FuquaConnect first steps guide

Welcome to FuquaConnect! Learning a new platform can be overwhelming, so we have developed this guide to walk you through the steps you should take the first time you login to FuquaConnect. This guide is not exhaustive of all potential tools available, but it is designed to focus your efforts on the most important tasks to tackle immediately.

Drop-in training and help sessions will be available in January 2020, along with more detailed guides on FuquaConnect's tools. For now, follow this guide step-by-step and you'll be good to go!

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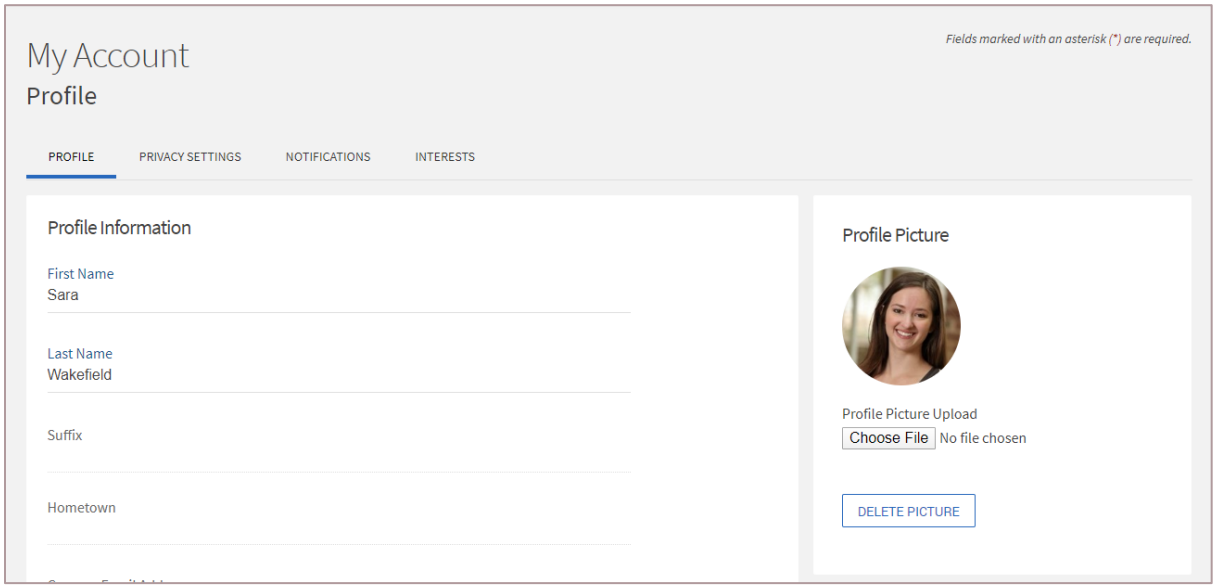
Upload your personal profile picture and review your notification settings

Before you get your club or department's organization in order, make sure you review and update your personal user information. After you login to FuquaConnect, click the circular icon with your initial at the top right of the screen. Click where it says **Your Name** and **Account.**



Here you can review your personal information in FuquaConnect, upload a profile picture, update your **privacy settings**, and review or edit your **notification settings**.

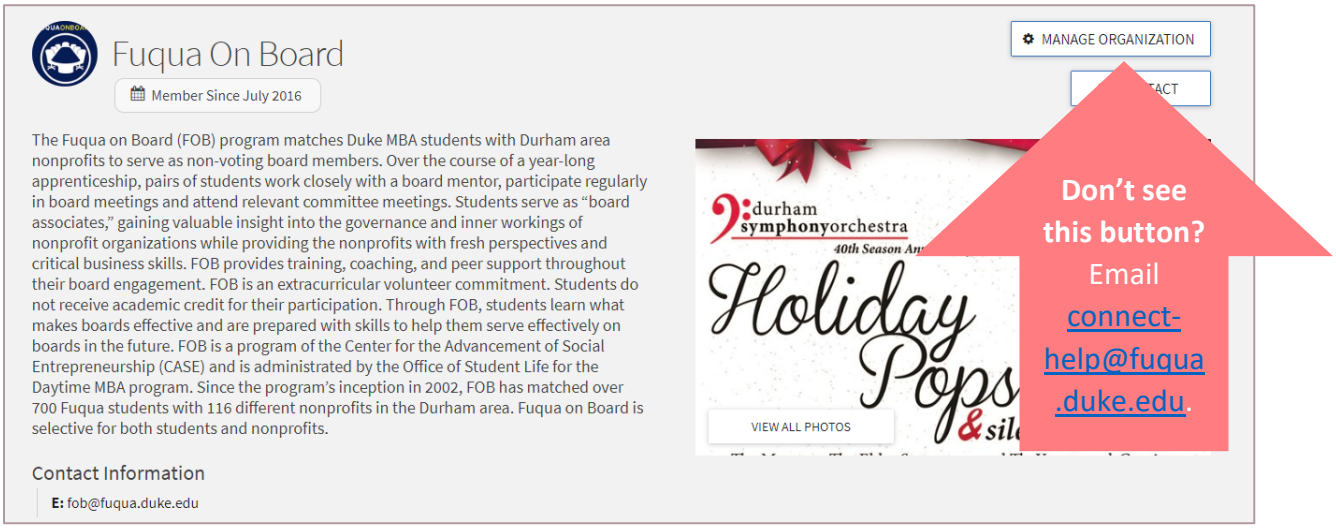
Pro-Tip: We recommend keeping email notifications turned ON for **event cancellations, event invitations, event ratings,** and **organization news articles.**

You can edit whether your memberships in certain organizations will show on the public view of that organization's roster in **privacy settings**. You can modify when you receive email notifications from FuquaConnect in **notification settings.**

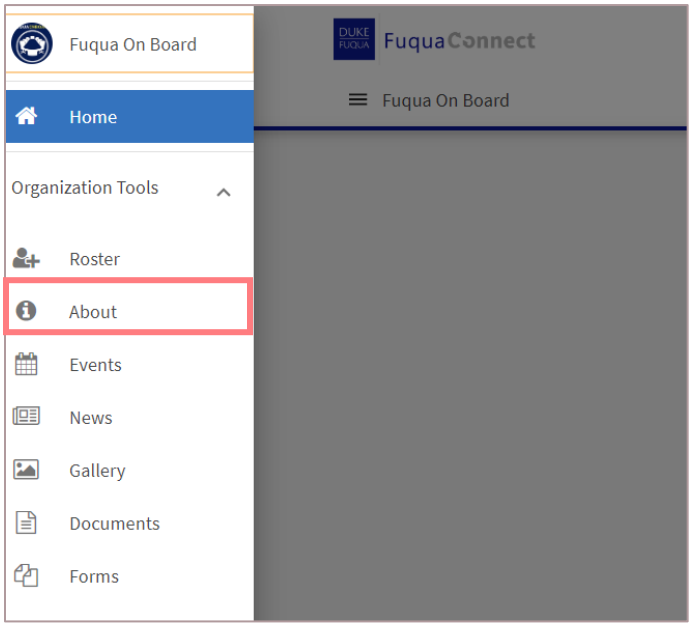
Upload your organization's profile picture and review / edit profile information

Your organization's profile picture (or logo) did **NOT** migrate over from OrgSync; however, most of your organization's other profile information should have come over in the upgrade to FuquaConnect. To upload a logo and edit your profile information, visit your organization's **Action Center**:

1. Search for your organization in the search bar or select it from your list of memberships on the FuquaConnect home page.
2. This is your organization's home page (or **Explore View**) and is what any member of the Fuqua community will see when they visit your organization:



3. Click **Manage Organization** to get to the **Action Center** (a new window will open)**.** Click the menu button next to the name of your organization (under the FuquaConnect logo) to expand all of your organization's tools.
4. Click **About** to review and update your profile information or upload a logo.



