# Engage Guides:

# Managing Your Roster

## Student Life & First-Year Experience

Version 5.19.25

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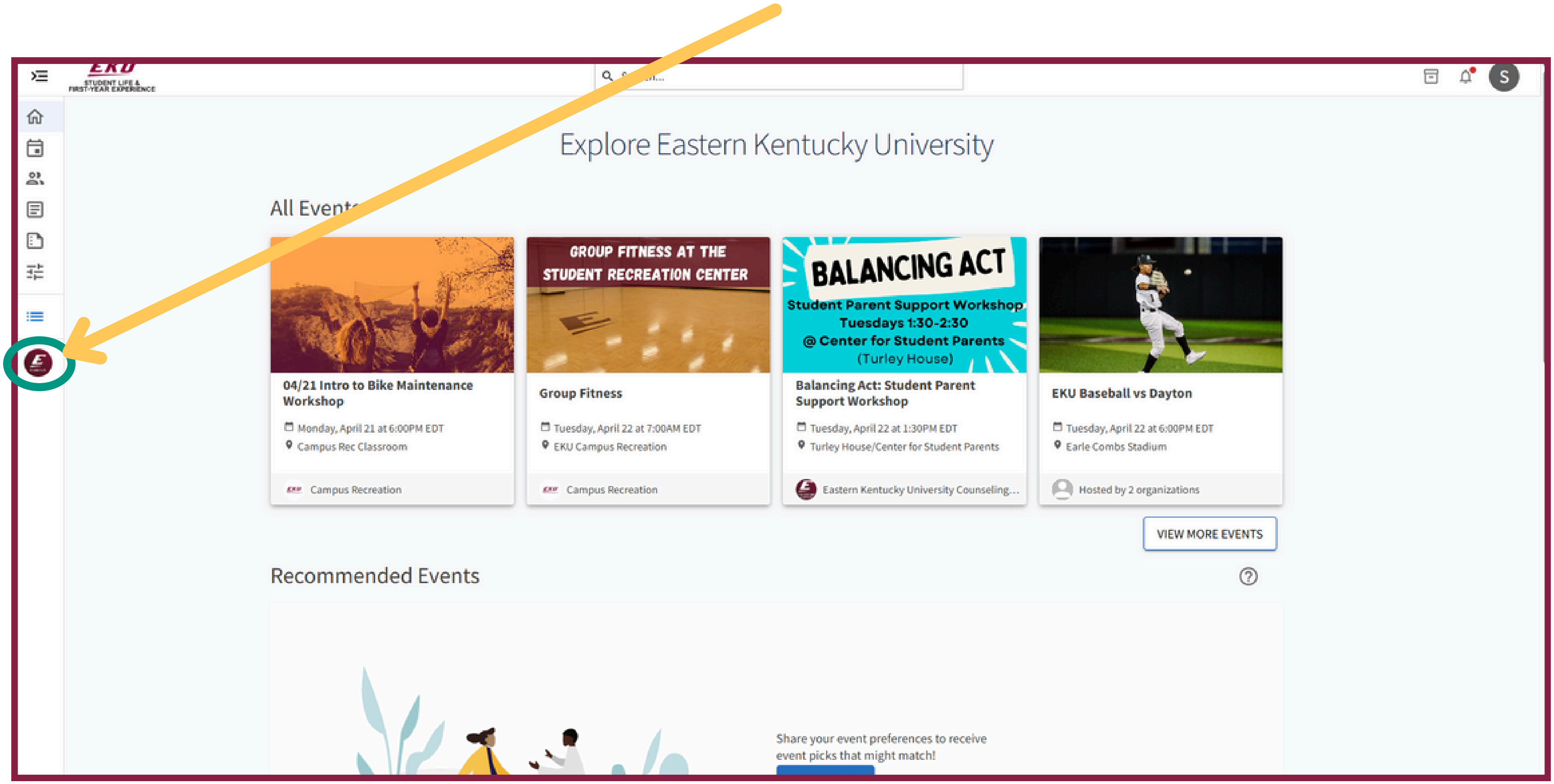
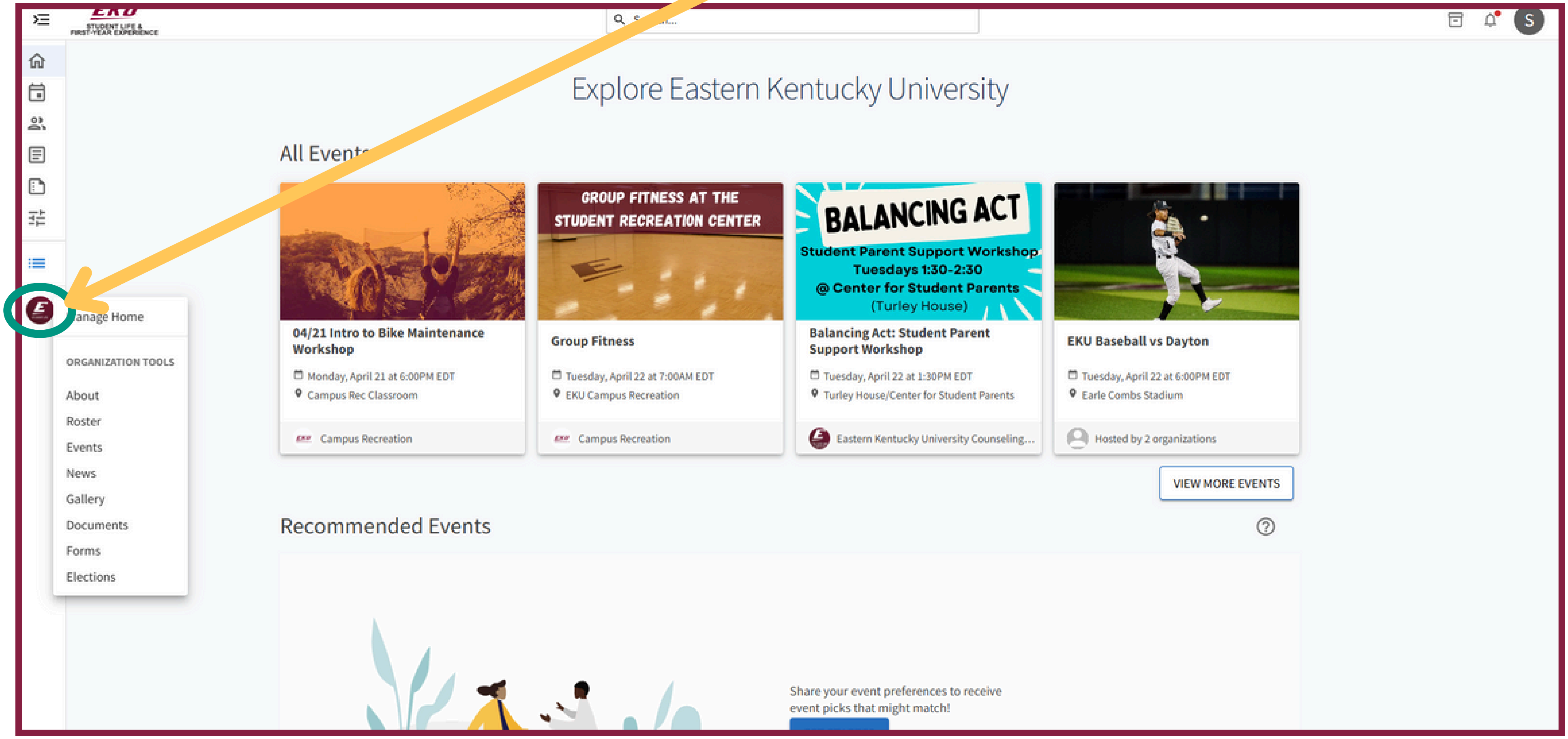
## **Step 1:**

Find the organization you wish to manage from the left-side menu on your screen.



