UW – Stevens Point Involvement Network (S.P.I.N.)

User Guide

7/26/2017

This document includes step by step instructions for use of the S.P.I.N. software (https://spin.uwsp.edu) Additional questions may be directed to case@uwsp.edu

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Introduction: Logging In and Switching Views

A. To log in to Stevens Point Involvement Network, go to spin.uwsp.edu and click the "Sign In" button in the upper-right corner of the web page. Enter your campus login username being sure to have "@uwsp.edu" at the end, and your password. Click "Sign in".

    a. Internet Explorer is NOT a recommended Browser for use with SPIN.

B. Once logged in to Stevens Point Involvement Network, click on the view switcher ⦂ in the upper-right corner of the web page to change between Explore and Manage views.

1. Managing the Organization's Roster

A. From your organization's page, click the "Manage Organization" button ⚙ MANAGE ORGANIZATION in the upper-right corner of the browser window.

B. This will open the organization's overview page. From here, click the Menu button ☰ in the upper-left of the browser page. From here, click the Roster button 👤+ from the list of options.

Note: Only organization position holders with "Roster" permission will be able to perform the following steps.
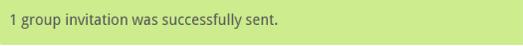
Section 1: Managing Officers and Members

A. The "Current" tab will show all currently listed members, even those that are hidden in the public view.

B. You can remove members by checking the box and clicking "End Membership".

C. You can add officer positions by clicking "Edit Positions". **Note:** For more information on positions, refer to Section 3.

D. The "Pending" tab will show individuals whom you have invited to join but have not yet confirmed or denied the invitation.

E. The "Prospective" tab shows individuals who have asked to join your organization. You can "Approve", "Deny", or "Send Message" to these individuals.

Section 2: Inviting Members and Officers

A. Click "Invite People".

B. If adding an officer, type one name into the E-mail address box.

C. Click "Add E-mail Addresses".

D. The below column will appear on the right side. Use the dropdown menu to select the correct position.

Invitations will be sent to:

Invite as	Member ▾
ljentz@uwsp.edu	🗑

[SEND INVITATIONS] CANCEL

E. If adding members or multiple officers, type all emails into the E-mail addresses box separated by commas or one per line.

F. Click "Add E-Mail Addresses".

G. In the right column leave the dropdown menu as **Invite as** Member ▾
Recommendation: If adding a large number of people, add all as members. It will be quicker to add them all first and to assign positions later.

H. Click "Send Invitations"

I. If successful, you will see `1 group invitation was successfully sent.` at the top of the page.

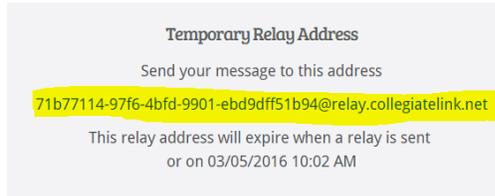J. You can view sent invitations under the "Pending" tab on the manage roster page.

Section 3: Managing Positions

A. Click "Manage Positions" on the Public Roster page.

B. To edit an existing position template, click on the Position Name.
    i. Position Name: This can be edited to an organization specific title.
       Note: For President and Treasurer, **do not** change the position type. These can be renamed "Captain" or "Head of Finance" respectively; just **do not** change the position type.
    ii. Position Type: Most positions fall under "Officer". **Note:** To see the full explanation of all types refer to Appendix A.
    iii. Show holders of this position on the organization's roster: Checking the box means the individual and position will show up in the specified type section. Leaving the box unchecked means the person has that title for administrative purposes but is not listed in the roster.
    iv. Active: Leave Checked
    v. Set Management Access: This is where you will be able to assign your officers access to the parts of your page. **DO NOT ASSIGN ALL ACCESS.**
        i. If the holder(s) of position need(s) additional access, select "Limited Access".
        Note: Refer to Appendix B for explanations of each permission.

C. To create a new position, click on the "+ Positions".
    i. The creation process is the same as the above steps for editing a position.

