MCReflections

IN THIS ISSUE

A NOTE FROM CLIENT SERVICES
By Lexi Swinimer

If you are anything like me, it is hard to believe that December is here. Before we know it, we will turn the page from 2022 looking forward to 2023. This is the first school year since 2018 that has not been marked by social distancing, mask mandates, and online learning. Our chapters have learned and grown from these experiences, and our chapters are stronger as a result.

I hope that you are able to take some time this holiday season and slow down to enjoy the beauty and wonder of the season. This is always a hectic time of year for our collegiate Members with the crunch of final exams and projects coincides with officer elections and the holiday season. We remind you that taking care of yourself is the only way to be able to take care of others. Be sure that you are drinking plenty of water, moving your body, and making time for healthy meals.

We hope to see you at one of our interactive workshops to showcase how to best utilize MCR. Our Learning Lab is also a great way to sharpen your skills in using MCR as a leader or admin!

As a reminder, for non-enterprise accounts, invoices were sent on November 1 and are due upon receipt. Chapter Presidents, Treasurers, and Advisors have access to invoices under the Finance section.

We wish each of our Members a Happy Holiday season, and look forward to working with you in the New Year!

Incoming Officers Interactive Workshops

Join us for an interactive workshop that will help leaders to best utilize MCR for maximum effectiveness.

By centralizing your communication and chapter operations, leaders will be less burdened with frequent, easy to find answers, and Members will feel more empowered having access to the information they need.

Choose the date that works best for you!

Wednesday, January 4, 2023 @ 7:00 PM EST

Sunday, January 8, 2023 @ 12:00 PM EST

Monday, January 9, 2023 @ 8:00 PM EST

If these workshop times don't work for your schedule, or you would like a more personalized review of how to integrate MCR into your chapter operations, schedule a meeting with us to audit your chapters usage and make specific suggestions!

CHECK OUT THE MCR LEARNING LAB

NEW! Calendar events now associated with Position

Chapter events will now be associated with the position that creates the event; so an outgoing officer can create an event and when the leadership positions are changed, the event can be managed by the incoming officer.
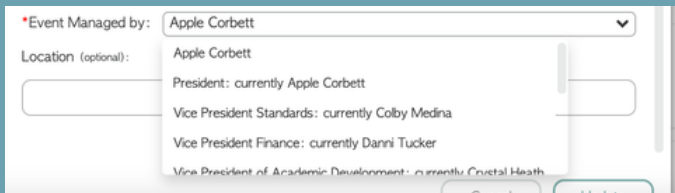
- All events for 2022-2023 were backfilled with the position of the person who created the event
- Admin leaders/advisors can re-assign events to any leader within the chapter
- When there is a leadership change, the new leader will become the owner of the event and able to manage all of the event details and attendance
- Members who hold more than one position will be able to select the correct position for the event so it transfers to the correct incoming officer.

One of the last tasks the outgoing leadership should finalize, is to plan for the Spring semester and create your chapter event calendar.Your knowledge from the last year will create the most successful calendar and will give your incoming leadership a good place to start. It also assists in your transition as the calendar discussion will facilitate many other conversations.

- Best Practice: *The outgoing leadership plans the Spring calendar now so it can be voted on and passed at the last chapter meeting of the term*

You will create events using the DRAFT feature on the calendar - this would be in place of creating your events in a different program, like google calendar, and then transferring them to MCR.

DOCUMENT SHARING

It is a good idea to double check that all of your documents are shared with the right members and easily accessible through the Collaborate section on the website and Documents in the mobile app.

The sharing permission logic for documents and folders are as follows:
- Shared Files & Folders will be listed in Collaborate under Shared with me
- All files within folders are shared with anyone the folder is shared with
- You can remove sharing of a specific file within a folder by updating the specific sharing permissions for the file; all other files in folder will continue to be shared with the shared members of that folder
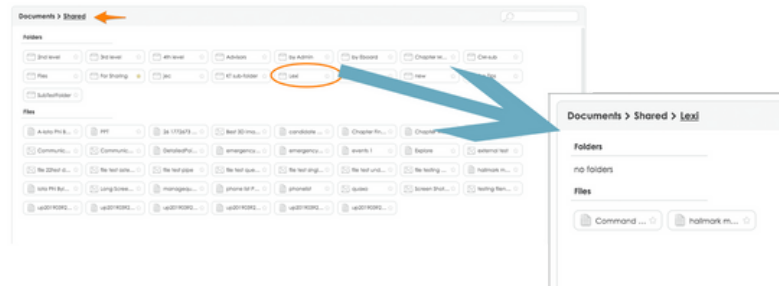
Important Notes:
- When a file or folder is shared, you will have the opportunity to notify the relevant members that you have shared a file/folder with them.
- You should check sharing permissions for files and folders to make sure they are shared with the correct groups/individuals
  - Right click on the folder and select share, confirm the groups to share with and then click the "Update" button and the updated sharing permissions will be applied to the group.
- The most common sharing error we notice is that when the document/folder is uploaded it is not shared with anyone or it is shared with individual users instead of with a group.
- We recommend sharing with the group so that you don't accidentally miss someone. If the group is updated, that will automatically update the document/folder sharing permissions as well.

[Click here for a detailed document sharing tutorial](#)

# Leader Transition Reminders

Leader Transition

Whether you are transitioning into or out of a new position, your commitment to put in the effort to communicate, ask questions, and share resources will be critical to your success!

It's also critical that all new leaders learn how to use MCR as a leader (It's different!) and the best way to do that is through MCR Learning Lab.

Check out our getting started guide for transition HERE!

If you are an incoming leader and want to learn more ways to incorporate the features of MCR into your chapter, schedule a meeting with us to audit your chapters usage and make specific suggestions!
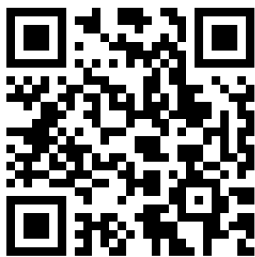
Changing Leaders

1. Once your new officers have been installed, the outgoing chapter president will need to log into MCR and update the Officer assignments under My Access.
   a. Do not do this until you have had your installation ceremony because once this is changed over, outgoing officers will no longer have leader access to MCR.
2. Access will change immediately, but you should encourage leaders (both outgoing and incoming) to log out and log back in.

To Update Leadership:

1. Click on My Access, you will land on Chapter Info. where all the leader positions are listed.
2. To make changes, click the pencil at the top right
3. Click the drop down arrow next to the member you want to change
4. Type in the new Member for each position and when you're done, hit update.

Click Here for Full Article

Inactive Achievements

Achievements roll over from one term to the next as often chapters use the same achievements each term, for example, paying dues on time. But sometimes Achievements are stand alone activities for a single term and having the Achievement displayed in the queue is confusing for Members and can cause more important Achievements to be lost in the clutter. For this reason, we have a feature allowing Admin leaders to make Achievements inactive.

- Marking an Achievement "Inactive" removes it from your Member's list of submission options but does not delete past submissions/points
- If you are unsure about the need for past history utilizing the "Inactive" option is best as you can always reactivate and/or duplicate the Achievement if necessary.
- To determine if an Achievement has been actively used by the chapter you can look at the total submissions by term; anything with zero submissions has not had any Members submit this Achievement for that term.
- Deleting (2) an Achievement is permanent and causes you to lose all data associated with the achievement.
  - For example, if Members had submitted an achievement for something in the fall and you delete it, those points and submissions would no longer be visible in past terms.
  - Keeping an Achievement as is, will keep the Achievement as a submit option for current and future terms.