How – To Guide for Organization Presence Administrator

HOW TO LOGIN TO PRESENCE

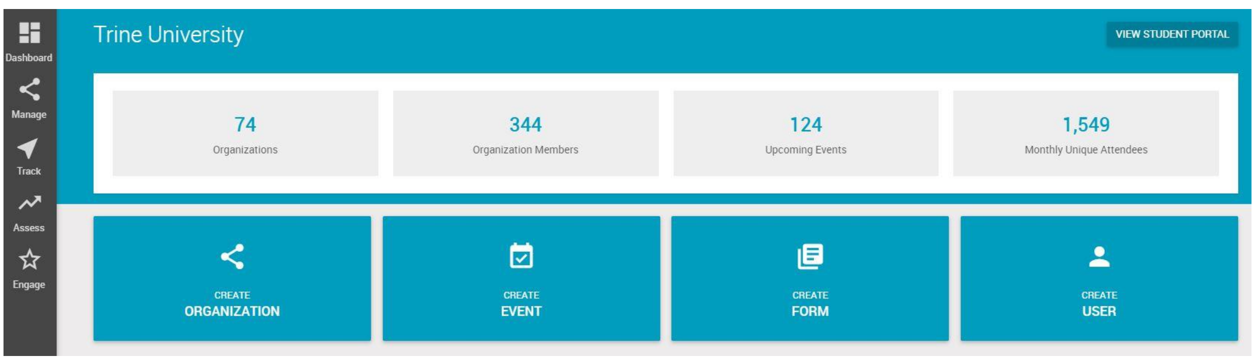
- Go to trine.presence.io
    - You can also access presence through the Trine website
        - https://www.trine.edu/campus-life/index.aspx
            - Click on the Campus Events button
- Once on the homepage for Trine University Campus Activities
    - Click on the user symbol in the top right corner to open a dropdown list and select login
- Login with your Trine username (email) and password

HOW TO ACCESS THE ADMINISTRATOR VIEW

- Once you are back on the Trine University Campus Activities page
    - Click on the user symbol again to open the drop down menu and select Admin Dashboard

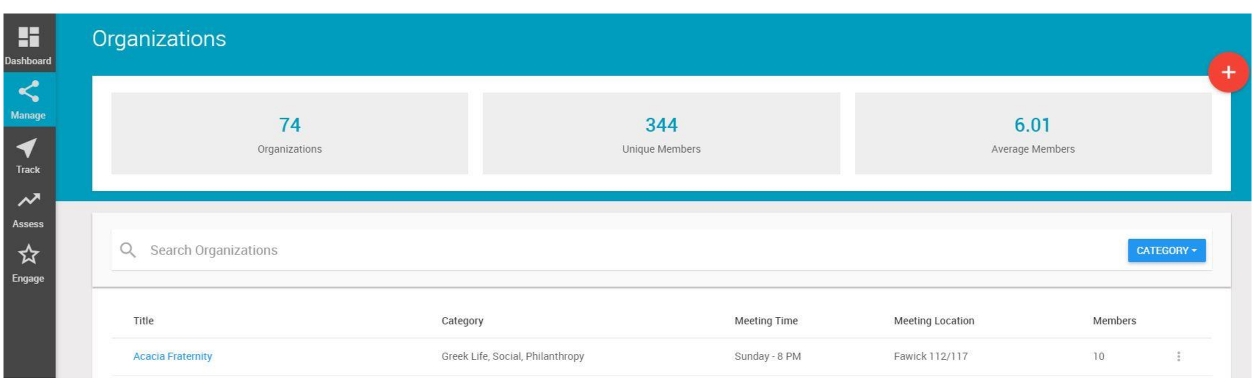
HOW TO NAVIGATE THE ADMINISTRATOR VIEW (DASHBOARD)