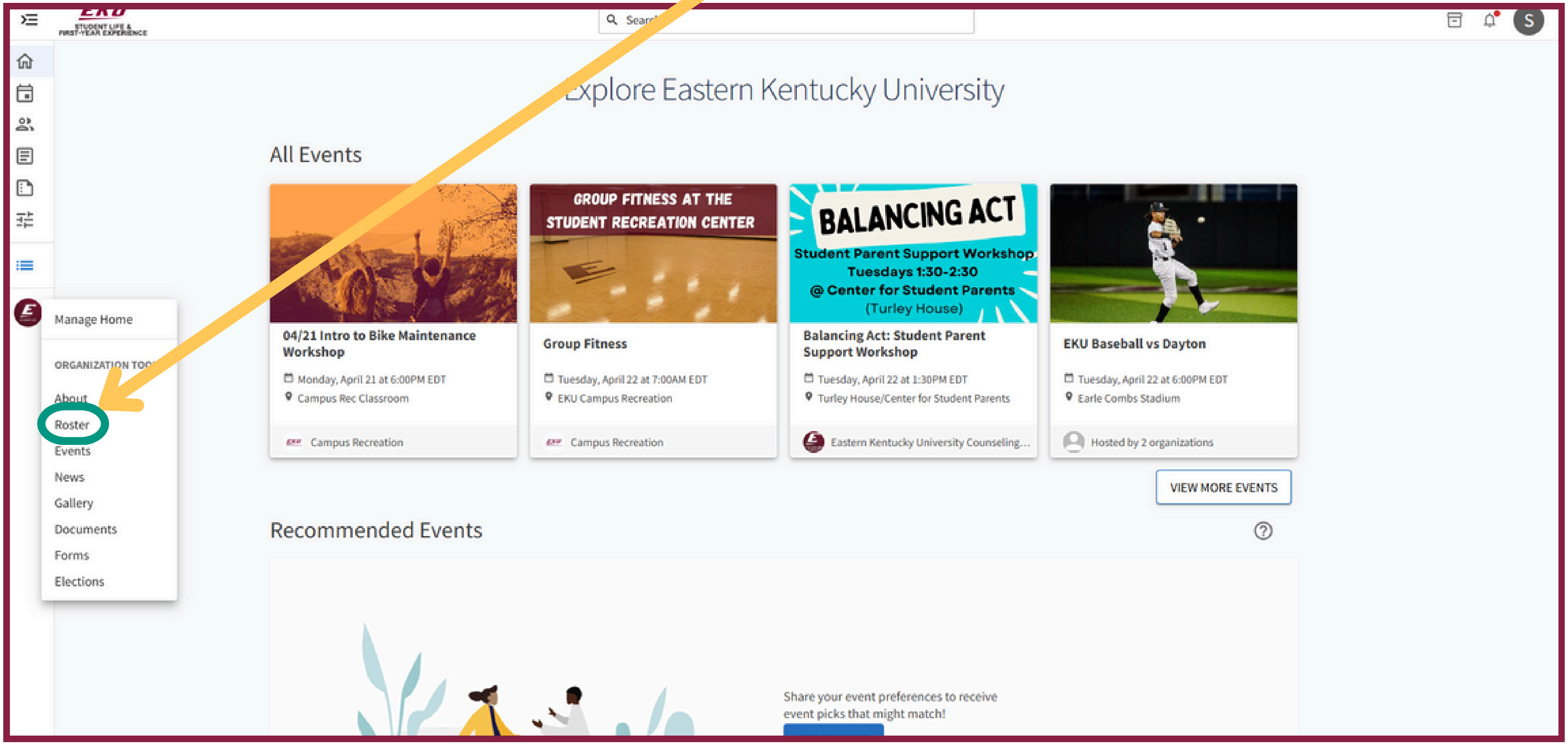
## **Step 2:**

Click your org's icon to open the management tab for your organization.



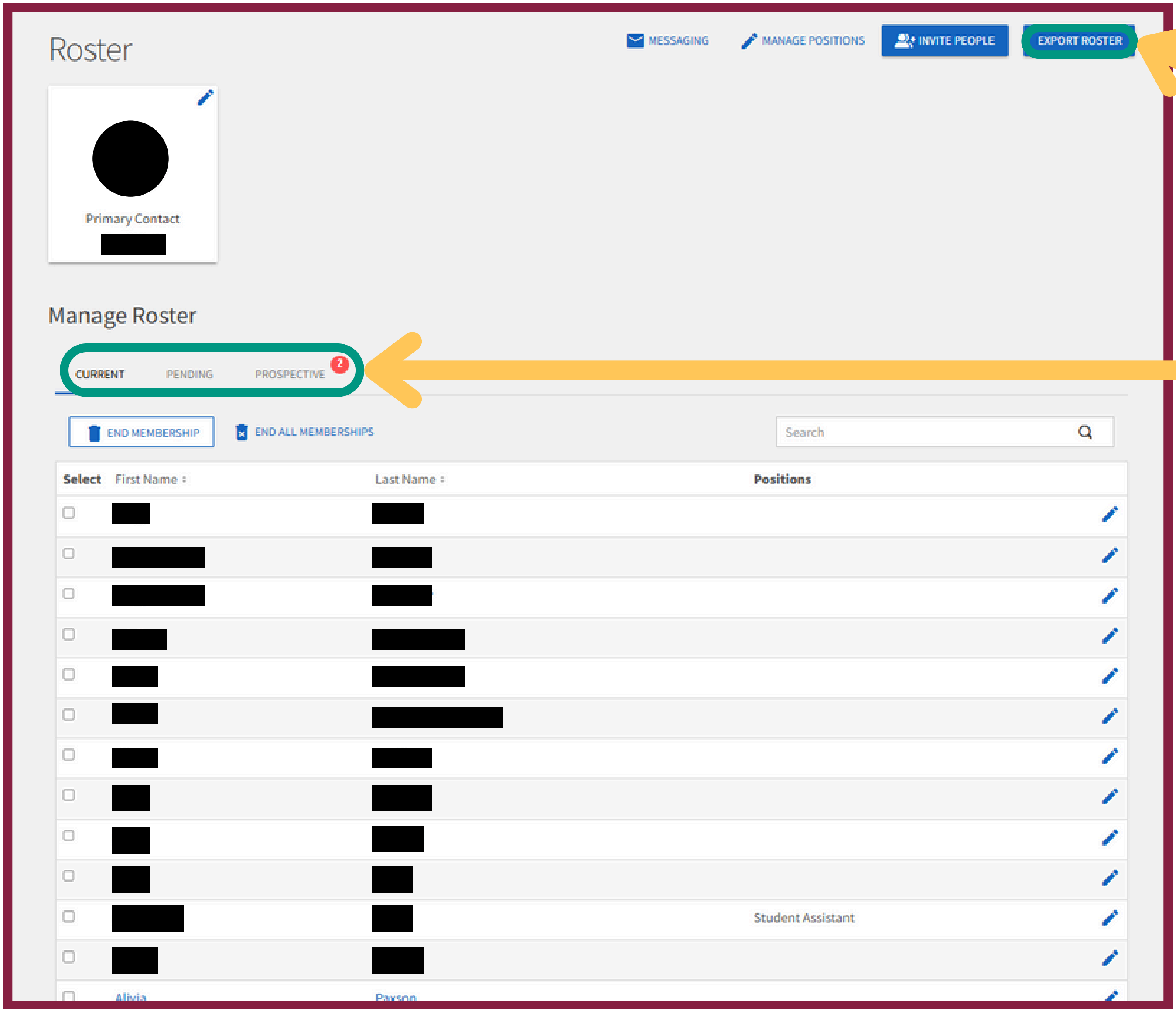
## Step 3:

Click the “Roster” button in the management tab.



# **Managing Your Roster Home Page:**

This is where you can view and manage your organization's membership roster.

