Resource Manual

Assessment and Special Projects
Office of the Dean of Students
Vanderbilt University

http://www.vanderbilt.edu/anchorlink
About Anchor Link

Anchor Link is Vanderbilt’s student involvement platform that helps students become connected on campus and manage their experiences outside the classroom. Anchor Link serves as the central calendar for student life and has groups for every registered student organization and residence hall on campus, as well as a variety of university departments, programs, and resources.

Anchor Link has robust functionality for managing student organizations including recruiting new members, publicizing events and news, tracking attendance, maintaining organization records, conducting elections or polls, and communicating with members.

The public Anchor Link site is accessible to anyone, including those outside of Vanderbilt. However, every student, faculty, and staff member may log in with their VUnet ID and password for a more robust campus user view as well as customized content for each individual user based on their involvement and interests.

Accessing Anchor Link

Anchor Link has both a public site and a campus user site with additional content for users who are logged in with their VUnet ID.

1. Go to anchorlink.vanderbilt.edu.
2. Click Sign In at the top right corner of the public site.
3. Log on using your VUnet ID and password.
Home Page Overview

Home
Anchor Link has both a public version of the site as well as a customized view with additional content for campus users who are logged in using their VUnet ID.

Explore view is the default view when users log into the community. You can find the Explore view by clicking on the three by three grid in the top right corner next to your profile initial or picture. Explore will take you to the community home page, where users can see important campus alerts, their organization memberships, check out upcoming events, read news posts, find shortcuts to their co-curricular Paths, and helpful Campus Links. The Explore view is also where users can view organization pages and access content created by organization officers or administrators. Every user in the community will have access to the Explore View.

The public Anchor Link site is accessible to anyone with an internet connection. Organizations in Anchor Link can choose whether the events and content they create is shown to “Anyone in the World”, “Students & staff at Vanderbilt” (users must be logged in with their VUnet ID), or “Organization Members” (only visible to members on their roster).

Events
Clicking Events in the white toolbar will allow logged in users to access the complete listing of events registered to “Anyone in the world” and “Students & staff at Vanderbilt.” Events that are visible to organization members only will also be shown here, if you are a member of that organization. Search for events by name, date, theme, category, and perks.
**Organizations**
Clicking **Organizations** in the white toolbar will allow logged in users to access the complete listing of organizations in the system. Search for organizations alphabetically by name, or by category. Clicking on an organization’s name will provide basic profile information for that organization as well as any content they have chosen to display publicly or to campus users.

**News**
Clicking **News** in the white toolbar will allow logged in users to access the news feed, which displays all news articles posted by organizations. The news feed always displays “Public” articles and will also display “Campus Only” articles when a user is logged in.

**Forms**
Forms in Anchor Link community are now easier to find than ever with the Forms Directory! Here, you can search for any form using the search bar in the upper left hand corner, either by form name or by the organization that created it. You will also see any submissions you already have in progress, and view past submissions.
The Action Center
Access your personal **Action Center** by clicking on the grid and navigating to the **Manage** view. You will see a list of the organizations for which you are in a leadership role leader. From here, you can click the tile for an organization to manage events, the roster, forms, etc. You also have the ability to register a new organization from this screen.

On your **Action Center** homepage, you may also see an aggregated list of items that need your review. These could be form submissions or event requests for which you have been tagged as a reviewer. Click on the name of the form or event to enter into the review process.
User Account

All Vanderbilt University undergraduate students, graduate/professional students, faculty, and staff members have accounts automatically created in Anchor Link. This account is connected to a user’s campus (@vanderbilt.edu) e-mail address and Commodore Card ID number so users will be recognized when they swipe into Anchor Link events.

Users can complete their basic profile information, contact information, interests, privacy settings, and notification settings upon logging into the system. See below for detailed instructions on setting up the user profile.

**Complete Your Basic Profile Content**
- Click **Account** in the pop-out menu after clicking your initial.
- Upload a profile picture.
- List a preferred e-mail address other than your @vanderbilt.edu e-mail (optional).
- Connect Social Media Profile Links including your Facebook, Twitter, or LinkedIn (optional).
  - Note: Your social media accounts will be displayed anywhere your name is displayed (ex. an Organization roster)
- Note: You do not need to enter a Preferred First Name, Middle Name, Suffix, or Hometown nor complete any information under the “Demographics” section.
- Click **Update** at the bottom of the screen to save changes.

**Update Your Contact Information**
- Click **Contact Information** in the gray navigation bar.
- Provide any contact information that you would like to be displayed when someone sees your name displayed in the system (ex. on an Organization Roster). You are not required to provide any additional contact information.

  *Note: Any contact information you provide or edit here will only be used within Anchor Link. If you have changes to make to your home/permanent address, please contact the University Registrar.*
• Click **Update** at the bottom of the screen to save changes.

**Set Your Privacy Settings**

- Click **Privacy Settings** in the gray navigation bar.
- **Community Directory Settings**
  - Choose which pieces of contact information you would like to “Show” to other campus users when your name is displayed within Anchor Link (Ex. an organization roster).
- **Organization Roster Settings**
  - You may choose to hide your membership or officer positions for any organization so that you will not be displayed on the organization’s public roster. The officers of any organization will still be able to view members who have elected to “Hide” their public membership.
- Click **Save Settings** at the bottom of the screen to save changes.

![Organization Roster Settings](image)

**Set Your Notification Settings**

- Click **Notifications** in the gray navigation bar.
- **General E-mail Notifications**
  - It is strongly recommended that you keep your e-mail notifications set to “All Notifications.”
  - If you alter your e-mail notifications, you will still get messages sent to your Anchor Link inbox. However, you may miss important, time sensitive messages by not having them sent to your e-mail.
- **Text Message Notifications**
  - Providing your cell phone number and turning this feature “On” allows for organizations you are a part of within Anchor Link to send you text messages.
- Click **Save** at the bottom of the screen to save changes.

**Designate Your Interests**

- Click **Interests** in the gray navigation bar. Interests are used to provide customized recommendations for organizations on campus.
- Go through the folders and select the Interests that appeal to you most. You can update your Interests at any time.
By clicking on your name or photo in the upper right corner, you are able to access the following resources.