Section 4: Messaging

A. To message your organization's officers or members, click "Message" on the public roster page.

B. To send an email, click "Create Relay".

C. From here you have a couple options:
    i. To send the message to particular positions, click the "Edit" button under "Positions".
        a. From here, you can check the box of the positions that should receive the message.
        Note: To send the message to everyone in the organization, including officers, just check the box next to Member.
    ii. You can also select individuals by clicking the "Edit" under "Members".

D. Once you have selected the desired recipients, enter a subject in the "Subject" box. This will autofill as the subject of the email.
E. Click "Generate".
F. You will be able to review the details of the email relay on the next page. If you are satisfied:
   i. If you are using the Outlook **Desktop** App, simply click on the long email address like the one below:

Temporary Relay Address

Send your message to this address

71b77114-97f6-4bfd-9901-ebd9dff51b94@relay.collegiatelink.net

This relay address will expire when a relay is sent
or on 03/05/2016 10:02 AM

   ii. If you are using the Outlook **Web** App, copy the below address into the "To" section of a new message:

Temporary Relay Address

Send your message to this address

71b77114-97f6-4bfd-9901-ebd9dff51b94@relay.collegiatelink.net

This relay address will expire when a relay is sent
or on 03/05/2016 10:02 AM

University of Wisconsin-Stevens Point [US] https://email.uwsp.edu/owa/?ae=Ite

Send   Options... HTML

To...   71b77114-97f6-4bfd-9901-ebd9dff51b94@relay.collegiatelink.net
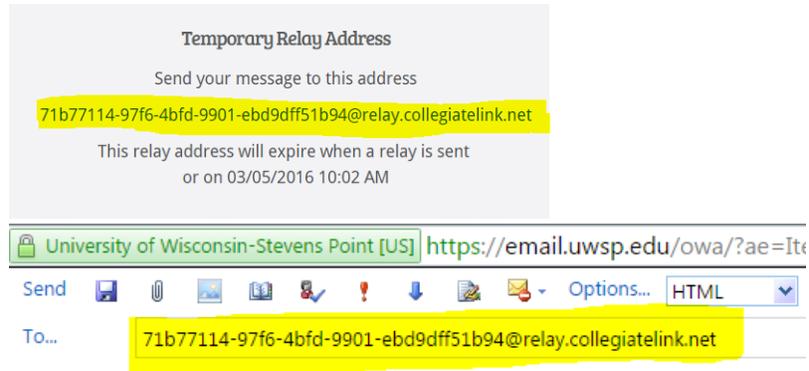
   iii. Complete the process like you would with any other email.

Appendix A: Position Types

Member:

Use for a general member position. Position title will not appear in the roster. Individual will not show up in specific section.

When to use: Member needs access to additional features but is not a true officer.

Officer:

Use for all officer positions other than the President and Treasurer. Position title will appear. Individual will show up in "Officer" section.

When to use: Most position templates will fall under this type e.g., Vice President, Secretary, Web Manager, etc.

Treasurer:

Use for the treasurer(s) of the organization. Position title will appear. Individual will show up in "Treasurer" section.

When to use: Treasurer only

President:

For president(s) of the organization. Position title will appear. Individual will show up in "President" section.

When to use: President only

Adviser:

Use for organization advisers. Position title will appear. Individual will show up in "Adviser" section.

When to use: Primary and Secondary advisers.

Student Staff:

Use for paid student positions. Position title will appear. Individual will show up in "Student Staff" section.

When to use: Primarily to be used by campus departments and offices.

Professional Staff:

Use for professional staff. Individual will show up in "Professional Staff" section. Job title will be seen.

When to use: Primarily to be used by campus departments and offices.

Appendix B: Summary of Position Template Permissions

By default, the president and treasurer will have full administrative access. The primary adviser will be able to view all functions but not edit.

