OrgSync Implementation Checklist

Please use this guide to get started with OrgSync and set up your organization portal. If you encounter any technical difficulties or need further training/assistance from OrgSync, please contact OrgSync Support (support@orgsync.com). Also, you may visit the OrgSync online user guide @ http://help.orgsync.com for step by step instructions on each of the items below.
OrgSync offers weekly online trainings. To register, visit http://www.orgsync.com/media_events/events.

You may also contact the Office of Student Development Programs and speak with Kathy Jones, David Stetter, or Carmen Stoen for assistance at 812/465-7167 or Getinvolved@usi.edu.

Create your personal OrgSync Account: Visit www.orgsync.com and click Login in the upper right hand corner. Click on "To Sign in with Campus ID" and enter your myUSI login information. Complete the registration and personal profile information.

Register your organization. Individual completing registration for organization will automatically be given administrative access to the portal.

Set Organization Settings:

1. ***Review/Create account groups***. Account groups will allow you to setup different access levels to edit different modules as make it easier to target communications to members within your organization. Create committees based on certain events or initiatives your organization is working on to disseminate even more targeted information to your members.
    a. Default account groups: Administrators, Alumni, Inactive Members, Members, Officers
2. ***Set up group permissions***. Setting up group permissions allows you to manage access to tools and modules within OrgSync based on your account groups.
3. ***Create a welcome message and custom footer***
4. ***Invite officers.*** Once your officers have joined your organization, you may assign them to the officers group, and together you can begin to add content to your portal.

Create content:

1. ***Add Files to Media Section (meeting minutes, pictures, videos, etc.)***
2. ***Add News Posts***
3. ***Edit Event Categories*** We have set the following default categories:
    a. Organization Meetings
    b. Social
    c. Service
    d. Educational Programs
    e. Leadership
    f. Intramurals
    g. Recruitment
    h. Risk Management (fraternities and sororities should add)
4. ***Add upcoming events and meetings to your organization's calendar.***
5. ***Build online forms and polls.***
6. ***Invite your members.*** Although you may invite your members at any point during the process, we suggest populating your organization's portal first so that your members see an established community upon joining, allowing them to get involved quickly and easily.