**Your Name**
Clicking on your name will take you to your account, and will allow you to edit your profile, upload a picture, update your contact information, designate interests to receive custom recommendations for organizations and events, and edit your privacy settings and notification settings. See the previous section on editing this information.

**Paths**
This gives you an overview of your progress in any Co-Curricular program(s) you are enrolled in through Anchor Link. Switch between paths by using the drop down menu under the header “Progress for ____”. Scroll down to see a detailed chart of your progress as well as an overview of the requirements and potential completion options for any program in which you are enrolled.

**My Event History**
Here, you will see all of the events you have attended and swiped into. You can view the event details, navigate to the host organization page, and leave a reflection for that event.

**My Memberships**
This drop down is where you go to manage your involvement within Anchor Link. From this section you can access and edit your organization memberships. Your shortcuts will display any organization you are a member of within the system. This is the fastest way to get to the home page for any of your organizations. Select **Current Memberships** to see your current memberships.
**Experiences**
Experiences allow you to track out-of-the-classroom activities, such as awards, conferences, study abroad, internships, or other involvement outside of the institution. Experiences let you showcase these additional activities on your co-curricular record to share with future employers, graduate schools, for scholarship applications, or for any other reason you might want to share your involvement.

**Service Hours**
This tool allows you to manually submit service hours that you would like to associate with a specific organization you are a part of. These service hours can be included on your co-curricular involvement record, allowing you to showcase your involvement in an organization or in the community. Note that you must be a member of an organization in Anchor Link in order to add service hours within that organization.

**Co-Curricular Resume**
Here you can view all of your involvement from your time at Vanderbilt. Organization memberships, experiences, service hours, reflections, and event attendance will all be displayed here. You can save a copy of this as well.

**Submissions**
If you’re logged into Anchor Link, all of your form, election, org registration, and event submissions are saved. Anytime you advance past them to a new page of a submission, it will create a partial record on your submission list (which can be resumed at a later time). Access this page to resume any partial submissions or view the status of completed ones.

**Notifications**
This is your message inbox within Anchor Link. Depending on your notification settings, you may receive messages to both your @vanderbilt.edu e-mail address and your Anchor Link inbox.

**Downloads**
Any download you request (transcript, event attendance list, etc.) will be listed here for you to access at any time.
Managing Your Organization

The term “organization” in Anchor Link refers to a group or site within the system. Organizations include all registered student organizations, residential areas, Commons Houses, living learning communities, Dean of Students offices and programs, and a variety of other university departments, programs, and resources.

All student organizations must complete the annual registration process through Anchor Link in order to become official registered student organizations (RSOs). During the registration process, organizations must update their organization’s contact information, officers, and membership roster. Organizations must upload a copy of their constitution and bylaws as well as a signed Officer and Adviser Affirmation form.

For questions about student organization registration visit: http://www.vanderbilt.edu/anchorlink/student-leaders/register-your-organization/

Any university departments or programs that would like to have an organization created should email anchorlink@vanderbilt.edu to request a group. Creating a group in Anchor Link will allow departments to advertise events, track attendance, publicize programs, and communicate with students.
Customizing Your Organization

Organization officers have the ability to customize the appearance of their organization’s site including profile photo and header. Follow the instructions below for the various customization functions.

**About**

If you have permissions to make changes to your organization, edit your organization's details by going to the Action Center for your organization, clicking on the three horizontal bars to the left of the organization name to open the Organization Menu, and selecting About.

Here you will be able to update your organization summary, contact information, social media information and profile picture. If you are adding links to social media pages, make sure they are set to public. If you are adding a Facebook link, make sure it's a group page. Links to personal profiles will not display on your page. When you're done making changes, click Update to save.

**Note: Information listed in the Contact Page and External Page Links section will be made available on your organization home page, and will be shown on the public side of the site. Users that are not logged into the system will be able to see this information, so do not include anything that should not be public.**
Roster

Here you can manage current members, invite new members to join your organization, assign membership classifications or officer positions, and grant administrative access to the features of your site. Only officers with all access or full access to the Roster can manage the organization membership and officer positions.

Accessing Organization Roster
1. Select the Roster tab from the pop-out menu next to organization name in the top left corner.
2. The complete roster for your organization is now displayed.

Invite New Members
1. Click on Invite People in the top right corner.
2. Enter the email addresses of the individuals you wish to send invitations for membership and click +E-mail Addresses
3. Select a designation from the Invite as dropdown if you would like to assign a specific position or officer designation to the person you are inviting. Leave the designation as “member” if the person does not need to be assigned a position.
   a. If the position you want to use has not yet been created, you can always add a designation after the user has accepted your invitation to the group
4. Click Send Invitations when all people have been added to the list.

Approve New Membership Requests
In addition to being invited to join your organization, prospective new members can request to join by clicking the Join Organization button on your organization’s home page. These members must be approved by organization officers before they are added to the organization’s roster.

1. From the organization’s pop-out menu, select the Roster tab on the left.
2. Select the tab labeled Prospective in the middle of the page.
   **Pending members are those your organization has invited to join. Prospective members are those who have found the organization and indicated they would like to join.**
3. Review the users who are awaiting membership approval.
4. Click Approve or Deny next to each user.
5. Confirm each action.

Assign Positions to Officers or Members
1. From the organization’s Roster, locate the member you would like to assign an officer position.
2. Click Edit Positions to the right of the member’s name (pencil icon).
3. Select the appropriate position from the list of positions available.
   a. If the appropriate position does not already exist, see below for instructions on creating new positions.
4. Click the Save button.
5. The roster page will reload with the position now assigned to the member will be displayed.

