

Presence Organization Transition Instructions

Getting Started

The first thing you need to do is to create your account. All students have already been uploaded into the system, however individual still must create their account to gain access to the management side of the system. Follow the simple instructions below to create your account:

1. Go to the website: upstate.presence.io
2. Click on the person image in the upper right corner and click "Login"



3. Enter your UPSTATE* email address and create a password.
4. You are now ready to manage your organizations.

*Please note that you must use your upstate email password so your account will be identified correctly with the current system information.

Managing Groups

There are a variety of functions group leaders can utilize to manage their organizations. This includes: editing your organization, creating events, utilizing campus forms, accessing attendance forms, and seeing post-event data.

The location to manage your organization is called the "Dashboard". To access the dashboard log-in to the system. Then again choose the image in the upper right corner of the person and down arrow and click " Admin Dashboard".

This will take you to the back-end of the Presence system to allow access to manage your organization.

Dashboard

The screenshot shows the SUNY Upstate Medical University dashboard. At the top, a blue header contains the university name and a 'VIEW STUDENT PORTAL' link. Below the header is a 'Your Organization Summary' section with four cards: '2 Organizations', '18 Organization Members', '16 Upcoming Events', and '72 Monthly Unique Attendees'. The main content area features three large blue buttons: 'CREATE EVENT', 'CREATE FORM', and 'CREATE USER'. Below these are three sections: 'Events' (a table of upcoming events), 'Campus Forms' (a message about missing forms), and 'Organization Requirement Failures' (a list of items needing attention). A vertical toolbar on the left contains icons for 'Manage', 'Track', 'Assess', 'Engage', and 'Create'. Red arrows point from callout boxes to these elements: 'Your Organization Summary' points to the summary cards; 'Toolbar' points to the left sidebar; 'Upcoming Events' points to the event table; and 'Current Items Needing Attention' points to the orange header of the requirement failures section.

Title	Date/Time
Symphonia Masterworks: Rite of Spring	03/03/2018 - 7:30 PM
CAGB Meeting	03/13/2018 - 5:30 PM
Upstate Night: Kinky Boots	03/15/2018 - 7:30 PM
Symphonia Pops: Celtic Celebration: Music of the Emerald Isle	03/17/2018 - 7:30 AM
Symphonia Masterworks: Mendelssohn and Mahler	03/24/2018 - 7:30 PM

Organization Requirement Failures
Campus Activities Governing Board (CAGB)
Must transition by 2/28/2018, 6:15 PM.

Organization Summary

From the organization summary you can see how many organizations you are a member, total members in your organizations, How many upcoming events for all organizations, and how many individual people have attended events that month.

Upcoming Events

Events are show in descending order. If you click on an event you can edit the event or view the event details – including the pin to check people into the event.

Toolbar

This bar allows you two manage your organization, forms, events, and people. You can also see your organization statistics by clicking the “Assess button”. The Track and Engage buttons are currently not in use. You can also create events or users by clicking the large blue buttons in the middle of the dashboard screen.

Current Items

There may be times when there are items needing your attention for approval or updates. This is shown in bottom right corner of the dashboard. These items must be resolved for the notice to be removed.

Transition

1. Log In to Presence and Click “Administrative Dashboard”
2. Scroll over “Manage” on the toolbar and click “Organization”
3. Click on the name of the organization that says “In Transition”
4. Click the edit pen in the white circle at the top right corner
 - a. You must change at least one item to transition
 - i. Click Former for any past members OR keep them active and change their status to “member”
 - ii. Add new officers – you will need their name and email address
 - b. Under Advisor – delete the second blank space for an advisor if you advisor is not changing
 - c. Update your description, image, and Facebook handle if you want
 - d. DO NOT change your name!
 - e. Click Preview and make sure everything looks correct
 - f. Click “Edit” and click the “Active” button for any new members you added
 - g. Click Preview again and then Submit