menu for a particular organization. The tools you have access to will be based on your position within the organization.



You may see any one of the following tools. Click the linked name of the tool to explore a more detailed walkthrough.

Manage Home: Your current page provides a summary of your organization. On this page, you will see your organization profile photo, the name of the organization the number of members, and the name of the Primary Contact.

About: In the About tool, you can update some of your organization's basic details, such as the profile photo, description, summary for the organization directory, contact information, and social media links.

Roster: The Roster tool includes your ability to manage positions for the organization, send organization messages, invite members, remove members, and approve pending memberships.

Events: The Events tool allows you to create and manage your organization's events. Submit an event request, or manage an individual event, including inviting attendees, tracking participation, or changing an event's details.

News: The News tool helps you share what your organization is doing with the community. You can create, edit, and delete News posts from this area.

Gallery: The Photo Gallery helps you create a more visually appealing organization homepage. Photos are a great way to show off the exciting things your organization has done! Your gallery photos will be showcased at the top of your organization's public-facing page.

Documents: The Documents tool allows you to create a shared storage space for important organizational files. You can share these files publicly or only with certain members or Position holders within your organization.

Forms: Use the Forms tool to move any of your organization's paper forms into Engage. Use forms for sign-ups, interest forms, applications, and more!

Elections: The Elections tool allows you to create elections for you organization, either for the entire community to vote on, or exclusive to organization members.

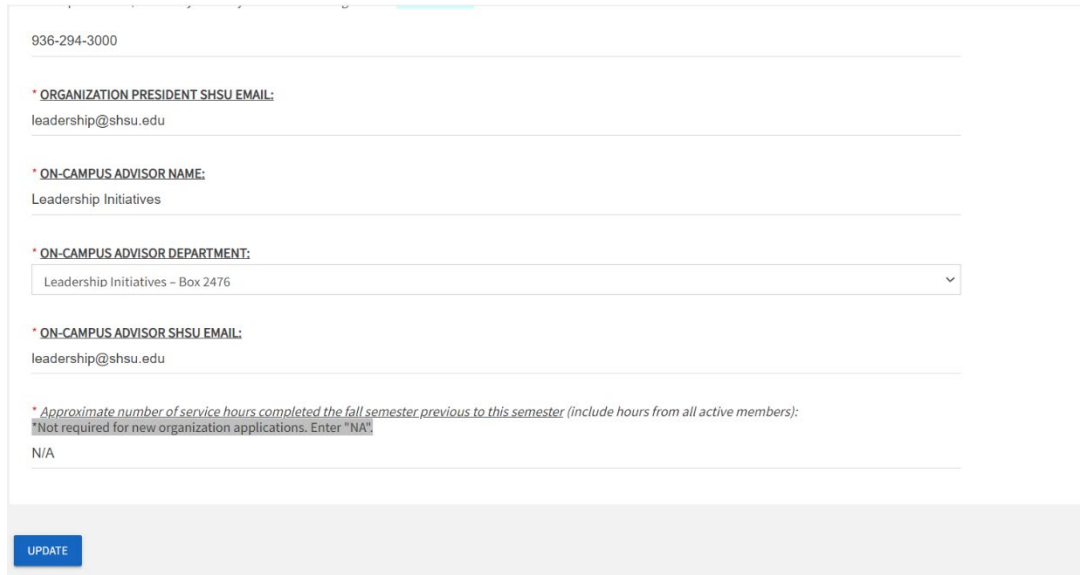
Service Hours: Through the Service Hours feature, you will be able to submit service hours on behalf of your organization's members.

About

To make changes to an organization page, you must be either the primary contact, or hold an officer position within the group that has been assigned access to administrative features.

When updating the organization's information, you will be able to update your organization summary, contact information, social media information and profile picture. If you are adding links to social media pages, make sure they set to public. You can also update any additional fields requested by your campus's administrators.

When you're done making changes, click *Update* to save.



936-294-3000

* ORGANIZATION PRESIDENT SHSU EMAIL:
leadership@shsu.edu

* ON-CAMPUS ADVISOR NAME:
Leadership Initiatives

* ON-CAMPUS ADVISOR DEPARTMENT:
Leadership Initiatives - Box 2476

* ON-CAMPUS ADVISOR SHSU EMAIL:
leadership@shsu.edu

* Approximate number of service hours completed the fall semester previous to this semester (include hours from all active members):
*Not required for new organization applications. Enter "NA".
N/A

UPDATE

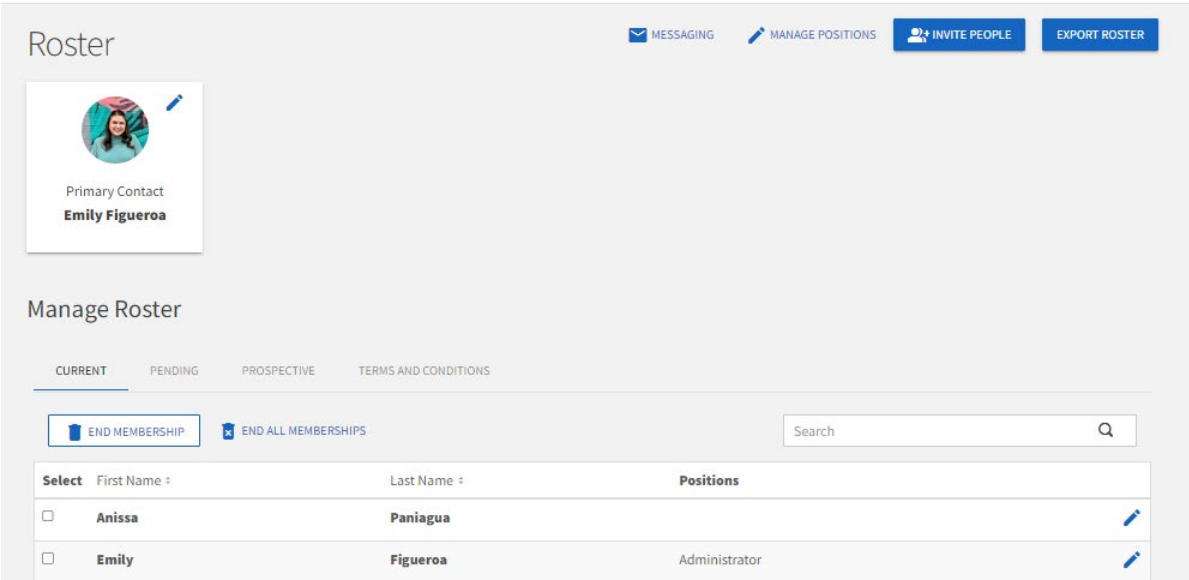
Note: Information listed in the External Page Links section will be made available on your organization home page, and will be shown on the public side of the site. Users that are not logged into the system will be able to see this information, so do not include anything that shouldn't be public.

