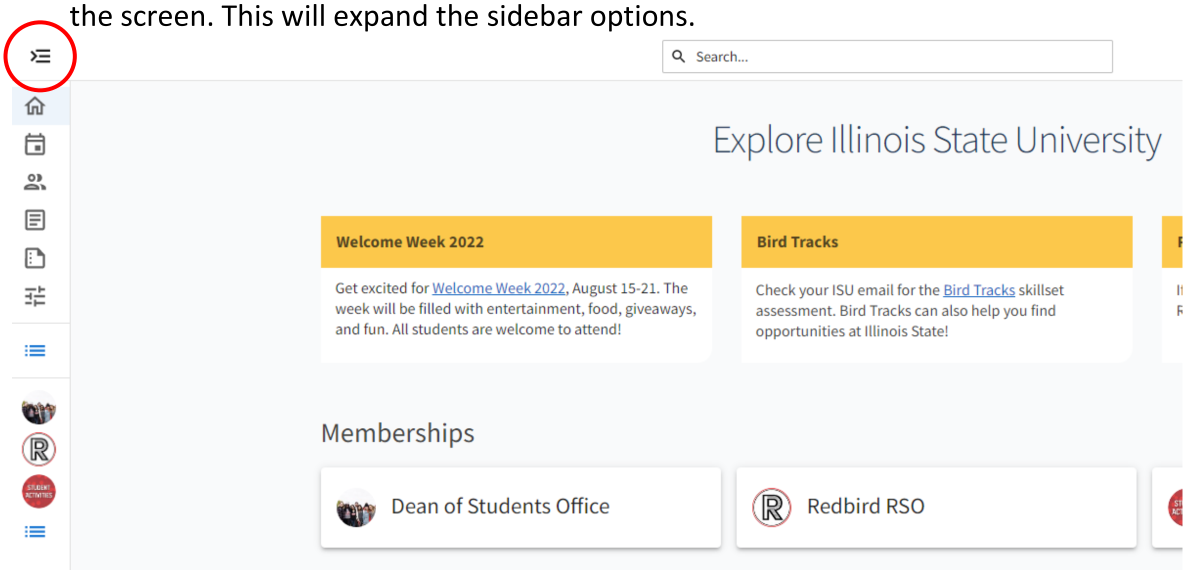
<u>How to Build-Out Your Organization's Profile</u>

Log on to https://RedBirdLife.IllinoisState.edu

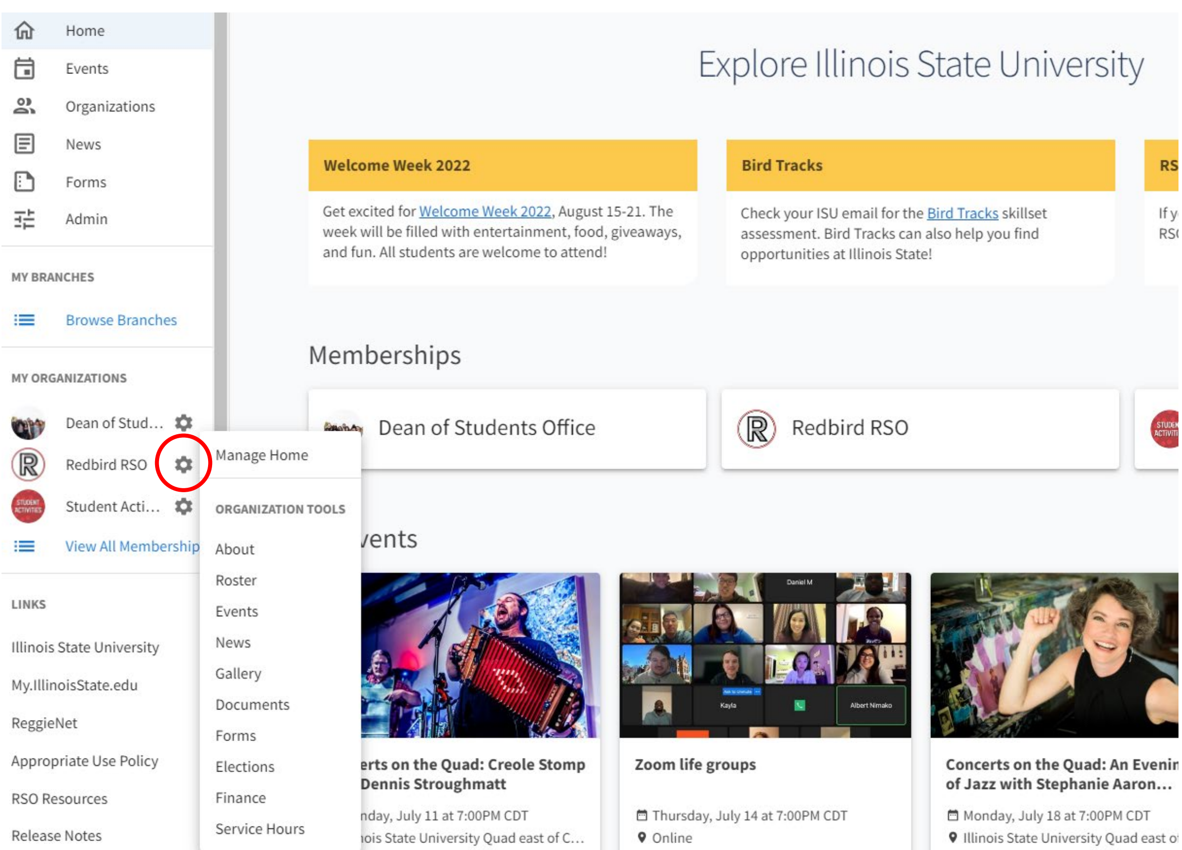
- Select 'Sign In' on the top right corner.
- Log in with your ULID.

