

Engage Guides:

Managing Your Roster



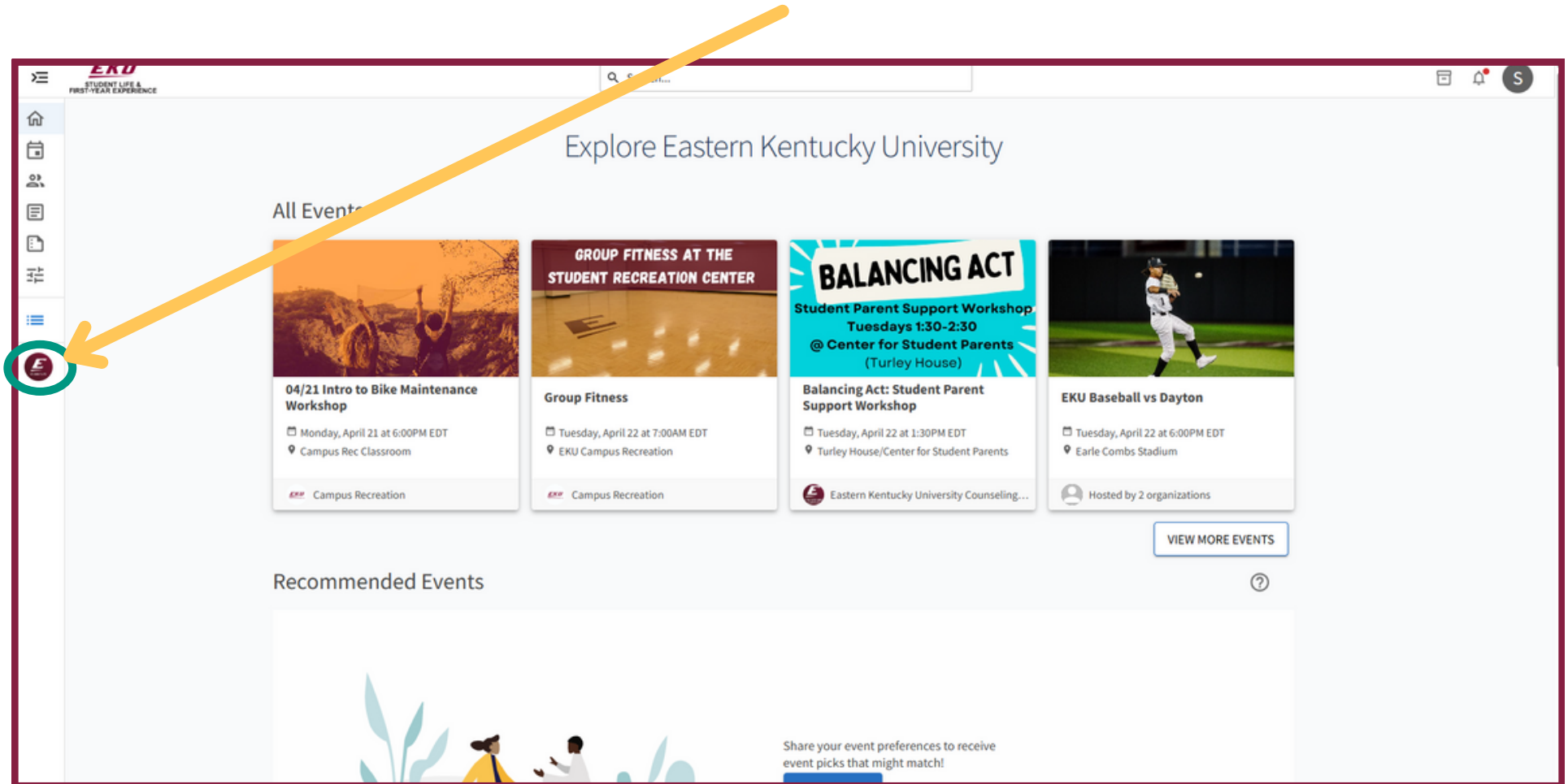
Student Life & First-Year Experience

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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.

