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Personal Account

Accessing SAINTS Connect
The URL for SAINTS Connect is saintsconnect.siena.edu. Your Siena College email login credentials serve as your SAINTS Connect username and password. All members of the Siena community have access to SAINTS Connect.

Managing Email Notifications
You will receive email notifications for various activities that occur within SAINTS Connect.
- Sign into SAINTS Connect
- Select your name in the top right corner of the home page
- Select “Account”
- Select “Notifications”
- Select the option that represents how you want notifications to be handled for:
  - System Email Notifications
  - Informational Email Notifications
  - Comment Wall Notifications
  - Text message Notifications
- Select “Save”

Please note: You will continue to receive all appropriate messages based on your involvement and position(s) on SAINTS Connect. The above options simply control which notifications you receive at your campus email address.

Managing Privacy Settings
- Sign into SAINTS Connect
- Select your name in the top right corner of the home page
- Select “Account”
- Select “Privacy Settings”
  - Community Directory Settings: select “Show” for your information to be visible to members of the campus.
  - Organization Roster Settings: select your privacy setting for each position that you hold. If left undecided, your membership will be visible to members of the campus.

Updating Personal Profile Picture
- Sign into SAINTS Connect
- Select your name in the top right corner of the home page
- Select “Account”
- Upload a profile picture via the “Choose File” button (under “Profile Picture”)

Finding/Joining an Organization
- Sign into SAINTS Connect
- Select the “Organizations” tab at the top of the home page
- Search by name, category, or keyword using features on the left side of the page
- Select an organization that you are interested in joining
- Select “Join” on the organization’s page
Leaving an Organization

- Sign into SAINTS Connect
- Select your name in the top right corner of the home page
- Select “Membership History” to view current and past memberships
- Select “Current Memberships” to see the organizations you belong to
- Expand an organization and select “Leave Organization” to terminate membership to that particular organization
- Select “Leave Organization” again to confirm that you wish to end your membership

Viewing Submissions

- Sign into SAINTS Connect
- Select your name in the top right corner of the home page
- Select “Submissions” to view Form, Election, Organization Registration, and Event submissions
Organizations

Updating an Organization’s Profile Picture

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “About”
- Upload a profile picture via the “Choose File” button (under “Profile Picture”)

Please note: To update an organization’s profile picture, you must have proper permissions.

Updating an Organization’s Photo Gallery

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Gallery”
- Select “Add Photos” to a photo album
  - The photo album should be set to be visible to “The Public”

Please note: To update an organization’s cover photo or upload pictures, you must have proper permissions.

Updating an Organization’s Summary and Description

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “About”
- Complete the “Summary” section – this information is visible in the Organization Directory
- Complete the “Full Description” section – this information is only visible to those that visit your organization’s page

Please note: To update an organization’s description, you must have proper permissions.
**Roster Management**

**Inviting Organization Members**
- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Roster”
- Select “Invite People”
- You may enter up to 500 email addresses in the text box, but you must use “siena.edu” email addresses. Separate each email address with a comma or enter one email address per line.
- Select “Add Email Address”
- Select individuals’ positions
  - If you are inviting a group of individuals with different positions, add as “members” and assign positions later
- Select “Send Invitations” to send invitations via email
  - Individuals will not appear on the roster until they have accepted the invitation

Please note: To invite organization members, you must have proper permissions.

**Removing Members from an Organization Roster**
- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Roster”
- Locate the member you’d like to remove and select the box to the left of the member’s name
- Select “End Membership” at the top of the user list
- Confirm that you would like to proceed

Please note: To remove members from an organization, you must have proper permissions.

**Assigning/Editing Positions**
- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Roster”
- Select the pencil to the right of the user
- Select the box next to the position(s) that you would like to assign to the individual
- Select “Save”

Please note: To assign positions to organization members, you must have proper permissions.
Updating Position Permissions

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Roster”
- Select “Manage Positions”
- Select the name of the position that you would like to adjust
- Edit the “Position Name,” “Position Type,” and level of “Management Access” for the position
- Select “Save”

Please note: To update position permissions, you must have proper permissions. Additionally, certain positions are not able to be updated (i.e. advisor).

Creating Organization-Specific Permissions

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Roster”
- Select “Manage Positions”
- Select “+ Position”
- Indicate the “Position Name,” “Position Type,” and level of “Management Access” for the position
- Select “Create”

Please note: To create a position, you must have proper permissions.
**Events**

**Finding an Event**
- Sign into SAINTS Connect
- Select the “Events” tab at the top page of the home page
  - Select a date on the calendar (on the left side of the page) to view events on that date and during the following week
  - Search events by keyword and/or the associated “Theme” or “Perks”
- Select the name of an event to view additional details and to RSVP

**Submitting an Event Form**
- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Events”
- Select “Create Event” at the top of the page
  - If you are completing an Event Form for the first time this academic year, you must complete Risk Management Training. This is located in the Event Form.
  - The Event Form also includes links to room reservations, the off-campus food waiver, club travel form, speaker request form, and fundraiser approvals.
  - If the event is a club meeting, you can forego the risk assessment piece by choosing “Event is just a meeting” on the “Event Info and Checklist” page.
- Your event submission will be reviewed by Student Activities & Leadership Development staff
- Any questions and final approval of your event will be sent via email

Please note: To submit an Event Form, you must have proper permissions.