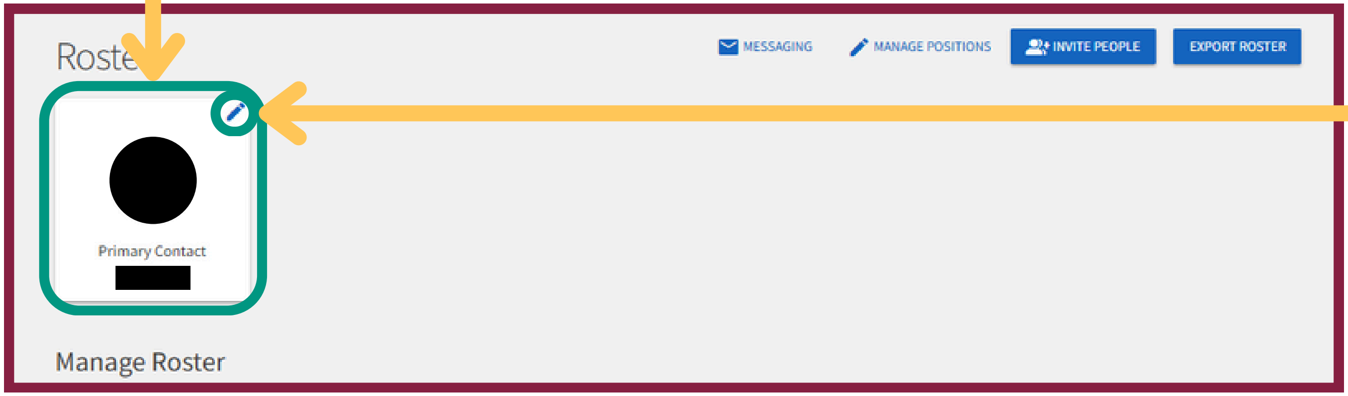



To download the roster for your organization, click the "Export Roster" button.

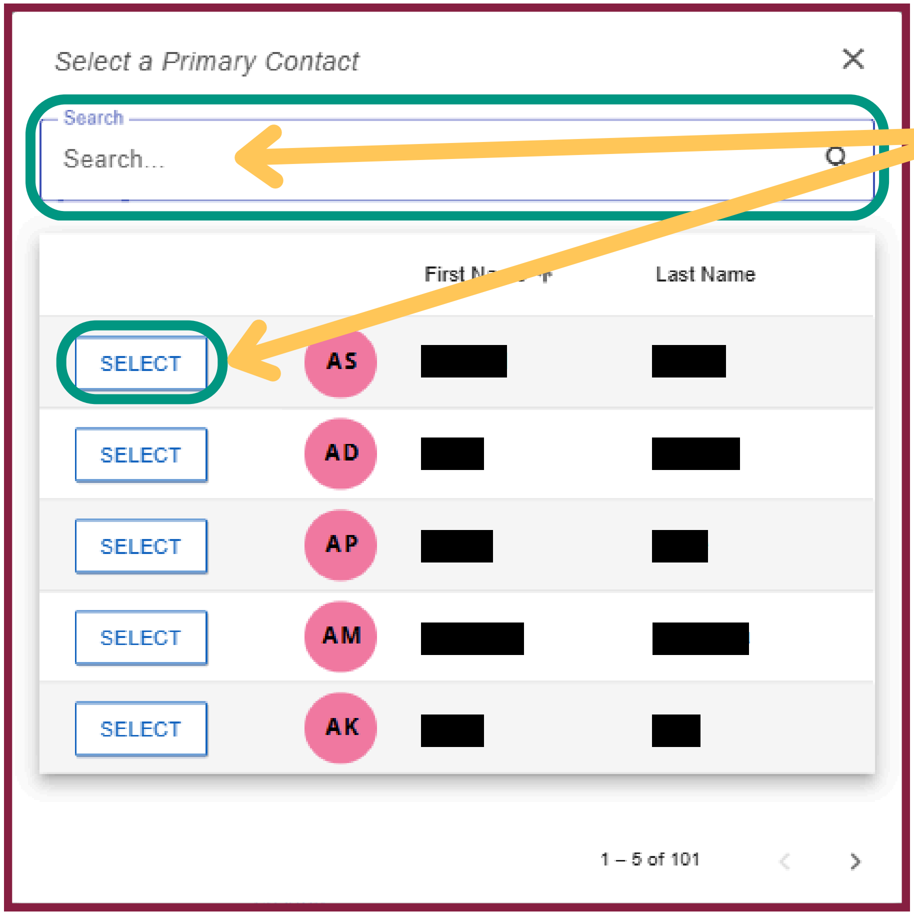
These buttons allow you to sort between your current, pending, and prospective members.

# Managing Your Roster - Primary Contact:

The Primary Contact receives messages from users on Engage trying to contact the organization.

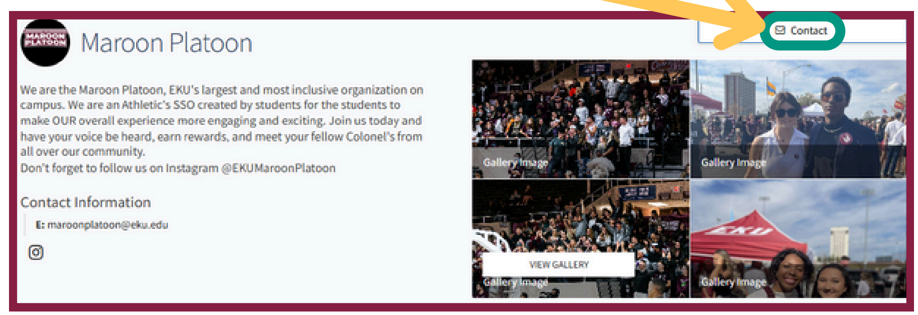



Click the blue pencil to change the Primary Contact. This will populate the list of current members on your organization's roster to select as the new Primary Contact.



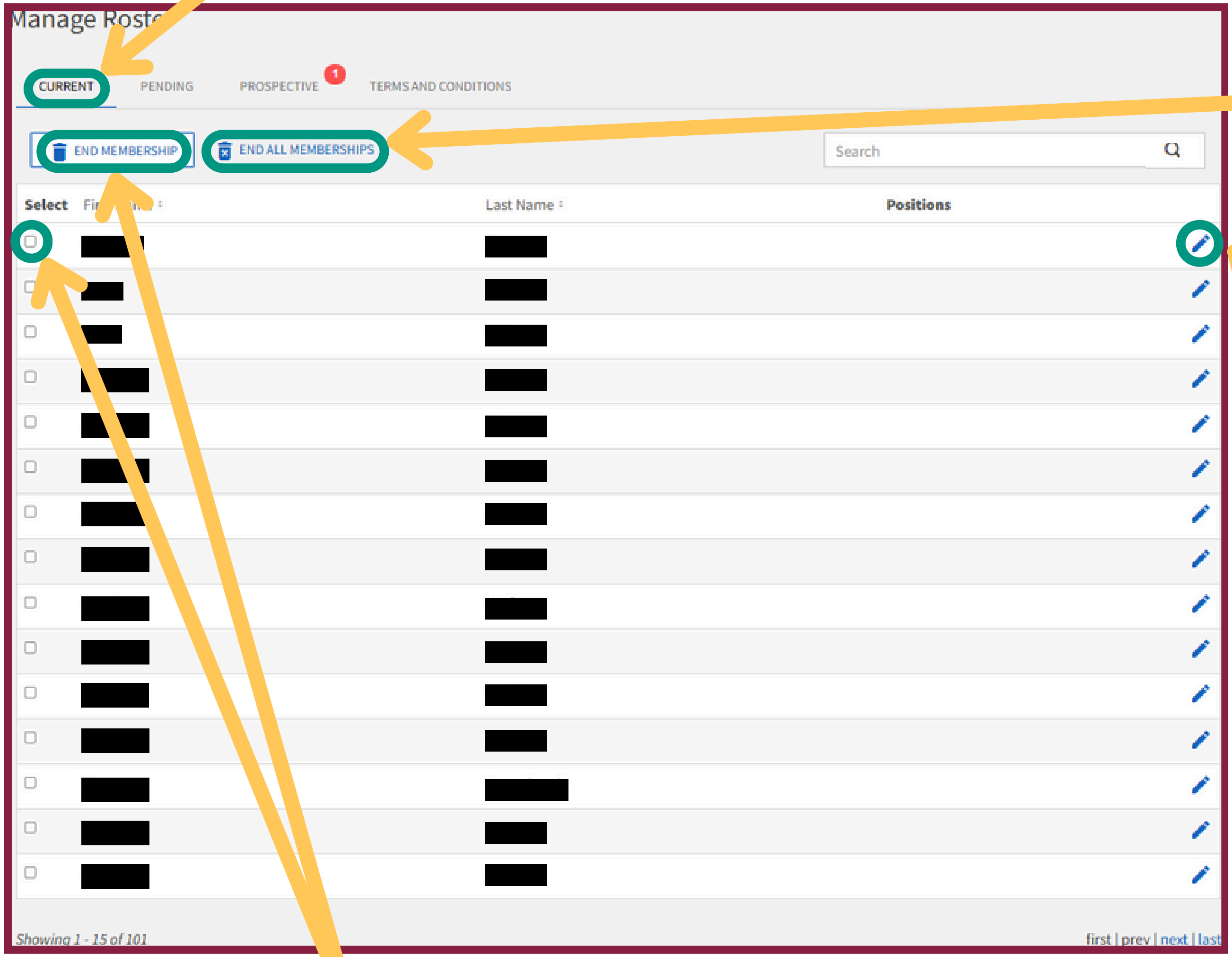

You can search for or flip through the list of current members on your organization's roster to select the new Primary Contact.