Navigate to RSO Profile Tools

- Once you've successfully logged in to the system, select the button on the upper left side of the screen. This will expand the sidebar options.



- Click the "Gear Icon" next to the RSO profile you want to manage in order to display 'Organization Tools'.



Roster

- Once you've selected 'Roster' from the 'Organization Tools' you will be able to see all of your current, pending, and prospective members under the 'Manage Roster' heading.
    - The individuals in the 'Pending' tab may not have opened the email invitation, or logged into Redbird Life yet.
        - You can choose to resend an invitation or delete the invitation to join the organization.
    - Those who appear in the 'Prospective' tab are people that have found your organization on their own.
            - You can choose to accept or decline their membership to your organization.
                - If their membership request is denied, they will not receive any message.
                - If their extended an invitation to your organization, they will receive an email inviting them to log into the portal to accept.
            - You can also choose to send them a message through the Redbird Life portal.
                - Keep in mind that the subject line will not transfer to the subject line of the email the prospective member receives.
- To invite more members to join the organization, click the blue 'Invite People' button on the right.
    - All emails entered into the 'E-mail addresses' field should be @ilstu.edu emails, as users of the platform have to sign in with their Central Login credentials.
    - All those whose emails are entered will receive an email invitation to log into the system and accept.
        - Invitees will only appear on the organization's roster after they have logged onto Redbird Life and accepted.
- Once returned to the main roster page, the 'Manage Positions' link will take you to see all of the positions held by members of your organization.
    - By selecting the blue '+ Position' button, you can add custom positions to your organization.
        - After typing the name of the position, select the 'Position Type' most applicable to the position being created.
        - Select the type of access the organization created position will have.
            - By selecting 'Limited Access' you will have the ability to pick and choose the features this officer will have access to.
- The 'Messaging' feature on the Roster menu allows you to send out both Relays (mass emails) and mass text messages.
    - Relays can be created under the 'Relays' tab.
        - After selecting the 'Create Relay' button, you will have the ability to select the holders of positions, and/or the members your message should be sent to.
        - After entering the subject of the email you wish to send, select the blue 'Generate' button on the bottom of the page.
            - This will generate your temporary relay address.

        - In your normal email software (Outlook, Gmail, etc.) create the message you wish to be relayed to the selected individuals, then send it to the temporary relay address that was provided.
            - If sending from the 'Mail' iPhone app, the message may not send the way it is formatted to, and may end up in the recipient's spam folder.
        - Emails will appear in the recipient's inbox from relay@relay.engagement.engage.campuslabs.com or similar.
    - The text messaging feature, available under the 'Texts' tab, will only send messages to those on your roster who have added their cell phone number and carrier to their profile.
        - To send a mass text message, select the blue 'Send Text' button.
        - You can select specific position holders and members to send the message to, or you can select the 'All Members' option and choose which members on your roster you wish to exclude (if any).
        - After you've composed the message, you can choose to send it to yourself first by selecting the 'Preview' button, or send it out to the specified members by clicking 'Send'.
- The Primary Contact for your organization can be edited at any time.
    - Select the blue pencil icon next to the current Primary Contact to select the member you wish to change it to.

About

- This section allows you to edit any basic information about your organization, such as official name, organization descriptions, profile picture, and contact info.
    - Please do not enter any actual street addresses into the system, all information entered in this section will be available to the public.
- Click 'Update' at the bottom of the page for your changes to be saved.

News

- Selecting the 'News' button will bring you to the 'Manage News' page.
    - Here you can see and search articles already published by your organization.
    - News articles will appear at the bottom of the organization's main page.
- Select the blue 'Create Article' button to start the creation of the news article.
    - Any picture added to the article will be displayed as the cover photo when it appears on the organization's page.
    - Be sure to select the appropriate 'Visibility' option for each article:
        - Public – anyone on the internet
        - Institution – anyone who is logged-in to RBL
        - Organization – only people in your RSO
        - Private – choose which positions within your organization can view
- Click the blue 'Create Article' button to publish the article to your organization's page.
    - Once published, the article can be edited or deleted from the 'Manage News' menu

Gallery

- In this section you can create albums and display photos on your organizations profile page.