About the Organization Profile:

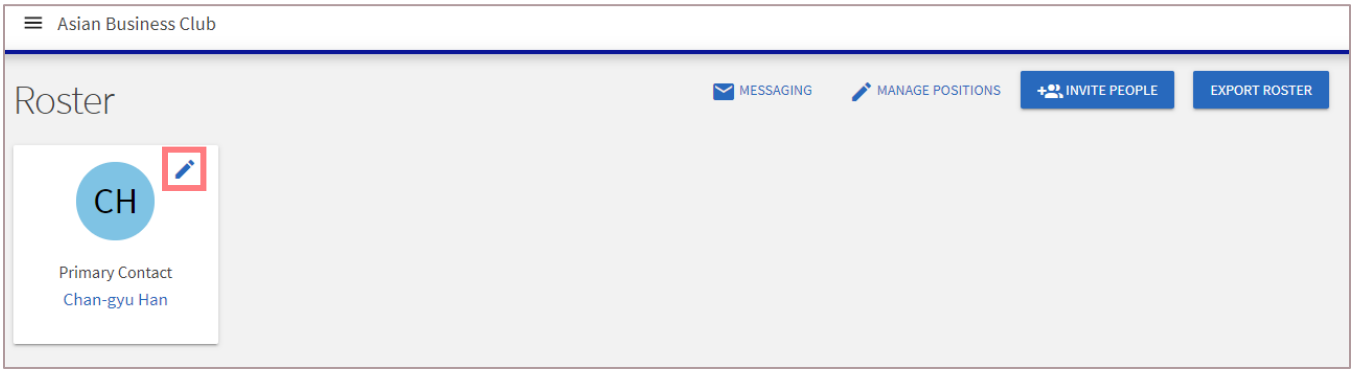
- Your organization has both a **summary description** and a **full description**. The summary will show when space is minimal in the FuquaConnect organization directory. The full description shows on your organization's home page.
- If your organization has a **generic email** (e.g. techclub@duke.edu), enter that in **Email** under the **Contact Information** section.
- If you have an updated **external website** (Sites@Duke or other platform), insert that URL in the **External Websites** section.
- Review the **Social Media** links and add or update any that did not migrate over from OrgSync.
- There are 4 required and 1 optional additional questions as part of your organization profile. Only the questions about membership, activities, and leadership will display on your organization's home page.

Confirm or update your organization's Primary Contact

The organization **Primary Contact** is a **NEW** feature of FuquaConnect! The Primary Contact receives all of the inquiries generated from the **Contact** button on your organization's home page. Only **one person** can be set as your organization's Primary Contact.

The **Contact** button is visible to both the internal Fuqua community and external visitors. By default, one of the co-presidents was selected as your organization's **Primary Contact.** To change your Primary Contact:

1. Follow the steps for editing your profile to get to your organization's **Action Center.** Expand the menu and select **Roster.**
2. The **Primary Contact** will be listed at the top, right under "Roster". Click the pencil to edit.



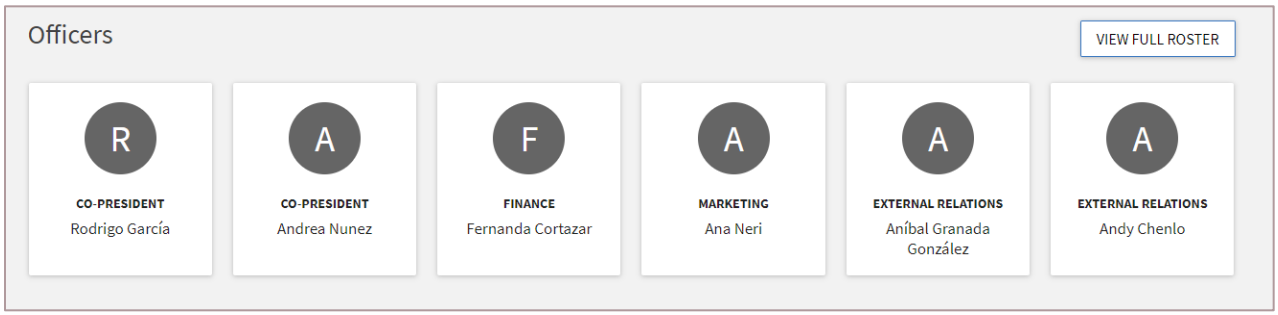
3. In the pop-up, search for the name of the person. Click **Select** next to their name to make them the primary contact.

Review your Roster and confirm / modify your organization's Positions

Your organization **Roster** is where you will manage your organization's memberships, invite new users, categorize your cabinet and grant administrative permissions via the **Positions** tool, and message your organization (more on that tool later).

About Positions:

The **Positions** tool is similar to the Groups functionality in OrgSync. **Positions** allow you to create uniquely named roles for members of your cabinet, assign administrative permissions, and feature the holders of certain Positions publicly on your organization's home page. We also use the Positions tool to categorize users based on program affiliation to facilitate communication with specific programs or program years.



Assigning your cabinet members to Positions helps you easily transfer administrative responsibilities each year. It also informs the Fuqua community about your club leadership to streamline information sharing and connections to resources (e.g. can pull a report of all treasurers to share policies or info session dates).

Your Cabinet and Positions:

Note that you can only grant administrative permissions by *Position* and not to individual users. This means you will need to assign each user to a Position in order to give them the ability to edit or manage content in your organization. We have already set up your **Co-Presidents** and **SY Cabinet** with their respective Positions in your organization, which come with appropriate permissions to manage your organization.