Your screen should look similar to this



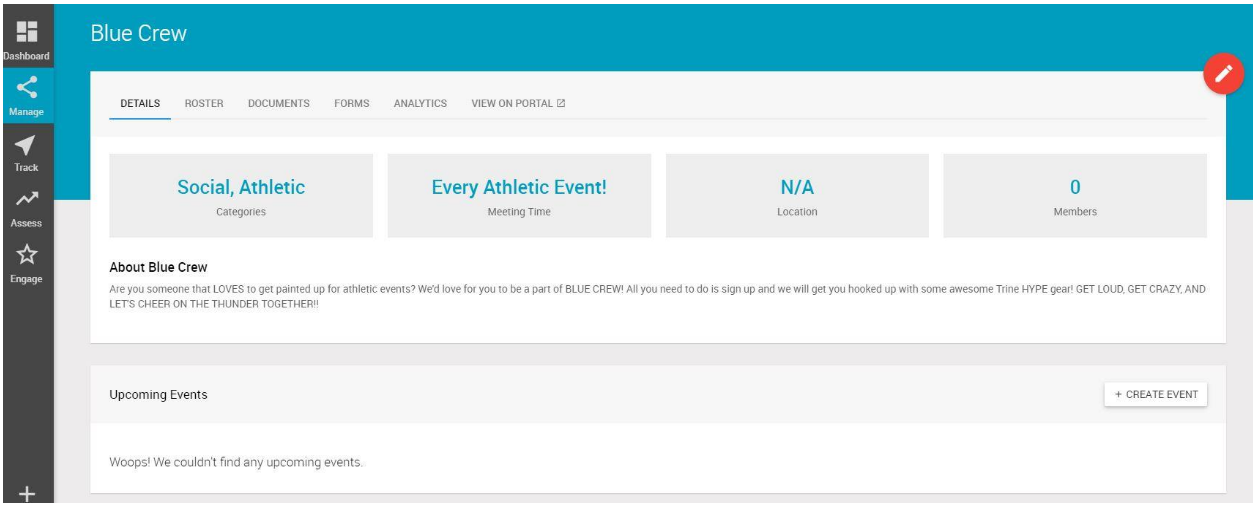
- On the left hand side of the screen, scroll over the "Manage" option
- Once you are hovering over the "Manage" icon, a list will generate to the right of the icon
- Click on **"Organizations"**

Your screen should look similar to this



- **Click on your organization name**

Your screen should look similar to this

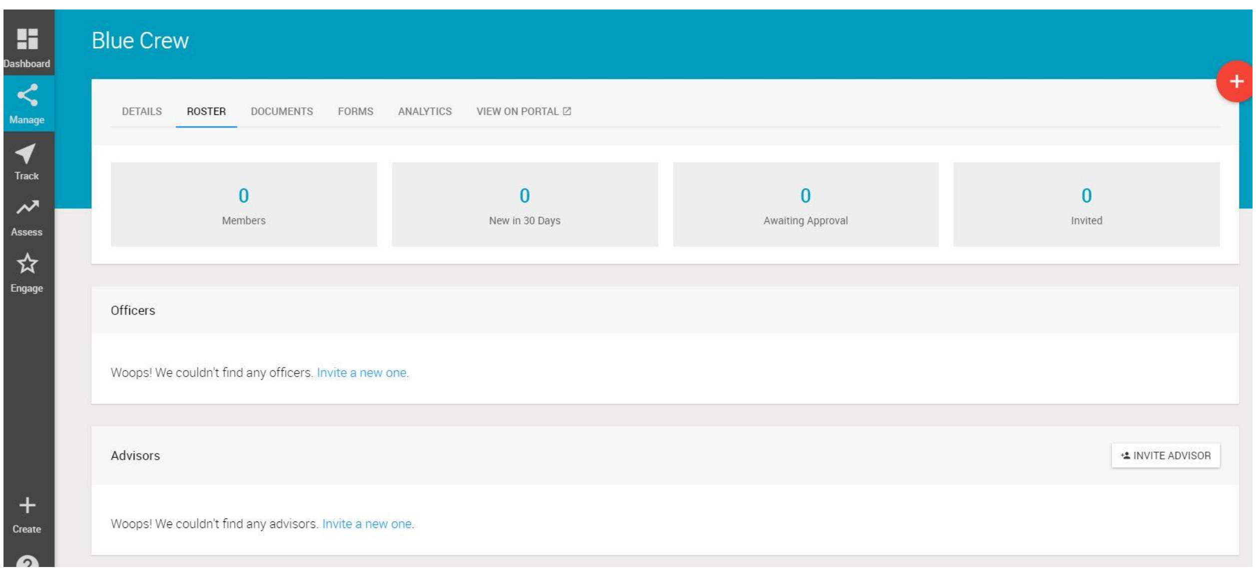


- Across the top of the screen underneath your organization's name is a series of tabs
    - Details, Events, Roster, Documents, Forms, Analytics, View on Portal

