Hello, chapters & advisors!

This document is meant to be your "Cliff Notes"© version of the instruction manual for using Campus Director (TechniPhi 2020), the recruitment management system used by your campus. It is written from our own personal experience with the system, so it is our hope that it will answer your questions quickly and efficiently … we know that when it comes to recruitment and membership selection, you often need answers and you need them now!

Should you have any questions or need additional help, please feel free to contact us or your region's College Panhellenic Specialist (CPHS).

All our best wishes for a very successful recruitment for you!

In our bonds,

Linda Henderson, ΔΨ

Sigma Sigma Sigma Sorority
Chief Panhellenic Officer
NPC RFM Senior Specialist

Phone: (609) 736-0766 (Eastern time)
E-mail: trisigma.cpo@gmail.com

www.trisigma.org

http://trisigmaphtraining.weebly.com/

Rebecca Calkins, EO

Sigma Sigma Sigma Sorority
College Panhellenic Coordinator
NPC RFM Specialist

Phone: (630) 631-9648 (Central time)
E-mail: Rebecca.calkins.trisigma@gmail.com

College Panhellenic Specialists:

CPHS – Region 1	Michelle Hallett, EH	(610) 496-2193	m.hallet@live.com
	Laura M. Sweet, ΔΠ	(864) 979-3200	lsweetm@aol.com
CPHS – Region 2	Alison Wirth, EO	(217) 251-4740	sss.panhellenic2@gmail.com
	Brenda Ray, ΑΨ	(520) 561-9094	TriSigmaPanhellenic2k@gmail.com
CPHS – Region 3	Nikki Colletti, ΓΜ	(225) 362-6560	nikkiccolletti@gmail.com
CPHS – Regions 4 & 5	Kat Gillan, AZ	(205) 219-0726	katgillan75@gmail.com
CPHS – Region 6	Rebecca Calkins, EO	(630) 631-9648	Rebecca.calkins.trisigma@gmail.com

Updated February 2021

CampusDirector

After logging into your chapter's Campus Director website, you will be on the **HOME** screen and will see the **Message of the Day (Chapter)** screen. These are messages specifically for your chapter, OR that the Panhellenic is sending out to all the chapters on your campus.

CampusDirector

Sigma Sigma Sigma at

👤 Chapter Member

ALL PNMS

PRIMARY POOL

SECONDARY POOL

🏠 HOME

☰ MASTER LIST

🔧 GENERAL

ROUNDS

PANHELLENIC PREVIEW

VALUES

PHILANTHROPY

❓ USER GUIDES

🎥 TRAINING VIDEOS

Message of the day (Chapter)

Need Help?

Message of the day for:

Sigma Sigma Sigma at

CampusDirector

ALL PNMS (   )

PRIMARY POOL (   )
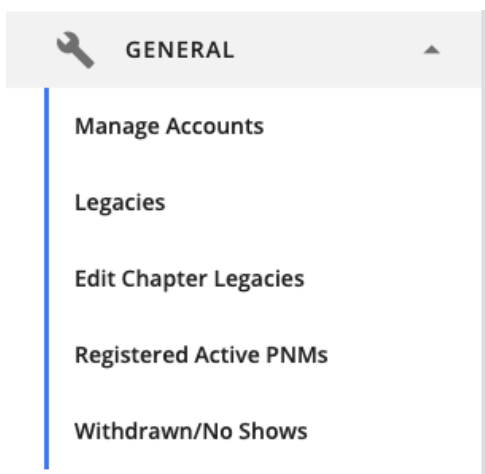
SECONDARY POOL (   )

🏠 HOME

☰ **MASTER LIST**

🔧 GENERAL ▾

Master List
- ➢ Here you have options for generating a list of all PNMs.

- ➢ The column on the left is where you will check the boxes for the data about the PNMs you would like displayed.

- ➢ The column on the right is where you select the order in which you want the PNMs displayed. For this, you will probably want "Alphabetically".