Create New Positions Specific to Your Organization
1. From the Roster page, click the Manage Positions link.
2. A list of all the current positions available for your organization will be listed. Some of these can be organization created, while others may be system-wide positions.
3. Click the + Position button at the top of the page.
4. Identify the name of the position.
5. Select the position type:
   a. Officer – Will be displayed at the top of your membership roster.
   b. Member – Will be displayed in the general roster listing.
6. Set the following options as appropriate:
   a. Show holders of this position on the organization’s roster: Check this box if you would like this position designation to be visible to users.
   b. Is Active: The position is available for a user to hold. If this is not checked, the position will only be available as a past position.
7. Set Management Access:
   a. No Access allows no administrative access but the user will still be able to see any content designated for organization members.
   b. All Access allows administrative access to all features of the organization’s site. Only users with All Access can edit the roster.
      i. If some of your officers do not want to receive membership requests for the organization, you should change them to Limited Access and give them only “View” access to the roster.
   c. Limited Access allows you to select each feature of the organization’s site that the position should not have access, have full access, or only be able to view.
8. Click Create.
Change Administrative Access for Existing Positions

1. From the Roster page, click the Manage Positions link.
2. Click the name of the position you would like to edit.
3. Select the position type
   a. Officer – Will be displayed at the top of your membership roster.
   b. Member – Will be displayed in the general roster listing.
4. Set the following options as appropriate:
   a. Show holders of this position on the organization’s roster:
      Check this box if you would like this position designation to be visible to users.
5. Set Management Access:
   a. No Access allows no administrative access, but the user will still be able to see any content designated for organization members.
   b. All Access allows administrative access to all features of the organization’s site. Only users with All Access can edit the roster.
      i. If some of your officers do not want to receive membership requests for the organization, you should change them to Limited Access and give them only “View” access to the roster.
   c. Limited Access allows you to select each feature of the organization’s site that the position should not have access, have full access, or only be able to view. Finally, click “Create.”

Removing Members from the Organization Roster

1. From the pop-out menu, click Roster to be brought to the Manage Roster page.
2. Locate the member you would like to remove.
3. Check the box on the far left of the member’s name.
4. Click End Membership at the top of the screen.
5. Confirm deletion.

Roster Messaging

Anchor Link allows you to send e-mails and text messages to your entire membership roster or subsets of your membership.

E-mail Messaging

Anchor Link allows you to send e-mails to your entire membership roster or subsets of your membership. These e-mails can sent via any mail platform, and can include links and attachments. **Note: Relays can take up to 24 hours to send, based on the number of recipients.

You will be given a temporary relay address to which you will send your message.
1. From your organization’s page, click Roster in the pop-out menu then click Messaging that will appear on the top of the page.
2. Click the Create Relay button.
3. Select the recipients for your message
   a. You can send to specific position holders, as well as...
   b. All Members – everyone on your organization’s roster

4. You will be given a temporary relay address. If you use Outlook, simply click the address. If you would like to use a different email server, simply copy and paste the address into the “Send To” region. This address will expire in 24 hours.

Text Messaging
The same process and options are available to send text messages to those users who have identified a mobile phone number in their notification settings. Access the Texts (SMS) tab on the Messaging page to send/view text messages.

Due to the nature of SMS messaging, this method of communication is not instantaneous and should not be used as the only means of communication when you need to ensure delivery of a message.
Creating Events

Event Registration Information
Events are not auto-approved and therefore must be approved by a site administrator. We encourage you to submit your events in Anchor Link at least two weeks in advance. Events can be submitted up to one week after they have occurred. Any submission for an event older than one week may require justification, and may or may not be approved following review.

- Events are reviewed on a daily basis during the work week for approval.
  - Most events are approved immediately upon review.
  - Events occurring in large events spaces (ex. Langford, Student Life Center, Sarratt Cinema) need to be reviewed by the manager of that space before being approved.
  - Events with special needs (ex. Police, Plant Operations, outside amplification, etc.) may be required to attend a Special Event Registration meeting through the Office of Reservations & Events.
    - Some areas have specialized event registration and approval processes. If you fall under one of these categories, contact the appropriate office if you have questions about your event approval.
    - Residential Education (ex. RA & LLC Programs) events are approved by Residential Education staff.
    - Events hosted by Law or Medical School organizations will be approved by staff in those areas.

- You can edit or cancel an event once it has been created by opening the event and clicking the Change Details button in the Manage Event portal.
  - While you can submit changes to an event, all event changes must be approved by a site administrator. Thus, you are encouraged to have all event details confirmed before creating an event.

- Creating an event through Anchor Link does not reserve a space.
  - You must go through the Office of Reservations & Events, Virtual EMS, or the appropriate venue to book your space on campus prior to creating your event in Anchor Link.

- As you progress through the Event submission process, your information is saved once you click the Next button.
  - To continue where you left off or to make changes before submitting your event, log into Anchor Link and go to:
    - Click your initial or photo in the upper right-hand corner → Submissions → Events

Creating a New Event
Events can only be created by officers or administrators of an organization/group who have been granted administrative access. Events flyers/images will appear on the Event Cork Board on the home page along with the basic event details. You can set who can see and RSVP to the event during the creation process.
1. Go to your organization’s home page and select Manage Organization in the right corner.
   a. Note: You must have administrative access to your organization to create events. This can be either “All Access” or “Full Access” to the Events feature.
      i. All Access Administrators of a group (ex. Primary Contact, President, other designated officers) can grant access privileges through the Roster.

2. Click the toolbar on the left, then select Events, and +Create Event.
   a. For public events, the description should include as much detail as possible and avoid organization jargon that will not make sense to the general public. For events that will only be shown to members of your organization, the description can contain less information.

3. Enter the Event Title, Theme, Description, Date, Start time, End time, and Location. (Required)
   a. When inputting a location, you can select if you want a map shown to attendees.
   b. If you select “No. I prefer to not show a map.” You only need to provide the location name and room number, if applicable.

4. List any Co-Hosts for your event. Type in the name of the organization and select from the short list. You may have up to 25 co-hosts listed for your event. The event will show up on each co-host’s event page, but only on the main calendar once. Only the main host (the organization submitting the event) will be able to make updates to the event and download event attendance.

5. Attach a flyer or image to associate with your event (Note: this will serve as an attachment with your event, not your event photo that you select on page 2)
   a. Supported files include image files (jpg, jpeg, tif, tiff, gif, png, bmp), Office files (xls, xlsx, ppt, pptx, doc, docx, pub, rtf) and html, htm, mht, and pdf.

