Executive Guide

to

Summer 2019 Updates

INTRODUCTION

WHY IS CLUBHUB CHANGING?

Prior to the summer of 2019, SU clubs used a platform provided by OrgSync to manage their organizations, make bookings, request funding, and more; however, OrgSync was bought out by Campus Labs and their platform is being discontinued. Campus Labs offers a new platform they call *Engage* which will replace OrgSync. The transition to this new platform is much easier and more efficient than implementing an entirely new system. The new ClubHub will launch **June 27, 2019.**

This decision was made after consulting the 75th and 76th SU executive. Many of the new features of this system have been requested by club executives in the annual surveys and in conversation with Clubs Committee members at Clubs Week. It is made possible by an SU Quality Money grant.

WHAT'S NEW?

Aside from a new logo, we are excited to launch this new system for a number of reasons we think will make managing your club much easier, including:

- **Central log-in using your UCalgary account**. No more separate passwords!
- **Co-hosting events**. List all of the organizations supporting your events!
- **Public visibility.** Your portal now functions as a public-facing web page that anyone can view!
- **Customize positions.** Don't call your president a president? Change the title!
- **Easy Elections.** Conduct elections or polls of your members through your portal!
- Pick **Multiple Categories** for your organization and events!
- **Log in at:** **http://suuofc.campuslabs.ca/engage**

ACTION REQUIRED

Most of the information on your current ClubHub portal will migrate to the new platform. Certain things, especially those that need customizing and anything relating to individuals, will not. The Clubs Office is working hard to make this transition as seamless as possible by manually updating as much information as possible for you.

As club executives, you will need to take the following action to fully update your portals:

- **Re-Add Members and Execs.** Most memberships will migrate if they use their UCalgary email.
- **Update Positions.** Update the primary contact, re-add your officers, and customize their titles.
- **Add photos and select featured photos**. Up to four photos will show up on your portal home.
- **Check your files.** All documents migrate over as publicly visible. Change the settings if necessary.
- **Continue to register events.** Any approved events will carry over. Anything pending will not.
- **Resubmit incomplete or re-opened forms.** Just like events, unsubmitted requests to not migrate.

MORE INFORMATION

This guide will cover basic steps for most of the action items above. If you are missing any data (especially from incomplete events or forms) please email the CSO. We recommend sending all of your executives to a **ClubHub 101** session in September, which will cover basic ClubHub features and requirements. ClubHub 201 will resume in January with advanced tips! Online help (with videos) is available directly from Engage **here**.

PORTALS & VIEWS

YOUR PORTAL

Once set up, the public view of your portal will look like this:
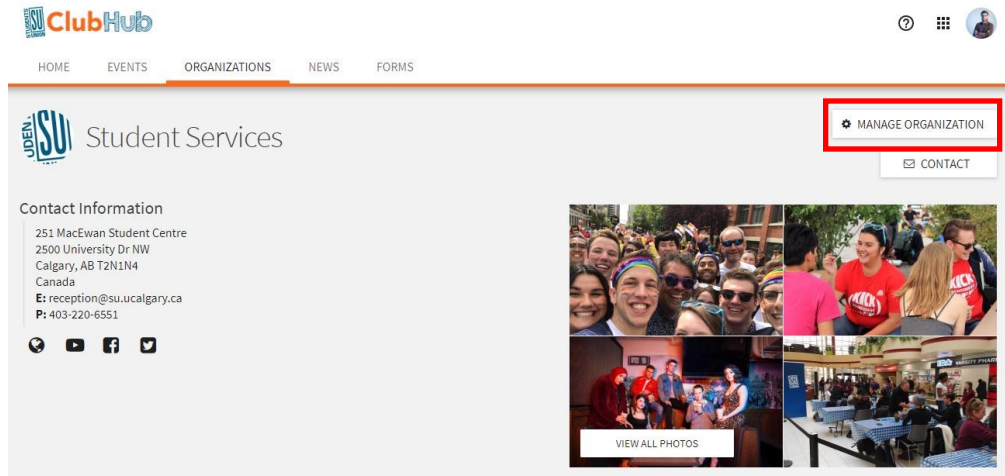
MANAGE VIEW