- ➢ In the right column, underneath "Select the Order to Display PNMs", you will see where you can select which PNMs to include in your list. This might be controlled for you and the only option might be "Active/Enrolled PNMs". But you might have options for "All PNMs" or "All Except No Shows".

- ➢ Scroll down and you will see blue buttons for your "display" options: either to PRINT PDF, DOWNLOAD PNM PICTURES, or EXPORT.
  - • If you choose "Export", all the information will download on your computer as a *.csv file which you can then open in Excel.

Over to the left, you will see a panel, at the top of which will be the **General** fields. These are fields that every chapter will have, regardless of the campus you are on.

🔧 GENERAL ▴

Manage Accounts

Legacies

Edit Chapter Legacies

Registered Active PNMs

Withdrawn/No Shows

Manage Accounts
- ➢ List of those chapter members, advisors, or Tri Sigma staff/volunteers who have access to your chapter's Campus Director account.

- ➢ You can add someone to have access by clicking the blue "New Account" button you see at the top of the page.

Legacies
- ➢ Here you will find every PNM who has a Legacy claim to one or more of the NPC groups on your campus.

- ➢ Legacies of Tri Sigma will show in ***blue bold italics***.

- This information is provided by the PNM herself. You might want to verify that a PNM who claims she is a Legacy is indeed one. Contact NHQ to do so.

- "First Name, Last Name" columns are the PNM's name. The "Organization" column contains the NPC sorority to which the PNM's mother, sister, grandmother, cousin, etc. belongs, you will see the PNM's "Relative's Name", the "Relation" to the PNM, and the "School" at which the PNM's relative was initiated into the NPC group.

Edit Chapter Legacies

- Here you will find an alphabetical list of all PNMs going through primary recruitment this year.

- Should you learn that another PNM is a Legacy of Tri Sigma, you can go in here and update that PNM's Legacy information.

- Just click on the first letter of the PNM's last name, select that PNM, and you will see fields to fill in with the new information you have. Click on the blue "Save Changes" button when you are done.

Registered Active PNMs

- Where you will find the list of all "active" PNMs still in the system, in alphabetical order by First Name.

- In the drop-down at the top, you will be able to adjust your screen view to see 10, 25, 50, or 100 PNMs at a time (default is 25).

- Sorting options …
  - If you wish to sort the PNMs alphabetically by Last Name, just click on the double arrows you see to the right of where it says "Last Name" in the blue header.

  - You might find it helpful instead to sort the PNMs by their recruitment Council ID. To do so, just click on the double arrows you see to the right of where it says "Council ID" in the blue header.

  - If you want to sort by the recruitment counselor group, click on the double arrows you see to the right of where it says "RC Group" in the blue header.

- Display and save/print options …
  - If you choose "Excel", all the information will download on your computer as a *.xlsx file which you can then open in Excel.

  - If you choose "Print", it will display a list of all PNMs on your computer screen and will direct right to your print manager. From here you could either print it or save the document as a PDF.

- Your Tri Sigma Legacies will show in ***blue italics***.

Withdrawn / No Shows

➤ Where you will find the list of all PNMs who have withdrawn from recruitment or were "no shows", in alphabetical order by First Name.

➤ In the drop-down at the top, you will be able to adjust your screen view to see 10, 25, 50, or 100 PNMs at a time (default is 25).

➤ Sorting options …
- If you wish to sort the PNMs alphabetically by Last Name, just click on the double arrows you see to the right of where it says "Last Name" in the blue header.

- You might find it helpful instead to sort the PNMs by their recruitment Council ID. To do so, just click on the double arrows you see to the right of where it says "Council ID" in the blue header.

