



OVERVIEW

RooConnect is The University of Akron's online student organization directory and management system. With over 340 registered student organizations, RooConnect is your connection to campus engagement!

This document provides some quick reference guides to utilizing RooConnect. While the product looks different from OrgSync, most of the functions you had in OrgSync are also in RooConnect. We encourage you to explore all aspects of RooConnect!

Browser: RooConnect works best in Google Chrome

URL: rooconnect.uakron.edu OR <https://rooconnect.uakron.edu> (www will not work)

Privacy Settings: Review how to adjust your [privacy settings here](#)

App: Download the free Corq app to have access to student organizations and events

Views:

Explore: this is the standard view that all students can see and have access to. You can find all student organizations, campus events, news stories and more in this view.

Manage: this view is provided to student organization officers who have been granted certain access to manage their student organization. You can find this view by clicking on the squares to the left of your name.

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QUESTIONS OR ISSUES?

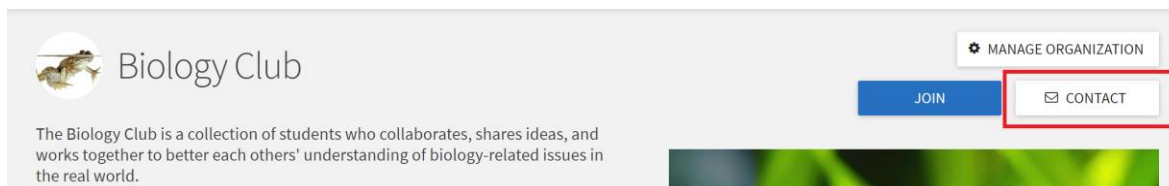
Please contact the SOuRCe during our office hours so we can assist you in person!

THE ROLE OF THE PRIMARY CONTACT

Primary Contacts hold key roles in RooConnect organizations. Every organization must have a Primary Contact identified.

Primary Contacts have two major forms of organization access:

- Full access to all [organization tools](#)
- Receive all inquiries from the organization's "Contact" buttons



ASSIGNING A PRIMARY CONTACT

Although primary contacts do not need to complete an organization's registration form, whichever user who submits a registration form that is approved by an administrator will automatically become the new primary contact of the organization. This ensures that all organization inquiries will go to the most relevant recent contact for the organization. Primary contacts can also be assigned directly by an organization officer with full access to the [roster](#), or [by an administrator](#).

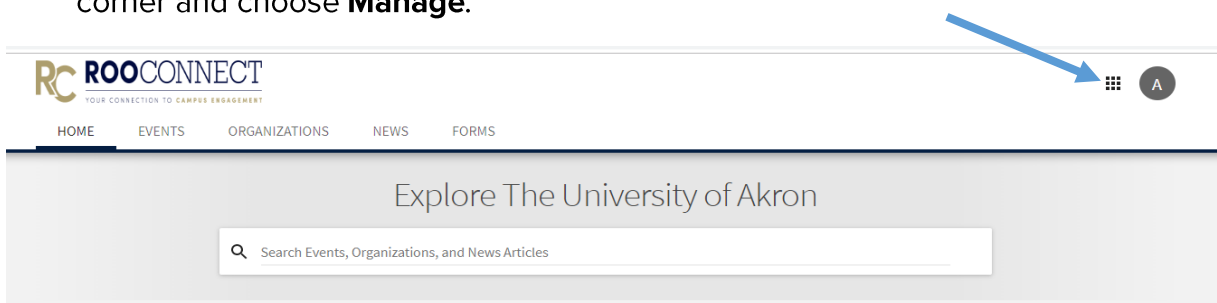
The SOuRCe recommends the primary contact to be the President of the student organization, therefore, the President should be the officer completing the annual registration process.

CREATING EVENTS TO POST TO ROOCONNECT CALENDAR

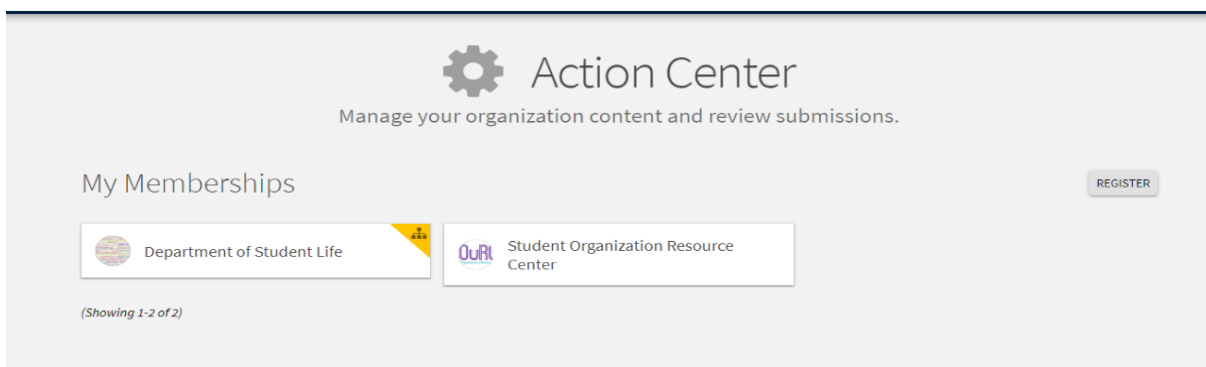
Only primary contacts and positions with full access over Events can create events within an organization. If you do not have the proper permissions, you'll want to talk to your primary contact or your site administrators in order to request the required access. From within your organization's [Action Center](#), go to Events in the organization tool menu.

Before you can request to have your event added to the RooConnect calendar, you will need to reserve a space on campus through sueventplanning@uakron.edu. You will be asked to upload a copy of your room reservation form.