Reminder: According to SHSU's Student Organization Policy, student organizations must update their OrgLINK About page as soon as changes occur. It is your student organization's responsibility to maintain this page to receive communications and updates from the Department of Student Involvement: Leadership & Service.

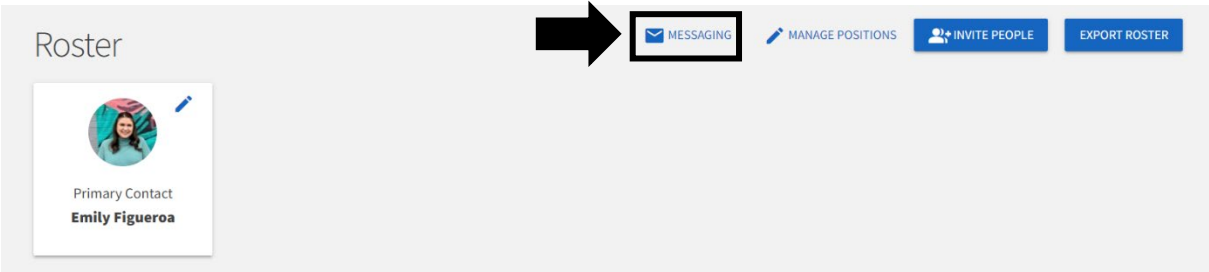
Roster

This tool allows you to manage your roster and keep your information up to date.

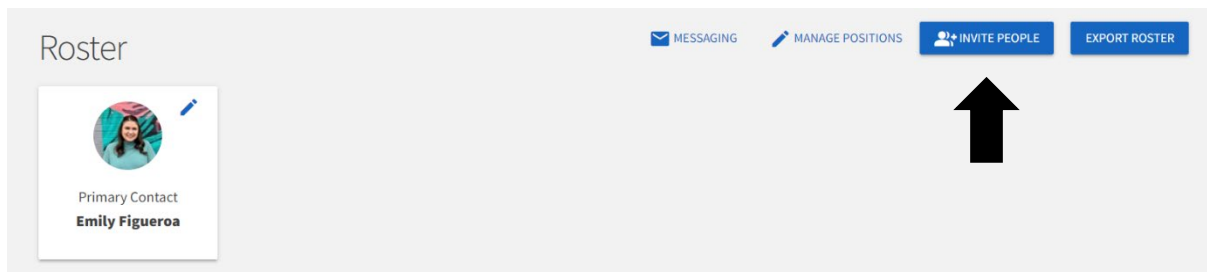
The roster will show you a list of all your organization's members and information about your organization's primary contact. The primary contact is person designated to be the main point of contact for your organization.



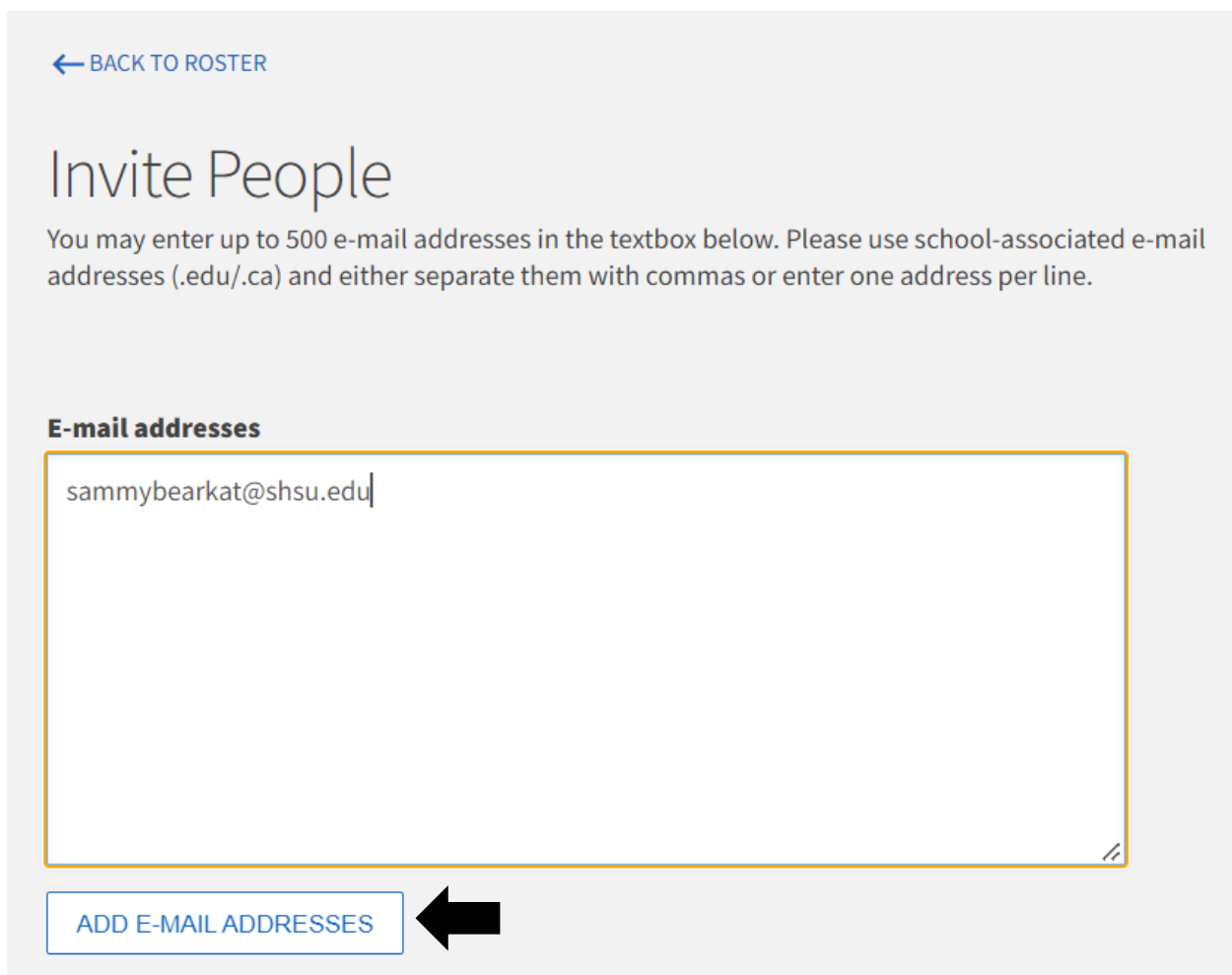
Messaging: As a Roster manager, you have the ability to send messages to your organization members. Click *Messaging* at the top of the *Roster* page to create a message relay.