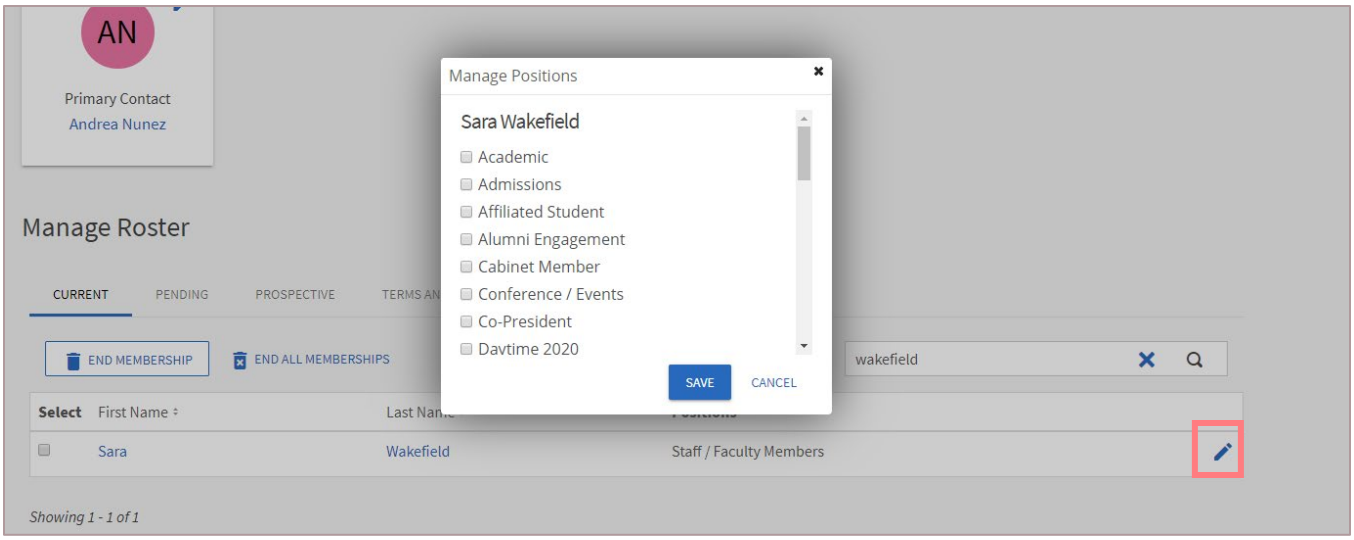
You will need to assign your FY Cabinet members to Positions to give them administrative permissions to your organization. You have two options:

1. Assign them to the already created **Cabinet Member** Position. Assigning your FY Cabinet members this Position will automatically give them administrative permissions to manage your organization, but note that they will *not* show on the roster on your organization's home page.

2. Assign them to a Position specific to their role. This may involve **modifying an existing Position** or **creating a new Position for your organization**.

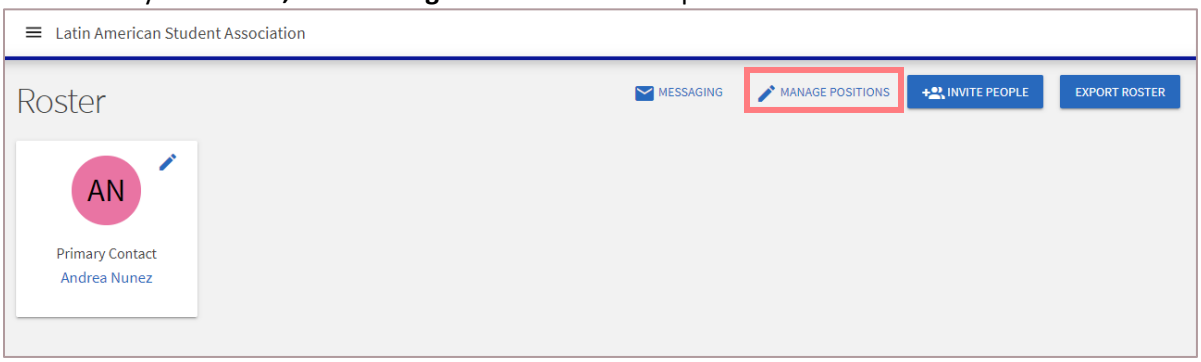
Assigning Positions:

1. Follow the instructions for updating your Primary Contact to get to your **Roster**.
2. Search for the user in the search bar. Click the pencil icon on their row.
3. To assign them to a Position, select the appropriate checkbox in the pop-up and click **Save.**
4. If that Position is set to show on the public roster, they will now appear on your organization's home page in the officers list.

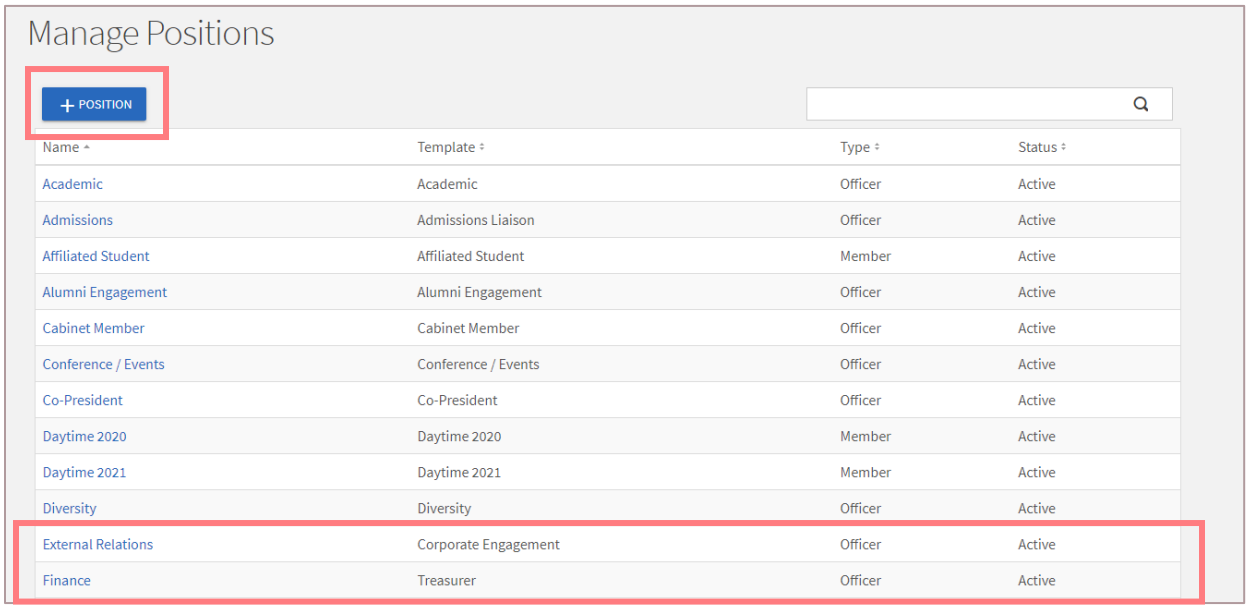


Reviewing or creating Positions:

1. From your **Roster,** click **Manage Positions** at the top.



2. A list of existing Positions will appear. Some of these Positions you will be able to modify the name or administrative capabilities, but others will be locked for editing by FuquaConnect administrators. For example, **Finance** and **External Relations** below have been renamed from Treasurer and Corporate Engagement, respectively. Where possible, it is best to modify existing Positions to suit your club's needs to keep FuquaConnect's reporting consistent.