ADDING MEMBERS TO YOUR ORGANIZATION ROSTER

- Click on **"Roster"**

Your screen should look similar to this



- Click on the + button in the top right corner to add members
    - Type in the student's full name or Trine email address
    - Hit the "search" button
    - A list will be generated with names that match what you searched for
    - Click the green "add" button to the right of the person you would like to add to your organization's roster

<u>ADDING POSITION TITLE TO MEMBER ON ROSTER</u>

- Click on the pencil icon to the right of the member's name on the roster
- A pop-up box will appear – Member Position will be a drop down menu option
- Click on the option of title that you would like to assign to the person
    - If the position is not listed – choose committee chair
- Click save

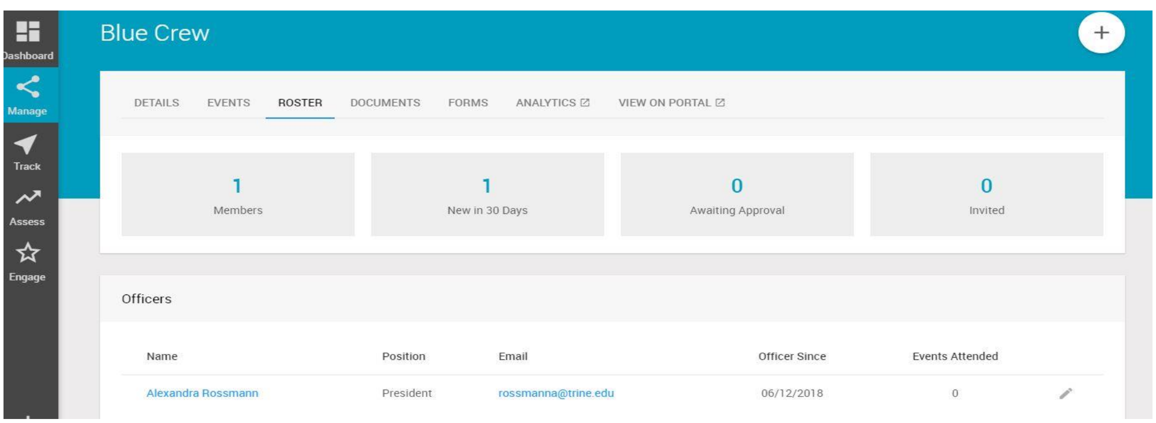
<u>CHANGE SETTINGS FOR ROSTER</u>

- Click on "Roster"
- Scroll down to "Members" section
- Click on "Settings"
- Options:
    - "Allow students to join on portal" – students can add themselves to the organizations membership roster by clicking on the "join" button on the student portal page
    - "Allow organizations to restrict members" – admins are in control of membership numbers
    - "Require approval for members" – if a student requests to join the organization from the student portal, the admin will receive notification to approve or deny the pending membership request