Inviting members: Invite members to join your organization by clicking *Invite People* at the top of the *Roster* page.



Type in one or more than one email addresses (one per line) then select *Add E-Mail Addresses*.



Select what position you would like to invite the members as, then hit *Send Invitations*.

Invitations will be sent to:

Invite as Member

sammybearkat@shsu.edu

SEND INVITATIONS CANCEL

Ending memberships: Locate the member(s) you would like to remove and check the box on the far left of the members' names. Click *End Membership* at the top of the user list. A confirmation box will appear to let you know that ending this user's membership will also remove all of their positions and permissions.

Manage Roster

CURRENT PENDING PROSPECTIVE TERMS AND CONDITIONS

END MEMBERSHIP END ALL MEMBERSHIPS Search

Select	First Name	Last Name	Positions
<input type="checkbox"/>	Anissa	Paniagua	
<input type="checkbox"/>	Emily	Figuroa	Administrator
<input type="checkbox"/>	Gabby	Sauceda	Administrator
<input type="checkbox"/>	Kayci	Pharaon	
<input type="checkbox"/>	Meredith	Conrey	Department Head

Approving memberships: As an officer, you also have control over who joins your organization. When you are updating the roster, you will see tabs for Current, Pending, and Prospective members. *Pending* members are those you have invited who have not yet accepted your request. *Prospective* members are those who have requested to join and are waiting on a decision.

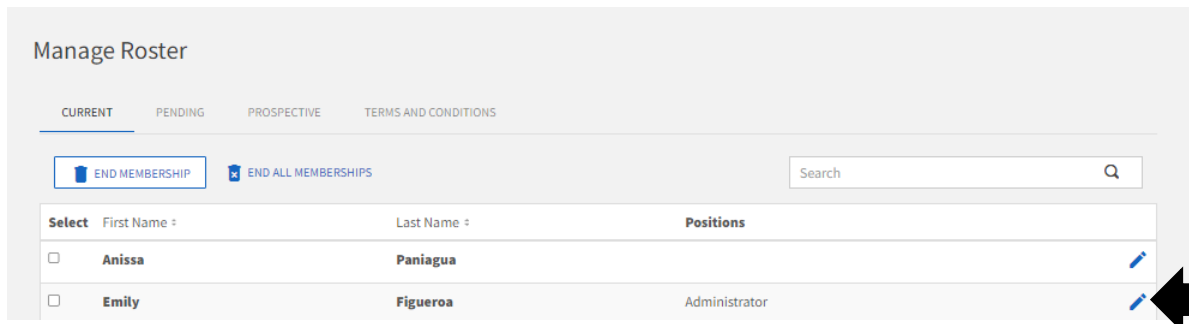
Manage Roster

CURRENT PENDING PROSPECTIVE TERMS AND CONDITIONS

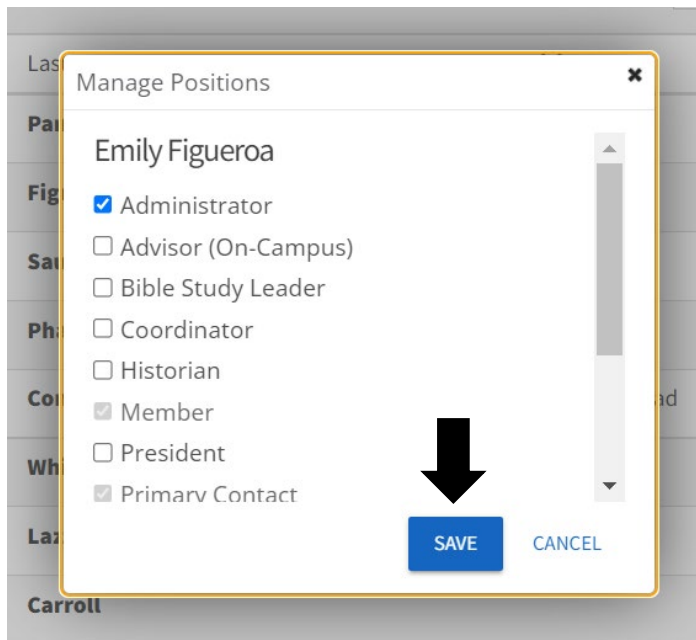
END MEMBERSHIP END ALL MEMBERSHIPS Search

Select	First Name	Last Name	Positions
<input type="checkbox"/>	Anissa	Paniagua	
<input type="checkbox"/>	Emily	Figuroa	Administrator

Assigning people to Positions: In the "Manage Roster" section, you can also edit the positions your different members hold. Click *Edit Positions* to the right of a user name to take this action. A list of all available positions will appear. Assign a user to a position by clicking the appropriate checkbox and clicking Save.



Update the position type then select Save.

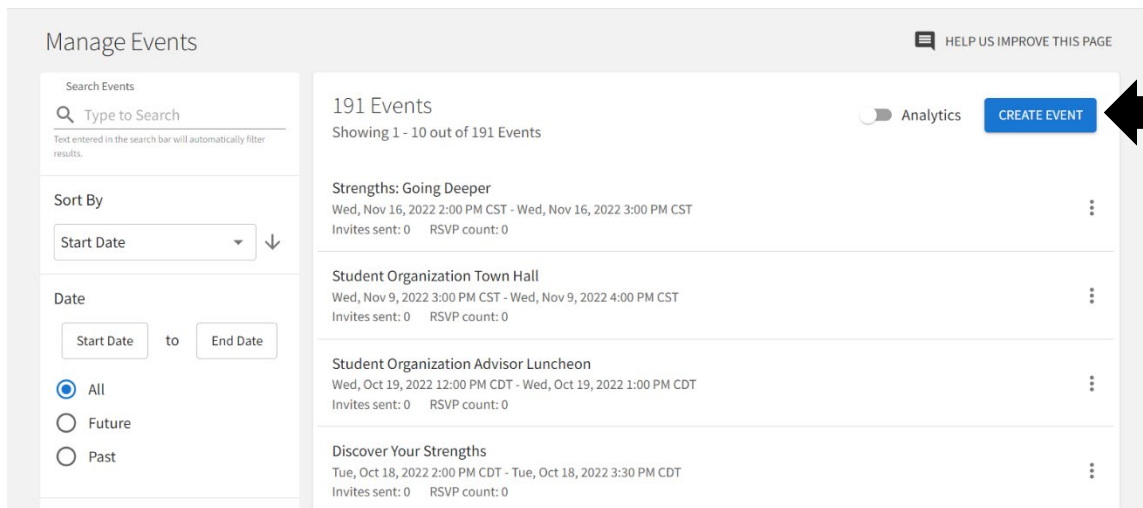


Reminder: According to SHSU's Student Organization Policy, student organizations must update their OrgLINK roster within 3 business days of an election. This is a great time to update the officer list and remove any members who have left the organization. It is your student organization's responsibility to maintain an updated roster to receive communications and updates from the Department of Student Involvement: Service & Service.