Clicking **Manage Organization** in the top right will take you to the **Manage View** where you can manage your club. This looks a little different, and will give you access to organization tools specific to your club, including Roster, Events, and more. To access this sidebar, click on the menu icon on the top right:
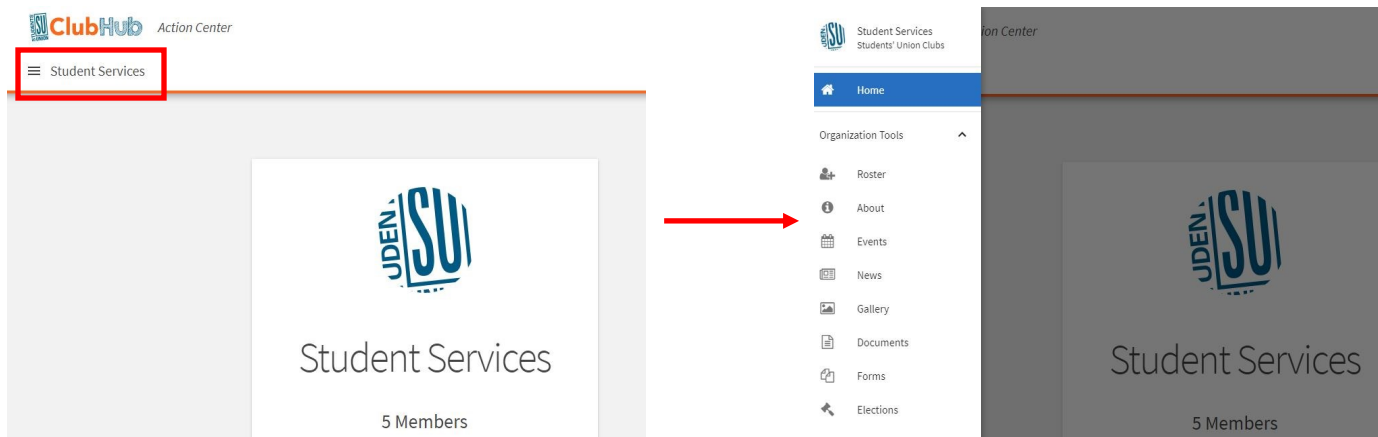
ACTION CENTRE

If you're an exec for multiple portals, you can manage all of them by clicking on the squares beside your profile picture and clicking **manage**. This takes you to your **Action Centre**. All of your club memberships will show up here. If you create forms for your club, this is where you'll manage them too:
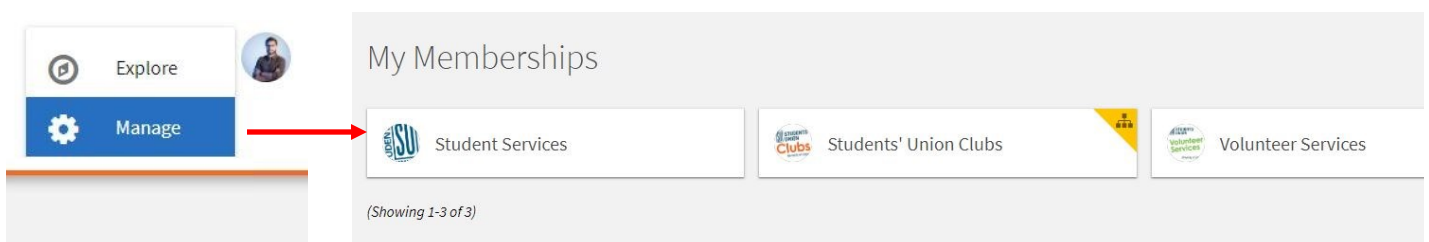
ROSTER

1. CONTACT PERSON

Every organization now has a **contact person**. Every club will automatically have a contact person assigned. To choose a new person, click the pencil beside their name. They must be a member of your portal. This person will receive the messages sent via the **contact us** link on your public page, but their name and contact info will not be publicly visible.

2. POSITION TEMPLATES

We have provided four basic executive (all-access) templates: President, Vice President, Secretary, and Treasurer. There is also a Jr Exec template (limited access) and a member template (view only). You can assign as many of each as you need. You can also change what these are called (for instance, changing *President* to *Co-President* or *Treasurer* to *VP Finance*) in your organization by clicking **Manage Positions**. You can also create club-specific positions and customize their level of access by clicking the **+Position** button here. This is handy if you have multiple Vice President or Director positions with different titles.

3. INVITING MEMBERS

Everyone who had a UCalgary email associated with their old ClubHub account will still have the same memberships in the new ClubHub. Anyone who did not make this update may have to be re-added to your ClubHub portal. You can also invite them directly to an executive position!

Remember to check the **prospective** tab frequently for any join requests from students.

4. CHANGING POSITIONS

Once a person is in your roster you may edit the positions they hold. You can also add multiple positions (if they're both Secretary and Treasurer, for example) by clicking the pencil beside their name. This step will also be part of Annual Reports.

ABOUT, GALLERY, & DOCS

CLUB LOGO, WEBSITES, & SOCIAL MEDIA

These fields are all accessible in the **About** tab. Only the CSO and Primary Contact can edit these fields. We will be manually updating all club logos based on what we have on file. If you have a new logo, upload it in the **Gallery** section and we'll make the updates, or ask your Primary Contact to change the logo.

Please remember: Clubs are **not allowed** to use the UCalgary crest or logo without permission. Clubs may use this **SU Registered Club logo** to show affiliation.