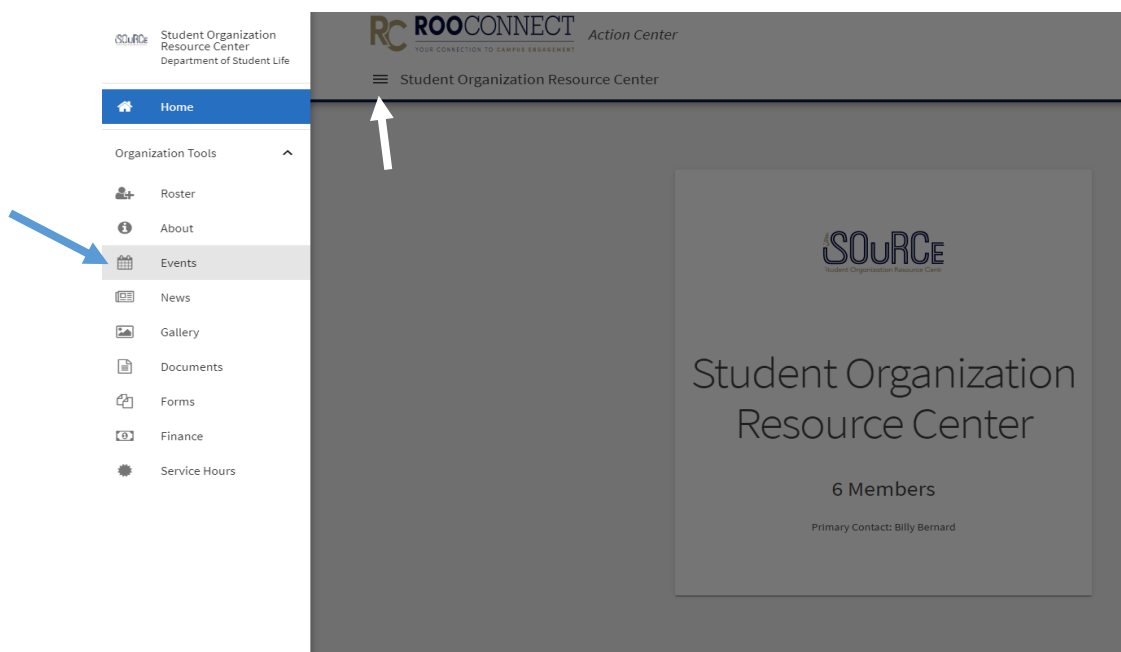
1. On the homepage of RooConnect, click on the squares in the top right-hand corner and choose **Manage**.



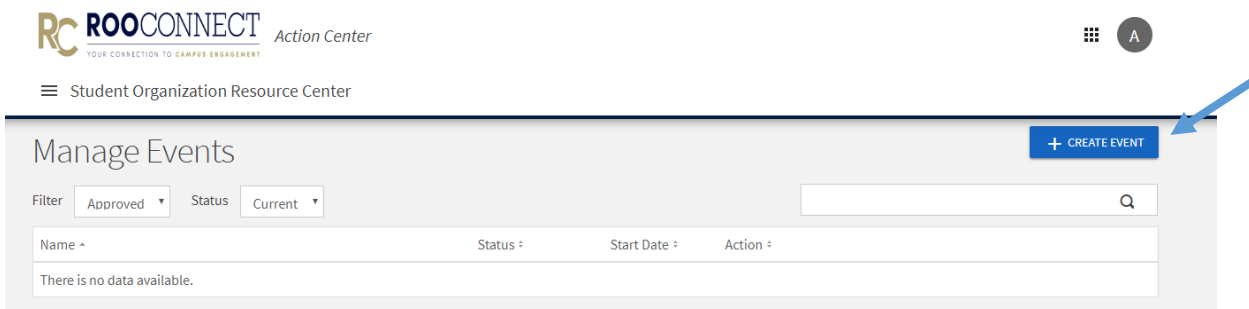
2. You will be redirected to the Action Center where you will be able to see all the organizations you are a part of. Click on the organization for which you are creating an event.



3. Click on the 3 lines next to your organization's name and click on the Events tab.



4. Click the **Create Event** button in the top-right corner of the page.



5. Once you are on the Create Event page, go through and input all the information for your event such as Event Title, Theme, Description, Date, Time, and Location.

The screenshot shows the 'Create Event' form. Blue arrows point to the following fields:

- Event Title:** A text input field with the placeholder 'Enter Event Title'.
- Theme:** A dropdown menu currently showing 'Not Selected'.
- Description:** A rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, link, unlink, bulleted list, numbered list, decrease indent, increase indent, and link.
- Additional organizations co-hosting this event:** A text input field with the placeholder 'Type here to search for organizations'.
- Start Date:** A date picker showing '20 May 2019'.
- Start Time:** A time picker showing '12:00 PM'.
- End Date:** A date picker showing '20 May 2019'.
- End Time:** A time picker showing '01:00 PM'.
- Location:** A section with an 'ADD LOCATION' button.

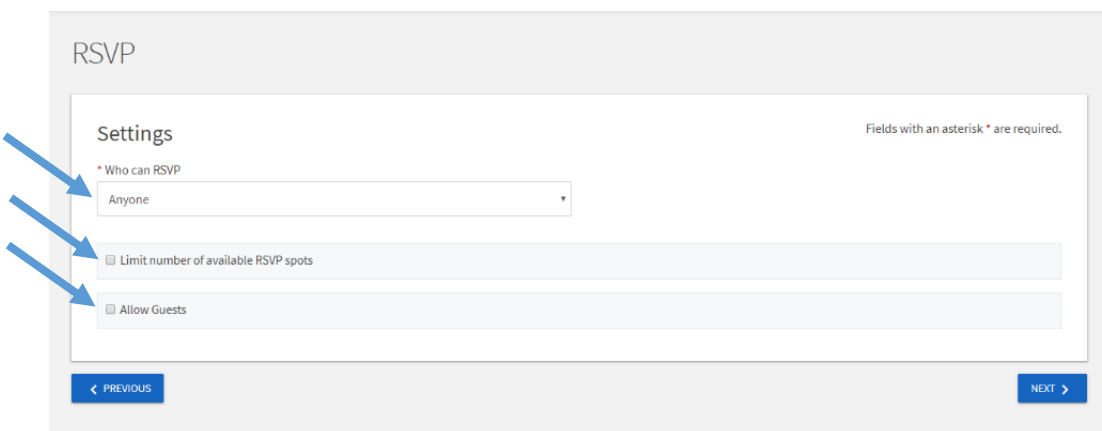
6. You can also choose who can see your event, as well as selecting a category and listing any perks your event will have.