Name	Template	Type	Status
Academic	Academic	Officer	Active
Admissions	Admissions Liaison	Officer	Active
Affiliated Student	Affiliated Student	Member	Active
Alumni Engagement	Alumni Engagement	Officer	Active
Cabinet Member	Cabinet Member	Officer	Active
Conference / Events	Conference / Events	Officer	Active
Co-President	Co-President	Officer	Active
Daytime 2020	Daytime 2020	Member	Active
Daytime 2021	Daytime 2021	Member	Active
Diversity	Diversity	Officer	Active
External Relations	Corporate Engagement	Officer	Active
Finance	Treasurer	Officer	Active

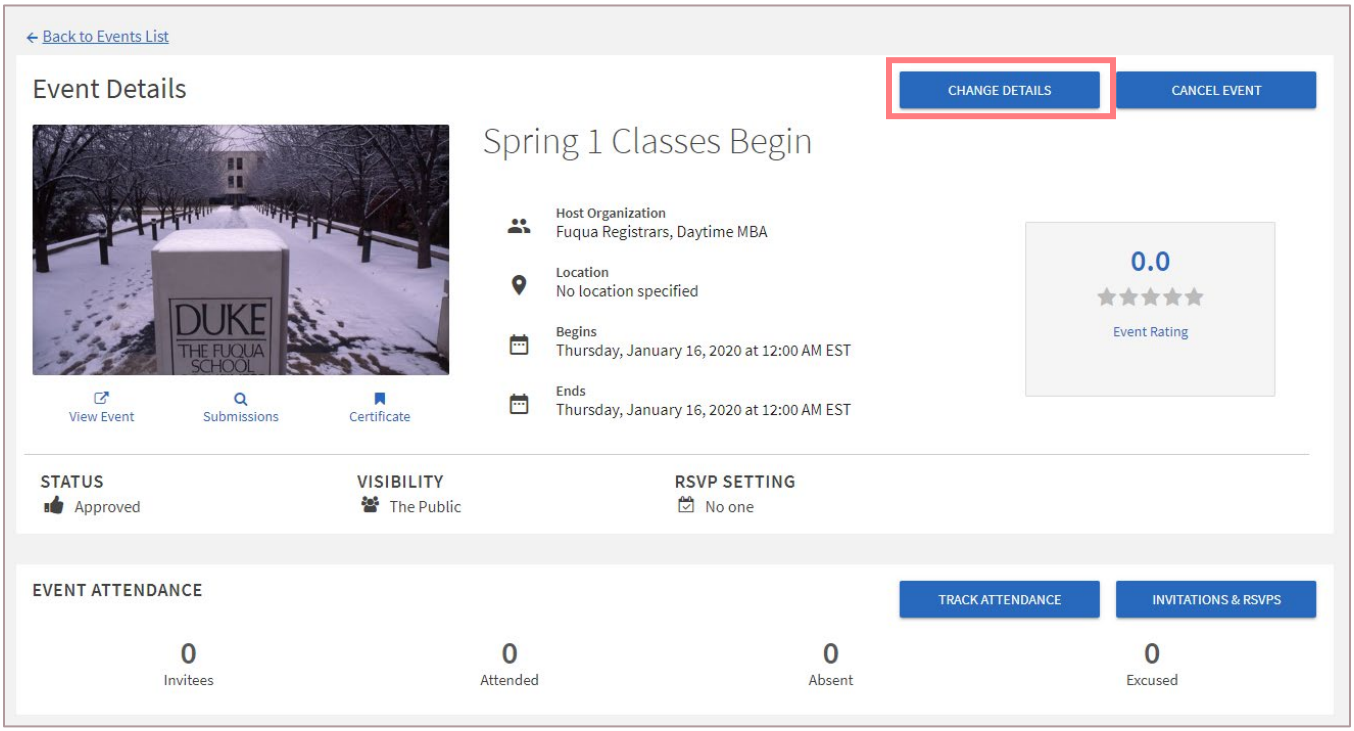
3. However, if none of the existing Positions are appropriate for your club, you can create a new Position. Click the blue **+ Position** button and complete the form to create a new Position type.
    a. **Position Name:** Should be the name of the position or role (E.g. Operations, Roadmap Director, etc.)
    b. **Position Type:** Select **Member** if you are creating a classification for a subset of your members (e.g. Roadmap 2020 Participants, I-bankers, etc.) that don't necessarily need administrative permissions. Select **Officer** for cabinet roles or other administrative permission holders.
    c. Click **Show holders of this position on the organization's public roster** if you want them to show on your organization's home page.
    d. Keep **Active** checked.
    e. **Management Access:** select **All Access** to grant permissions to every aspect of your organization. However, if you want this Position to only have access to certain parts of your organization (like Events and News), you can select **Limited Access** to customize their administrative permissions.

Update your upcoming events and/or create new events

Your OrgSync events for the Spring term should have migrated in the upgrade to FuquaConnect. However, FuquaConnect has more robust event functionality than OrgSync, so we recommend reviewing and editing each of your events to take advantage of these new features.

Accessing your Event Dashboard:

1. Select the event from your organization's feed. Click **Manage Event** in the top corner.
2. This is your **Event Dashboard** where you can send invitations or review RSVPs, track attendance, or change the details. Click **Change Details** to update the event.



Basic Event Details:

The first page of the event form allows you to update the basic event details – title, description, location, etc.

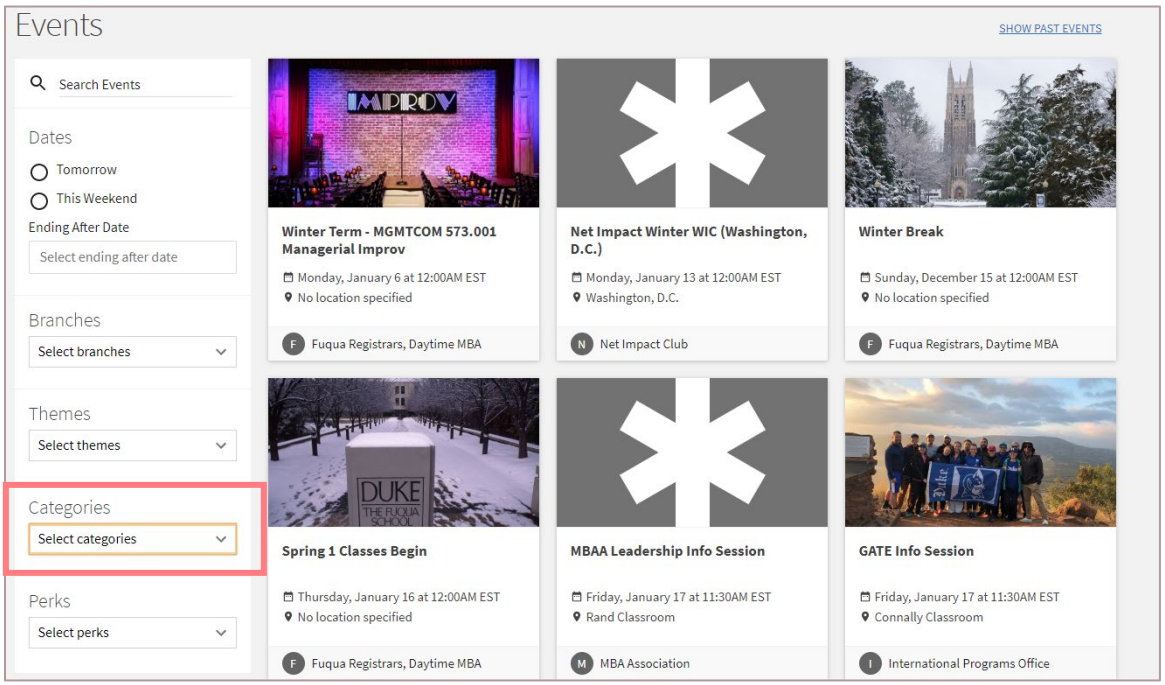
1. **Theme:** Themes are a hardcoded feature of FuquaConnect that are consistent across all other campuses using this platform. Fuqua doesn't plan to use this feature for reporting, but you are still required to select a theme to create an event. Just select the theme that makes the most sense for your event.