6. Specify the type of event: (Required)
   a. Anyone in the world: Anyone who accesses the site will be able to view the event without logging in.
   b. Students & staff at Vanderbilt: Anyone logged in with their VUnet ID can view this event.
   c. Organization Members: Only members of your organization can view this event. (GBMs and events with minors should be organization members only.)
   d. Invited Users Only: Only members who have been invited to the event by the host will be able to see it.

7. Specify who can RSVP: (Required)
   a. Anyone: Anyone who is logged in can RSVP.
i. Even if you do not need to capture RSVPs for your event, it is recommended that you select **Anyone**. Users can RSVP to events to keep track of them in their personal Anchor Link events calendar under the “Events” section of their user account profile.

b. **Only invitees**: Only users that you invite through Anchor Link can RSVP.

c. **No one**: Use this option if the event is “closed” to certain members or RSVP is not applicable.

8. Select the categories which the event fits from the drop down menu.

a. Categories allow users to search for events by type in the Events calendar page.

9. Select the perks which the event offers from the drop down menu.

10. Under Additional Information, provide a URL for the event website or Facebook event if applicable.

11. Upload a relevant document that users can download.

a. File size must be **under 4MB**.

b. Allowable file types are **DOC, DOCX, XLS, XLSX, PPT, PPTX, PDF, TXT, RTF, CSV, JPG, JPEG, GIF, PNG, TIF, TIFF, SVG, WPS, WPD**.

12. Click **Next**.

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**PAGE 2**

1. Attach a flyer or image to associate with your event

2. Click **Skip** if you choose to not include a photo.

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**PAGE 3**

1. Read through “**Basic Event Information.**”

2. Indicate who the event is being registered by. **(Required)**

3. Indicate if your event is occurring in any of the listed locations on campus. **(Required)**

a. Your event will be approved once the manager of this space confirms your reservation.

4. Check all applicable boxes related to the needs of your event. **(Required)**

a. Based upon what check boxes you select, you may be required to fill out additional forms (ex. VUPD or Security Request, Social Event with Alcohol Registration form, etc.).
5. If you would like free graphic design assistance for your event, click “ACE Design Team Request Form.”
   a. *Note:* This form is housed on a different page of the site. You are welcome to complete your event registration and then go back and complete your design request form. ACE Design Team can also be found in the Organizations Directory.
6. Click *Next.*

**ADDITIONAL PAGES:**

1. Complete any additional forms prompted by the check boxes for your event needs or based on your organization type.

**FINAL PAGE:**

1. Check if you would like attendance at this event to show up on a user’s Co-Curricular Resume (found under the My Involvement Section).
2. Click *Submit.*

![](image.png)
Managing Events

1. Go to your organization’s home page and select **Manage Organization** in the right corner.
   a. Note: You must have administrative access to your organization to create events. This can be either “All Access” or “Full Access” to the Events feature.
      i. All Access Administrators of a group (ex. Primary Contact, President, other designated officers) can grant access privileges through the Roster.

2. Click the toolbar on the left, then select **Events**.
3. Click the name of the event in question
   a. To view past events, sort the Status by “Past.”

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**Event Invitations**

To send invitations to your Anchor Link event, open the Event page and click the **Manage Invitations** button. *(Remember: you must have administrative access to use this function).*

Anchor Link allows you to send invitations to users in two ways:

1. **Invite Users:** You can invite anyone who is a member of any organization you are a part of within Anchor Link.
   a. Users must be selected individually, but you can sort by Organization and Position.

2. **Invite by E-mail:** You can invite using a list of e-mail addresses.
   a. Since attendance tracking creates a list of e-mails of all attendees, this is a good way to invite people who have previously attended your events.
When a user is invited to an event, they will receive invitations in their @vanderbilt.edu e-mail account, and in their Anchor Link inbox.

Managing RSVPs
If you have the RSVP feature turned on for your event, the response of any user who RSVPs can be found by opening the Event Page and clicking the Manage Invitations button.

- You can click Response in the RSVP toolbar to sort the users by their Response (Yes/Maybe/No/Not Responded).
- You can also click Export to download an excel spreadsheet of all users who have RSVP'd or been invited to the event to access a list of names and e-mails. This download will also include any comments made by those that have RSVP’ed (like dietary restrictions).
Attendance Tracking
To track attendance at your Anchor Link event, open the Event page, click Manage Event, and click the Track Attendance button. (Remember: you must have administrative access to use this function)

When you track attendance at an event through Anchor Link, you will automatically capture not only the total number of attendees but the following information about each attendee:

- First & Last Name
- Campus E-mail Address
- Preferred E-mail Address (if they have listed one)
- Timestamp
- Who tracked their attendance
- Any comments provided next to the user’s attendance record

Attendance can be tracked in four ways:

1. **Swiping using an Anchor Link Card Reader**
   **Card readers can be checked out through a variety of offices and can be reserved via the Anchor Link home page.**
   a. Plug in the card reader to the USB port of your laptop or desktop computer. You must be connected to an active internet connection to track attendance.
   b. Click the link to the Swipe Page and enter your Access Code.
   c. Click submit (see image below).
   d. When a user successfully swipes their card, there will be a series of dots before you see Success.
Click the + Add Attendance button for the following three methods:

2. Invitations
   a. If you used the invitations feature, you can simply go through and check Attended/Absent/Excused for each invited user.

3. Text Entry of E-mail Addresses or Card ID Numbers
   a. You can enter Vanderbilt campus e-mails or Card ID numbers and indicate a user’s attendance status.
   b. You can keep a running list of attendees rather than clicking Add each time which will take you back to the previous page.

4. File Upload of E-mail Addresses or Card ID Numbers
   a. If you do not have an internet connection, you can utilize Excel and the card reader to keep a list of attendees. Open an excel file and click into an empty cell. After attaching your card reader to your computer, you can begin to track attendance. The system will automatically select the next cell after you swipe a card. Save this file as a .CSV file to upload later. Upload those Card ID numbers when you do have internet. Be sure to select E-mail Address or Card ID Number when pasting or uploading.
   b. You can upload a .CSV or .TXT file with e-mail addresses or Commodore Card ID numbers.