Explore Eastern Kentucky University

All Events

04/21 Intro to Bike Maintenance Workshop
Monday, April 21 at 6:00PM EDT
Campus Rec Classroom
Campus Recreation

GROUP FITNESS AT THE STUDENT RECREATION CENTER
Group Fitness
Tuesday, April 22 at 7:00AM EDT
EKU Campus Recreation
Campus Recreation

BALANCING ACT
Student Parent Support Workshop
Tuesdays 1:30-2:30
@ Center for Student Parents (Turley House)
Tuesday, April 22 at 1:30PM EDT
Turley House/Center for Student Parents
Eastern Kentucky University Counseling...

EKU Baseball vs Dayton
Tuesday, April 22 at 6:00PM EDT
Earle Combs Stadium
Hosted by 2 organizations

[VIEW MORE EVENTS](#)

Recommended Events

Share your event preferences to receive event picks that might match!

Step 3:

Click the "Roster" button in the management tab.

The screenshot shows the EKU Student Life & First-Year Experience website. On the left, a sidebar contains a 'Manage Home' dropdown menu. The 'Roster' option is highlighted with a green circle, and an orange arrow points from the instruction text to it. The main content area features a header 'Explore Eastern Kentucky University' and a section titled 'All Events'. This section displays four event cards: '04/21 Intro to Bike Maintenance Workshop' (Monday, April 21 at 6:00PM EDT, Campus Rec Classroom), 'Group Fitness' (Tuesday, April 22 at 7:00AM EDT, ECU Campus Recreation), 'Balancing Act: Student Parent Support Workshop' (Tuesdays 1:30-2:30, Turley House/Center for Student Parents), and 'EKU Baseball vs Dayton' (Tuesday, April 22 at 6:00PM EDT, Earle Combs Stadium). A 'VIEW MORE EVENTS' button is located below the event cards. At the bottom, there is a 'Recommended Events' section with a placeholder image and a prompt to share event preferences to receive event picks that might match!

Managing Your Roster Home Page:

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

The screenshot shows the 'Roster' home page. At the top, there are navigation links: 'MESSAGING', 'MANAGE POSITIONS', 'INVITE PEOPLE', and 'EXPORT ROSTER'. The 'EXPORT ROSTER' button is highlighted with a yellow arrow. Below the navigation bar, there is a 'Manage Roster' section with three tabs: 'CURRENT', 'PENDING', and 'PROSPECTIVE'. The 'CURRENT' tab is selected and highlighted with a yellow arrow. Below the tabs, there are two buttons: 'END MEMBERSHIP' and 'END ALL MEMBERSHIPS'. A search bar is located to the right of these buttons. Below the search bar is a table with columns: 'Select', 'First Name', 'Last Name', and 'Positions'. The table contains several rows of member information, with some names redacted. The last row shows 'Albula' and 'Paxson' as the first and last names, respectively, with 'Student Assistant' as the position. A yellow arrow points to the 'PROSPECTIVE' tab.