2. **Co-Hosts:** If you have other organizations or clubs sponsoring your event, you can type in the name of those organizations in the co-hosting box to select them. If you select a co-hosting organization, this event will also show in their feed of events on their organization's home page. **However, only the organization that created the event will be able to edit event details moving forward.**

3. **Show To**: These visibility settings are very similar to the options available in OrgSync. The option selected for your event should match what was selected in OrgSync.
    i. **Public**: Anyone in the world will be able to see this event, but only signed in users will be able to RSVP.
    ii. **Students & staff at FuquaConnect****: Anyone in the Fuqua community
    iii. **Organization Members**: Only the members of your organization in FuquaConnect
    iv. **Invited Users Only**: Only the members of your organization that you invite to the event (you can invite based on Positions, e.g. cabinet members or Daytime 2020/2021)

    *****This is the recommended option so that your event will show on the main FuquaConnect event feed, allowing greater visibility into all events across our community.***

4. **Event Categories: Assigning categories to your events allows them to be filterable on the main FuquaConnect event feed, helping members of the Fuqua community find events appropriate for them.** There are categories for describing the intended audience of the event (e.g. Open to: Daytime, Open to: MMS/MQM, etc.) and categories for describing the nature of the event (e.g. Social, Career Prep, etc.). You can assign as many categories to your event as you need.



5. **Perks:** This is another hardcoded feature of FuquaConnect. You don't need to select any Perks, but you may opt to select **Free Food** or **Free Stuff** if you think that may motivate attendance at your event.

6. **Additional Information**: These questions are used primarily for internal reporting on FuquaConnect and to help connect event planners to resources based on the nature of their event (guest speakers, attendees, etc.).

RSVP Settings:

Slightly different than who can see the event's details in FuquaConnect, the RSVP settings dictate who is able to register to attend the event. FuquaConnect's RSVP options are similar to OrgSync's:

1. **Anyone:** anyone in the Fuqua community
2. **Only invitees:** only individuals that you invite to your event
3. **No one*:** RSVP not required or necessary

Note: if you set your events in OrgSync as "RSVP not required" prior to the upgrade, they will be set to **No One in FuquaConnect. You will want to update this setting for all of your events so your members can begin RSVPing.*

NEW RSVP features in FuquaConnect:

- **Guests:** Allow individuals who RSVP to register that they will bring guests and the number they plan to bring.
- **RSVP Questions**: Ask your event attendees to answer custom questions when they RSVP to your event. This is a great option for asking for dietary restrictions or t-shirt sizes in advance of your event!

Event Rating:

For the time being, leave this box **unchecked**. We will roll out additional information about how to utilize this feature in January 2020.

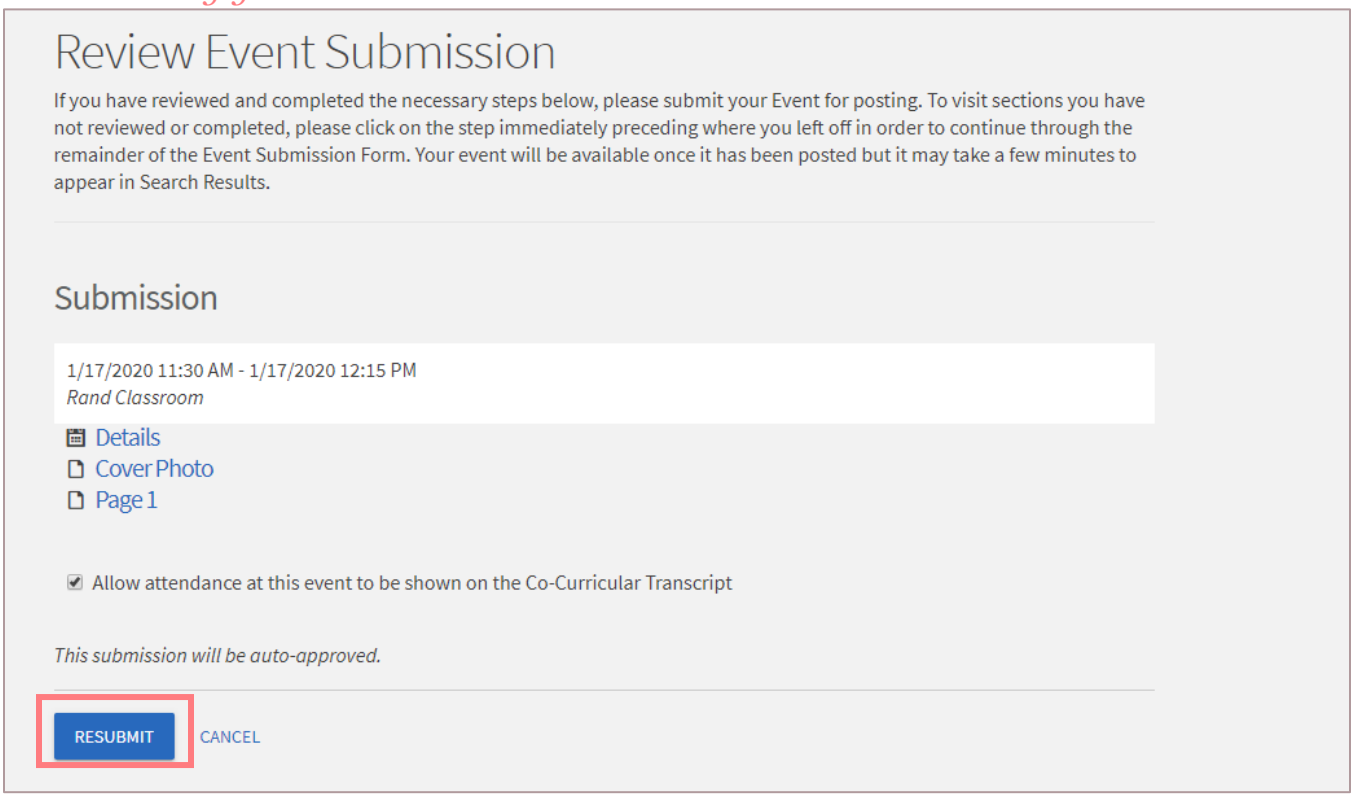
Event Photo:

Unfortunately, once you edit any event details in FuquaConnect, the event photo that migrated over from OrgSync will be deleted. You will need to re-upload the photo during the event update process. Once you upload a photo in FuquaConnect, you won't have to re-upload it each time you edit the event details. If you don't upload a photo, FuquaConnect will add a default image.

Custom Fields:

Like the Additional Information collected during the basic event details, these questions are used primarily for internal reporting on FuquaConnect and to help connect event planners to resources based on the nature of their event (catering, alcohol, etc.).

