Member SAO360 Activity Request Quick Reference Guide (side 1)

Enter an Activity Request with Module(s)

1. Go to **SAO.nd.edu/360**, click **Click Here to Launch Application** and log in.
2. From your *Dashboard* under *My Groups*, select the group making the request.
3. Click **Other Activity Requests**.
4. Fill out the applicable fields:
   a. Name of Event
   b. Date of Activity
   c. Co-sponsoring group (use Ctrl key to select more than one)
   d. Other Event Sponsors (Non-Student Groups)
5. Click **Add modules** (upper right).
6. Select the appropriate module(s) to add to the request.
7. Click **Add Selected Modules**.
8. Select each module to expand it.
9. Read any pertinent policy information provided regarding the module.
10. Fill out the specific information related to the module.
    To remove the module: Click **Remove module** *twice*.
    Note: Once a request is submitted, modules cannot be removed.

You can either *Save*, *Cancel* or *Submit* the request.

> **Note**: To return to a previous page, use the SAO navigation tools. Do not use the Back button of your browser.

Save an Activity Request In-Progress

1. Click **Save Request**. This saves the entered information for later access and editing but does not submit it to initiate the activity confirmation process. The request is still on the screen and can be edited.
2. Review the unsubmitted request and make changes and add comments (see *Post a Comment*, below) as needed. Click **Save** to save but not submit.

Note green "success" status bar at top of screen. Status remains at 0%. Unsubmitted modules are tagged as *New*.

At this point you can *Edit*, *Cancel*, or *Submit* the request or return to the Group Page (**To Group**).

View and Edit a Request

Request can be viewed and edited by initiating member or Officer1.

1. From the Group's page click **In Process Requests**.
   Note: To view Current and Completed requests, click **View Activity Requests**. Click a column to view and sort list by any column header. To see the status of module(s), hover your pointer over the *Statuses* field. To locate a request using the Search function, enter a key word that appears within the name and click **Search**.
2. To open request, click on it from the list.

Edit a Request

1. On the Activity's page, make changes and Post Comments as needed (see *Post a Comment*, below).
2. To officially submit the request and start the confirmation process, click **Submit**. Click **OK** to policy statement. Status is now > 0%.
3. To retain the unsubmitted status, click **Save**.

Submit an Activity Request

A request can be edited/submitted by initiating member or Officer1.

1. Click **Submit**.
2. Click **OK** to the policy statement. This submits your request but does not complete the request. The request will be reviewed by your group Advisor and, if Approved, Department Contacts will be assigned to work with you to confirm the various modules of the request.
3. If necessary, make any additional changes or comments (see *Post a Comment*, below). Click **Submit**.

Note green "success" status bar at top of screen and status change to > 0%.

Once a request is submitted it is routed to the group's Advisor and modules are marked *Advisor review*. The Advisor can: *Deny* a module (lock it) or *Approve* (forward to Student Activities Liaison to assign appropriate Department Contact for ultimate approval/denial); or ask for more information.

Cancel an Activity Request

If a request is still listed as *In Progress*, it can be cancelled by member originator or Officer 1.

1. From your *Dashboard* under *My Groups*, select the group for the request.
2. Click **View Activity Requests** and locate and open the request you wish to cancel.
3. Click **Cancel**.

The request is now locked and can no longer be edited or acted upon. To re-submit the meeting, a new MRO request will need to be created.

Edit a Submitted Request

1. From your *Dashboard* under *My Groups*, select the group for the request.
2. Click **View Activity Requests**
3. Select the request you wish to edit.
4. Make changes and Post Comments as needed (see *Post a Comment*, below). Note that "Past Values" now appears in blue next to the name of the field you have changed.
5. <u>To view a history of changes to a field</u>, click **Past Values**. (Only available for submitted requests.

Post a Comment

Posted comments generate an email to parties involved informing them a comment has been posted. Posts are read on the Activity Request's page.

1. From your *Dashboard* under *My Groups*, select the group for the request.

Continued…

2. Click **View Activity Requests** and select the request to post a comment for.
3. In the *New comment* field, enter your comment. Click **Post Comment**. As subsequent comments are exchanged, you will see the string of all prior comments.

Print a Request

1. Locate and open the Activity Request you wish to print.
2. Click the **Print icon** at upper right above the module section of the request. A print-ready document showing the request details will display in your browser.
3. Use the **Print** command from your browser to print the document.

Upload a Document

The originator or Officer 1 can append documents to the request. Anyone with access to the request can view and download the appended files.

1. From the Activity's page, open the **Imprinting module**.
2. Click **Choose Files** (scroll down to Supporting Files section).
3. Note file types that can be uploaded.
4. Browse for the file(s) and click **Open** (use **Ctrl** to select multiple files).
5. Click **Save** (or **Submit Request**).
6. To view the document, click the **Page icon** ( )
7. To download a document, click the **Download icon** ( ).

Receive Approval/Denial of a Module

When a module of your request is approved or denied anywhere in the workflow, notification emails will be sent to you and all other involved parties.

Unlock a Request

To re-open a completed request, contact the Student Activities Office (574-631-7308) to ask that the request be unlocked and the workflow reset.

1. Your Advisor and club will receive an email when a request has been unlocked.
2. From your *Dashboard* under *My Groups*, select the group for the request.
3. Click **In Process Requests**.

The newly unlocked request will be listed as *In Process* with a status > 0% on your list of In Process Requests.