- You might want to sort the PNMs by the point at which they withdrew or left recruitment. To do so, just click on the double arrows you see to the right of where it says "Withdrew in Round" in the blue header.
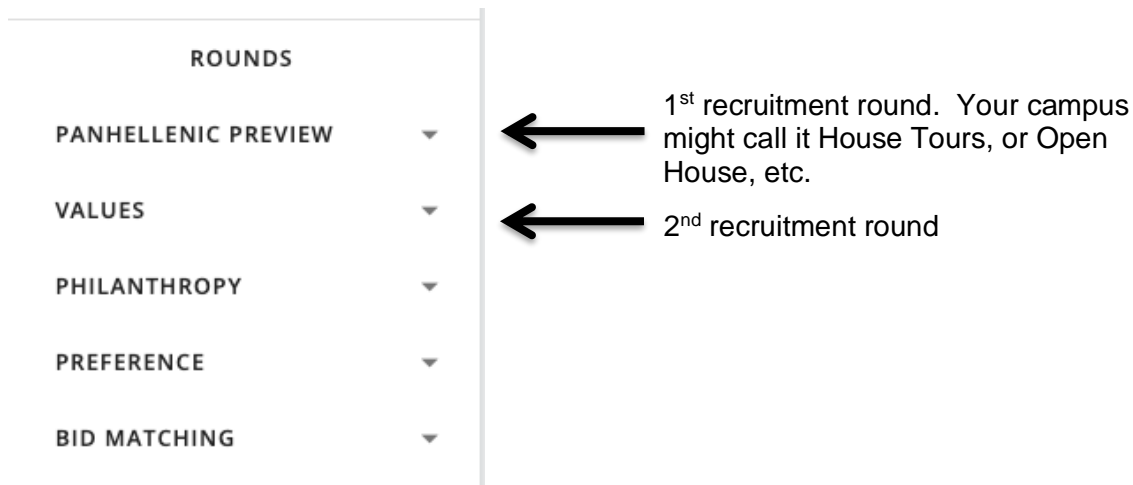
- If you want to sort by the recruitment counselor group, click on the double arrows you see to the right of where it says "RC Group" in the blue header.

➤ Display and save/print options …
- If you choose "Excel", all the information will download on your computer as a *.xlsx file which you can then open in Excel.

- If you choose "Print", it will display a list of all PNMs on your computer screen and will direct right to your print manager. From here you could either print it or save the document as a PDF.

➤ Your Tri Sigma Legacies will show in ***blue italics***.

Depending upon how many rounds of recruitment you have, what you see in the left panel of the CD screen, below the **General** section, might vary. What you see below is but one example.

ROUNDS

PANHELLENIC PREVIEW ▼ ⬅ 1ˢᵗ recruitment round. Your campus might call it House Tours, or Open House, etc.

VALUES ▼ ⬅ 2ⁿᵈ recruitment round

PHILANTHROPY ▼

PREFERENCE ▼

BID MATCHING ▼

The round names you see in this screen shot example might be different from what you call them on your campus. OR you might not have this many rounds. BUT the links inside those different rounds are the same: View Invitations, View Schedule, Reports.

Menus in your 1st /Opening Recruitment Round

View Schedule
➢ Here you will find the times of all of the first round's events.

➢ In the drop-down at the top, you will be able to adjust your screen view to see 10, 25, 50, or 100 PNMs at a time (default is 10).

➢ Sorting options …
- You most likely will want to sort by what party the PNMs are coming to. To do this, click on the double arrows you see to the right of where it says "Event" in the blue header.

- If you wish to sort the PNMs alphabetically by Last Name, just click on the double arrows you see to the right of where it says "Name" in the blue header.

- You might find it helpful instead to sort the PNMs by their recruitment Council ID. To do so, just click on the double arrows you see to the right of where it says "Council PNM#" in the blue header.

- If you want to sort by the recruitment counselor group, click on the double arrows you see to the right of where it says "RC Group" in the blue header.

➢ Display and save/print options …
- If you choose "Excel", all the information will download on your computer as a *.xlsx file which you can then open in Excel.