The screenshot shows the 'Event Details' form. Blue arrows point to the following fields:

- Show To:** A dropdown menu currently showing 'The Public'.
- Allow anyone to self-report attendance:** A checkbox that is currently unchecked.
- Event Categories:** A dropdown menu currently showing 'Select categories'.
- Perks:** A dropdown menu with the subtitle 'Special benefits for your attendees' and currently showing 'Select perks'.

A 'NEXT >' button is located at the bottom right of the form.

7. On the next page, you can manage who can RSVP to your event, if needed, or if there is a limited number of spots / if guests are allowed



The screenshot shows the 'RSVP' settings page. At the top, it says 'RSVP' and 'Settings'. A note states 'Fields with an asterisk * are required.' Below this, there is a dropdown menu for '* Who can RSVP' with 'Anyone' selected. Two checkboxes are visible: 'Limit number of available RSVP spots' and 'Allow Guests'. Three blue arrows point to these three elements: the dropdown, the first checkbox, and the second checkbox. At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.

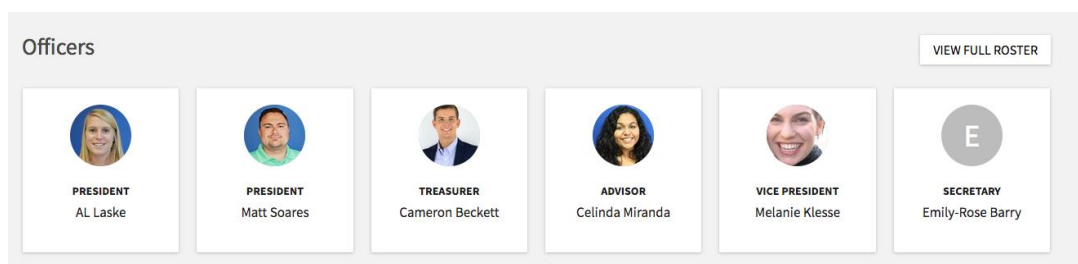
8. Next, you have the choice to upload a picture for your event. It is recommended that you add a photo so the event can stand out among other events on RooConnect.
9. You will be asked if your event costs money to attend. Select which applies to your event (yes or no). Next, upload a copy of your room reservation confirmation. You can upload this by downloading the file emailed to you by the Department of Student Life scheduling staff.
10. Finally, submit your event.

MANAGING YOUR ROSTER

The *Roster* tool allows you to manage your organization with ease and efficiency! This article highlights all the important aspects of managing your roster, keeping your information up-to-date, and making sure the right people have the right levels of permission they need in your organization.

BASIC NAVIGATION

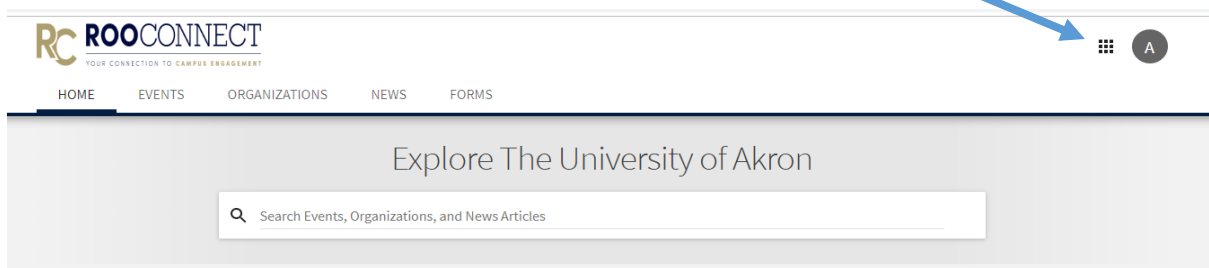
When you land on your organization's site, scroll down to see the organization's Roster. The roster will show you a list of all your organization's members and information about your organization's [primary contact](#). The primary contact is person designated to be the main point of contact for your organization. If you need to send a message to your primary contact, you can click the *Contact* button at the top of the organization page.



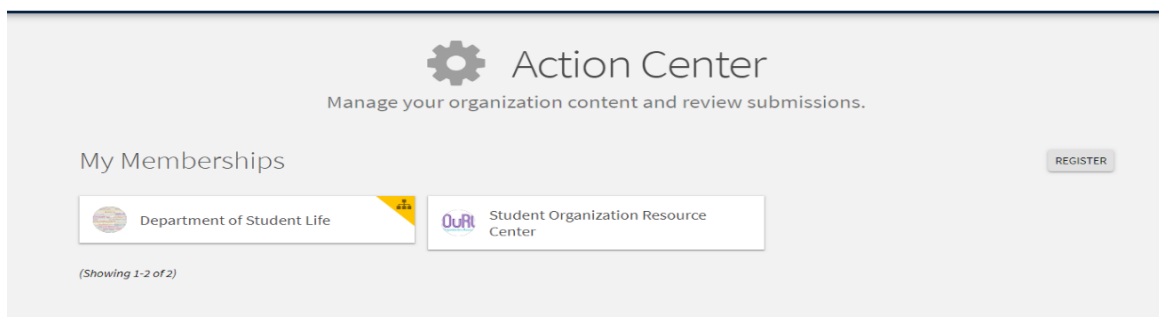
When you click **View Full Roster**, you will see members of the organization along with their photo and position, and then a list of general members who do not hold positions. Clicking on a user's name will open their Community Directory information, including basic contact information or any other additional information the user has chosen to publicly show.