Attendance Tracking Tip:
If you are using card readers at your event, it is recommended that you keep open a second tab in your browser that is open to the Text Entry page so that any attendees who did not bring their Commodore Card can enter their e-mail addresses. Keeping open a second tab that you can easily toggle back and forth between will save time and ensure you always are on the correct page.

To download an Excel spreadsheet attendance report, click the Export button on the right side of the Track Attendance page. This attendance record will be permanently accessible for your organization or office in the Past Events section of your Anchor Link group.

To learn how you can most effectively utilize your attendance records, visit:
http://www.vanderbilt.edu/anchorlink/2013/10/utilize-attendance/
**News Articles & Blog Posts**

The News feature can be used to post press releases, news stories, or blog posts for your organization that include the ability for users to provide comments and initiate discussions. Only officers with administrative access to News can post news articles.

1. From your organization’s pop-out menu, click the **News** tab.
2. Click **Create Article** button near the top of the page.
3. Enter the Title, Summary, and full story text of the article. You can use the text editing features to customize the style of the story of your article.
4. Include a header image by selecting **Choose File** and upload the file.
5. Select the permissions for the article by selecting the radio button to the left.
   a. **The Public**: Anyone is able to view the article and it will appear in the News Feed on the Anchor Link home page as well as the organization’s home page.
   b. **Anyone on Campus**: Anyone logged in to Anchor Link is able to view the article and will appear in the News Feed on the Anchor Link home page as well as the organization’s home page.
   c. **Only People on the Organization Roster**: Will only be viewable to members of the organization and can be accessed by selecting the **News** on the left side for the group.
   d. **Only Organization Members in Specific Positions**: Only viewable to the selected officer positions and can be accessed by selecting the **News** tab.
6. Click **Save**.

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**Anchor Link** Action Center

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**ANCHOR LINK**

**BACK TO NEWS**

**Create News Article**

*Title

*Summary

(up to 255 characters)

Body

Headline Image

Choose File — no file selected
**Photo Gallery**

Using the Photo Gallery section of your Anchor Link site allows you to keep visual records of your organization’s activities and provides a dynamic way to display the work of your organization to campus and potential members. Only officers with administrative access to Photos can create photo albums and upload images.

1. From your organization’s pop-out menu, click the **Gallery** tab.
2. Click **Create Album** near the top of the page.
3. Enter a name for the album and brief description.
4. Select viewing options for the album:
   a. **Public**
   b. **Anyone On Campus**
   c. **Only People on the Organization Roster**
   d. **Only Organization Members in Specific Positions**
5. Click **Create Album**.
6. Click **Add Photo** near the top of the page.
7. Enter a title and caption for the photo, and select the file from a saved location.
8. Click **Save Photo**.
9. Repeat steps 6-8 for each additional photo to be added.
10. Click **Back to Albums** once all photos have been uploaded to the album.

**Removing Photos**

1. From the Photo Gallery section on your organization’s page, locate the photo to be removed within an album
2. Click the red X in the corner of the photo.
Documents

Upgrading a New Document
1. From the pop-out, select the Documents tab.
2. Click Add File towards the top of the page
3. Select the file you wish to upload from a saved location by clicking on Upload. Files must be less than 10 MB in size.
4. Provide a title of the document.
5. Indicate the type of document from the drop down menu.
6. Click Add.

*To update security options, click the 3 black dots near the download button. You will then be able to display the document to either:
   a. The Public: Allows anyone to view the document.
   b. Anyone on Campus: Allows anyone within the system to view and download the document.
   c. Only People on the Organization Roster: Allows only members to view and download the document.
   d. Only Organization members in Specific Positions: Allows you to select what specific officers/members have access to view and download the document.

To Edit a Current Document’s Properties
1. From the pop-out menu, select the Documents tab.
2. Choose to create a folder or add file to a previously established folder.
3. When you click on Add File you will have the option to give the document a Title and Type (i.e. Finance Documents, Meeting Minutes, Applications, etc.).
4. Designate the permissions of the document. You can make documents viewable to large audiences such as the public or anyone on campus who is logged into Anchor Link or you can limit access to only organization members or people in specific positions (ex. Exec Board).

** To update the actual document file, follow the steps for replacing an existing document. Some documents cannot be moved or deleted except by a University administrator. Please contact the Office of Student Organizations if you are unable to delete a document.**

To Replace an Existing Document
1. From the pop-out menu, select the Documents tab.
2. Locate the document you would like to replace.
3. Click the 3 dots icon and select **Delete**. **Note: Once a document is deleted, it cannot be recovered.**
4. Upload the new version of the document you are replacing by following the steps in “Uploading a New Document” above.
Forms

How to Create a Form

- In order to create a form, you must have administrative access to the Forms feature within Anchor Link. Officer positions can be created and access levels can be set by the President of your group or anyone with All Access.

- To create a form:
  1. Click Manage Organization
  2. Click Forms
  3. Click +Create Form in top right corner.
  4. Complete the basic form information and designate who you want to have access to completing the form (additional details about form properties below).
  5. Click Save and Add Questions.
  6. Use the Add New section on the bottom to add varying types of questions, instructions boxes, or a file upload button. You can reorder any questions after creating them.
    - Note: The default for all questions is to be required. If you want a question to be optional, click on the question then click the Edit button. Then uncheck the Required box under Validation.

Details about Form Properties

- **Active:** Your form will only be live when the Active Box is checked AND during the time frame you set for the start and end times.
  - When this box is checked the form will not go live until the designated start date but it will automatically turn on at that time.
  - Generally, the only reason you would uncheck this box is if you need to temporarily or unexpectedly turn off your form.

- **Start Time/End Time:** Your form will be live during the time frame you designate here (so long as the Active box is checked).