- If you choose "Print", it will display a list of all PNMs on your computer screen and will direct right to your print manager. From here you could either print it or save the document as a PDF.

- If you choose "PDF", it will create a PDF of all the information as you have it sorted, downloaded to your computer/device.

➢ Your Tri Sigma Legacies will show in *blue italics*.

View Reports
➢ Click on the tiny arrow you see to the right of "View Reports" to expand the list.

➢ The different reports you can view are pretty self-explanatory here:
- Registered Active PNMs
- Withdrawn PNMs
- Accept/Regret/Withdraw Lists
- Overall Statistics
- Chapter Statistics

➢ These last two reports might be useful to you if your chapter keeps its own statistics!

Menus in your Middle Recruitment Round(s) & Preference

If you are <u>going into</u> one of these rounds then the first option you will see listed is ...

Enter Invitations
➢ Here you will enter the PNMs you want to invite to this next round.   There is a screen shot of what this looks like on the next page. *Scroll to end of this section for instructions on spreadsheet upload option!*

➢ In the left panel will be a list of PNMs who are in your "pool", that is all the PNMs that were at your previous round (the one you are coming out of).

➢ Your Tri Sigma Legacies will show in *blue italics*.

➢ At the top of the right panel, you will see "Invited PNMs" with two numbers (# / #) after. **The second number is your carry figure!**

➢ You can re-sort that PNM Pool list to have the PNMs listed alphabetically or numerically by selecting from the "Sort by" drop down underneath the two columns.

➢ To make your invite selections, click on the names of the PNMs that the chapter wishes to invite to the following round. You can select several names at a time by holding down the "Control" button on your computer and clicking on the names. To move these PNMs over to the "Invited PNMs" list, click the → arrow.

➢ As you do this, you will see that first number after "Invited PNMs" change. This keeps a running tally of your number of "Invited PNMs" out of the number of "PNM Pool" that you had attending the recruitment round that you just finished.

➢ Another option for making selections ... Select all the PNMs in the left column and move them over to the right. Then from the "Invited PNMs" panel (on the right), you can select the PNMs you DO NOT want to invite and move them back to the "PNM Pool" list by clicking on the ← arrow.

➢ Save your entries often by clicking on the blue **SAVE** button at the bottom of the screen. Feel free to save frequently!

➢ Double check the chapter's selections for accuracy !!!!!!!!!!!!!! You can still make changes and corrections at this point.

➢ Underneath those two columns showing your Pool (on the left) and Invites Chosen (on the right) is where you enter your **Flex Plus List** and **Flex Minus List**.

➢ On the left you will see "Plus (#/#)". The second number in the parentheses is the length of the requested Flex Plus List. The length of this list is determined by your campus' RFM Specialist. *Remember that your Flex Plus List includes those PNMs you would add on to your invite list if you could invite more.*

➢ To add a PNM onto the **Flex Plus List**, click on the down arrow ↓ you see above this Plus screen and under the left panel that lists all the PNMs in your Pool. **Remember that these PNMs need to be added in your order of preference!!!**

The order in which these PNMs are put onto the Flex Plus List VERY much matters!!!

For example, if your Flex Plus List was to be 10 long, you can list up to 10 PNMs above and beyond those on your invite list. The first PNM on your Flex Plus List should be the very next PNM the chapter ranked after the last on the invite list. The second PNM on your Plus Flex List would be the second PNM the chapter ranked after the last on the invite list, etc.

Tri Sigma strongly encourages & advises the chapter to include as many on the Flex Plus List as the chapter is permitted as it is in the chapter's very best interest to do so. Should you have any questions about creating this list, please contact your Assistant Director of Chapter Services, Regional Consultant, or College Panhellenic Specialist immediately.

➢ Save your entries often by clicking on the blue **SAVE** button at the bottom of the screen. Feel free to save frequently!