ADDING/REMOVING MEMBERS

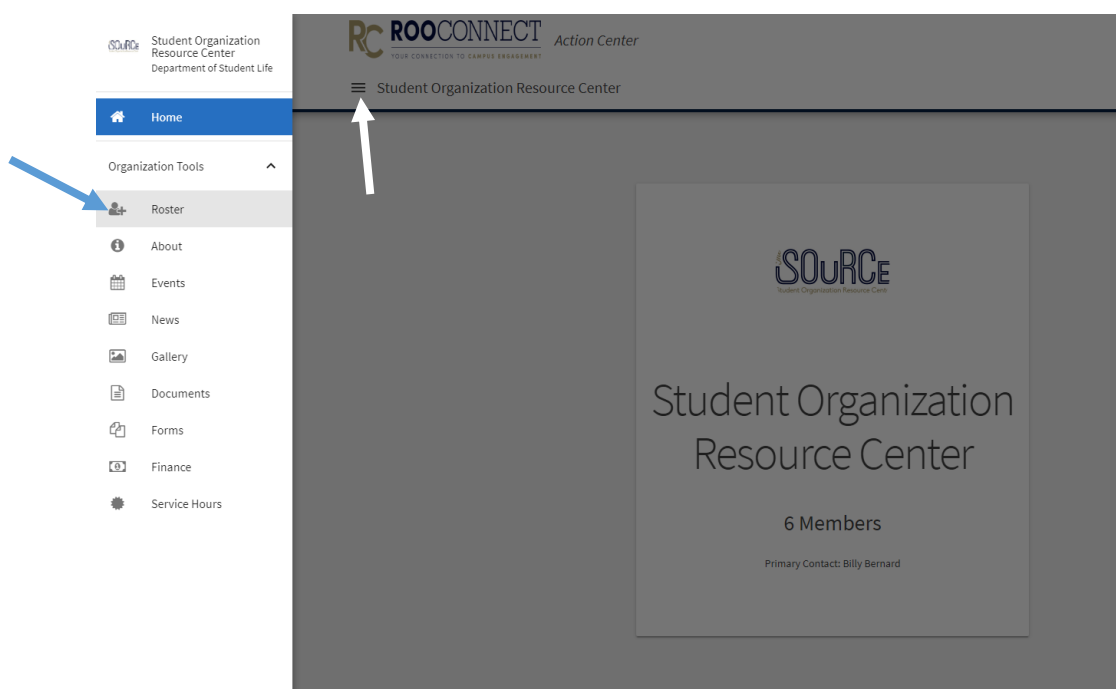
1. On the homepage of RooConnect, click on the squares in the top right-hand corner and choose **Manage**.



- You will be redirected to the Action Center where you will be able to see all the organizations you are a part of. Click on the organization you wish to add or remove individuals.



- Click on the 3 lines next to your organization's name and click on the **Roster** tab.



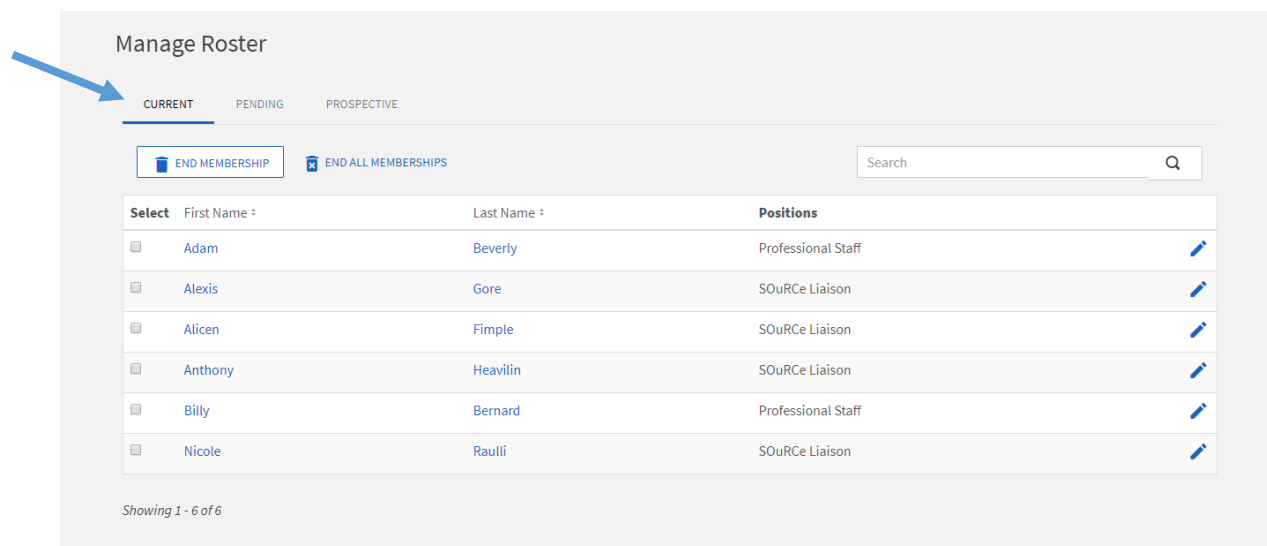
- You will be able to see your current member roster and any pending requests to join your organization.

5. To add someone to your organization, click on the **Invite People** button in the top-right of the page



6. Then enter the emails of those you wish to join your organization.

7. To remove someone from your organization, make sure you are on the Current tab for your roster.



8. Click on the box next to the names of the individuals you wish to remove from your organization and then click the **End Membership** button.

Manage Roster

CURRENT PENDING PROSPECTIVE

END MEMBERSHIP END ALL MEMBERSHIPS

Search

Select	First Name	Last Name	Positions
<input type="checkbox"/>	Adam	Beverly	Professional Staff
<input type="checkbox"/>	Alexis	Gore	SOuRCe Liaison
<input type="checkbox"/>	Alicen	Fimple	SOuRCe Liaison
<input type="checkbox"/>	Anthony	Heavilin	SOuRCe Liaison
<input type="checkbox"/>	Billy	Bernard	Professional Staff
<input type="checkbox"/>	Nicole	Raulli	SOuRCe Liaison

Showing 1 - 6 of 6

MANAGING POSITIONS

As an officer of your organization, or a person with access to manage the Roster tool, you have the ability to create Positions specific to your organization. Click on **Manage Positions** in the Action Center for the organization to explore this toolset.