**Viewing/Editing an Event Submission**
You can make edits to the details of an event if your event submission is in “started,” “approved,” or “denied” status. You cannot edit a pending/unapproved event. Edits to event submissions will be reviewed and approved by Student Activities & Leadership Development staff.
- Sign into SAINTS Connect
- Select your name in the top right corner of the home page
- Select “Submissions” to view Form, Election, Organization Registration, and Event Submissions
- Select “Events”
- Select the event that you wish to view/edit
Attendance Tracking

- Sign into SAINTS Connect
- Find the event you are looking to track attendance for (see above steps)
- Plug in your card reader into your laptop
- Select “Manage Event”
- Select “Track Attendance”
- Select the “Swipe Page” URL
- Copy the access code from the “Track Attendance” page and paste it into the “Swipe Page” URL
- Select “Submit” – the page is now ready to swipe card readers
  - Make sure the cursor is in the white box to ensure that the information is being entered
- To view attendees, toggle to the “Track Attendance” page and refresh
  - A list of attendees and their email addresses will show
  - You can export this file and use for future data and communication
Creating a Form

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Forms”
- Select “Create Form”
- Identify the name of the form, the date range that you would like the form to be available, if you’d like the form to be active, and if you will allow multiple submissions
- Identify who should have access to submit the form by checking the box to the left of each option
  - If you want everybody to have access, then do not check any box
- Select “Save” or “Save and Add Questions”
- Select the format of the question you’d like to add to the form (see lower have of the page)
  - Question types include: check box list, radio button list, text field, drop down list, instructions, single check box, ranking, and file upload
- Type in text for the question/answer set (if applicable) and select “OK”
- Select a question and the “Edit Icon” to make adjustments
  - Properties tab: update question text, indicate if question is required/optional, indicate if answers need to be shuffled, format the size of the text box
  - Answers tab: edit answer text, include “tooltip” for answer choices, include additional text to be associated with an answer choice, add additional answer choices, format the size of the text box
- Select “OK” when all edits have been made
- Repeat the above steps as needed for each question you would like to add to Page 1
- Select the Page List button about the added questions to add more pages to the form
  - Select the “+ Page” button to add a page to your form
  - You will be able to move pages by hovering over the specific page, clicking the left-hand corner, and dragging to where the page should be. You can also delete pages by hovering over the page and clicking the trash can icon
- Select the “Page Properties” button to edit a page name, select whether or not you would like to show the back button, and to add skip logic to your form
  - Please note: you will not be able to add skip logic to the first page of your form, as skip logic relies on previous page answer selections
- Repeat steps as needed to add additional pages
- Click “Back to Forms” once your form has been created

Please note: To create a form, you must have proper permissions.
Sharing a Form

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Forms”
- Select “Publish” next to the name of the form that you wish to share
- Select “Active” with regard to “Form Status”
- Copy and paste the form URL and send to recipients
  - Each person has a unique URL because they need to sign into SAINTS Connect to fill out the form. It is important that you send this universal URL to re-direct recipients to sign into SAINTS Connect first

Please note: To share a form, you must have proper permissions.

Exporting/Saving Form Submissions

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Forms”
- Locate the form in the list and select “Submissions” to the far right of the form
- Click “Export All” at the top of the list of submissions
- Indicate to open or save the file, and click OK

Please note: To export/save form submissions, you must have proper permissions.

Printing Form Submissions

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Forms”
- Locate the form in the list and select “Submissions” to the far right of the form
- Select the printer icon to the far right of each submission
- Select “Print” in the top right corner

Please note: To print form submissions, you must have proper permissions.
Elections

Creating an Election and Viewing Results

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Elections”
- Select “Create Election” at the top of the page
- Edit “Properties” of the election
  - Select the “Active” button so that the election goes live, and have a specific start and end time so that the election will open and close automatically
  - Select “Display an alert on the organization homepage when the election is active and voting is open” to have a reminder shown on your organization’s webpage
  - Select “Only allow users listed on the roster of this organization to vote” if you do not want the entire campus to have access to vote
- Create “Ballots” – each ballot can have multiple questions
  - Enable or disable “General Access” – enabling means that you are not restricting anybody in the organization from voting for a specific ballot
  - Question types include: check box list, radio button list, text field, drop down list, instructions, and ranking
- View “Results”
  - You will see the percentages under the “Results” tab
  - You can export every vote OR every voter’s name separately, but you are unable to pair the voter with who they voted for
- Send the election link to members
  - Select “Publishing Options” and copy and paste the link to send to recipients
    - Each person has a unique URL because they need to sign into SAINTS Connect to fill out the election. It is important that you send this universal URL to re-direct recipients to sign into SAINTS Connect first

Please note: To create an election and view election results, you must have proper permissions.
Finance

Viewing an Organization’s Available Budget

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Finance”
- Select “Accounts” to view a summary of the available balance
  - To see a detailed version of requests and transactions, select the account name

Please note: To view an organization’s available budget, you must have proper permissions.

Submitting a Purchase Request

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Finance”
- Select “Create Purchase Request”
  - You do not need to fill out the “Payee Information” section
  - If you do not see your vendor in the dropdown list, please email ahutton@siena.edu
  - If you are requesting a store credit card, please detail who will pick the card up and when

Please note: To submit a purchase request, you must have proper permissions. For detailed information regarding purchase request eligibility, you can visit the Club Finance Manual.

Submitting a Funding Request

- Sign into SAINTS Connect
- Find your organization’s page via the Organization Directory or the Action Center
  - To access the Action Center, select the switchboard in the upper right corner of the home page and select “Manage”
- Expand the menu on the left side of the screen and select “Finance”
- Select “Create Funding Request”

Please note: To submit a funding request, you must have proper permissions. For detailed information regarding funding request eligibility, you can visit the Club Finance Manual.

Submitting a Check/Credit Card/Travel Advance Request

- Sign into SAINTS Connect
- Scroll down to “Campus Links” on the home page and select which request you need to complete

For detailed information regarding check requests, credit card requests, and travel advance requests, you can visit the Club Finance Manual.