- **Allow Multiple Submissions:** Check this box if you would like to allow users to complete this form multiple times.
- **Allow Submissions only from Users on your Roster from these Positions:** You have the ability to designate who you want to have access to complete the form here.
  - **General Access:** To allow any user to be able to access a form, select **General Access**. Users will still have to log into the system but they do not have to be a part of your organization. Only people with VUnet IDs can access forms.
- **Notifications:** There is a **Notifications** tab where you can select users that you would like to be e-mailed every time a form is submitted.
  - Only users with the appropriate level of access (designated in the Roster section) will be able to view forms.
  - You are not required to have anyone notified when forms are submitted.

**Building Your Form**

After you determine the settings for your form, you’ll be taken to the form builder and you will land on the first page of your form. At any time, you can jump back into the settings by clicking **Form Properties** in the top right of the page. In addition, you can jump to additional pages of the form by clicking **Page List** in the top left. To name the page, click **Page Properties** in the top right. The name of each page will be visible to users filling out the form.

When you’re ready to start adding questions into the form, take a look at the list of question types that are available to you. Each of these question types serve a unique purpose. See below for a complete explanation of each. Note that any time you add a question to your form or change a setting, these changes will save in real time.

---

### 2016-2017 Ingredient Donation Form

Which of the following ingredients do you volunteer to donate:

- [ ] Eggs
- [ ] Flour
- [ ] Sugar

---

Add New...
Question Type

- **Check Box List**: Multiple choice question that allows users to choose more than one option.
- **Radio Button List**: Multiple choice question that only allows users to select one option.
- **Text Field**: Open text response. Alter the number of rows to provide the user a larger space to write in for longer answers.
  - **Validation for Text Fields**: Form creators can also ensure responses follow a particular format, including phone number, date, time, and e-mail address, using a validation setting. When you select the “Text Entry” question type within forms, select the check box next to the "Pattern". Then, choose how you would like that particular question to be validated using the dropdown menu. Your pattern options and their validation descriptions are listed below. **Note**: it is helpful to provide the requirements of the field in your form.
    - State (US) - Enter a valid state abbreviation.
    - Zip Code (US) - Enter a valid zip code.
    - Phone - Enter a valid phone number in one of the following formats: (425) 555-0123, 425-555-0123, 425 555 0123, OR 1-425-555-0123.
    - E-mail Address - Enter a valid email address.
    - Date - Enter a date in the following format: 12/12/2001
    - Decimal Number - Enter a positive number.
    - Integer Range 1-150 - Enter a number from 1 - 150.
    - Time of Day - Enter a time between 12:00 and 11:59.
    - Postal Code (Canada) - Enter a valid Canada postal code.
    - URL - Enter a valid URL.
- **Drop Down List**: Multiple choice question where users can only choose one option. The only difference between the dropdown and radio button options is that the user has to click the dropdown to view the available choices.
- **Instructions**: This is your method of providing additional instructions or information to the user. Instructions do not require any action on the part of the user.
- **Single Check Box**: Think of this as a method to provide the user a set of terms and conditions that they need to agree to before they can proceed on the form. You can input the terms that need to be agreed upon and the user will be provided a single check box to confirm their agreement.
- **Ranking**: Provide the user multiple answer choices for them to rank. You can also determine the maximum number of items they need to rank.
- **File Upload**: Allow the user to upload a file from their computer. Files must be under 4 MB and the uploader accepts most file types. If you prefer a specific file type, make sure to indicate this within the instructions of the question.

For each of the question types, you also have additional question options. Once you have created a question, click on the blue Edit icon within the question to view its additional options. Potential options and their descriptions are below.

- **Required**: Select the "Required" box if you want the question to be mandatory for users before proceeding. This option is available for all question types.
- **Shuffle Answers**: For Check Box List and Radio Button List question types, you can choose to shuffle your answers. For example, if you input an alphabetical list but want the answer choices to appear random, you can shuffle them. Note: This will not shuffle the answers every time a different user fills out the form.
- **Minimum and maximum answers**: If you are utilizing the Check Box List, you can identify the minimum or maximum number of answers a user can select.

You also have the ability to put additional properties on your answer choices for Check Box List, Radio Buttons, and Ranking question types.
• **Include Text Area:** Text Area allows you to provide additional space for users to write-in an answer. For example, you may want to include an "Other" option to a multiple choice question, but want users to write-in their additional option.

• **Include Tooltip:** The tooltip allows you to hover over the answer choice to read additional information about it. The additional information will appear automatically next to the answer choice.

• **Include Additional Text:** Similar to the tooltip, Additional Text allows you to put in additional information about an answer choice. The difference between the two is in how the information appears. With Additional Text, an information icon appears next to the answer choice. Clicking that icon will open up a box with the additional information.

**Creating Multiple Pages & Using Skip Logic within Forms**

- You have the ability to create forms with multiple pages. You can have all users complete all pages of the form or you can select which pages a user needs to complete based upon their responses to questions within the form. This feature is called **skip logic**.
  - Ex. If on Page 1 a user answers Yes to a question, they could be directed to Page 2, but if they answer No, they could be directed to a different page or not directed to any further pages.

- To create multiple pages:
  1. Create the first page of your form.
  2. Click the **Page List** button in the top left corner.
  3. Click the + **Page** button under the form name.

- To set up skip logic:
  1. Open up the page that will be the destination after the question.
  2. Click the **Page Properties** button in the top right corner.
  3. Click the **Conditions** Tab.
  4. Click **Add Condition**.
  5. Select the question, select the desired answer, and then click “is selected” or “is not selected” depending on what is appropriate for how you would like the form to function.
  6. You can add multiple conditions to group questions/answers with AND/OR criteria if multiple conditions can or must be true to move to a specific page.

**How to Distribute a Link to an Anchor Link Form**

**NOTE: Do NOT simply open the form and copy the URL from your address bar. Since every submission is saved, a unique URL is created for each user that opens a form. Your URL will not work for other users**

1. Click **Forms** in the pop-out menu, then click **Manage Forms**.
2. Click **Publish** next to the appropriate form.
3. Use the URL provided in the **Copy URL to Share** box.