Roster

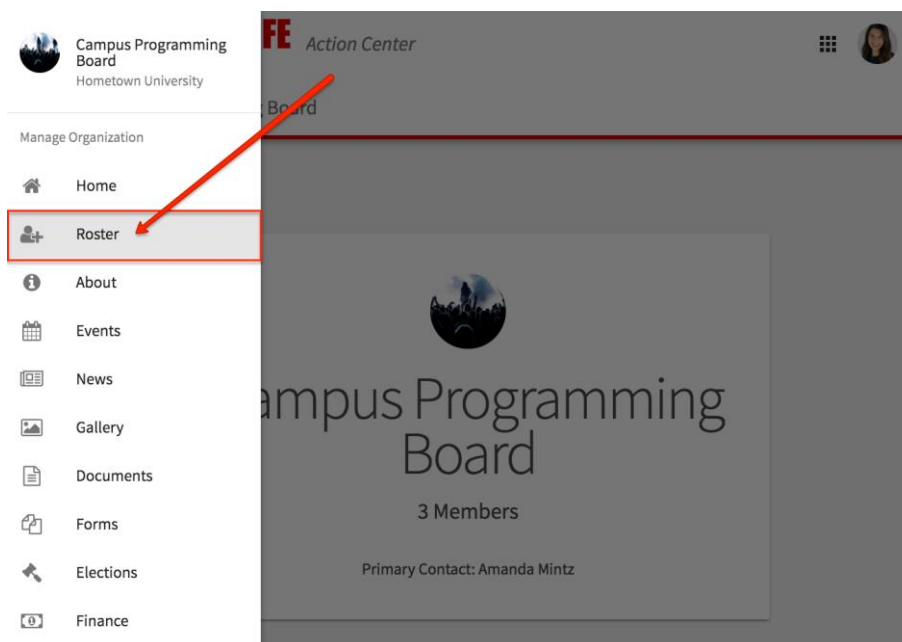
MESSAGING MANAGE POSITIONS INVITE PEOPLE

Primary Contact
AL Laske

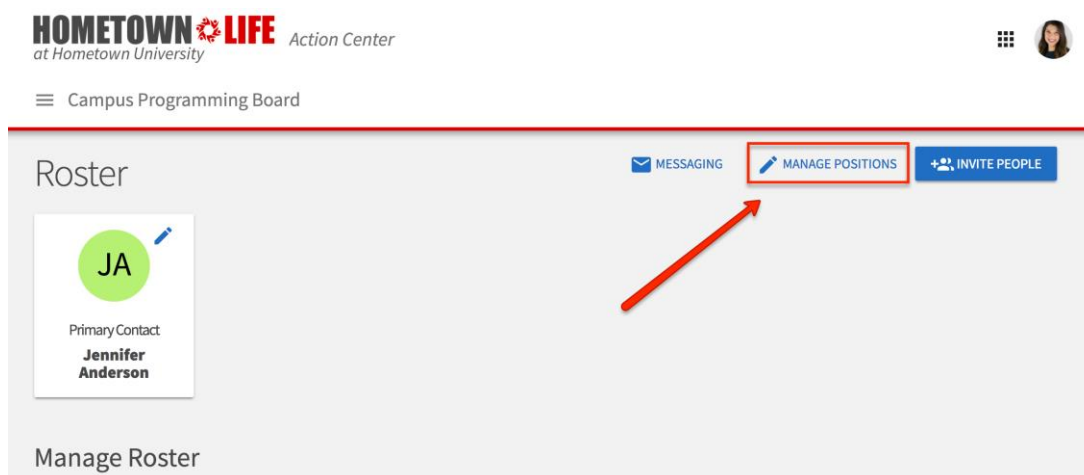
On this page, you can see a full list of the positions available to your organization. Some of these will have been created by your campus's site administrators, while others might be created specifically by your organization.

CREATING POSITIONS SPECIFIC TO YOUR ORGANIZATION

Every organization is unique, and you might find that your organization has its own specific Position titles that you want to create in your organization's site. To create new Positions for your organization, navigate to the Action Center for your organization site and click on the Roster tool.



Keep in mind you will need the appropriate level of access to manage the Roster in order to create new Positions. From the Roster menu, click **Manage Positions**. A list of all the current positions available for your organization will be listed. Some of these may have been created by the organization, while others may be site-wide positions created by your campus administrators.



To create a new Position, click **+Position** at the top of the page. Give the Position a name. Keep in mind the name should be of the Position itself, not of the user who will eventually hold this Position in your organization. You then need to assign the Position to the Position Type that is most appropriate. These “types” are determined by your system administrators.

Check the box next to "Show holders of this position on the organization's roster" if you want the user holding that position to be visible on the roster page of your organization. If you want the position to be available for users to hold immediately, select **Active**. If this is not checked, the position will only be available as a past position.

Create Position

Create a new position that is unique to your organization. You can grant *no*, *all*, or *limited* access.

Position Name should be the name of the position being created (i.e. Historian, Technical Guru, etc...) and not the name of the person who will or who is currently in the position. Once created you can assign the position to members on the **Manage Roster** page.

Position Name

Position Type

Members

☐ Show holders of this position on the organization's roster

☒ Active *(If not checked, the position will only be available as a Past Position)*

Set Management Access

☒ **No Access**
 People with this position can access NO management features

☐ **All Access**
 People with this position can access ALL management features

☐ **Limited Access**
 People with this position can access the management features selected below

CREATE

CANCEL

Finally, you will need to set the management access for this Position. Users who fill Positions with "No access" will not be able to manage any tools within the organization. "All access" allows Position holders to manage every tool within the organization's site - these are the users who will have the most power within your organization. Limited access allows you to select the level of access the Position should have for each tool within the organization site. See below for information about what each level of access will allow for each tool.