<u>REMOVING MEMBERS FROM YOUR ORGANIZATION'S PAGE</u>

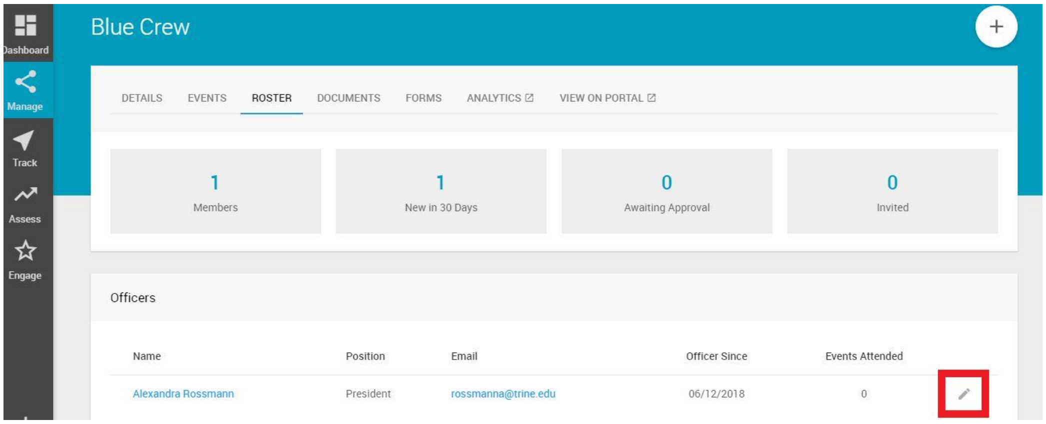
- Click on **"Roster"**

Your screen should look similar to this



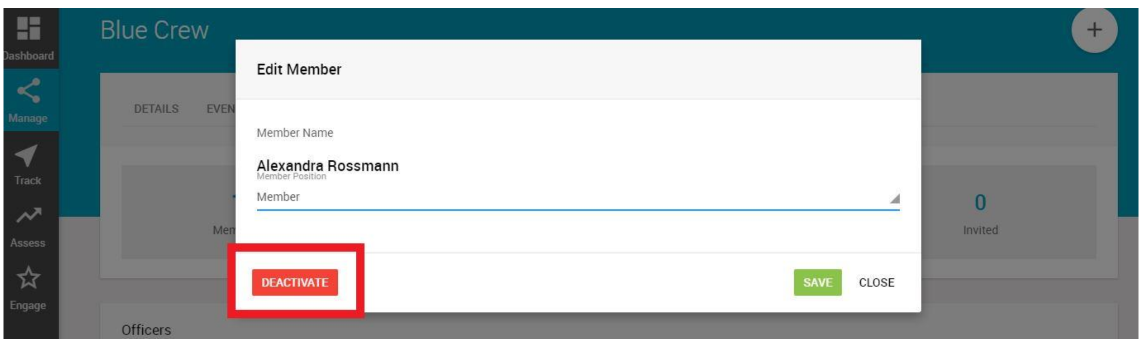
- Click on the pencil on the right side of the screen next to the name of the person you are removing from the organization

Click on the icon in the red box



- A pop-up box will open with the information for the member, click on the red DEACTIVATE button in the left bottom corner of the pop-up box

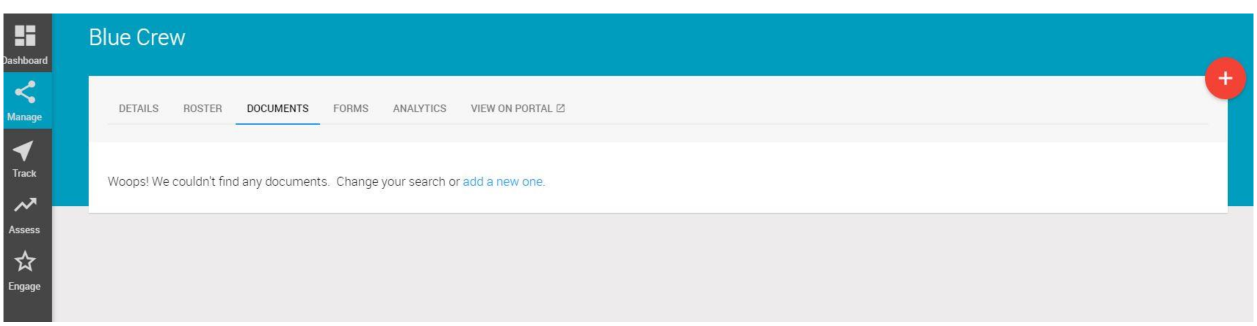
As shown below



<u>ADDING DOCUMENTS TO YOUR ORGANIZATION'S PAGE</u>

- Across the top of the screen underneath your organization's name is a series of tabs
  - Details, Events, Roster, Documents, Forms, Analytics, View on Portal
- Click on **"Documents"**