This is the public-facing view of the button for users to send a message to the Primary Contact.



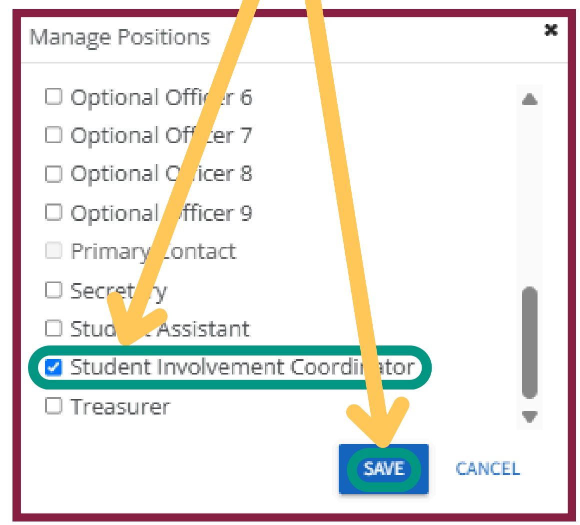
# Managing Your Roster - Current Members:

Click the “Current” button to manage your list of current (active) members for your organization.




The “End All Memberships” button will remove everyone from your organization’s roster.

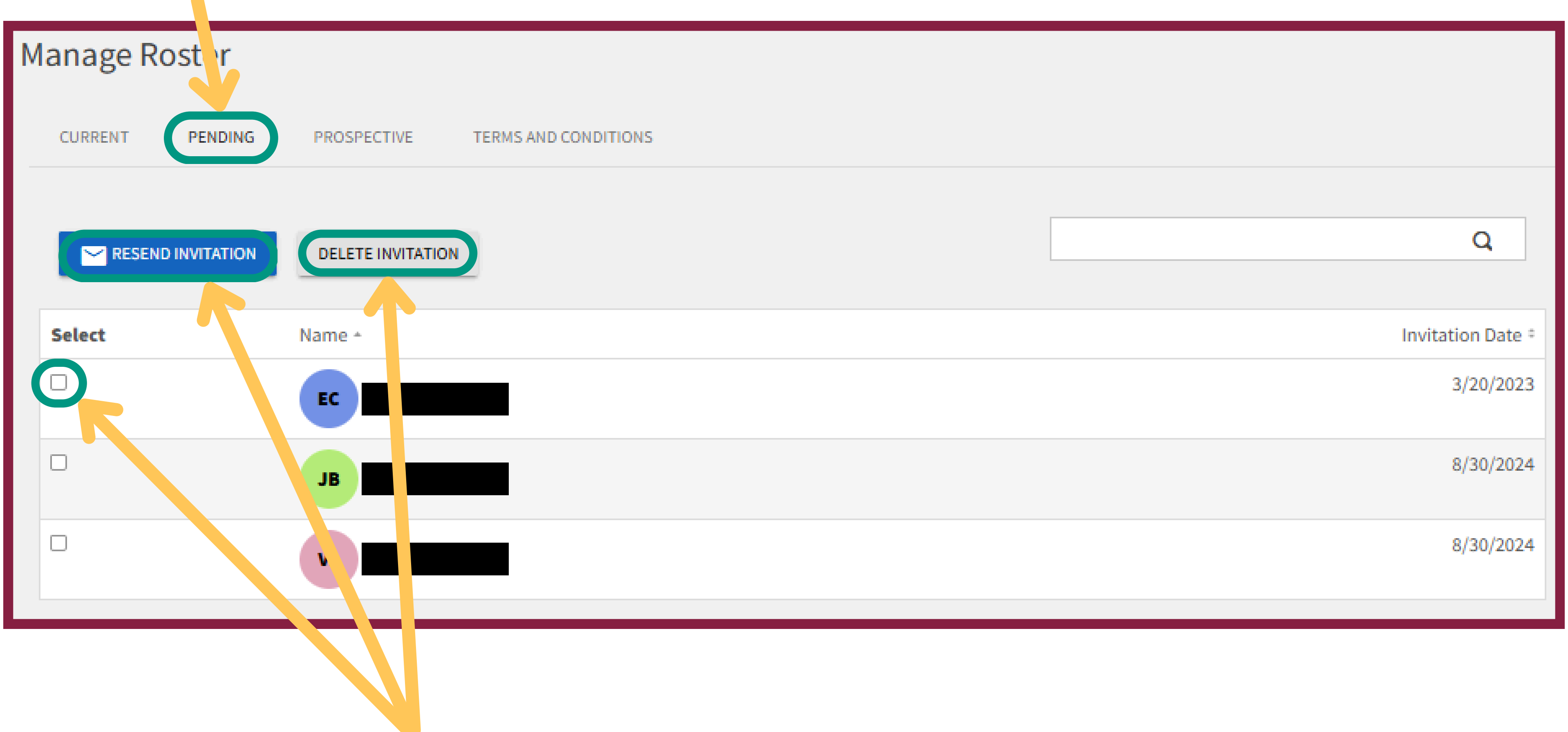
To change a member’s position in your organization, click the blue pencil next to their name, then click the box next to the position you want to assign them, and then click the “save” button.




To remove someone from your roster, click the check-box next to their name, and then click the “End Membership” button.

# Managing Your Roster - Pending Members:

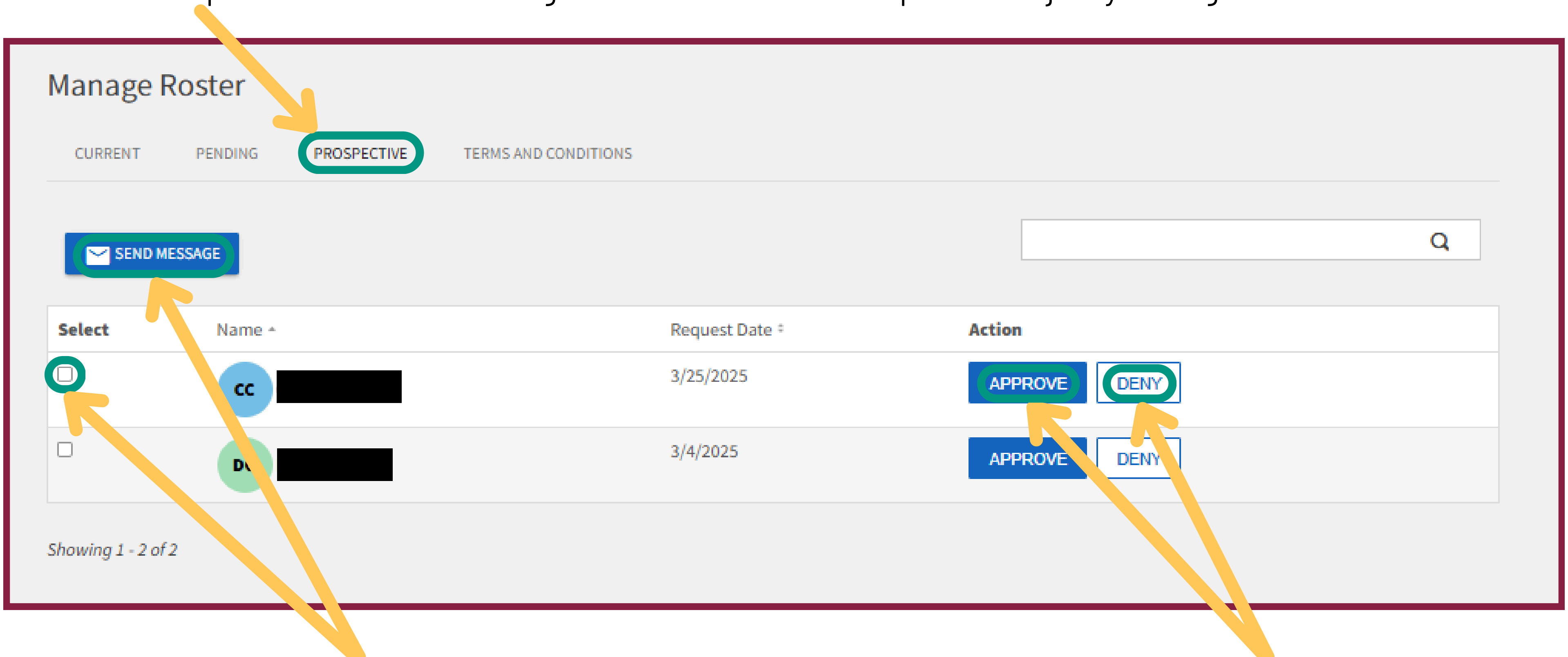
Click the “Pending” button to manage your invitations list of users to join your organization.