Roster

MESSAGING MANAGE POSITIONS INVITE PEOPLE EXPORT ROSTER

Primary Contact

Manage Roster

CURRENT PENDING PROSPECTIVE 2

END MEMBERSHIP END ALL MEMBERSHIPS

Search

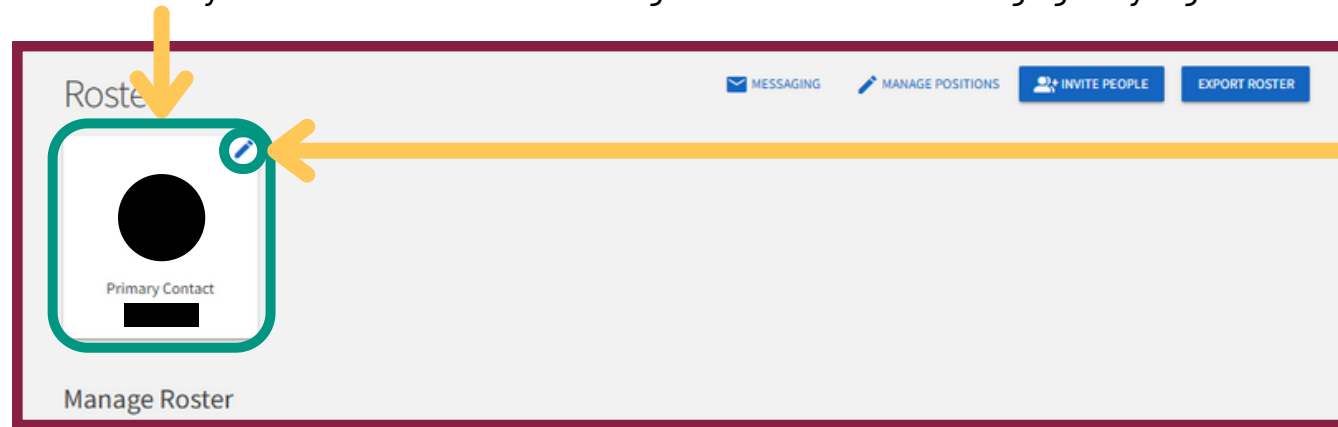
Select	First Name	Last Name	Positions
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	
☐	[Redacted]	[Redacted]	Student Assistant
☐	[Redacted]	[Redacted]	
☐	Albula	Paxson	

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

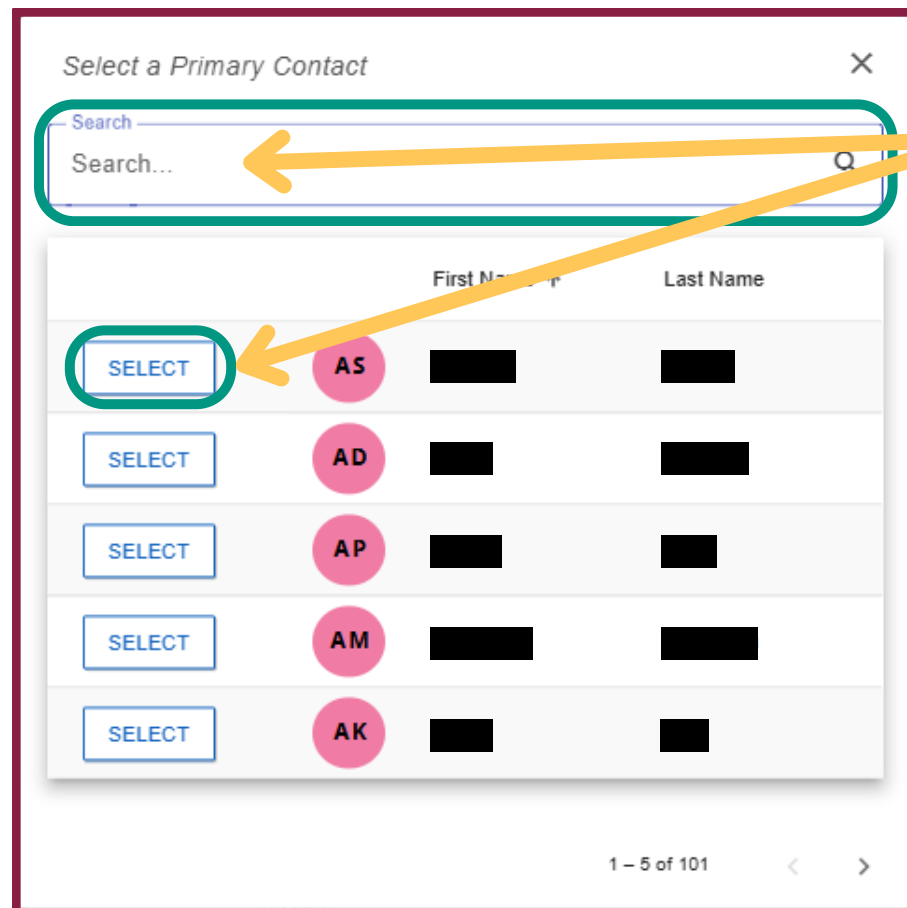
These buttons allow you to sort between your current, pending, and prospective members.