Your screen should look similar to this



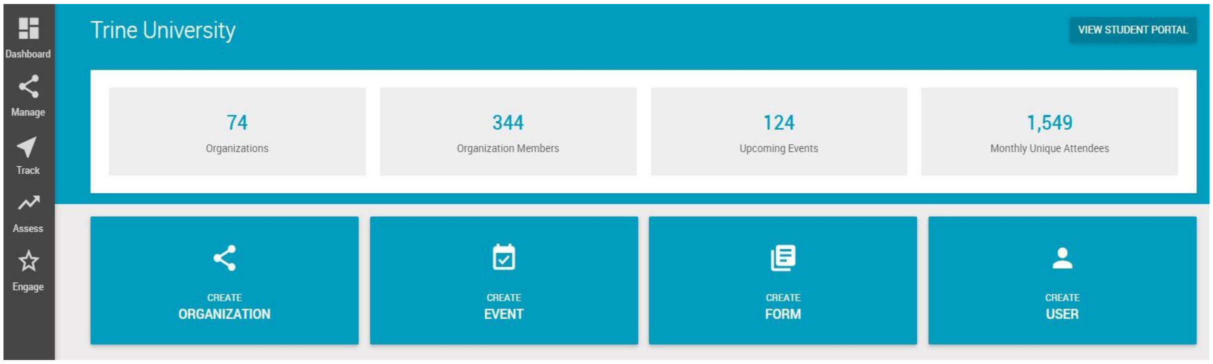
- Click on the + button in the top right corner to add documents
  - Enter a Title for your document
  - Enter a Description for your document

  - Decide if you would like document to be seen by members only, officers only, or public
  - Upload file
    - Any standard type of document (e.g. Word, Excel, PDF) will work
    - Images cannot be uploaded as documents
    - There is a 5mb limit for the file size
  - Click the green “Save” button
- Your documents should then be reflected on the “documents” screen

<u>CREATING EVENTS FOR YOUR ORGANIZATION</u>

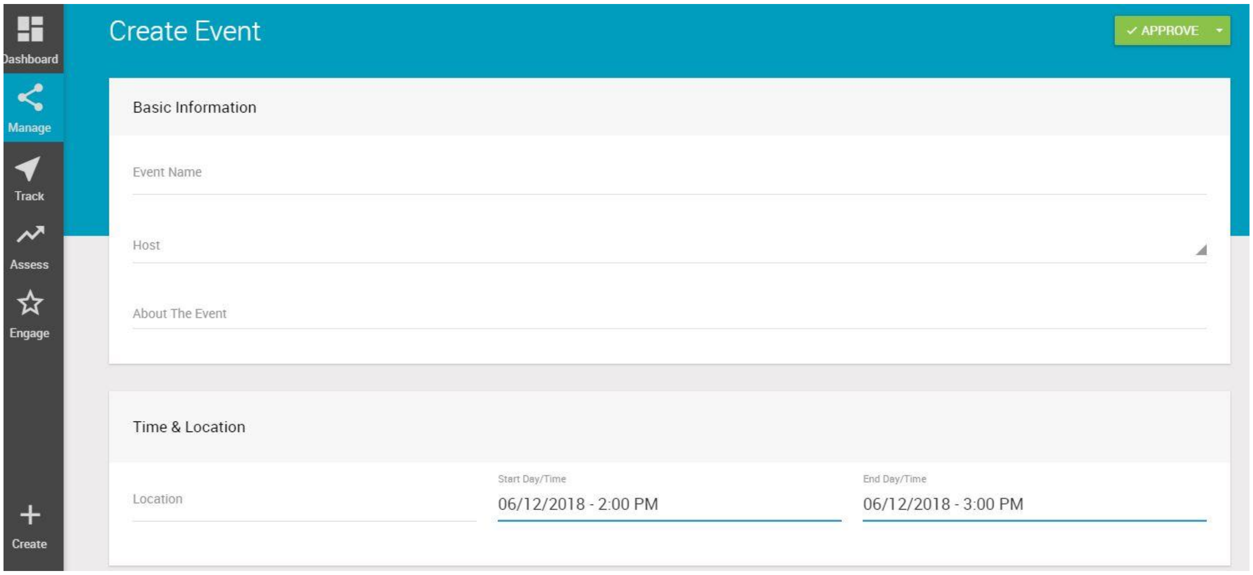
- Navigate to administrator dashboard

Your screen should look similar to this



- Hover over the “Create Event” box and click

Once you’ve clicked on Create Event – the screen below will open



- Fill out the following sections:
  - Event Name
  - Host Organization

- About Event
- Location
- Date/Time – start and end
- Contact Person
- Image

OPTIONS FOR CLOSED EVENTS:

- At the bottom of the event creation page – there are two options to limit the event view
  - Hidden from Non-Members (click check box if you want to apply to your event)
    - This will allow for only members on your roster to see the event on the calendar when they are logged into the campus activities website/app
  - Members Only Check-in (click check box if you want to apply to your event)
    - This will allow for only member on your roster to be able to check in for attendance at the event

View of the options on the screen