**How to View Form Results**

1. Click **Forms** in the pop-out menu, then click **Manage Forms**.
2. Click **Submissions** next to the appropriate form (if any forms are pending, it will show the number of unapproved submissions).
3. From here, there are three ways that you can view submissions:
   1. Click on the eye next to each submission.
• This method allows you to open up the text fields of the form, gain access to any uploaded documents, and approve or deny the form with comments.

2. Download as a PDF by clicking on the PDF icon next to each submission.
   • This method is useful when the form includes lengthy text answers or when you’d like to print individual submissions.
   • The PDF version will not include any uploaded files.

3. Export all submissions into a single Excel spreadsheet by clicking the Export All button.

Helpful Tips about Approving Forms
- If you click the Approve button next to the Export All button when you are in the dashboard that lists all the pending form submissions, it will just send an e-mail approving the form without any comments.
- If you open the form submission using the eye next to the form, you have the ability to approve or deny the form and provide a comment.
  - The comment you provide will be sent in an e-mail and Anchor Link message to the person who submitted the form.
- You are not required to approve forms if you do not want to. If it takes unnecessary time or you are concerned that approving a form will cause confusion, you can simply leave the submissions pending permanently. Even when forms are pending you can still export all the results into the excel spreadsheet.
  - Example: When forms that are used to enter a contest you have two options to prevent confusion when someone sees that their form has been approved:
    - Leave the form pending indefinitely.
    - Approve the form with a note along the lines of “Thank you for entering our contest. Winners will be notified via e-mail on (Date).”

How to Access Uploaded Files from Forms
- When you build forms you have the ability to add a file upload button so that a user can provide a photo, word document, or excel spreadsheet.
- In order to access these uploaded files, you must open the form using the eye next to the submission. The uploaded file will not appear in the PDF version or the excel export.
  - When you open the submission, go to the page where the file is uploaded and then click on the file name and it will download.

Archiving Forms
- When you are done using a form you archive it by selecting it and clicking the Archive button so that it does not appear in your list of Active forms.
- When a form is archived new submissions cannot be completed but you can always restore the form if you would like to use it again at a later date.
- You still have the ability access all form submissions even when a form has been archived.
Elections

While the tab may be called Elections, this function of Anchor Link can be utilized in a variety of ways including polls and surveys. Some examples of how the Elections feature can be used include holding officer elections, voting on a t-shirt design, selecting catering for a program, or getting feedback on what type of event your organization should hold.

Voting in Anchor Link elections is confidential and users are only able to vote once in any election. You have the ability to determine who can vote in your election: any Anchor Link user, only members of your organization, or only a specific population of users called an eligibility list.

Creating an Election for your Organization

1. From the pop-out menu, select the Elections tab.
2. Click Create Election at the top right of the page.
3. Identify the name of the election.
4. Check if you would like instructions displayed to voters and complete the additional instructions box with any relevant information. We always recommend that instructions be included on elections.
5. Indicate if the election should be Active (meaning turned on during the selected dates) and select the date range for voting.
   • You can always turn the election to Inactive or change the voting timeframe once the election has been created
6. Indicate if you would like an alert displayed on your organization’s home page when voting is open to prompt users to vote.
7. Indicate if the election is for organization members only (people listed on your Anchor Link Roster). You can elect not to limit the election and have it open to any Anchor Link user.
8. Click Save.

Creating Ballots for your Election

You can create as many ballots as needed, and each ballot can have only one question or a series of questions. Each ballot can be accessible to any Anchor Link user, only members of your organization’s roster, or only a specific population of users called an eligibility list (ex. members of an organization’s Executive Board, first year members of an organization). A user will see only the ballots they are designated to see.

Only Anchor Link site administrators have the ability to create eligibility lists. If you have specific voting needs for your organization and would like help creating eligibility lists for an election, please contact the Office of Student Organizations and Governance.
1. Once you have created an Election, make sure you are in the **Ballots** tab and click **Create Ballot**.
2. Enter the name of the ballot.
3. If you have not worked with an administrator to create an Eligibility list, your election will default to **Enable General Access**.
   - General Access either means anyone on Anchor Link OR anyone on your membership roster, depending on what you selected when you created the election
4. Click **Save** when all access has been identified.
5. Click the format on the left side of the page of the question you’d like to add to the ballot:
   - **Check Box List**: Multiple choice question that allows users to choose more than one option.
   - **Radio Button List**: Multiple choice question that only allows users to select one option.
   - **Instructions**: This is your method of providing additional instructions or information to the user. Instructions do not require any action on the part of the user.
   - **Ranking**: Provide the user multiple answer choices for them to rank. You can also determine the maximum number of items they need to rank.
   - **File Upload**: Allow the user to upload a file from their computer. Files must be under 4 MB and the uploader accepts most file types. If you prefer a specific file type, make sure to indicate this within the instructions of the question.
6. Type in text for the question and answer set, if applicable. Click **OK**.
   - Text fields can be associated with an answer, e.g., *Other (please specify)*, if needed.

**Editing Ballot Questions**

1. From the Ballot page, edits can be made to each question after they have been created.
2. There are several options once you click on a question to make edits.
   - Click the arrows to move the question to a different position in the question order.
   - Change the page number and sequence number to move the question from one page to the next or after a certain question.
   - Click the trash symbol to delete the question entirely.
   - Click blue edit symbol to make edits to the question text or answer options.
3. Once in the Edit box for a particular question, you are able to make any adjustments to the question as a whole.
   - Designate the minimum and maximum number of answer selections on the **Properties** tab.
   - Include a “Tooltip” for an answer choice on the **Answers** tab. The Tooltip text will display when the user hovers over the answer choice.
   - Include “Additional Text” to be associated with an answer choice on the **Answers** tab. The specific text will display in a pop-up window after the user click on an “i” icon.
   - Include a “Text Area” for an answer choice on the **Answers** tab.
   - Add additional answer choices on the **Answers** tab.
   - Reformat the size of the text box, either at the bottom of the **Properties** tab or on the **Answers** tab by adjusting the number of rows to the desired size.
4. Click **OK** when all edits have been made.