To resend or delete an invitation for someone to join your organization, click the check-box next to their name, and then click the “Resend/Delete Invitation” button.

# Managing Your Roster - Prospective Members:

Click the “Prospective” button to manage members that have requested to join your organization.

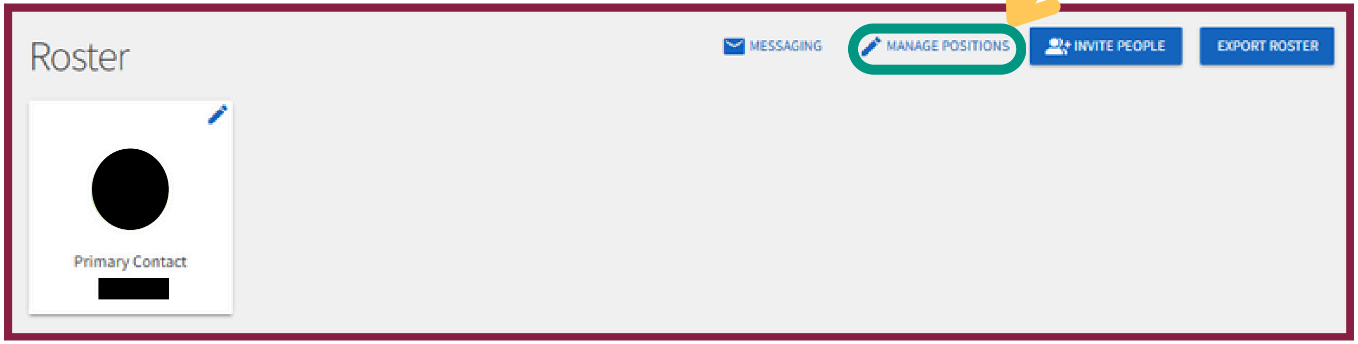


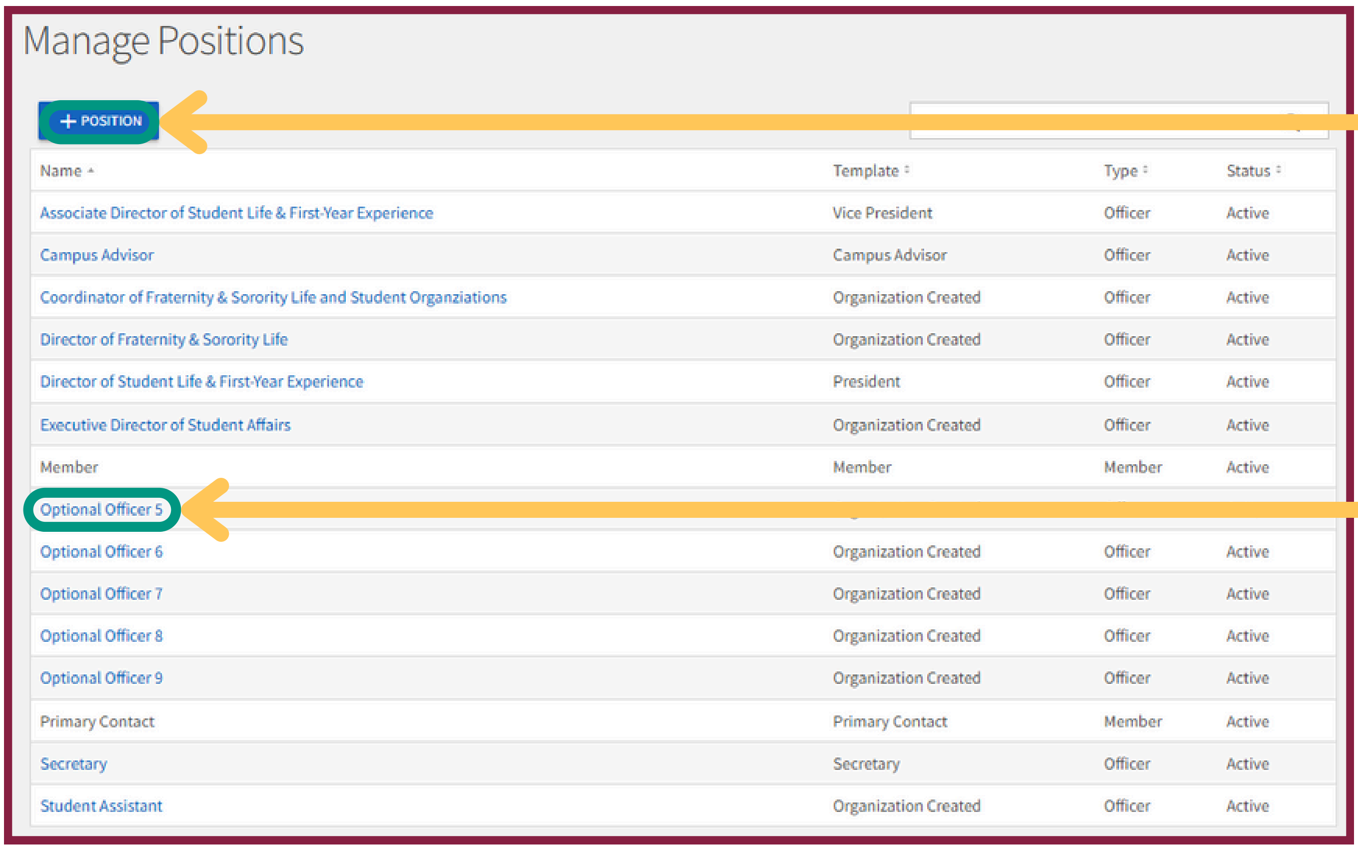

To send a message to the user before you approve or deny their request to join your organization, click the check-box next to the user’s name, and then click the “Send Message” button.

To approve or deny a request to join your organization, click the “Approve/Deny” button next to the user’s name.

# Managing Your Positions:

From the Managing Your Roster Home Page, click the "Manage Positions" button to edit your organization's position types.




To create a new position for your organization, click the "+ Position" button.