Events

The *Events* tool allows you to manage your organization's events from one central location. This walkthrough will provide you with the information you need to know to successfully manage your organizations events.

Create an Event: Look for the *Create Event* button at the top of the page. Remember, you will only see this option if you have full management access over events.



Event Information: The first page allows you to enter your event's basic information such as event title, theme, description, start and end time, and location into their respective boxes. You can also identify if the event will be co-hosted with other organizations. Required fields are marked by the red asterisk at their start.

Multiple dates: Click *Add Another Date* to create a recurring event.

Location: You can also choose whether to include a helpful map, courtesy of Google Maps, to your event details page. When submitting the details of an event, you can also add an online location as well as instructions for how to access it. Events can be exclusively online or combined with a physical location for both online and in-person attendance.

Event Visibility – Listed below are some features regarding how your event is show to the public.

Show-To	Determine whether the event should show to the public, authenticated users only, only members of hosting organizations (and cohosting organizations), or only to invited users
Event Categories	Associate the event with one or more event categories
Perks	Associate the event with one or more event perks (special benefits for your attendees)
Additional Information	Complete any additional fields that may be required by your campus. Depending on your institution's settings, your responses to these questions may show publicly on your published event page.

RSVP: The second page allows you to customize your RSVP settings. Use this tool to collect information from your attendees before the event or to set a specific attendee limit.

Post-Event Feedback: The third page allows you to collect quick feedback from your attendees after an event is over. You can choose to create a questionnaire that will be emailed out to attendees after the event.

Event Cover Photo: The fourth and final page allows you to customize your event's cover photo by clicking *Choose File* and adding an image that you feel will draw attention to your event. We recommend a photo that is 1024px by 600px or larger, under 10MB. If you choose not to upload a photo, a default photo will be chosen for you based on the theme of your event.

Once you have filled out all of the necessary information for your student organization's event, you will be asked to fill out addition questions. Please figure out the following details before submitting your event on OrgLINK.

- Is this event on campus or off campus?
- Type of event (sponsored special event, mixer, date party, semi-formal/formal, etc.)
- Is this a recurring General Business meeting?
- Is this a tabling event?
- Will this event require AV/Amplified sound?
- Is this student organization affiliated with Fraternity and Sorority Life or SHSU Club Sports?
- Will this event be open to the general public or closed by invitation only?
- Approximately how many people will attend this event?
 - o Will this event have more than 100 people?
- Will this event have off-campus guests, off-campus speakers, or minors?

- Will alcohol be present at this event?
 - o Has law enforcement been scheduled?
- Types of transportation
- Will the student organization be serving food at this event?
- Will the student organization be charging admission or accepting cash at this event?
- Student organization Point of Contact
- Point of Contact Phone Number
- Point of Contact SHSU Email

Once these questions are answered and you have submitted your event, your student organization advisor and the Department of Student Involvement will need to approve the event. Upon approved, you will then be available for viewing and for the audience you selected to RSVP.

Manage Events: From your event list, you'll be provided a list of all of the events you have going on, and you can filter by those that are approved vs those that have been cancelled, as well as those that are current or upcoming, those that are past, or by all events. Click on the name of an event to manage it further.



The screenshot shows an event management page with the following details:

- Event Title:** Get a PIZZ-A that Graduation Medal
- Host Organizations:** Leadership Initiatives + 1 other
- Location:** Lowman Student Center - 325
- Begins:** Wednesday, August 24, 2022 at 12:00 PM CDT
- Ends:** Wednesday, August 24, 2022 at 1:00 PM CDT
- Event Rating:** 0.0 (displayed with five stars)
- Buttons:** CHANGE DETAILS, CANCEL EVENT
- Navigation:** View Event, Submissions
- STATUS:** Approved
- VISIBILITY:** Students & staff at Sam Houston State University- OrgLINK
- RSVP SETTING:** Anyone

Managing Tools – Listed below are some managing features for your student organization’s event.

Change Details	If you need to update information about your event, like changing the date or location, you can do so by clicking <i>Change Details</i> . This will walk you back through your event
----------------	--

	request process and allow you to make any changes as necessary.
Cancel Event	If you no longer plan to host this event, "Cancel Event" allows you to send a message to all users who are involved in the event, including invitees. The event will remain on your page but will be listed as cancelled.
View Event	Select this icon to switch to see what your student organization's event looks like to the public.
Submissions	You can view the event request submission(s) for this particular event.

You also have the ability to invite users to the event, review RSVPs and track attendance from this page. You will also find a link and a QR code that you can share with individuals who wish to RSVP to your event.

EVENT ATTENDANCE

6
Invitees

0
Attended

0
Absent

0
Excused

ATTENDANCE URL [COPY URL](#) [VIEW QR CODE](#)

Any Engage user who visits this URL within 72 hours after the event ends will be marked as "Attended" for this event.

POST EVENT FEEDBACK [SEND NOTIFICATIONS](#) [EXPORT FEEDBACK](#)

Event Ratings and Evaluation Questions are anonymous and only visible to the Event Organizer and users with Management permissions.

Notifications cannot be sent unless attendance has been tracked by at least one attendee. Sending notifications will only alert attendees once, whether or not they've already given feedback on the event.