TOOL	NONE	VIEW	FULL
Registration Forms	Cannot view registration form submissions.	Can view the organization's registration submission, but cannot edit it.	Can edit and resubmit the organization's registration form.
Documents	Only able to see documents that have been shared publicly or with that user's position.	Able to view all documents, but cannot edit, delete, or create them.	Has full access to documents, including the ability to create, edit, and delete them.
Messaging	Does not have access to the messaging tool, but will receive messages sent to them.	Can view messages sent from the organization but cannot create new message relays.	Has full access to send message relays to members of the organization
Events	Only able to see events that have been shared publicly, within their organization, or ones they have been invited to.	Able to view all event details and submissions, but cannot edit, delete, or create them.	Has full access to events, including the ability to edit and delete them, manage invitations, manage event attendance, and submit event requests.
Finance	Cannot access the finance tab.	Can view transactions and requests, but cannot edit or create them.	Can submit purchase and funding requests on behalf of the organization.
Wall	Can view and contribute to the wall.	Can view and contribute to the wall.	Can view and contribute to the wall.
Roster	Can view the public roster of members but has no management access for the roster or Positions.	Can view all members of the organization, organization created positions, but cannot make edits to the roster or create new organization positions.	Can manage the roster, including the ability to create and edit positions, invite members, and approve memberships.
Profile	Can only see the basic profile of the organization.	Can view the full organization's profile but cannot update it.	Can edit the organization's profile.
News	Only able to see news posts that have been	Able to view all news posts, but cannot edit,	Has full access to news, including the ability to

Forms	shared publicly or with the organization.	delete, or create posts.	create, edit, and delete posts.
	Only able to see forms that have been shared publicly or with that user's position.	Able to view all forms, but cannot edit, delete, or create them. User can also view form submissions but cannot approve or deny them.	Has full access to forms, including the ability to create, edit, and delete forms and manage form submissions.
Photos	Only able to see photo galleries that have been shared publicly or with that user's position.	Able to view all photo galleries, but cannot edit, delete, or create them.	Able to manage all photo galleries, including the ability to edit, delete, and create them.
Service Hours	Able to see their own service hours and submit service hours for review.	Able to see service hours submitted by any user, but cannot approve or deny them.	Able to view all service hours for all users and make decisions about approving and denying service hours.
Elections	Only able to see elections that have been shared publicly or with that user's position.	Able to view all elections and election results, but cannot edit, delete, or create them.	Able to create, edit, and delete elections and view results.

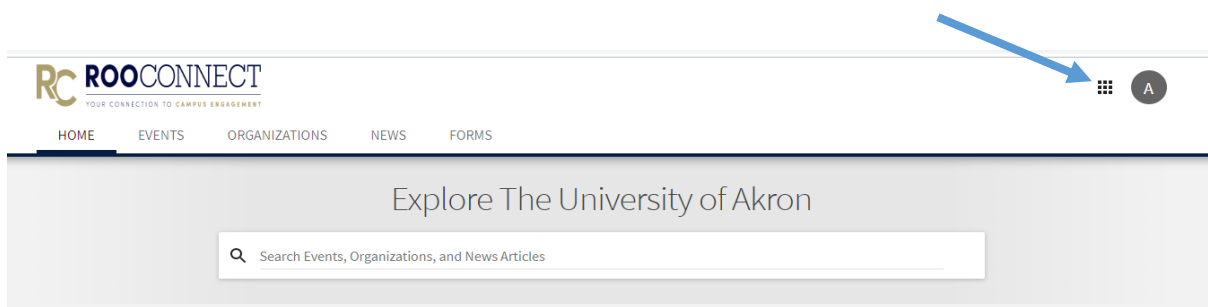
When you are finished determining the level of access for the position, click **Create**. Once the position has been created, it may take a few minutes before it can be assigned to a member.

If you do not see the position immediately, give the system a few minutes while the position is being generated. For information about adding or changing members' Positions, please read our article on [changing positions in your organization](#).