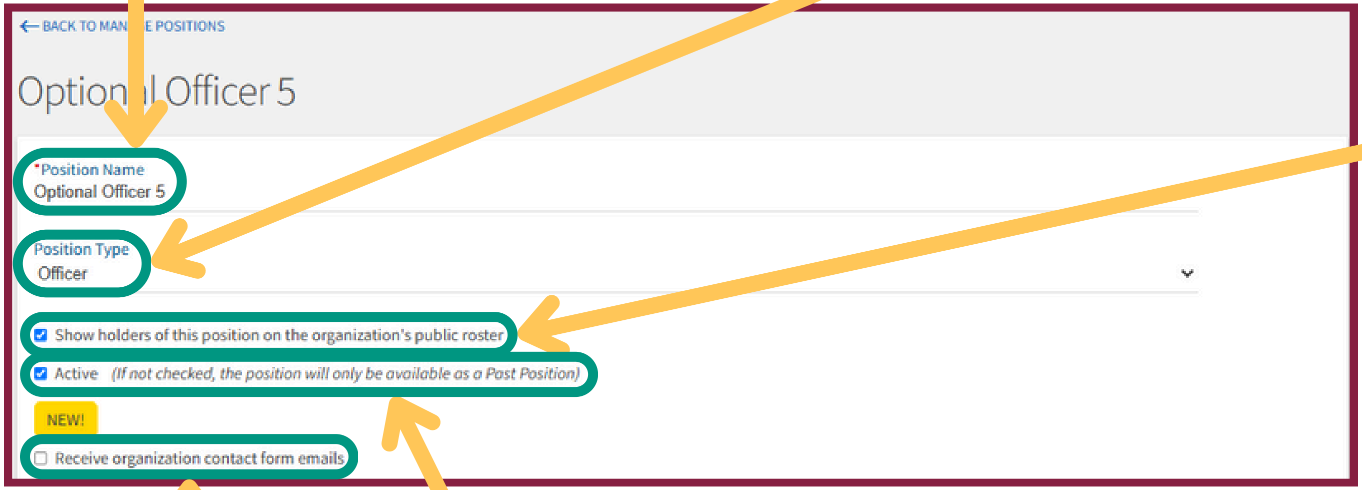
Click an existing position to make changes to it.

# **Managing Your Positions - Creating/Changing A Position:**

This is the management page for an individual position within your organization.

The “Position Name” will be the position’s official title.

The “Position Type” sets the position’s level within your organization (member or officer).



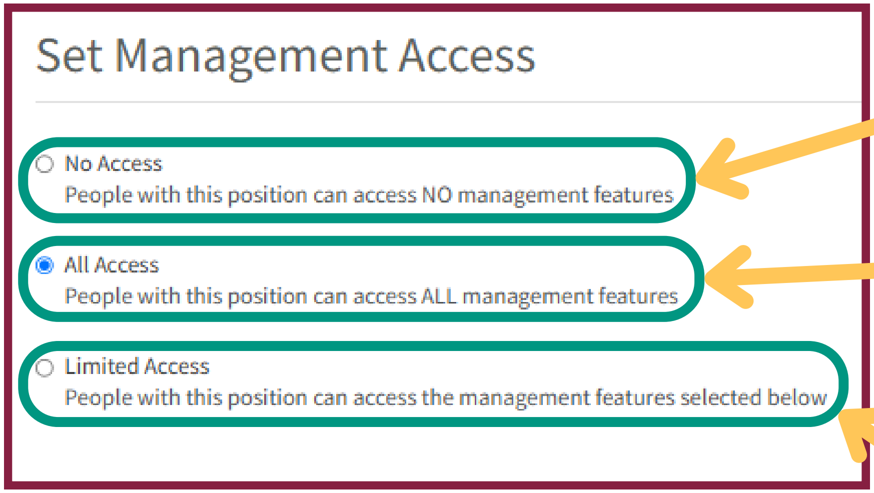

The “Show Holders…” check-box toggles whether members assigned this position can be seen on the public roster.

The “Active” check-box toggles the position’s status (active or past).

The “Receive Organization…” check-box toggles whether members assigned this position receive messages from users sent to the organization on Engage.

# Managing Your Positions - Setting Management Access:

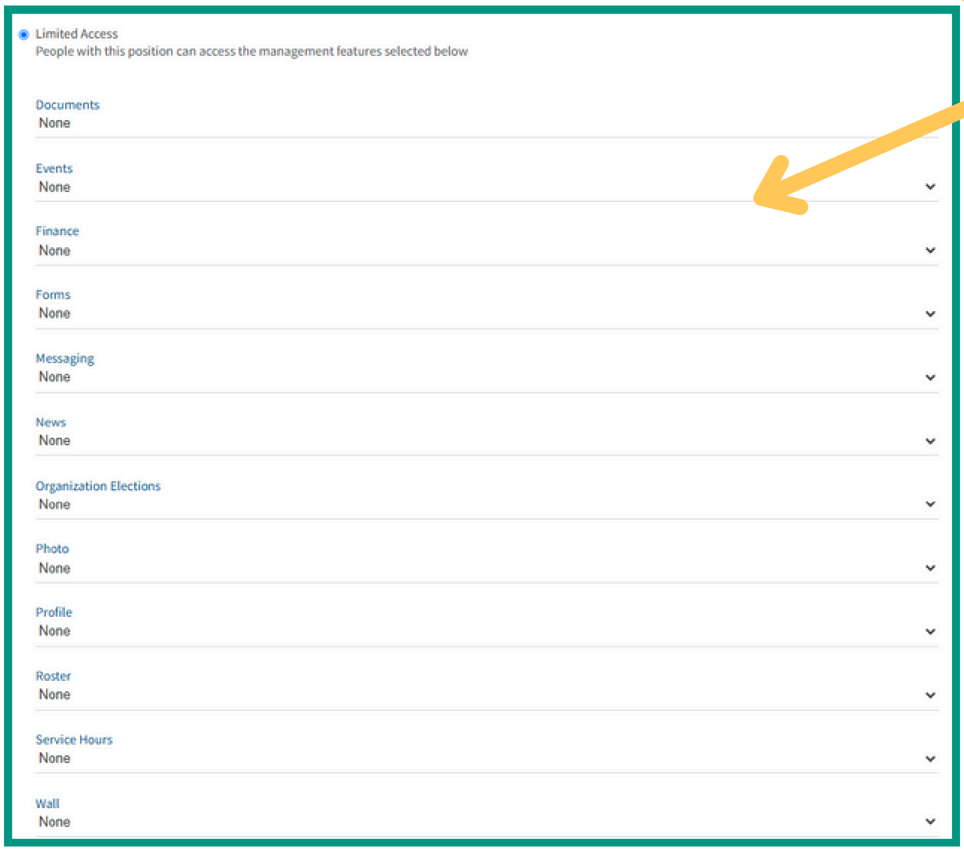
This section is where you can adjust individual position's permissions for managing your organization.




The "No Access" button doesn't allow that position to make any changes to your organization.

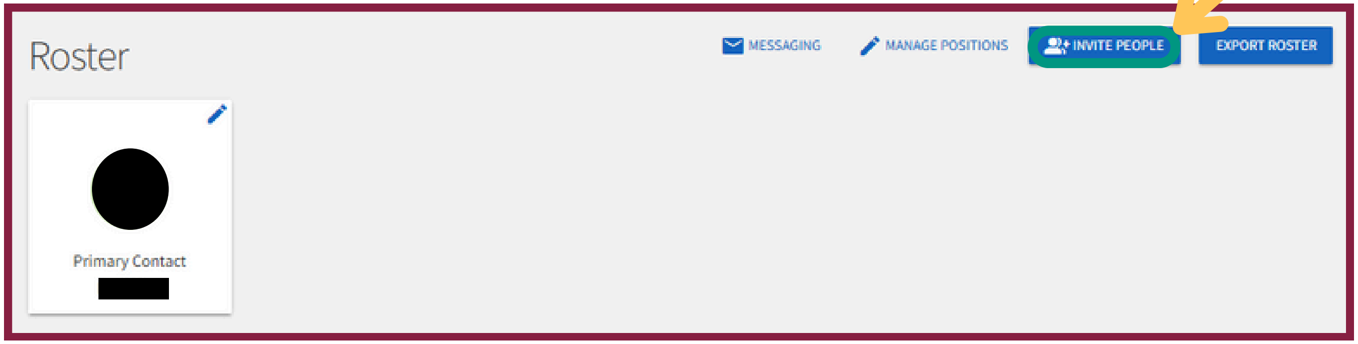
The "All Access" button allows that position to fully make changes to your organization.

The "Limited Access" button will toggle a drop-down menu of the types of management access levels in Engage. Each access level can be changed to "none", "view", or "full" permissions. Setting "full" permissions for a position's access level allows the role to fully manage only that feature for the organization.