Submitting your Event:



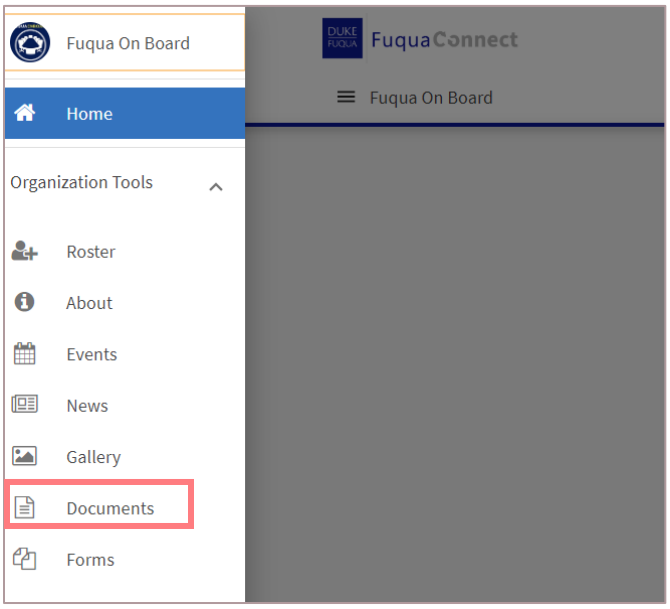
The final page allows you to review and make any last minute edits to your event. Click **Resubmit** to finalize the updates to your event (will say **Submit** when creating a NEW event). You can expect a brief delay (about 10 -15 minutes) before any changes you made show on the main FuquaConnect event feed.

Check / update the visibility settings on your Documents and Forms

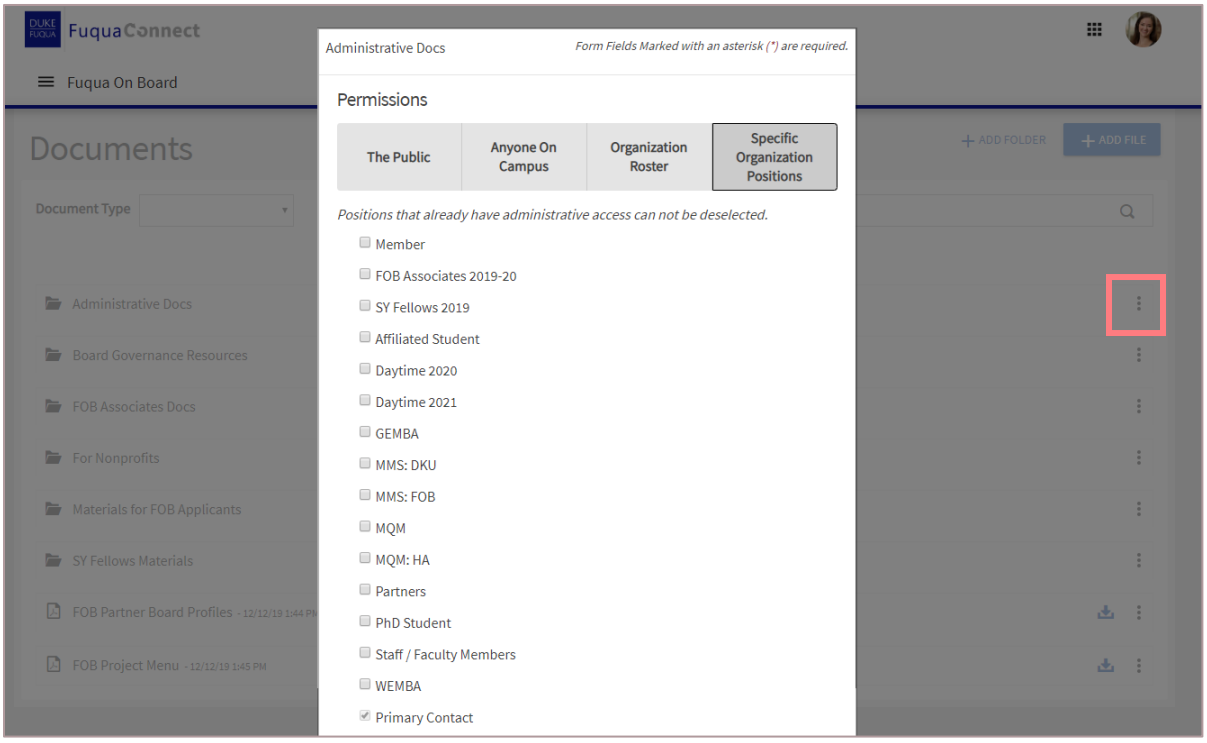
Documents (known as "Files" in OrgSync):

All of your folders and files should have migrated over from OrgSync during the upgrade. However, their visibility may have defaulted to **Private** during the upgrade. Check and update the permissions on each of your documents or folders to make sure they are set as you want.

1. Navigate to your organization's **Action Center** and select **Documents** from the menu.



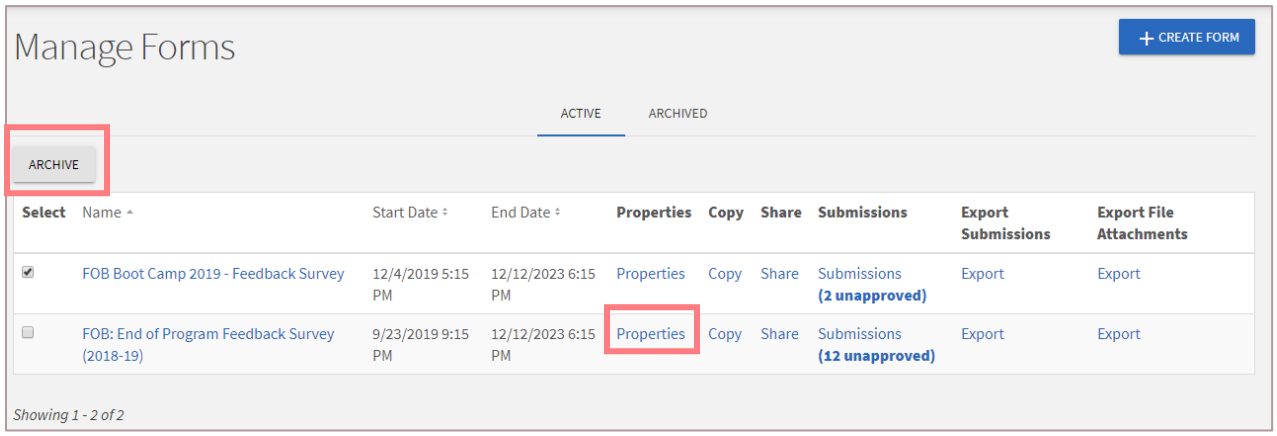
2. Click the 3 dots next to each folder and file and select **Permissions**. If you select **Specific Organization Positions** under Permissions, you will be able to limit visibility to specific Positions within your organization.