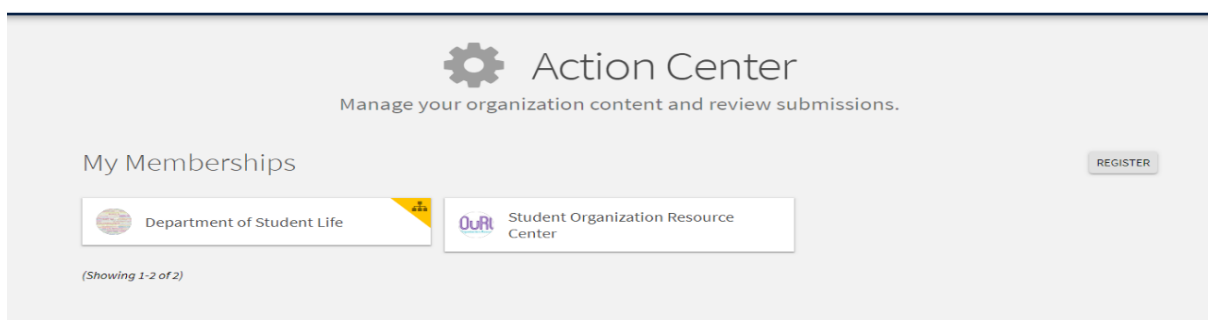
SUBMITTING A BUDGET REQUEST TO USG/GSG

*** REMINDER: A budget request must be submitted AT LEAST 30 BUSINESS days in advance WITH your advisor's approval! ***

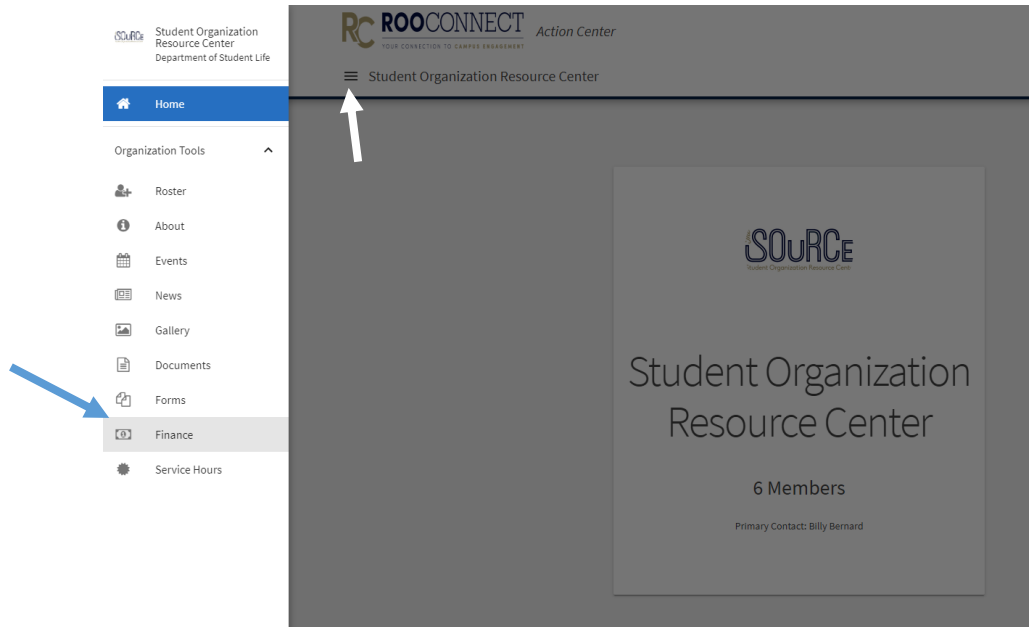
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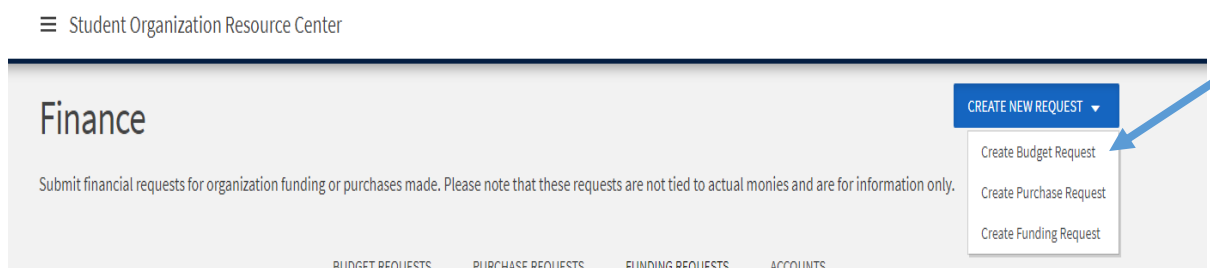
2. You will be redirected to the Action Center where you will be able to see all the organizations you are a part of. Click on the organization for which you are creating the budget.



- Click on the 3 lines next to your organization's name and click on the Finance tab.



- Once you are on the Finance page, you will be able to see any past budget request your organization has submitted, as well as the **Create New Request** button. Click the button and select **Create Budget Request**.



- You will choose which budget request corresponds with what your organizations is requesting money for, Events and Projects or Travel.

6. Go through, page by page, and fill out all the questions, such as a description of what you are requesting the money for, your organization information, contact information, and specific information regarding your Event/Project or Travel.
7. Once you have filled out all the information about your Event/Project or Travel, you will add your line items. This is where you specify exactly what your organization is requesting money for, things such as:
 - Airfare tickets
 - Supplies
 - Hotel Rooms
 - Conference/Registration Fees
 - Etc.
8. Click on the “Add Item” button to add your line items

9. You will choose your line item from the drop-down box at the top and record the quantity, price, and total cost of that specific line item.

10. It is also required for you to upload supporting documents for every line item.

These can include documents such as:

- Invoices
- Quotes
- Adding the specific items to your cart on the website from which you plan to buy from and providing a screenshot/picture of the prices and total costs

New Line Item

* Line Item Category (Required Field)

Airfare (Expense) ▼

Funding can be provided only for coach or economy class seats, not first class.

* Name (Required Field)

Description

* Quantity

1

X

* Cost

\$

=

Total

Cost must be a number.

* Upload Support Document (10MB max) (Required Field)

Choose File

No file chosen

CANCEL

SAVE

11. For a travel budget, you also must add Emergency Contact, Release of Liability, and Drivers Licenses/Proof of Insurance (only needed if members are driving to and from the destination) for each student. Click on **Add Item** under the Emergency Contact/Release of Liability section to upload these files.

REQUEST ADDITIONAL INFORMATION BUDGET

Organization Travel

Requested Total \$0.00

Reviewer Adjusted Total \$0.00

Sections (2)	# of Line Items (0)	Amount
Travel Funding Line Items	0	\$0.00
Emergency Contact/Release of Liability	0	\$0.00

Budget Section:

Travel Funding Line Items ☒

▲ This section is required.

+ ADD ITEM

+ ANOTHER "TRAVEL FUNDING LINE ITEMS" SECTION

Budget Section:

Emergency Contact/Release of Liability ☒

+ ADD ITEM

+ ANOTHER "EMERGENCY CONTACT/RELEASE OF LIABILITY" SECTION

12. Choose which form you will be uploading from the drop-down box and upload the corresponding form. In the box that asks for the cost, input \$0.

New Line Item

*** Line Item Category (Required Field)**

Emergency Contact Files (Expense)

Emergency Contact Files (Expense)
 Release of Liability Files (Expense)
 Drivers License/Proof of Insurance (Expense)

Description

*** Quantity** *** Cost** **Total**

1	X	\$	=	Cost must be a number.
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*** Upload Support Document (10MB max) (Required Field)**

Choose File
 No file chosen

CANCEL SAVE

13. Once you have uploaded Emergency Contact and Release of Liability forms for every student and Drivers Licenses/Proof of Insurance forms, if needed, submit the budget request.