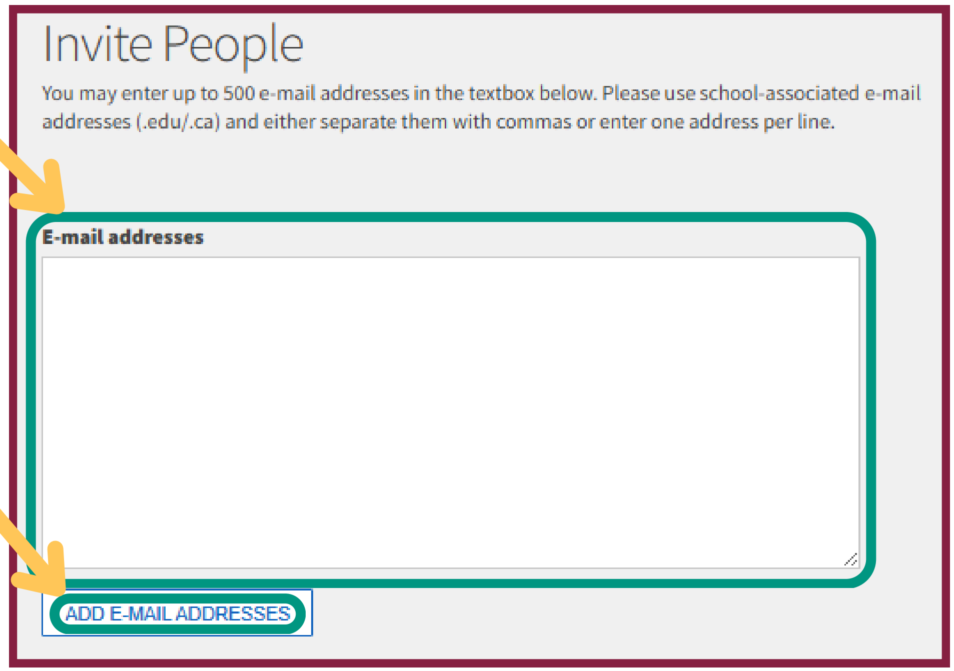
# Inviting People to Your Organization:

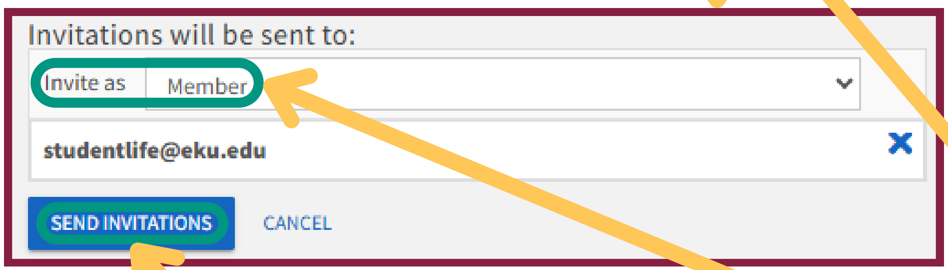
To invite members to join your organization and your roster, click the “Invite People” button from the Manage Your Roster Home Page.




Enter the email address for the member you want to invite to join your organization.

Click the “Add Email Addresses” button to review your invitations before sending.



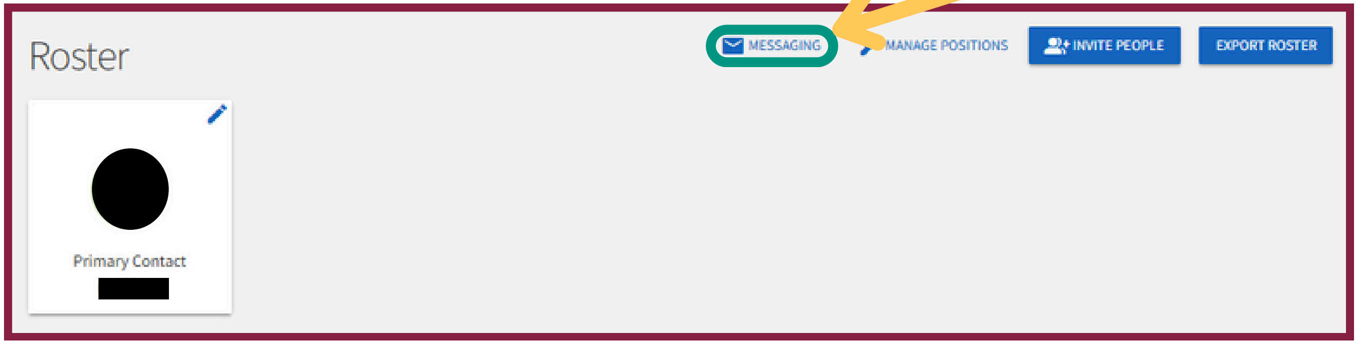




To send your invitations to join your organization, click the “Send Invitations” button.

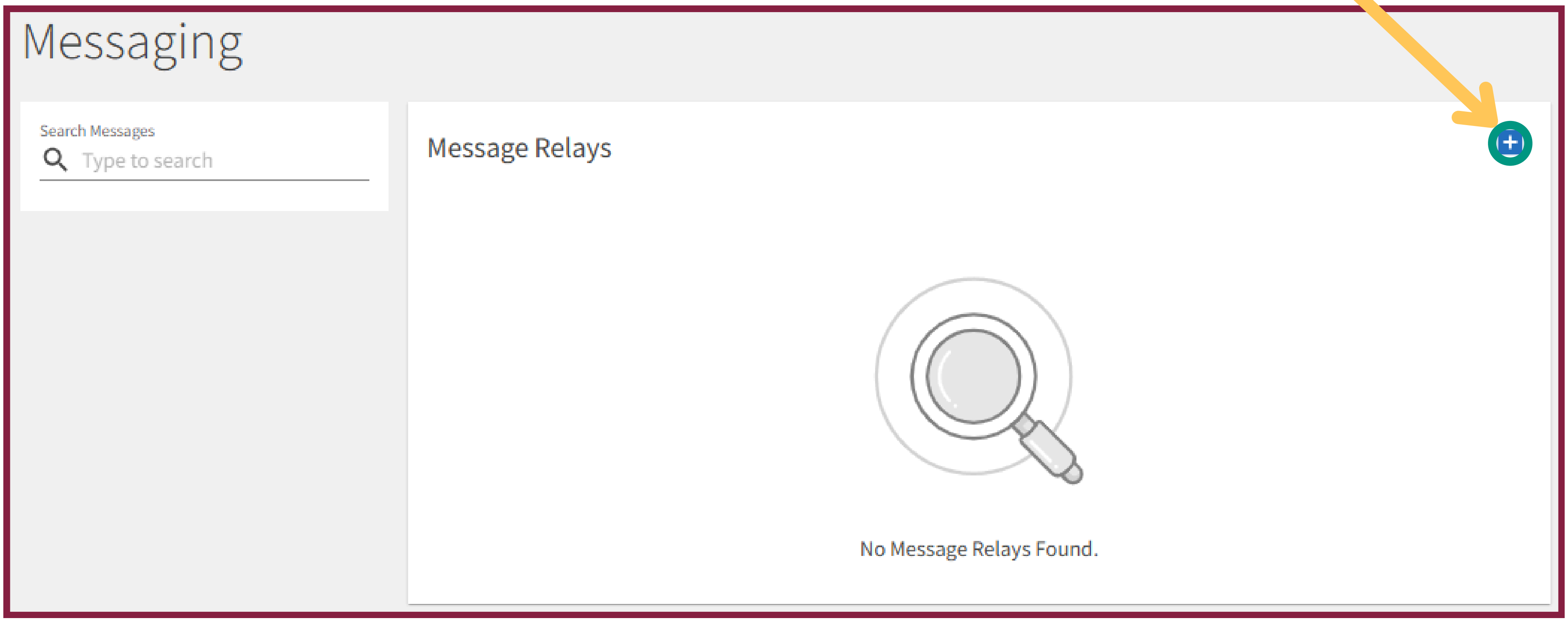
You can change the position you are inviting the member to by changing the “Invite As” section to what you want them to hold.

# Messaging Your Organization:

To use the messaging function for your organization, click the “Messaging” button from the Manage Your Roster Home Page.