0.0

No ratings have been submitted

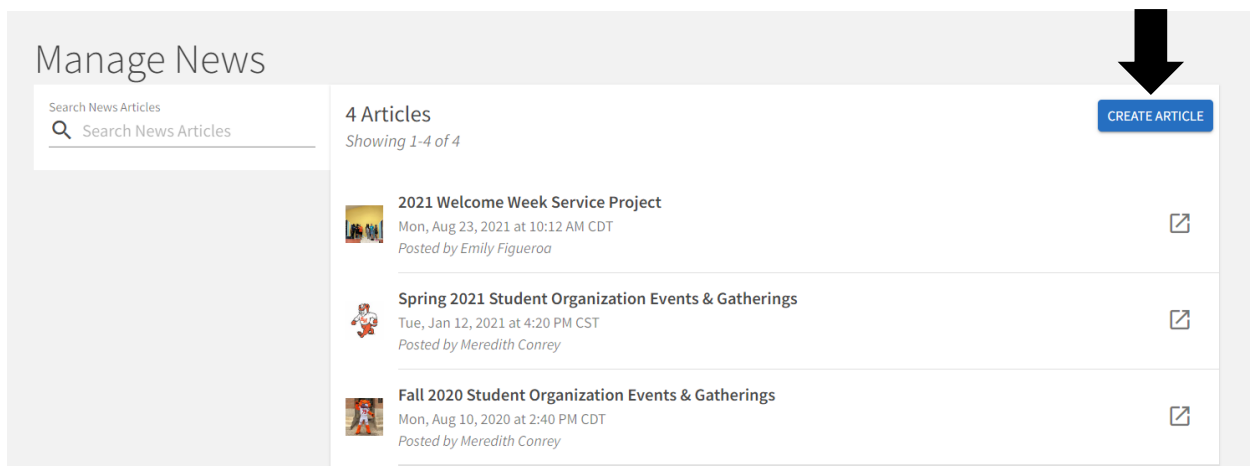
5 Stars		0
4 Stars		0
3 Stars		0
2 Stars		0
1 Star		0

Reminder: Please read through the Student Organization Policy to see when events should be uploaded.

News

The News tool allows you to keep your members up to date on all of your latest news. With a format like a blog, members can view a quick summary of the most recent news or drill down to view the full contents of each post. To view News in your organization, navigate to your organization's public page and scroll until you see News posts listed.

Create a news article: To create a News Article, Click the *Create Article* button to get started.



Article Information: This page will ask for a title, summary, and the content of the article. You can also select a headline image.

This page will also ask for visibility settings. This allows you to determine who can see your news post.

Finally, select whether you would like to notify members of your organization that this news article has been shared. When you notify members, an email will be sent including the title, summary of the article, and a link to view the full post.

Create News Article

Title *

Article Title *


Summary *

Article Summary *
(up to 250 characters)

Body *

B
 I
 U

Enter the body of the article



Drop file or click to upload.

Image Caption

Visibility

Visibility
Public

Edit/delete an article: If you would like to edit or delete a news article from your site, you will first click on the article and then select to either edit or delete the article.

2021 Welcome Week Service Project

Organization
Leadership Initiatives

Author
Emily Figueroa

Post Date
Mon, Aug 23, 2021 at 10:12 AM CDT

Summary

Welcome Week Service Project - New Danville


Body

On Friday, August 20, 2021, 8 students gathered to complete the Welcome Week Service Project.

Article Actions

EDIT ARTICLE

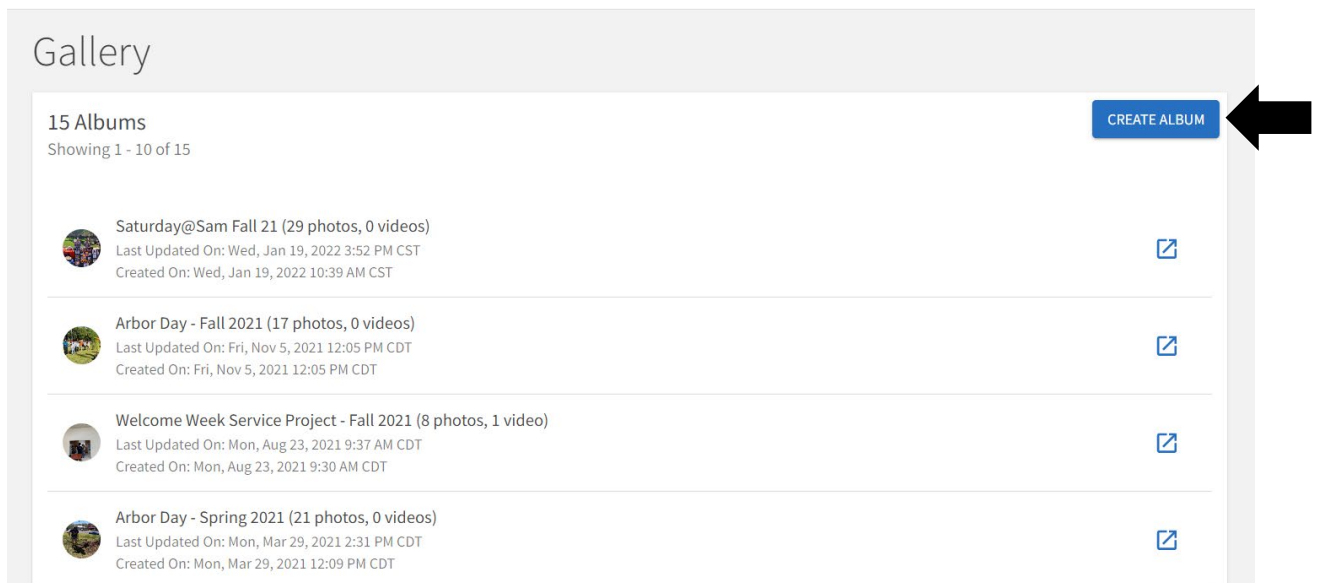
DELETE ARTICLE



Gallery & Documents

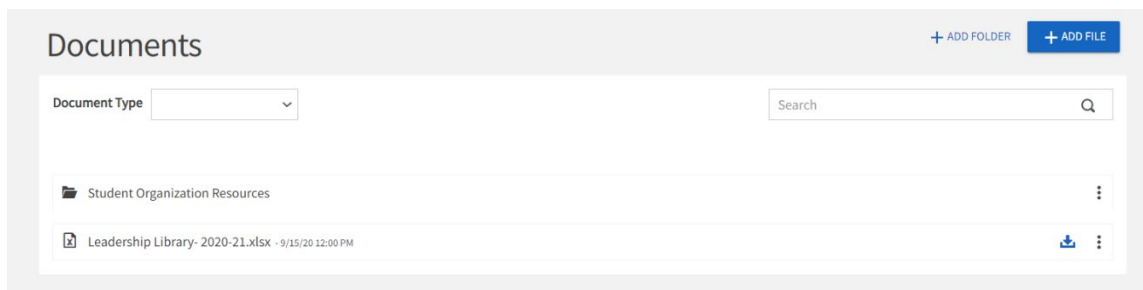
Photos: Photos are a great way to show off the exciting things your organization has done! Your gallery photos will be showcased at the top of your organization's public-facing page.