Registration Forms
Full: No additional permissions; Registrations will already be open to be completed by anyone. However, the registration will only be accepted if completed by the president.
View: No additonal permissions
Suggested Additional Officers: Any

Documents
Full: Access to upload, delete, and modify documents
View: Access to see all uploaded documents
Suggested Additional Officers: All

Messaging
Full: Ability to use mass messaging relays.
View: No additional Permissions
Suggested Additional Officers: Officers who would have had access to the organization's email

Events
Full: Ability to create and modify events, track attendance, and manage RSVP's
View: See all details of all organization events, including invite only events
Suggested Additional Officers: Those in charge of coordinating events

Finance
Full: No additional permissions at this time; Finance module is in the works.
View: No additional permissions at this time.
Suggested Additional Officers: President and Treasurer Only

Wall
Full: Delete comments on home page discussion thread.
View: No additional permissions
Suggested Additional Officers: Those who will frequently use the SPIN page

Roster
Full: Access to manage roster and positions. ***Do not give anyone other than the president and treasurer this permission.*** Individuals with this permission can end any memberships including the president, can give themselves full access to all features, and can give others full access to all features. This is one permission to rule them all, one permission to find them, one permission to bring them all …
View: No additional permissions
Suggested Additional Officers: President and Treasurer Only!

Profile
Full: Access to edit the about sections of the page and change the profile picture
View: No additional permissions
Suggested Additional Officers: Secretary, Web Weaver/Manager

News:
Full: Access to create, edit, and delete news stories
View: Can see all news stories including those for only specific positions
Suggested Additional Officers: Any

Forms
Full: Access to create, edit, and deactivate forms; access to approve and deny submissions
View: Can see all organization forms and submissions
Suggested Additional Officers: Any

Photo
Full: Access to create upload, delete, and edit photos and albums in the gallery
View: Can see all organization photos

Suggested Additional Officers: Any

Service Hours
Full: Access to approve and deny service hours
View: Access to see all submissions
Suggested Additional Officers: Volunteer Chairs/ Coordinators

Customization
Full: Access to change interests and cover photo
View: No additional permissions
Suggested Additional Officers: Web Manager/ Weaver

Polls
Full: No additional permissions
View: No additional permissions
Suggested Additional Officers: Any

Elections
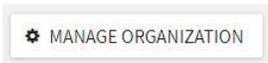**Full:** Access to create, edit, and delete elections
View: Can view all elections and details thereof
Suggested Additional Officers: Those in charge of conducting elections

3. Creating and Managing Events

Note: Only organization position holders with full "Events" permission will be able to perform the following steps.

Section 1: Creating Events

A. From your organization's page, click the "Manage Organization" button in the upper-right corner of the browser window.
B. This will open the organization's overview page. From here, click the Menu button ≡ in the upper-left of the browser page. Then, click the Events button 📅 from the list of options.
C. Click "Create Event". This will open the event-creating page.
   i. <u>Event Title:</u> Enter event title
   ii. <u>Theme:</u> Select the theme that most accurately describes the event. This is a searchable field in the events calendar and the CORQ app. The theme will also generate an event photo if a custom event photo is not uploaded.
   iii. <u>Description:</u> Enter who, what, and why of the event.
   iv. <u>Dates:</u> Enter start date and time and end date and time.
   v. <u>Location:</u>
      1. <u>Location Name:</u> Enter the Where

         2. <u>Address:</u> An address is only required if you want to include a map to the event. To not include a map click on the "No" button at the top of the popup window.

         3. When you have completed the location information, click "Save".

vi. If this is a re-occurring event or meeting, click "Add Another Date".

vii. <u>Event Details:</u>

The "Show To" dropdown menu allows you to select the privacy of the event.

         1. "Students & Staff at University of Wisconsin – Stevens Point" will show the event to any logged in user.

         2. "People Invited by Host" will show this to only those you invite through the event.

         3. "Organization Members" will show this event to only those that are confirmed members of the organization.

         4. "Anyone in the World" will make the event completely public and viewable to those who do not have a UWSP login.

viii. <u>Event Categories</u> are searchable "tags" for the event. You may select all that apply.

