How To: Advisor Resource

This how to will help you as an Advisor use OrgSync. Remember, if you ever have any questions on OrgSync contact Student Life at stulife@mst.edu
The Role of an Advisor in OrgSync

OrgSync is being used by Student Life for all RSO Compliance. This system will be used to replace the paper compliance process that has existed in the past. RSOs that you advise will submit online forms through OrgSync, and you will be asked to approve them. This will show you how to do that a number of other functions you should be aware of as an Advisor.
You are being asked to

- Approve RSO Compliance Submissions
- Approve any forms submitted for your review by your officers (this is an individual RSO process, not Student Life)
- Help ensure accuracy of the RSOs Roster
- Encourage your student leaders to use OrgSync fully as a resource for their success.
Step One: Log In

A. Sign into OrgSync from studentlife.mst.edu

B. Follow the prompt to log in with your S&T Credentials. You must use your User Name, not any email alias.

C. Click Log In.
Step Two: Welcome to the Community

Your organizations exist within the community. The Missouri S&T Feed will inform you about community wide events, and anything relevant to you. It knows what's relevant based off of the organizations you are a part of. So you will only receive information that’s pertinent to you!
Step Three: Create your Profile

Your profile is very important to your OrgSync experience. To edit your profile click the “Settings Button” and “Manage Account”

Do the following:

A. Upload a photo of yourself

B. Input your mobile number and provider (note, your cell phone number is not visible to the community, it only allows you to receive texts from your organizations)

C. Input your about me information, just a small blurb on who you are

D. Click “Next”. This will take you to your university profile that is not editable or viewable by any student. Click “Finish”. 
Where is the RSO you advise?

If you are a current advisor, you should have received an invitation in your email from the organization to join and be an administrator. If not you can request to be made an administrator by the organization. Your RSO should show up if you hover over the Organization tab. If your RSO is not here you may browse for your RSO and request to join.
Look for an Organization

You can browse for organizations in a number of different ways.
A. By Category
B. By Name or Keyword
C. Alphabetically
D. Flip through

Now, find an organization you want to be a part of, and click the picture!
Join an Organization

Join orgs you are a part of, ones you want to be a part of etc. Click “Join Now” to be a part of an organization! Follow the joining instructions that you are prompted to fill out.

See all the contact info for this org

See all the contact info for this org

See the news feed for this org

See the news feed for this org

Click Join Now to be a part of this org

Click Join Now to be a part of this org

These tools will provide you with a lot of information on the org

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OrgSync provides a number of tools to each organization so that they can manage themselves. The “Toolbar” holds the ability to manage rosters, email members, create events, upload files, build online forms, upload pictures, create websites and a number of other resources for students. Only administrators have the ability to use all of these tools. You can set these abilities in the settings section.
Managing Membership

As an Advisor you should have what is called Administrative Privilege within the RSO Portal. Officers in the RSO may be administrators as well, this can be left up to the RSO to decide who is an administrator.

To make someone an administrator, follow these steps:
A. Click on the person’s name under People
B. Click “Manage”
C. Select “Administrators” from the groups listed (members can be a part of multiple groups) Be careful, you can remove yourself as an administrator and not be able to fix it!
D. Change the title of your person to reflect their position within the RSO.
Approving Something

There will be times that you are asked to approve something submitted by the organization you advise. This is because you have been listed as a reviewer for the form. You will receive an email from OrgSync that looks like this. Please follow the instructions in the email, click the link and review the form.

Follow the link to be taken to the form. You may have to log in.
Approving Forms

This is an example of the Organization Registration Request, the most common form you will be asked to approve. Please review the form for accuracy. By approving the form you will be agreeing with the compliance statement. You can take action in the following ways:

A. Approve the form if everything is correct
B. Deny the form if something is wrong

It may be beneficial to leave a message that will be viewed by Student Life staff and the RSO leader who submitted the form.
The Calendar

Hover over “My Tools” and select “Calendar”. You’ll be able to see everything on your calendar for the month! Organizations you are a part of filter into this calendar and you are able to see only what you want to see. From community wide events, to specific org events. You can even share your calendar to iCal, Google Calendar or Outlook.

Clicking on an event will take you to the information about it.
Things to Know as an Advisor

• The Advisor Listserv will run through OrgSync next year. Advisors will be a part of a special group in Joe’s Club (a portal in OrgSync everyone is a part of).

• Students have involvement records within OrgSync that feed into a co-curricular transcript that will be very useful. As an Advisor you also have access to this for your own use.

• There is an ePortfolio system in OrgSync that allows students/advisors to create their own personal website which is a great professional resource for them.

• To Do Lists are a great tool that will help with delegation amongst the organization you advise.

• All students have been pulled into OrgSync and will be pulled by a continuous PeopleSoft feed. Students will always be able to access the system with their campus credentials.

If you notice bugs in OrgSync contact support@orgsync.com and report the issue. If you ever need assistance in OrgSync contact Student Life at stulife@mst.edu