Uploading Photos: To add photos to your organization's gallery, click *Create Album* and Select the file(s) from a saved location and include a caption.



Documents: The *Documents* tool allows you to create a shared storage space for important organizational files. You can share these files publicly or only with certain members or Position holders within your organization.

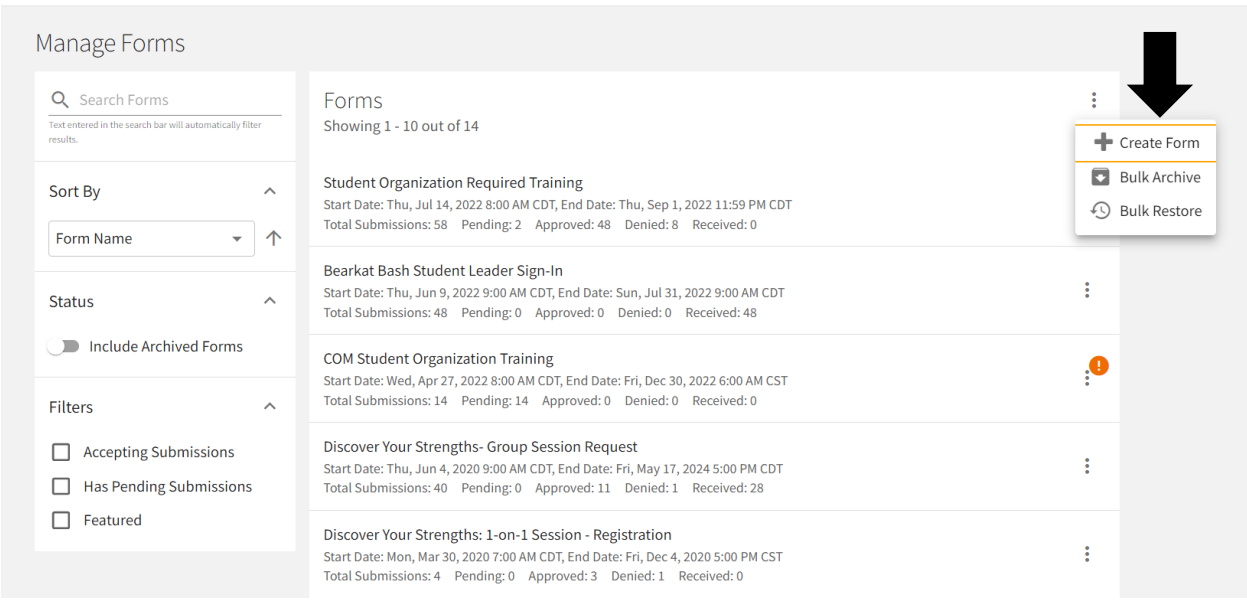
Uploading Documents: To add documents to your organization's profile, click *Add File* and Select the file from a saved location.



Forms

Creating a paperless office or organization is easy in Engage - take all your forms online using the Form builder! The Forms tool can be used for a variety of purposes and the easy-to-use tools in Engage make it easy to move many of your current paper-based processes into your site.

Create a form: To create a form, click the three dots on the top right corner then select *Create Form*



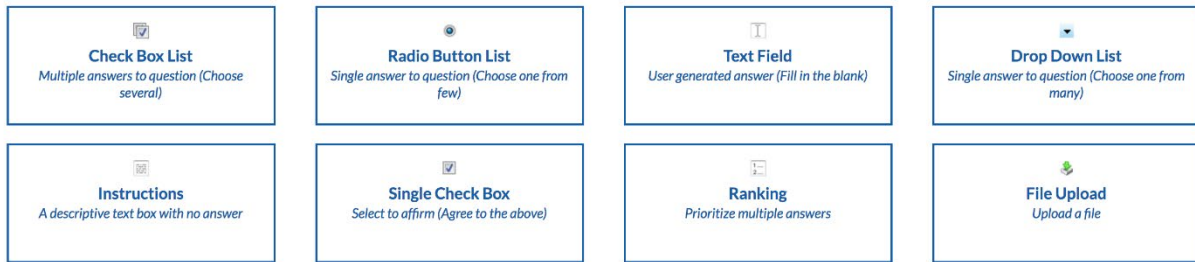
Form Settings: When creating a form, you will first be prompted to identify your form properties. Enter a name for your form and then fill out the additional settings. See below for an explanation of each setting.

Active	Determine if the form should be accessible yet. If the active option is not chosen, then users will not be able to complete the form. Leaving "Active" unchecked allows you to work on a form before making it live to your users.
Start/end time	The time period for which the form should be open. Submissions will only be accepted during this time period.
Feature in Explore Forms	Enabling this option will make this form appear as "Featured" in the Forms Directory in Explore, allowing users to more easily find and fill out this form. <i>This option only appears to community-wide administrators who oversee forms.</i>

Hide from Explore Forms	Enabling this option will hide the form from the Explore view of Engage, including the Forms Directory and the organization page that created the form. This option can be used to hide organization registration related forms from public view, or to make forms private to send via message relay to a subset of users. <i>This option only appears to community-wide administrators who oversee forms.</i>
Submission Approval Process	Choose whether you would like the form's submissions to go through an approval/denial process where they are pending until processed, or if you prefer the for's submissions to be automatically marked as "received" without any approval process.
Allow Submissions from Public Users	Enabling this option means anyone, including those who do not have an account in your community, is able to fill out the form. If you enable this setting, "allow multiple submissions" will be disabled because there is no method to limit respondents to one submission.
Collect Personal Information	If allowing form submissions from public users, you can choose to add an additional screen to the submission process which will collect the name and email address of any user who completes the form without being signed in.
Allow Multiple Submissions	Users can submit more than one submission. If this option is not selected, users will be restricted from the form after one submission.
Submission Restrictions	Determine if you want to restrict the form to certain users. If you're creating this form at the administrative level, you have the option to restrict the form to primary contacts in specific organization types. If you create this form in an organization, you can restrict the form to users within your organization that hold a specific position. If you want to make your form available to any user in your community, do not select any submission restrictions.

Form Questions: After you determine the settings for your form, you'll be taken to the form builder and you will land on the first page of your form. At any time, you can jump back into the settings by clicking *Form Properties*. In addition, you can jump to additional pages of the form by clicking *Page List*. To name the page, click *Page Properties*. The name of each page will be visible to users filling out the form.

Add New...