         1. To add a category, click on the dropdown menu.

         2. Click on the desired category.

         3. The added category will appear below the drop down menu:

           On Campus   ✕

         4. You can remove a category by clicking the "X"

ix. <u>Perks</u> work the same as Event Categories above.

x. <u>Who can RSVP allows to you control event attendees.</u>

         1. "Anyone" allows any individual who can see the event to RSVP.

         2. "Only Invitees" allow only those who have been invited through the event to RSVP

         3. "No one" removes the RSVP option for an event

xi. <u>Maximum number RSVP spots allowed:</u> Entering a number into this field will limit how many people can RSVP. This can be used as an event registration for a limited space event.

         1. <u>"Count guests against remaining RSVP spots"</u>, this turns on the system feature to automatically reduce the number of spots available as RSVPs AND counts "Guests" included in a single RSVP.

         2. <u>"Show remaining RSVP spots to public"</u>, this allows the public to see the number of spots available.

xii. <u>"Allow anyone to self-report attendance"</u>, Checking this box will allow individuals to confirm on their own whether he or she attended. This is to be used for events where attendance will not be tracked. DO NOT use for events for which you need accurate information.

xiii. When finished entering information click, "Next".

xiv. This next page will allow you to upload a cover photo. To upload a photo, click "Choose File".

1. If a photo is uploaded, the events shown to all logged in users and/ or the public will appear in the opportunities board on the home page and in embedded feeds. Like the events below. After an event cover photo has been uploaded, click "Next".
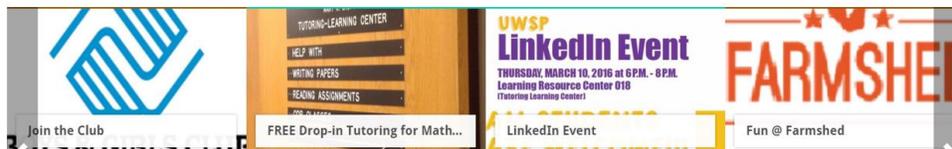
2. If a photo is not uploaded, the event will still appear in the events section, but not in the opportunities board. If not uploading a photo, click "Skip".

xv. The next form will ask you to select an organization type. Select the appropriate option from the list, and click "Next".

xvi. Student organizations will be asked to supply additional information. On this page if "On – Campus" and "None of the Above" are selected, then no additional information will be required. If both of these are not selected, the form will walk the user through the appropriate university policy to ensure compliance. When finished, click "Next".

xvii. This will open the Review Event Submission page. You can go back to any of the prior pages to edit information by clicking on the page name e.g., "Details".

xviii. When satisfied, click "Submit".

Section 2: Editing Events
a. You may go back anytime to edit event details by clicking on the "Change Details" box at the bottom of the event page.

Section 3: Managing Invitations
a. Click on the "Manage Invitations" box at the bottom of the event page.
b. You may invite members from you organization roster using the "Invite Users" tab.
   i. Click on a name to add to the list.
c. You may invite others via email address using the "Invite by Email" tab.
   i. Type the email addresses in the box.
   ii. Click "Add E-Mail Addresses".
   iii. In the right column that appears, when satisfied, click "Send Invitations".

Section 4: Tracking Attendance
Note: Only organization position holders with full "Events" permission will be able to perform the following steps.

Card Swipe in SPIN

a. Log onto https://spin.uwsp.edu/
b. Go to your organization's page
c. Click on Manage Organization
d. Click on the Menu Expander and then the Events tab

e.   Select the event for which you are taking attendance

f.   At the top of the page, click "Track Attendance"

g.   Copy the "Access Code"

h.   Click on the Swipe page url: https://spin.uwsp.edu/swipe

i.   Paste the access code in the white bar and click submit

j.   "Ready to swipe" should appear in a blue bar.

