

# SAO360 Quick Reference Guide for Officers

## Access SAO360

1. In your browser go to the **sao360.nd.edu** web page and click on the link
2. Log in to SAO360 with your **NetID** and **password**.

## Register a Group

Administrators and Officer1 roles can register a Group. This needs to be done yearly and a notice will display on the group page when the registration is due.

1. On your *Dashboard*, if a message displays in red asking you to register your group, click the **group name**.
2. Take a moment to review your *Group Information*.
3. Click **Register Group**.

On the *Group Page* you will see a message at the top indicating that you have successfully registered your group. There will no longer be a red message on your *Dashboard*.

## Add a Group Member

For Holy Cross or St. Mary's student, you will need: email and first and last names.

For an ND student you will need: NetID.

1. On your *Dashboard*, under *My Groups* click the **group name**.
2. From the *Update* dropdown at the left, click **Membership**

3. For ND student, enter the student's **NetID**. The NDID, email and member's name will auto-populate.  
For non-ND student, enter **email** and **first and last names**.
4. Check any *Available Role* you wish to assign.
5. Enter *Graduation Year* and *Affiliation* (optional).
6. Click **Yes or No** to the two additional questions.
7. Click **Add Member**.

Prospective ND member receives email indicating pending membership and a link to SAO360 to accept or reject membership. HCC/St. Mary's members are automatically added to membership. No email is sent.

## View Group Information, Current Officers and General Membership

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. Click **Group Information, Current Officers** or **General Membership** to see current lists.

## Remove a Group Member

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. Click **Current Officers** or **General Membership** to see current list.
3. Locate the member you wish to remove and under *Status*, click **Edit**.
4. Under *Change Group Member Status*, check **Inactive** or **Former**. (Clicking the radio button automatically saves the new status and a message in red will display, indicating that the action was successful.)

Clicking the radio button saves the new status in the system, and a message in red will indicate that the action was successful.

**NOTE:** *Former* indicates a member who is not expected ever to return to the group. The use of *Former* and *Inactive* is a group decision.

## Accept/Reject Membership Request

1. On your *Dashboard*, under *Membership Requests* click the **check mark** to accept the membership request or the **X** to reject it.

Student will receive email indicating whether the request for membership is accepted or rejected.

## Email an Individual Member or Officer

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. Click **Current Officers** or **General Membership**.
3. Locate the member/officer you wish to email and click their email address link. A New Message window opens in your email client with the To: and From: fields populated.
4. Type the message and send.

## Email All Members

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. Click **Email members**. A New Message window opens in your email client with the From: field populated and the Bcc: fields used to keep member emails confidential.
3. Type the message and send.

### Add a Role to a Group

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. From the *Update* dropdown, click **Group Roles**.
3. From the *Role* dropdown, select the role you wish to add.
4. Add *Title* and *Description* as needed.
5. Click **Add Role** and then **Back to Group** to return to the *Group Detail* page.

The new role is now shown under *Current Available Roles*.

To edit a role, perform **steps 1 and 2**, then under *Current Available Roles* click **Edit** for the role you wish to edit (or click **Remove** to delete the role). Make changes to the description then click **Save Role**, then **Back to Group**.

### Assign a Group Member a Role

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. Click **General Membership** and locate the member for which you would like to assign a role.
3. Under *Role(s)*, click **Add**.
4. Click **Add New Role**.
5. Check the appropriate role and click **Save**.

When member logs in, the new role will display.

### As Officer1, Change Officer1

An Officer1 can only be changed by the **Officer1, or an Administrator**. Before adding new Officer1, be sure new officer is a General member of the group.

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. From the *Update* dropdown, click **Officer1**.
3. Under *New Officer1 NetID*, enter the **NetID** of the proposed Officer1.
4. Click **Submit**.

An email is sent to the group Advisor for approval. Upon Advisor approval, new Officer1 will be notified. This email is copied to SAO, group email and other officers (2–4) for notification.

### Change an Officer's Role

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. Click **Current Officers** and locate the officer whose role you would like to change.
3. Under *Role(s)*, click **Edit**.
4. Under *Roles in <Your Group>*, the officer's role will display. Click **Remove**.

The officer's role will revert to *General Member* and the member will now be shown in the *General Members* list.

**NOTE:** To give an officer an additional role, if available, click **Add New Role** and select the role from the list of available roles. Click **Save**. The multiple roles are displayed.

### Add or Change Your Advisor (clubs only)

1. From the *Dashboard*, under *My Groups* click the **group name**.
2. From the *Update* dropdown, click **Advisor**.
3. Under *Request New Advisor*, enter the **NetID** of the new Advisor.
4. Click **Submit**.

An email will be sent to the new Advisor with a link to SAO360 to accept/reject the role. If there was a change in advisor, the previous advisor is notified of the change via email.