Social media, websites, and other links will be updated shortly based on the information we have on file. These fields will all be editable during Annual Reports or by the CSO at any time. The Primary Contact will also be able to view and change these; however, changes to the description or summary are not allowed unless a change in mandate (and revised constitution) has been approved by club members and the CSO.

GALLERY

Create an album, drag and drop. Easy as that! **Featured Photos** show up on your club's home page. We recommend choosing at least four photos right away so that your page stands out! Once uploaded, click on the 3 dot icon and select **edit**. You'll be able to change the caption and choose whether the photo is featured or the album cover.


DOCUMENTS

If your club uploaded any documents to ClubHub, they will migrate over as visible to anyone. To change these settings, go to the **documents** tab in the **manage view** and click the 3 dots. Select **permissions** and change as required. Club constitutions/bylaws will **always** be publicly visible.

EVENTS & FORMS

EVENTS

Events work the same way as they did previously. Any approved events will migrate to the new platform. To make a new event, you'll need to be in the **manage view** for your club. Click on **events** in the sidebar and **+ Create Event**. Think of this as the public-facing side of your event.
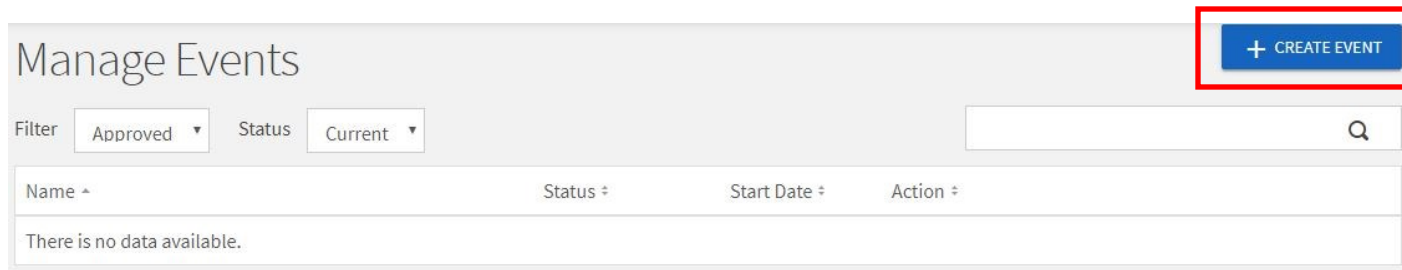
New features in this platform include the ability to pick multiple dates and locations for a series of events, include co-hosting clubs, select multiple event categories, and list perks specific to your event. The **themes** and **perks** are hard-coded and cannot be changed. They will be crucial to a future update announced shortly. The CSO can add new **categories** if you don't see one that fits your club!

We recommend always adding an event photo since these events will appear in the public calendar if you choose to show your event to **the public**. You can also choose whether to collect RSVPs!

ROOM BOOKINGS

Booking a workroom, requesting a classroom, and making a room reservation request for an MCEC space will work exactly the same. After entering your event details, you will be taken to the space booking form. Some of the information may seem repetitive (date, time, location, etc.) but think of this as the administrative side of your request.

DESIGNATED BOOKERS

One notable change is how Designated Bookers are assigned. Each club may still only have a maximum of two designated bookers; however, to add or replace one of these for your club, the person applying to be the new designated booker will need to complete the **Designated Booker Update** form, not a position request. These positions are the only ones that must be assigned by the CSO since we need to make sure our booking system is updated before they make reservations.

REQUEST FORMS

Requesting pop, lockers, clubs week tables, and funding, along with making Club Awards nominations and scholarship applications is also unchanged **except** that you now access these forms from the **home page** of ClubHub, not from your club's portal:
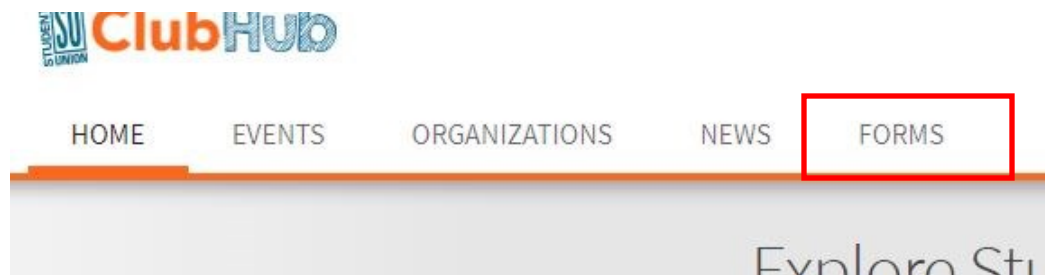
More Information at:

SU CLUBS
ClubHub
101

Sept. 10-12 and Sept. 24-26

10 am & 1pm in Cassio

Or online any time:

Engage Student Leader Resource Guide