k.   Click into the white bar

l.   Swipe ID cards with the scanner

Card Swipe in Excel **(Recommended method for events with large attendance or spotty Wi-Fi)**

a.   Open a blank Excel worksheet

b.   Click in cell A1

c.   Swipe ID cards

Adding Excel Stored Attendance to SPIN through Copy and Paste

a.   Log onto https://spin.uwsp.edu/

b.   Go to your organization's page

c.   Click on Manage Organization

d.   Click on the Menu Expander and then the Events tab

e.   Select the event for which you are taking attendance

f.   Scroll to the bottom of the event page and select Track Attendance

g.   Click on "+ Add Attendance"

h.   Click the Text Entry tab

i.   Select Card ID Number

j.   Copy and paste column A into the Attendees box (up to 500)

   a.   If your attendance is greater than 500, you can repeat steps f-i as many times as needed

k.   Ensure the status is set to Attend

l.   Click Add

Adding Excel Stored Attendance to SPIN through a File Upload

a.   Save the Excel file as a CSV (comma separated value)

b.   Log onto https://spin.uwsp.edu/

c.   Go to your organization's page

d.   Click on Manage Organization

e.   Click on the Menu Expander and then the Events tab

f.   Select the event for which you are taking attendance

g.   Scroll to the bottom of the event page and select Track Attendance

h.   Click on "+ Add Attendance"

i.   Click on the File Upload tab

j.   Click Card ID Number

k.   Choose Saved Excel File

l.   Click Upload

m. Refresh the page after a few seconds. This should now show as complete.
n. If error rows are present, click Export to view which numbers failed.

Adding Attendance for an email or Card ID sign up/in list
a. Log onto https://spin.uwsp.edu/
b. Go to your organization's page
c. Click on Manage Organization
d. Click on the Menu Expander and then the Events tab
e. Select the event for which you are taking attendance
f. Scroll to the bottom of the event page and select Track Attendance
g. Click on "+ Add Attendance"
h. Click the Text Entry tab
i. Select E-Mail Address or Card ID Number (depending on type of information collected)
j. Type email addresses in Attendees box (one per line)
k. Ensure status is set to Attend
l. Click Add

Section 5: Cancelling an Event
A. You may cancel an event at any time by clicking the "Cancel Event" box at the bottom of the event page.
   i. Those who have been invited and those that have submitted an RSVP will be notified. You can also enter a comment that will go out with the notification.

4. Forms

Note: Only organization position holders with full "Forms" permission will be able to perform the following steps.

Section 1: Creating a Form

a. From the organization homepage, click "Manage Organization."
b. Click the Menu Expander and then the "Forms" tab.
c. On this page, you will be able to see currently active forms. To view inactive forms click the "Archived" tab.
d. To create a new form, click "Create Form".
e. Enter the form name in the "Name" box.
f. If these forms should be immediately available, check "Active".
g. Enter the date and times of when the form should be available. The start time will default to 1 hour after the form creation started. This can be set earlier i.e., immediately. The end time can be set at any point in the future e.g., 1 year, for forms that always should be available.
h. Allowing Multiple Submissions will allow users to submit more than one pending form at a time. To enable this click, "Allow multiple Submissions".

i. Select which users should have access to the form. If the form should be available to all logged in users not just members, leave all boxes unchecked.

j. When satisfied, click "Save and Add Questions".

k. This will open the form "page". Recommended: Title the individual pages, especially for multiple page forms. To do so click, "Page Properties". Enter title and click, "Ok".

l. To add a question, click on the desired question type box e.g. "Radio Button List".

m. This will open the "add item" page. Type the question in the "Question Text" area.

n. If asking a multiple choice style question, enter the answers one per line in the answer text section.

o. When finished, click "ok".

p. When finished, simply click "Back to Forms". The form will auto-save.

q. On the forms page you will be able to get a shareable link by clicking "publish". You will also be able to set the form to active from this page, if you did not do so during the creation process.

Section 2: Editing a Form

a. In the forms section when in Manage View (see Introduction for how to switch views), click on the form name e.g. "example form".

b. If you need to edit an attribute of the entire form e.g., name, active status, or who can access the form click on "form properties".

c. If you need to edit a page, click on the page box.

d. To edit the page attributes e.g., name, conditions, or to show a back button, click "page properties".

e. To edit a question, the answers or question properties, click anywhere in the question area then click on .

f. To edit the question, edit the text box and then click "ok" to save and close or click "apply" to save and leave the edit box open.

g. To add or edit an answer, click on the "answers" tab. Click "+ new answer" to add an answer. To edit an answer, click on an answer option e.g., Ghostbusters , edit the text field. Then, click "ok" to save and close or click "apply" to save and leave the edit box open.