Edit PNM Invitation List

Sigma Sigma Sigma at Penn State University
Round: Philanthropy

Tip! Upload Invitations via a Spreadsheet: [Browse...] No file selected.

[**UPLOAD**]

PNM Pool
PNMs attending the prior round's Events

Clark, Julia <972>
Kimmel, Alice <1302>
George, Jamie <1327>
Gillespie, Marissa <666>
Yetter, Maddie <402>
Munoz, Isabella <389>
Catino, Mackenzie <1269>
Perry, Ema <1080>
Buzaitis, Anahi <1231>
Obringer, Rylee <1457>
Andrews, Sydney <951>
Manoff, Peri <452>
Sulema, Danielle <156>
Banville, Juliette <737>
McIntyre, Teghan <1298>
Regan, Maeve <1399>
Aprahamian, Alyssa <257>
August, Sylvie <417>
Benincasa, Chloe <991>
Casario, Abigail <988>

(0 PNM(s) selected)

Invited PNMs (0/0)

(0 PNM(s) selected)

→

←

Sort Lists By [-- Choose One -- ▼]

↑ ↓   ↑ ↓

Plus (0/0)

↑

↓

(0 PNM(s) selected)

Minus (0/0)

↑

↓

(0 PNM(s) selected)

[**SAVE**] [**SUBMIT**] [**CANCEL**]

The *Submit* button above will remain disabled until the following conditions are met:
The number of PNMs in the *Invited PNMs* list is less than or equal to 0.
The number of PNMs in the *Minus* list is **exactly** 0.

- On the right you will see "Minus (#/#)". The second number in the parentheses is the length of the requested **Flex Minus List**. The length of this list is determined by your campus' RFM Specialist and is <u>mandatory by NPC agreement to the full length requested</u>. ***Remember that your Flex Minus List includes those PNMs you would remove from your invite list if you had to. It essentially is an "un-invite" list.***

> The <u>order</u> in which these PNMs are put onto the Flex Minus List VERY much matters!!!
>
> For example, if your Flex Minus List was to be 10 long, you are to list the 10 PNMs you would <u>not</u> invite if you had to do so. PNM #1 on this list would be the <u>very last</u> PNM in your rankings done to create your invite list. PNM #2 on this list would be the next to last PNM in your rankings, etc. Basically, <u>work up from the bottom</u> of your ranked invite list.
>
> Submission of this list is mandatory!
>
> Should you have any questions about creating this list, please contact your Assistant Director of Chapter Services, Regional Consultant, or College Panhellenic Specialist immediately.

- To add a PNM onto the **Flex Minus List**, click on the down arrow ↓ you see above this Minus screen but under the right panel that lists all the PNMs you have invited to next round. **Remember that these PNMs need to be listed in your order of preference of removal !!!**

- Save your entries often by clicking on the blue **SAVE** button at the bottom of the screen. Feel free to save frequently!

- Now for the "point of no-return"! When you are certain that the selections are correct, click on the **SUBMIT** button.

- Notice the warning you see in red below the **SAVE** and **SUBMIT** buttons. Campus Director will not permit you to submit until your Flex Minus List is of the same length as that requested!

Option for uploading invites via spreadsheet:

- CD has a great feature here that permits you up upload your invite list from either a *.txt file or a *.csv file. You will see this at the top of the Enter Invitations page. Maximum file size is 1 MB.

- You have the option to either clear out existing invitations an replace with all in this file or to simply add the PNMs in the file to the invites that are already entered.

- Please let us know if you wish more information on how to do this!

When invite matching has been done by the F/SA & the RFM Specialist, this ENTER INVITATIONS menu goes away.

View Invitations

> ➢ This screen is populated with a summary list of your Invite List, your Flex Minus List, and Flex Plus List.

> ➢ Your Tri Sigma Legacies will show in ***blue italics***.