Check Box List	Multiple choice question that allows users to choose more than one option.
Radio Button List	Multiple choice question that only allows users to select one option.
Text Field	Open text response. Alter the number of rows to provide the user a larger space to write in for longer answers. You can also use the Text Field question to utilize validation , ensuring a specific format is entered.
Drop Down List	Multiple choice question where users can only choose one option. The only difference between the dropdown and radio button options is that the user has to click the dropdown to view the available choices.
Instructions	This is your method of providing additional instructions or information to the user. Instructions do not require any action on the part of the user.
Single Check Box	Think of this as a method to provide the user a set of terms and conditions that they need to agree to before they can proceed on the form. You can input the terms that need to be agreed upon and the user will be provided a single check box to confirm their agreement.
Ranking	Provide the user multiple answer choices for them to rank. You can also determine the maximum number of items they need to rank.
File Upload	Allow the user to upload a file from their computer. Files must be under 4 MB and the uploader accepts most file types. If you prefer a specific file type, make sure to indicate this within the instructions of the question.

For each of the question types, you also have additional question options. Once you have created a question, click on the blue edit icon within the question to view its additional options.

The image shows three sequential screenshots of a question editor interface. Each screenshot has a grey header bar with a blue checkmark icon, a 'Page' dropdown set to '1', a 'Sequence' dropdown, and a trash icon. A black arrow points to the first screenshot.

- First screenshot:** The 'Sequence' dropdown is set to '2'. Below the header is a text input field with the label '* First & Last Name:'.
- Second screenshot:** The 'Sequence' dropdown is set to '3'. Below the header is a text input field with the label '* SHSU Email:'.
- Third screenshot:** The 'Sequence' dropdown is set to '4'. Below the header is a text input field with the label '* Extension or Contact Phone #:'.

Potential options and their descriptions are below.

Required	Select the "Required" box if you want the question to be mandatory for users before proceeding. This option is available for all question types.
Shuffle Answers	For Check Box List and Radio Button List question types, you can choose to shuffle your answers. For example, if you input an alphabetical list but want the answer choices to appear random, you can shuffle them. Note: This will not shuffle the answers every time a different user fills out the form.
Minimum and maximum answers	If you are utilizing the Check Box List, you can identify the minimum or maximum number of answers a user can select.

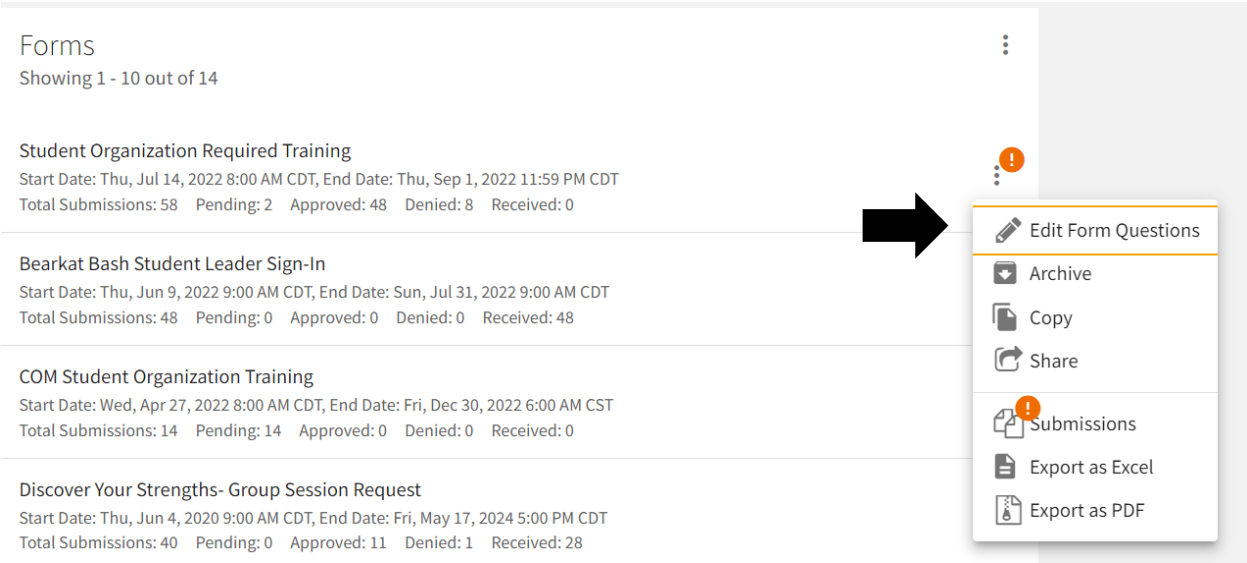
You also have the ability to put additional properties on your answer choices for Check Box List, Radio Buttons and Ranking question types.

Include Text Area	Text Area allows you to provide additional space for users to write-in an answer. For example, you may want to include an "Other" option to a multiple choice question, but want users to write-in their additional option.
Include Tooltip	The tooltip allows you to hover over the answer choice to read additional information about it. The additional information will appear automatically next to the answer choice.
Include Additional Text	Similar to the tooltip, Additional Text allows you to put in additional information about an answer choice. The difference between the two is in how the information appears. With Additional Text, an information icon appears next to the answer choice. Clicking that icon will open up a box with the additional information.

Adding Reviewers: When you are done building your form, you can identify who needs to be have access to give feedback on form submissions. Depending on the type of form you created, options may vary.

Publishing and Managing Submissions: When you're done building your form, navigate back to your form properties to publish it.

Edit a form: To edit a form, click the three dots to the right of the form then click *Edit*.




Here, you can also archive the form, copy it to create a new form, receive a sharable link, and review form submission.

Elections

Organization officers have the ability to create elections within their organizations, either for the entire community to vote on, or exclusive to organization members.

Create an election: To create an election, click the button in the top right corner.

Elections  [+ CREATE ELECTION](#)

Name	Start Date	End Date	Action
Student Organization End of Semester Survey	7/21/2022 8:00 AM	7/31/2022 8:00 AM	Publish
Fall 2019 Student Employees	8/13/2019 1:30 PM	9/13/2019 1:30 PM	Publish
Office Procedures	2/20/2019 2:00 PM	2/27/2019 4:45 PM	Publish
Spring Elections	8/13/2018 4:45 PM	9/13/2018 4:45 PM	Publish

Showing 1 - 4 of 4

Create Election Form fields marked with an asterisk (*) are required

*Name

Include Instructions

Additional Instructions

← → **B** *I* U % ☰ ☷ ☹ ☺ ☻ ☼ ☽ ☾ ☿ ♀ ♂ ♁ ♃ ♄ ♅ ♆ ♇ ♈ ♉ ♊ ♋ ♌ ♍ ♎ ♏ ♐ ♑ ♒ ♓ ♁ ♃ ♄ ♅ ♆ ♇ ♈ ♉ ♊ ♋ ♌ ♍ ♎ ♏ ♐ ♑ ♒ ♓

Active

Start Date and Time 12

End Date and Time 12

Display an alert on the organization homepage when the election is active and voting is open

Only Allow Users Listed on the Roster of this Organization to Vote

[SAVE](#) [CANCEL](#)

Here, you can choose if your election should be active and the date range your election should be available. When the election is set to *Active* and it falls within the date range, users will be allowed to access the ballot. You can also choose to display an alert on the organization homepage when the election is active and voting is open by checking the next box. The last option is whether or not to allow users outside your organization should be allowed to vote in the election-- checking the box will limit it to only users within your organization roster.