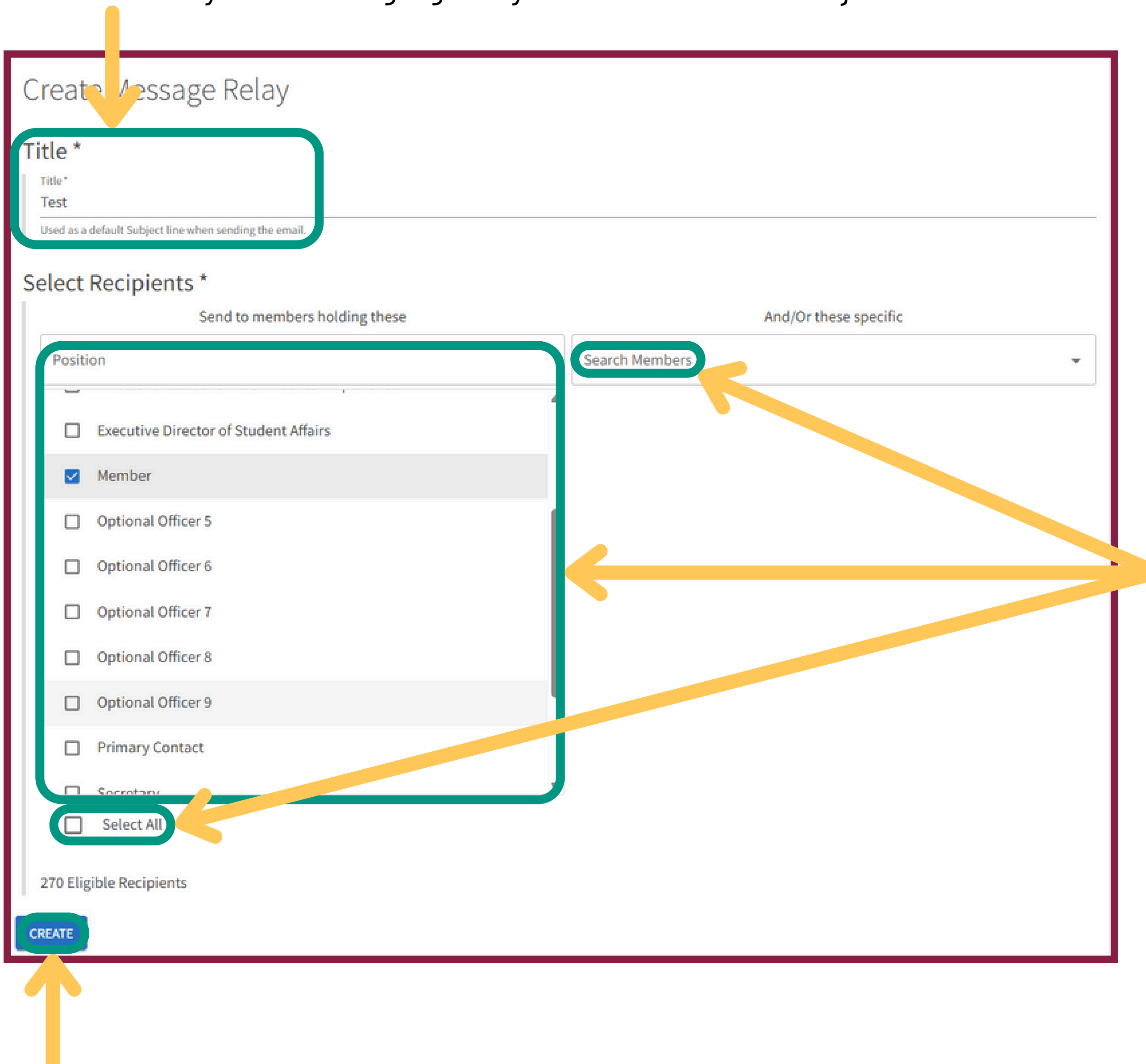



To create a massage relay to send to members in your organization, click the blue “+” button.



# Messaging Your Organization (2):

The "Title" of your messaging relay will serve as the subject line of the email.

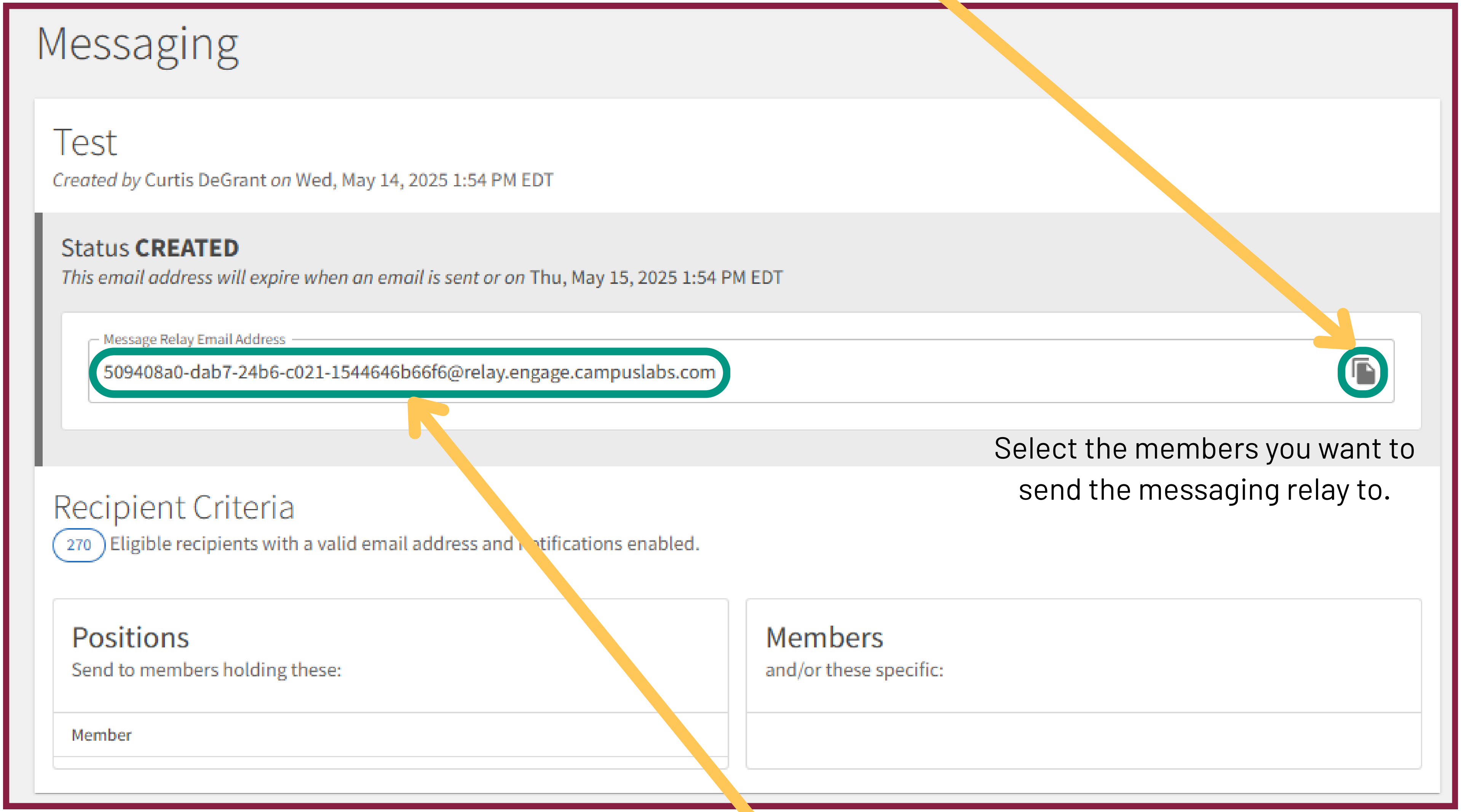



Select the members you want to send the messaging relay to.

Once you have your desired recipients selected, generate your messaging relay by clicking the "Create" button.

# <u>Messaging Your Organization (3):</u>

To copy the messaging relay email address, click the clipboard button.




Select the members you want to send the messaging relay to.

To send your messaging relay, go to your email and use this address to send your message to. This will send your email to everyone you selected as a recipient for that relay.

# Have Questions? Need More Help?

Feel free to give us a call or send us an email!

(859) 622-3855 | studentlife@eku.edu

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