**Adding Photos to Ballot Answers**

There is not an image upload button within the Answers section of the question builder. There are two ways that you can insert an image into your **Answer Text** or the **Additional Text** fields of a question.

**Insert an image found online**:
- Click the formatting button with the small tree icon to Insert/Edit an Image found online. This needs to be an isolated jpeg (for example, found using a Google image search).
- You can then edit the dimensions and alignment of the image in this section
**Insert your own photos:**
If you have a series of photos (ex. Candidates) that you would like to include on the ballot, the easiest thing to do is:
1. Upload the photos to a photo album in the Photo Gallery section of your Anchor Link page
2. In a separate browser tab from your Election, open the photo album and right click on a photo and select *Copy Image.*
3. Click back to your Ballot. Open the question and select the answer that corresponds to the image.
4. Paste the image in to the Answer Text section or Include Additional Text section depending on where you would like the image to appear
5. Repeat for each answer

**Adding Pages and Conditions to your Ballot**
Depending on the needs of your election/poll, you have the ability to create forms with multiple pages. You can have all users answer all questions on the ballot or you can set conditions to select which pages a user needs to complete based upon their responses to questions within the ballot.
- Ex. If on Page 1 a user answers Yes to a question, they could be directed to Page 2 but if they answer No, they could be directed to a different page or not directed to any further pages.

**To create multiple pages:**
1. Create the first page of your form
2. Click the *Page List* button in the top left corner
3. Click the *Page* button under *Add New* on the left side bar

**To add conditions:**
1. Open up the page of the ballot you would like to apply conditions to by accessing the *Page List* or scrolling through the pages at the top of the Ballot Page
   - *Page 1 cannot have conditions applied to it*
2. Click the *Page Properties* button in the top right corner
3. Click the *Conditions* Tab
4. Click *Add Condition*
5. Select the question, select the desired answer, and then click “is selected” or “is not selected” depending on what is appropriate for how you would like the form to function.
6. You can add multiple conditions also group questions/answers with AND/OR criteria if multiple conditions can or must be true to move to a specific page.

**To group conditions:**
1. From the *Conditions* tab in the *Page Properties*, check the box to the left of each condition that should be grouped together.
2. Click *Group Selected.*
3. Indicate if the group should be True or False.
4. Repeat steps 1-3 for each needed grouping.
5. Click *OK* when all conditions have been grouped.

Add as many ballots to the election as you need by following the steps outlined above. Once you are done creating ballots, you have now finished building your election. Be sure that it is set to *Active* so that the prompt will display on the organization’s home page for members to vote.
Publishing Options
Under the *Publishing Options* tab, you can edit your Election Status from Active/Inactive, change whether you would like a voting alert displayed, and access the URL to send to eligible voters.

Viewing Ballot Results
1. From the organization’s management page, select the *Elections* tab from the pop-out menu.
2. Click the name of the election
3. Go to the *Results* tab
4. Click on the name of the Ballot to see an overview of the current results
5. Click the *Export* button to download an Excel file of all the ballot entries
   - Voting is anonymous. You will only see a record of the votes cast, not who cast them.
Finance

How to Access the Finance Module

1. Go to your organization’s home page and select **Manage Organization** in the right corner.
   a. Note: You must be in an officer role to manage your organization. This can be either “All Access” or “Limited Access” with View/Full access to the Finance module. For more information on managing positions, see the “Change Administrative Access for Existing Positions” section one of this guide (in Rosters).
2. Click the toolbar on the left, then select **Finance**.
3. Click **Accounts**.
4. Click the account you want to access. There will most likely be only one account listed, and the account name will match the name of your organization.

   You should now be at a screen that looks similar to the following:

   ![Account Details](image)

5. You can view your organization's "Requests" and "Transactions". Click on **Transactions** (there will be nothing listed under requests). Here, you will see the following information:

   - **Trans #** – This is a unique number assigned to the transaction within Anchor Link
   - **Type**
     - Payment – money that your organization used to pay for a product or service
     - Deposit – money that has been added to your account
     - Allocation – money that has been
   - **Date** – date the transaction was imported into Anchor Link
   - **Amount** – dollar value of transaction (payments will be in parentheses)
   - **Available** – dollar value available at that transaction date (parentheses indicates a negative value)
   - **Memo** – short description of the transaction

Additional Transaction Details

1. To view additional details about a transaction, click on the blue transaction number:

   - **Trans #** – This is a unique number assigned to the transaction within Anchor Link
   - **Amount** – dollar value of transaction (payments will be in parentheses)
   - **Originating Acct** – not utilized at this time
   - **Date** – date the transaction was imported into Anchor Link
- Transaction – type of transaction
- Type – budget type assigned to the transaction by Vanderbilt
- Category – Date of Transaction
- Memo – short description of the transaction
- Payee/Source – Name of the Organization
Service Hours

Submitting Service Hours

1. Find **Service Hours** in the right-hand pop-out menu on the right under your initial or photo.
   a. You can also find **Service Hours** at the bottom of the left-hand pop-out menu on your organization’s page.

2. On the **My Service Hours** page, you will be able to see how many pending, approved, and denied service hours you have with each of your organizations.
   a. As an administrator, you can approve service hours in the **Manage Organization** function by clicking the box to the left of the name of the “submitter,” then clicking **Approve** to the right.

3. To submit service hours, click the **+ Add Service Hours** button in the top right hand corner of the screen. You will be taken to this page:
   a. Be sure to complete all required fields, and provide a contact to verify the hours.

4. Once you have submitted your service hours, the number of hours you submitted will appear under “pending hours” until the administrator of your organization approves them.
Discussion Wall

Specific content can be added to round out your organization’s site, including wall posts.

In the “Explore” setting, at the bottom of your organization’s page, type in the text field below “Discussion.”

1. Click Post.

**Your post will automatically be added to your organization’s wall. Anyone in your organization can post/comment on your organization’s wall. An e-mail will be sent to all members on the organization’s roster when a wall post. Officers can remove any post or comment that is inappropriate or unwanted.**

Users can change their personal Notification Settings if they do not wish to receive e-mail notifications for wall posts.