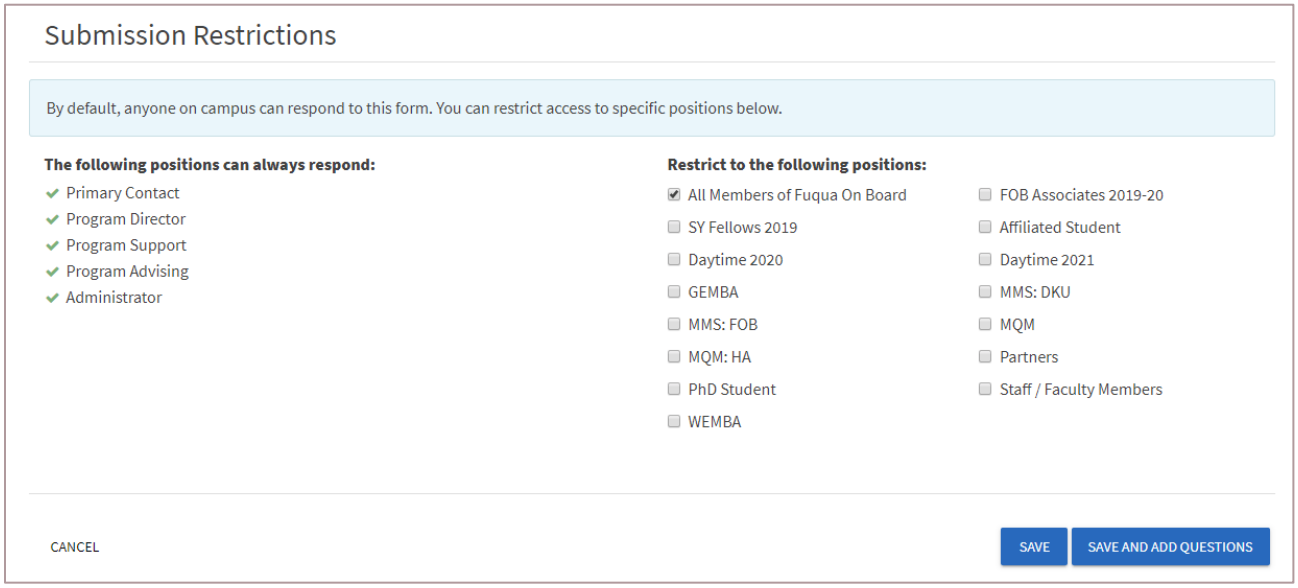
Forms:

By default, Forms created in FuquaConnect are able to be accessed and completed by everyone in the Fuqua community. Forms that you previously had unpublished in OrgSync may also have been "re-activated" in FuquaConnect. You can archive any old forms or restrict access to existing forms.

1. Navigate to your organization's **Action Center** and select **Forms** from the menu.
2. To archive an old form, select the check box next to the form and click **Archive.**



3. To change the visibility on an active form, click **Properties.** Scroll down to **Submissions Restrictions**. Click the box next to the Position or Positions to restrict access to just those individuals. Click **Save.**

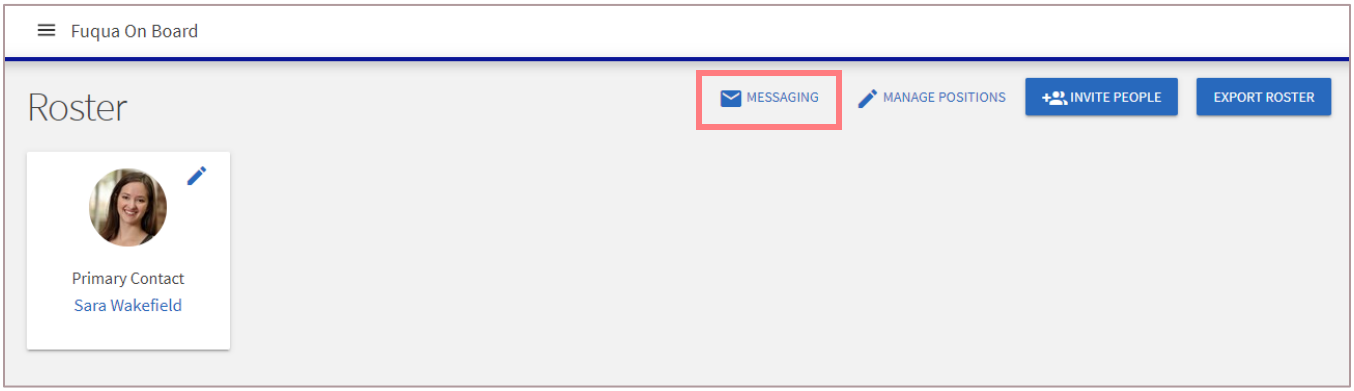


4. You may also want to review each of your forms and confirm that all questions came over as you expected and the data is appropriate.

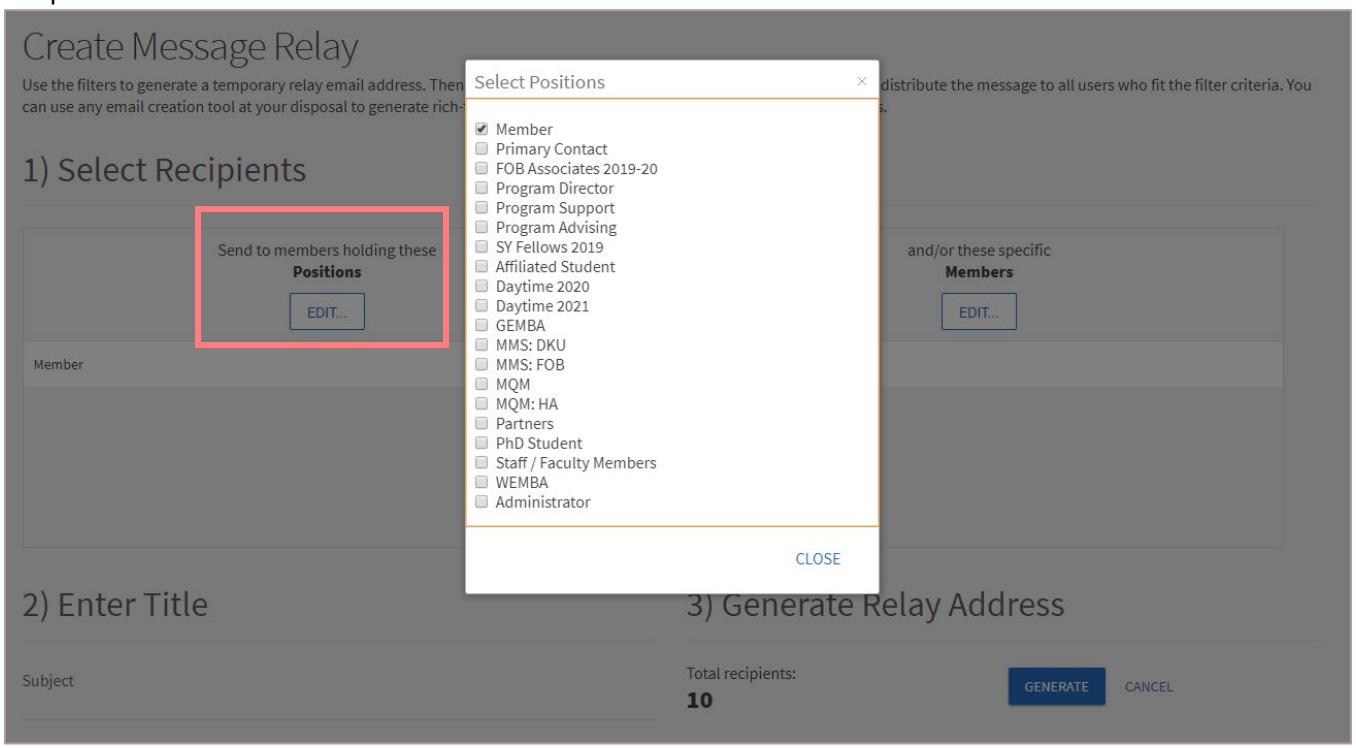
Send a message to your organization

Now that your organization's FuquaConnect page is updated and ready to share, you may want to send a message to your members to alert them to your upcoming events or the new locations of important documents. You can do this using the **Messaging** feature inside your organization's **Roster.**