Section 3: Conditional Logic

a. The forms in SPIN allow you to use a feature called Conditional or Skip logic. This means that the form will prompt additional pages to be read or completed based on the answer to previous questions. To create additional questions using conditional logic, click on "page list".

b. Click "+ page".

c. Click "page properties".

d. Selection the "conditions" tab.

e.   Click "add condition".
f.   In the "select question dropdown, select the question of which the response should prompt the user to complete this page. For example, I would select ☐ Who you gonna call? ▼ .
g.   In the "select answer dropdown, select the response that will prompt the user to complete this page. For example, I could select Bill Murray ▼ .
h.   The final dropdown allows you to dictate if the response should or should not be selected.
    i.   "Is selected" will prompt this page if the above response is chosen.
    ii.   "Is not selected" will prompt this page if the above response is not chosen.
    iii. For example, I could choose, "is not selected" to prompt the question

    * Why did you not choose Bill Murray?

i.   You can have multiple conditions. To add another condition click "add condition" You can then determine if this page should be prompted if both conditions are met by selecting "And", or if the page should be prompted if either condition is met by selecting "Or".
j.   To delete a condition click the "x".
k.   You can group the conditions as well. To do so, check the boxes to the left of each condition and click "group selected". You can then create infinite possibilites of conditions.
l.   To undo a grouping, click.

5. Elections

Elections can be conducted in the SPIN system. Elections operate similarly to forms but separate the submitter from the submission. In other words, administrators will be able to see who voted and the voting results but will be unable to see who voted for which results.

Section 1: Creating an Election

a.   From the organization's homepage, click on the "Elections" tab.
b.   Click on the "Create Election" button.
c.   Enter the election name in the "Name" box. This is the name for the entire election not just for an individual ballot.
d.   If additional information or instructions are needed or wanted, check "Include Instructions".
e.   Type the information or instructions in the "Additional Instructions" box.
f.   If the election should be available immediately after creation, check "Active".
g.   Set the date and times that the elections should be open.
h.   If you would like a banner to appear on the organization homepage (see below), check

    ☑ Display an alert on the organization homepage when the election is active and voting is open

    Elections
    Election
    ends 3/19/2016 10:15 AM   VOTE NOW

i.   If only the current members should be allowed to vote, check "Only Allow Users Listed on the Roster of this Organization to Vote".

j.   When finished, click "Save".

Section 2: Creating a Ballot

a.   Click on "Create Ballot". If you do not see this button, make sure you are in the "Ballots" tab.
b.   Title the ballot in the "Name" box. This should be the name of the particular position or question.
c.   Leave the General Access set to "Enable". Access Restrictions are an administrative function in the site. If you have a particular case in which particular members should not be able to vote on a ballot, contact case@uwsp.edu.
d.   Click "Save".
e.   This will open the ballot question creation page. This section operates exactly as a form. See "Forms" for more information. When completed, click "Back to Ballots". This will auto-save.
f.   The "Publishing Options" tab allows you to elect to display the election on the organization homepage and/or to get a shareable link. When finished, click "Save".
g.   When the election is live, you will be able to track the results in the "Results" tab.
h.   You can show the results based on: the total number of votes e.g., for ballot questions within the user can select more than one or by the total number of voters e.g., recommended for most election types.
i.   Click on the ballot name to view the results e.g.,

Ghostbusters		Voters: 2
Results		EXPORT BALLOT VOTES
Who is the best Ghostbuster?		
	Count	Percent
Dan Aykroyd	1	50%
Bill Murray	1	50%
Kristen Wiig	0	0%

j.   The list of all voters can be exported into a spreadsheet by clicking "Export all Votes".
k.   All election votes can be exported into a spreadsheet by clicking "Export all Votes".
l.   Individual ballot results can be exported into a spreadsheet by clicking "Export all Votes".