When you're finished with these settings, hit *Create*.

Create the ballot: You can create as many ballots as needed. A user will see each ballot they are designated to see. To start creating your ballots, click *Create Ballot*.

Create Ballot

*Name

Access Restrictions

If **General Access** is enabled, all users will be able to complete this ballot. If **General Access** is disabled, you can allow or deny access to the ballot to specified lists of users.

General Access

Eligibility Lists

Enter the name of your ballot, then determine if the ballot should be general access by selecting *Enable* or *Disable*. If you select *Disable*, you'll be prompted to enter settings for each of the available eligibility lists.

Eligibility lists are set up by campus administrators and are shared to organizations. If you are not seeing an eligibility list that you expect to see, contact your campus administrator.

Allow	Users on the list can access the ballot
Deny	Users cannot access the ballot, and supersedes being on an allowed list
Ignore	List will not be used for the ballot, users cannot access the ballot

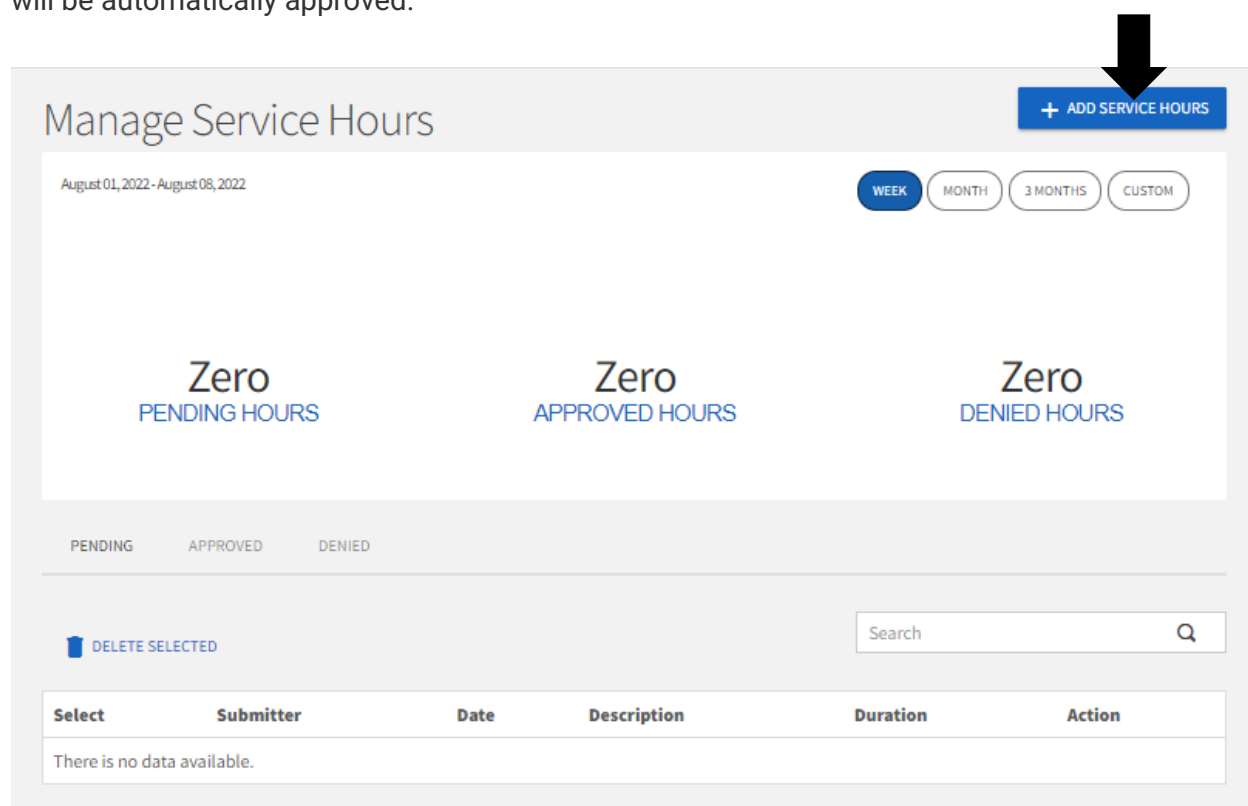
Once you're fine with your eligible users access, click *Create* to advance to the next page. You'll now be taken to the form builder with a limited selection of question types.

When you're finished, click *Back to Ballots* in the upper left corner. Repeat this for any additional ballots you need to create within the same election. Once all your ballots are ready, be sure to set your election to *Active* to ensure users can vote when the election starts and the prompt to vote will display on your organization homepage, if requested.

Service Hours

Depending on the type of organization you are in, you may have the ability to manually submit service hours that you would like to associate with a specific organization you are a part of. These service hours can be included on your co-curricular involvement record, allowing you to showcase your involvement in an organization or in the community. Note that you must be a member of an organization in Engage in order to add service hours within that organization.

Submitting on behalf of another member: As an officer of your organization who has full access to manage the Service Hours tool, you also have the ability to submit service hours on behalf of other organization members. To do so, click *Add Service Hours*. This provides you a different form with the ability to tie the submission to any member of your organization. Fill in the required and/or optional information and click *Create*. Service hours submitted by officers will be automatically approved.



Manage Service Hours

August 01, 2022 - August 08, 2022

WEEK MONTH 3 MONTHS CUSTOM

Zero PENDING HOURS

Zero APPROVED HOURS

Zero DENIED HOURS

PENDING APPROVED DENIED

DELETE SELECTED

Search

Select	Submitter	Date	Description	Duration	Action
There is no data available.					

Fill out the information requested. Once the hours are submitted, a representative from the Department of Student Involvement: Leadership & Service will review and approve the submissions.

Note: Review the Student Organization Policy to ensure your student organization's hours will be approved.