> ➢ Following your Invite List, you will see listed the PNMs you placed on your Flex Minus List and your Flex Plus List. Some CD lingo ... "Flex Minus Quota for Sigma Sigma Sigma" refers to the length of the Flex Minus List that was requested by the RFM Specialist. Above that you will see mentioned of how many your chapter provided. Similar for the Flex Plus List.

> ➢ If any of these PNMs have withdrawn or been released from recruitment, you will see their status noted. For example, WD-2 means that the PNM withdrew in Round 2 of recruitment.

View Reports

> ➢ The different reports you can view are:

Registered Active PNMs
- Gives you a list of all active PNMs as of that Round of recruitment.
- See Page 4 of this *CD Guide* for more details on this report.

Withdrawn PNMs
- You have the option of seeing all PNMs who have withdrawn from recruitment, or just those who have withdrawn this round. This last option could be helpful if you just want to update your list from the previous round.
- See Pages 4-5 of this *CD Guide* for more details on this report.

Accept/Regret/Withdraw List

Chapter Priority Ranking Counts
- Provides you with the number of PNMs who put Tri Sigma in their top "cluster" to return to for this coming round.

Chapter Statistics
- Will provide you with summative statistics up to and including this Round of recruitment.

Overall Statistics
- Will provide you with overall statistics for your entire Panhellenic.

> ➢ These last two reports might be useful to you if your chapter keeps its own statistics!

When your campus is almost done with Preference Round, you will see the **Bid Matching** option pop up on the bottom of the left panel on your home screen.

BID MATCHING ▲

≔ ENTER BIDLIST

≡ VIEW BIDLIST

📊 VIEW REPORTS ▼
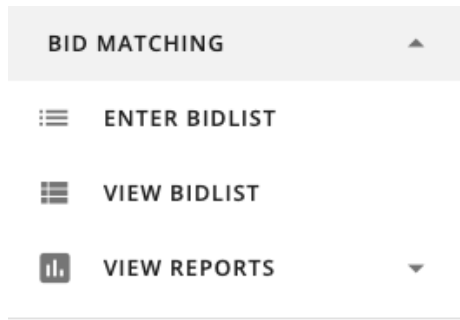
Remember that every PNM who was in attendance at the chapter's Preference Event(s) <u>must</u> appear on the chapter's bid list. This does include those PNMs who would have been in attendance but had an excused absence. This is a NPC Unanimous Agreement.

Enter Bid List

➢ In the left panel will be a list of PNMs who are in your "pool", that is all the PNMs that were at your Preference events. This list will include those PNMs who might have been excused from Preference Round but would have otherwise been present. *See screen shot on next page!* *Scroll to end of this section for instructions on spreadsheet upload option!*

➢ Your Tri Sigma Legacies will show in ***blue italics***.

➢ The right panel is the one into which you will put your bid list.

➢ In <u>rank order</u>, move over to your bid list the names of the PNMs you attended your Preference event. Again, **the order of the PNMs here is critically important!** To do this, click on the name of the PNM that the chapter wishes to place on the bid list and then click the → arrow. Remember that your bid list <u>MUST BE IN RANK ORDER</u> !!!

➢ Save your entries often by clicking on the **SAVE** button at the bottom of the screen. Feel free to **SAVE** frequently!

➢ Now for the "point of no-return"! When you are certain that the selections are correct, click on the **SUBMIT** button.

Option for uploading bid list via spreadsheet:

➢ CD has a great feature here that permits you up upload your bid list from either a *.txt file or a *.csv file. You will see this at the top of the Edit Bid List page. Maximum file size is 1 MB.

➢ You have the option to either clear out existing invitations an replace with all in this file or to simply add the PNMs in the file to the invites that are already entered.

➢ Please let us know if you wish more information on how to do this!

Once your Bid List has been submitted, the ENTER/UPLOAD BID LIST options go away.

Edit Bid List

Sigma Sigma Sigma at Penn State University
Round: Bid Matching

Tip! Upload Bids via a Spreadsheet:

Browse...   No file selected.