SENDING MESSAGES TO MEMBERS

RooConnect uses “Message Relays” or simply “Relays” to allow you to send a rich-text email message to many people based on their involvement data in Engage. For example a message to all Presidents of Recreational Sports organizations about an upcoming required meeting.

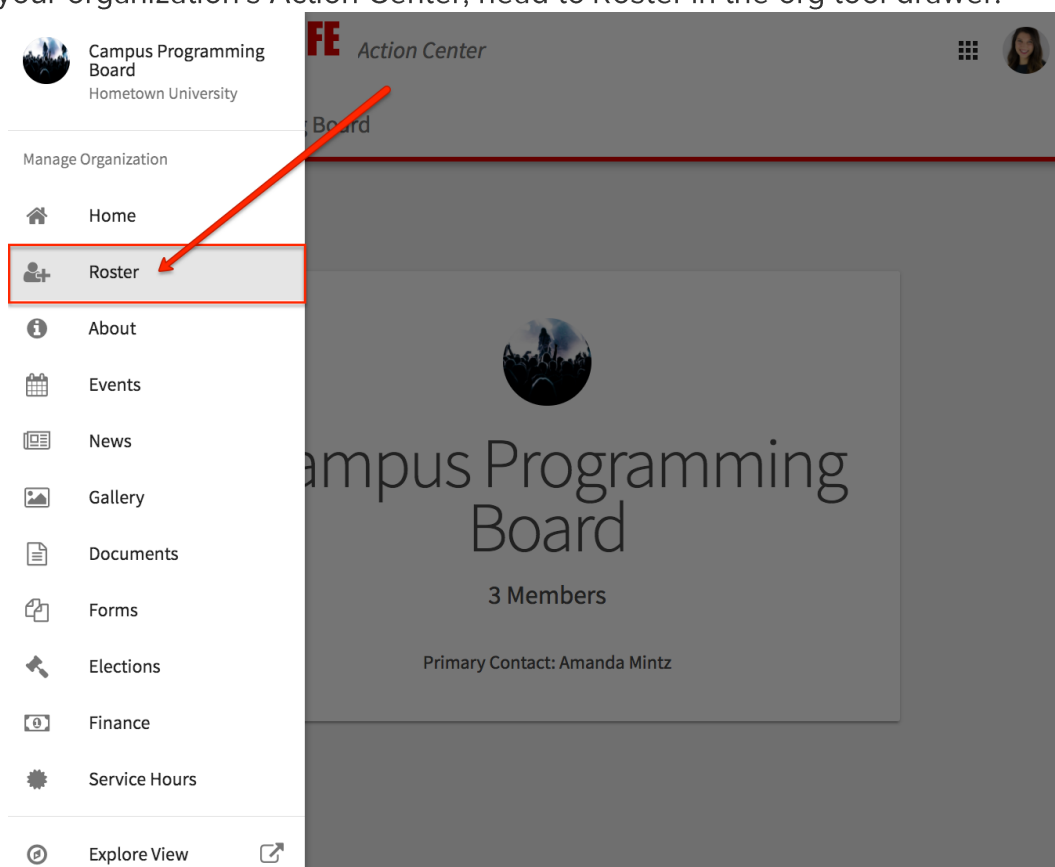
Organization leaders with "All Access" to messaging have the ability to message the members of their organization. From this area messages can be composed and delivered to various combinations of organization members and officers. There are two criteria that student leaders can use to define the message recipients:

Criteria	Examples
Positions	Primary Contact, Member, President, etc.
Members	Specific people within the organization

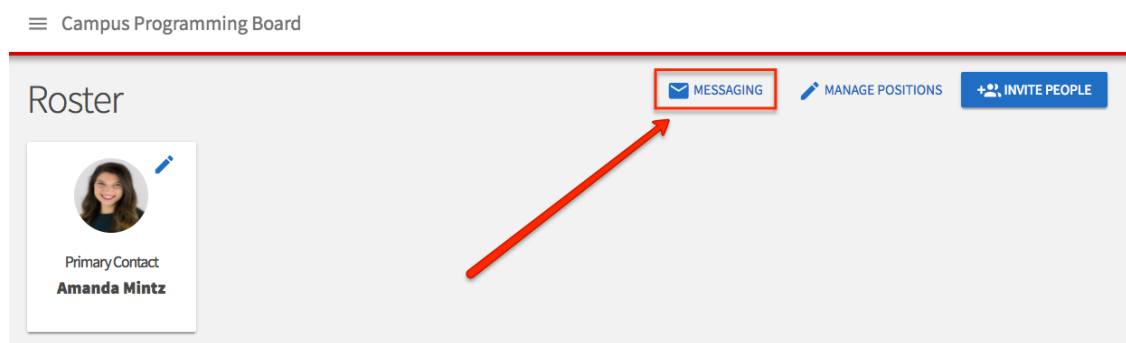
By using these pieces of criteria, an administrator can send a message to the holding certain [positions] and/or these specific [members]. Student Leaders can also send messages to all members of their organization, excluding specific individuals as appropriate.

CREATING A MESSAGE USING EMAIL

From your organization's Action Center, head to Roster in the org tool drawer.



Click on the **Messaging** link in the upper right corner, followed by **Create Relay** on the page that loads.



Select the positions or individual members that you would like to send the message to by selecting Edit... within each component.

1) Select Recipients

Send to members holding these **Positions**

[EDIT...](#)

Marketing Committee
Marketing Committee Chair

and/or these specific **Members**

[EDIT...](#)

3 Selected

Enter a title for your relay to identify it later (this does not carry over to your message). When you're finished, click **Generate**.

On the new page, take the Temporary Relay Address (email address in blue text), open a new email in your preferred email account (e.g., Outlook), and add this into the "To" field.

Then, just compose and send your message as normal!

Remember that messages are sent within the system and then out to an e-mail address if the user has not opted out of receiving messages via e-mail in their notification settings.