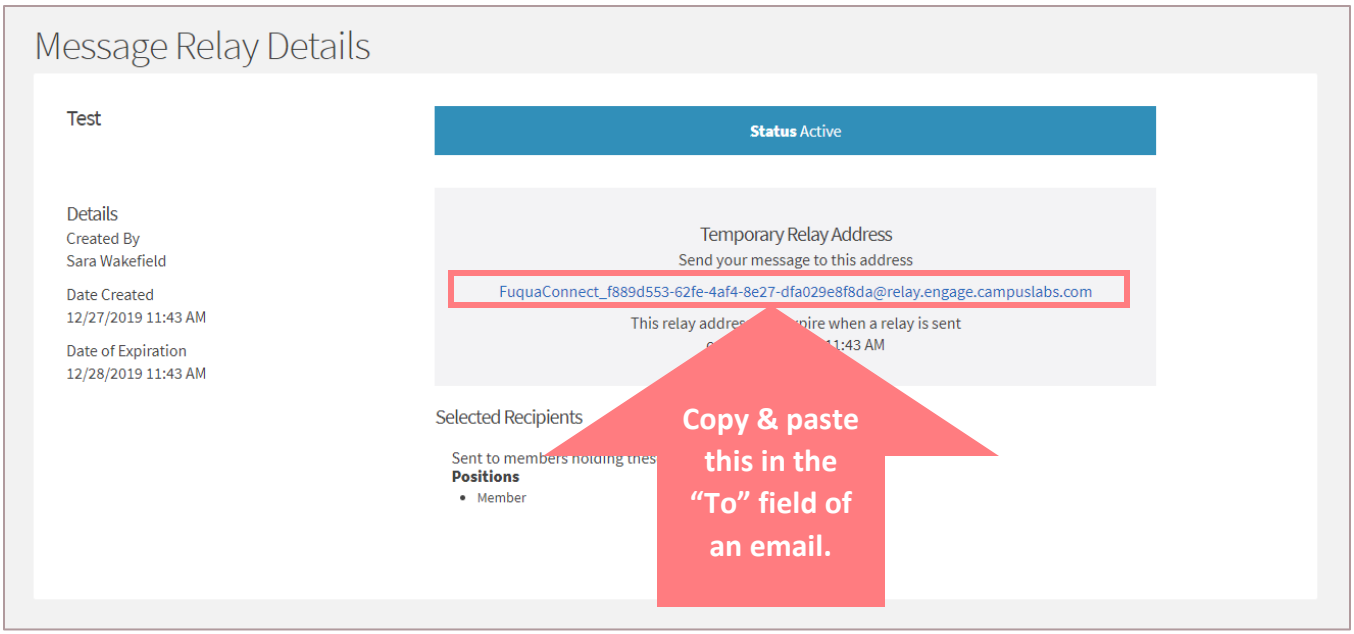
1. Navigate to your **Roster** from your organization's **Action Center** (follow the steps for updating your Primary Contact)
2. Click **Messaging** from the row of options at the top.



3. Click **Create Relay**.
4. To send to ALL members of your organization, click **Edit** from the left box and select the **Member** position.



5. Enter the **Title** or **Subject Line** of the message in 2). Click **Generate.**
6. A temporary email address for your organization will be created. You can copy and paste the relay address into the **To** field in an Outlook email to send to your members like a normal email. *Note: we recommend drafting the message you want to send in Outlook BEFORE initiating the messaging process and creating the relay email address in FuquaConnect.*

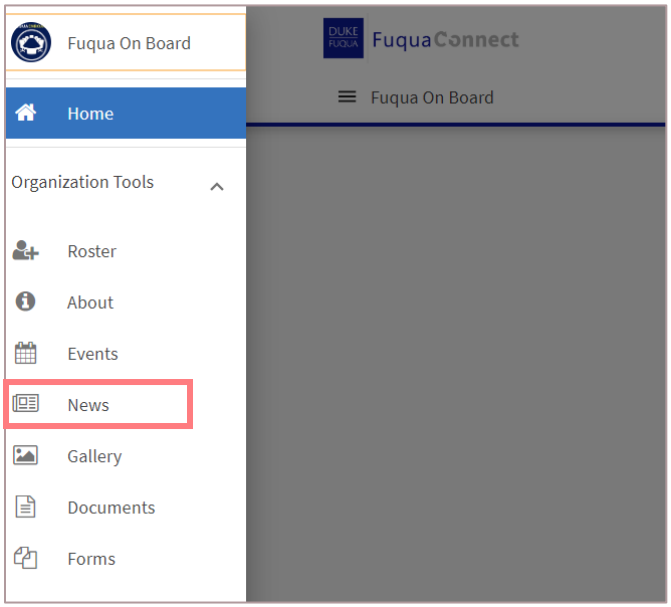


7. Once you hit send in Outlook, your message will be sent from **your organization name in FuquaConnect** (not you individually) to all of your members' emails. Because all emails from external systems must go through spam checks on Duke's servers, **your message may not be delivered immediately and may be delayed for up to 1 to 2 hours.** This makes the Messaging feature a good option for non-urgent messages like newsletters or general updates, but not for urgent messages about event cancellations or room changes.

Create a News post / explore the News feature

FuquaConnect has a News feature, similar to the tool in OrgSync. To explore this feature or create a News post:

1. Navigate to your organization's **Action Center** and click **News** from the menu.



2. Click **Create Article** to draft your News post.
3. To alert members via email about your News post, click the option to **Notify Members** at the end of the News form. Note that the email will come from FuquaConnect, **NOT** your Organization name and will not include the full text of your News post (only the Summary). You may prefer to use the Messaging tool as a result.

Appendix: Additional Resources

CampusLabs (the creator of FuquaConnect) has tons of great resources and help guides online to supplement this guide. You can view all available resources on the CampusLabs support site (always accessible by clicking **Support** at the very bottom of every page of FuquaConnect), but you may find these resources below the most helpful as you get started:

FuquaConnect Basics:

- **Getting Started Video**: 7 minute video with tips on navigating the FuquaConnect community, getting involved, viewing your account, and managing organizations.
- **The difference between the "Explore View" and the "Manage View":** Described the 2 primary "views" of FuquaConnect – the one everyone sees when they login and the manage piece where you can create content in your organization

Organization Rosters:

- **Roster Walkthrough:** Details the main features of the Roster tool in FuquaConnect
- **Primary Contacts:** Describes the role of the Primary Contact and how the "Contact" button works in FuquaConnect
- **Changing Position Holders in your Organization:** Instructions for changing which users are in certain Positions in your organization
- **Inviting New Members:** Outlines options for inviting new users to join your organization
- **Creating new Positions in your Organization:** Additional instructions for creating a new Position in your organization

Managing Events:

- **Creating a New Event:** Instructions for creating a new event for your organization
- **RSVP Settings:** Additional information on RSVP options in FuquaConnect
- **Tracking Event Attendance:** Details options for tracking attendance manually within FuquaConnect

Other Tools:

- **Messaging:** Options for messaging your organization's roster
- **Creating a Form:** Steps to building and sharing a form in your organization
- **Documents Overview:** Guide to the Documents tool in FuquaConnect and instructions for uploading a new file
- **News Walkthrough:** Guide to the News tool in FuquaConnect and instructions for creating or deleting a News article
- **Adding Photos to your Organization:** Instructions for adding photos to your organization's gallery