UPLOAD

PNM Pool
PNMs attending the prior round's Events

Chapter Bid List

In this column, you will see listed the PNMs who attended your chapter's Preference events.

Remember that all PNMs attending your Preference round MUST appear on your bid list !!!

→

←

(0 PNM(s) selected)

(0 PNM(s) selected)

Sort By   -- Choose One --   ▾

MOVE UP   **MOVE DOWN**

SAVE   **SUBMIT**   **CANCEL**

View Bid List
- ➢ This screen is populated with a summary list of your bid list in the order in which you entered it.

- ➢ Your Tri Sigma Legacies will show in *blue italics*.

View Reports
- ➢ The different reports you can view are:

  ### Registered Active PNMs
  - Gives you a list of all active PNMs as of that Round of recruitment.
  - See Page 4 of this *CD Guide* for more details on this report.

  ### Withdrawn PNMs
  - You have the option of seeing all PNMs who have withdrawn from recruitment, or just those who have withdrawn this round. This last option could be helpful if you just want to update your list from the previous round.
  - See Page 4 of this *CD Guide* for more details on this report.

  ### Compare Bid List to Preference
  - Here you can choose to compare your Bid List either to the "PNMs Invited" to Preference or to the "PNMs Attending" Preference.
  - Somewhat pointless, because since ALL PNMs who attend your Preference need to be on your Bid List, it should show 0 for the number of PNMs who were at your Preference but not on your Bid List.

When bid matching is complete and the final results have been posted by your F/SA, you will see the following **Bid Matching** options.

BID MATCHING ▲

:= VIEW BIDLIST

👥 VIEW NEW MEMBERS

📊 VIEW REPORTS ▼

View Bid List
- ➢ This screen is populated with a summary list of your bid list in the order in which you entered it.

- ➢ Your Tri Sigma Legacies will show in *blue italics*.

View New Members
- ➢ This screen is your chapter's matched bids, listed alphabetically by last name.

- ➢ Scroll to the very bottom and you will see how many Tri Sigma matched with in bid matching. This would include Quota Additions.

- ➢ Your Tri Sigma Legacies will show in *blue italics*.

Reports

➢ The different reports you can view are:

Registered Active PNMs
- Gives you a list of all active PNMs as of that Round of recruitment.
- See Page 4 of this *CD Guide* for more details on this report.

Withdrawn PNMs
- You have the option of seeing all PNMs who have withdrawn from recruitment, or just those who have withdrawn this round. This last option could be helpful if you just want to update your list from the previous round.
- See Page 4 of this *CD Guide* for more details on this report.

Compare Bid List to Preference
- Here you can choose to compare your Bid List either to the "PNMs Invited" to Preference or to the "PNMs Attending" Preference.
- Somewhat pointless, because since ALL PNMs who attend your Preference need to be on your Bid List, it should show 0 for the number of PNMs who were at your Preference but not on your Bid List.

Chapter Statistics
- Here you can bid matching statistics for your chapter.
- The "Number of PNMs hand matched to Sigma Sigma Sigma" (the last line item) would be the number of Quota Additions that the chapter received.

Chapter Statistics
- Here you can bid matching statistics for the entire Panhellenic and the other groups on campus.

Chapter Legacy Placement
- List of all Tri Sigma Legacies who came through recruitment and where they ended up matching to.

PNMs Eligible for Snap Bidding
- If you matched to Quota, you might not have this menu.
- Provides you with a list of PNMs who are now eligible for snap bidding in the event that your chapter did not make Quota and needs to engage in snap bidding.
- ***Remember that according to NPC rules, the only women who are eligible for snap bidding are those who at the very least started the formal recruitment process then either withdrew, were released, or otherwise did not receive a bid.***
- Options to view the list alphabetically by PNM last name or by PNM group.
- Your Tri Sigma Legacies will show in *blue italics*.