- To create an album select the blue button on the right side of the page.
  - Enter an appropriate name and description.
  - In the 'Visibility' field select the option which best fits the album's intended audience:
    - Public – anyone on the internet
    - Institution – anyone who is logged-in to RBL
    - Organization – only people in your RSO
    - Private – choose which positions within your organization can view
- To add photos to your album, select the album from the 'Gallery' page.
  - Select 'Edit Album'.
  - Under the 'Photos' section, drag or click to upload up to 10 files at a time.
  - Select 'Save Album' to save any changes.
  - The album's visibility can be altered in this section as well.
- Photos may not become visible immediately after being uploaded.

Documents

- In this section you can add files and folders to your organization's page.
- Click the 'Add File' button on the top right.
  - Files can be up to 10MB in size.
  - Select the type of document:
    - Default
    - Constitution/Bylaws
    - Organizing Documents
  - Select the permissions for the document:
    - Public – anyone on the internet can view
    - Anyone on Campus – anyone logged on to RBL can view
    - Organization Roster – anyone on the organization's roster can view
    - Specific Organization Positions – can specify the positions within your organization that have access to the document
  - Once all the fields are filled out, select 'Add' to successfully upload your document.
- Adding a folder will prompt you to create a title, and select the permissions as well.
- Selecting the three dots next to a document will allow you to:
  - Share via URL
  - Rename the document
  - Change the type of document
  - Delete the document from the organization's page
- Selecting the three dots next to a folder will allow you to:
  - Open the folder
  - Move the folder
  - Rename the folder
  - Alter the permissions
  - Delete the folder

Forms

- Selecting the 'Forms' category in the menu will bring you to a list of your current and archived forms.

    - Archived forms will appear under the ‘Archived’ tab.
    - Archived forms will automatically become inactive, new submissions will not be allowed, but any submissions that are in progress when the form was archived are still able to be completed.
    - Assigned reviewers will still be able to view the form and its submissions.
    - Archived forms are always able to be restored, but restored forms will remain inactive until the ‘Active’ box is checked in the ‘Form Properties’ tab.
- To create a form, select the blue button in the top right corner.
    - Check ‘Active’ under the ‘Status’ field to make the form active. This gives form creators the ability to build forms without it becoming accessible to others.
    - The start time of the form will auto-generate to an hour after the form was started. Similarly the end time will auto generate to a month after the form is started. Both can be changed.
    - It is **not** recommended that your organization allows anonymous submissions from public users. This would mean that anyone in the world who visits the Redbird Life portal, or has the form URL can submit as many responses as they like.
    - Selecting the option to feature the form in ‘Explore Forms’ will place the form in the ‘Forms’ tab in the main menu of Redbird Life users. Featuring forms will place a star next to them in the ‘Forms’ page for all user.
    - Checking the box under the ‘Restrict to the Following Positions’ heading will allow only members of your organization to view the form.
        - Choosing this option and the ‘Featured in Explore Forms’ will allow only members of the organization to see the form in the ‘Forms’ tab on the main page.
- Under the ‘Reviewers’ tab, the form creator can select members to be the assigned reviewers of the form.
    - Assigned reviewers are the only members of the organization that can view submissions.
    - The creator of the form will automatically be made a reviewer.
    - Reviewers can be changed at any time.
- To add questions to your form, select the ‘Save and Add Questions’ button on the bottom right of the page.
    - The form set up page can be accessed while adding questions to the form by selecting the ‘Form Properties’ button on the top right of the page.
    - Select the ‘Page List’ button on the left to add more pages to your form, select the page you wish to add questions to, or reorder the pages you have.
        - You can also go to different pages within the form by clicking the arrows to the right and left of the ‘Page #’ heading.
- Clicking on the ‘Page Properties’ button on the left will allow you to name pages, decide if the form should have a back button, and also utilize skip logic.
- Once the form is completed, select the ‘Form Properties’ button on the top right of the page.
    - Change any settings on this page, such as checking the ‘Active’ box.
    - Select the ‘Save’ button to save the form.
- Once at the “Manage Forms” page, the form creator can select the ‘Publish’ option next to the desired form.

    - This menu will allow the creator to change the status of the form.
    - The URL provided can be sent to anyone or posted elsewhere to easily access the form.
    - Select ‘Publish Form’ to launch the form where the creator designated.
- When members fill out the form, they will be able to review their submission before submitting for approval.
- Once members have filled out the form, assigned reviewers can go to the ‘Manage Forms’ page, by clicking on the ‘Form’ option from the menu, and review submissions by clicking on the ‘Submissions’ option.
    - Reviewers can choose to approve or view submissions.
    - Selecting the ‘Export All’ button will generate a report of all submissions that were approved.
        - This report will appear in the reviewer’s ‘Downloads’ page.
        - The ‘Downloads’ page can be found by clicking on the users profile in the top right corner of the page.
        - Once at the ‘My Downloads’ page the reviewer can choose to download the report or delete it.