Managing Your Roster - Primary Contact:

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

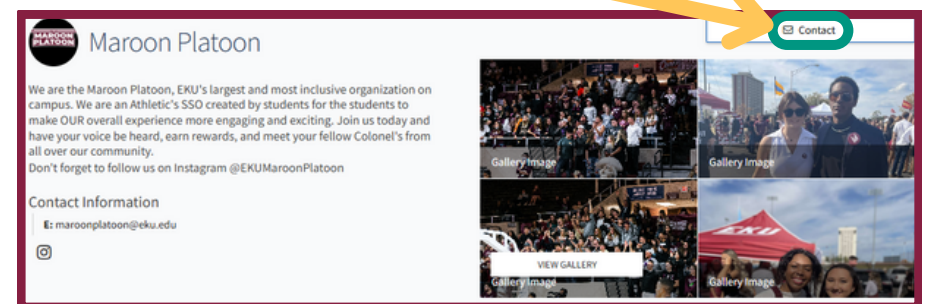


Click the blue pencil to change the Primary Contact. This will populate the list of current members on your organization's roster to select as the new Primary Contact.



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.

Manage Roster

Tabs: **CURRENT** | PENDING | PROSPECTIVE ¹ | TERMS AND CONDITIONS

Buttons: **END MEMBERSHIP** | **END ALL MEMBERSHIPS**

Search: [Search] 🔍

Select	First Name	Last Name	Positions
☒	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]

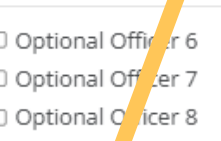
Showing 1 - 15 of 101

first | prev | next | last

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

- 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.



Manage Positions

- ☐ Optional Officer 6
- ☐ Optional Officer 7
- ☐ Optional Officer 8
- ☐ Optional Officer 9
- ☐ Primary Contact
- ☐ Secretary
- ☐ Student Assistant
- ☒ Student Involvement Coordinator
- ☐ Treasurer

SAVE CANCEL

Managing Your Roster – Pending Members:

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

The screenshot shows the 'Manage Roster' interface with the 'PENDING' tab selected. The interface includes a search bar and two buttons: 'RESEND INVITATION' and 'DELETE INVITATION'. Below these is a table of pending members with columns for 'Select', 'Name', and 'Invitation Date'.

Select	Name	Invitation Date
☒	EC [REDACTED]	3/20/2023
☐	JB [REDACTED]	8/30/2024
☐	V [REDACTED]	8/30/2024

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.

The screenshot shows the 'Manage Roster' interface with the 'PROSPECTIVE' tab selected. The interface includes a 'SEND MESSAGE' button, a search bar, and a table of prospective members. The table has columns for 'Select', 'Name', 'Request Date', and 'Action'. The 'Select' column contains checkboxes. The 'Name' column contains user names and avatars. The 'Request Date' column contains dates. The 'Action' column contains 'APPROVE' and 'DENY' buttons. Arrows point to the 'PROSPECTIVE' tab, the 'SEND MESSAGE' button, a checkbox in the 'Select' column, and the 'APPROVE'/'DENY' buttons in the 'Action' column.

Select	Name	Request Date	Action
☒	CC [Redacted]	3/25/2025	<button>APPROVE</button> <button>DENY</button>
☐	DU [Redacted]	3/4/2025	<button>APPROVE</button> <button>DENY</button>

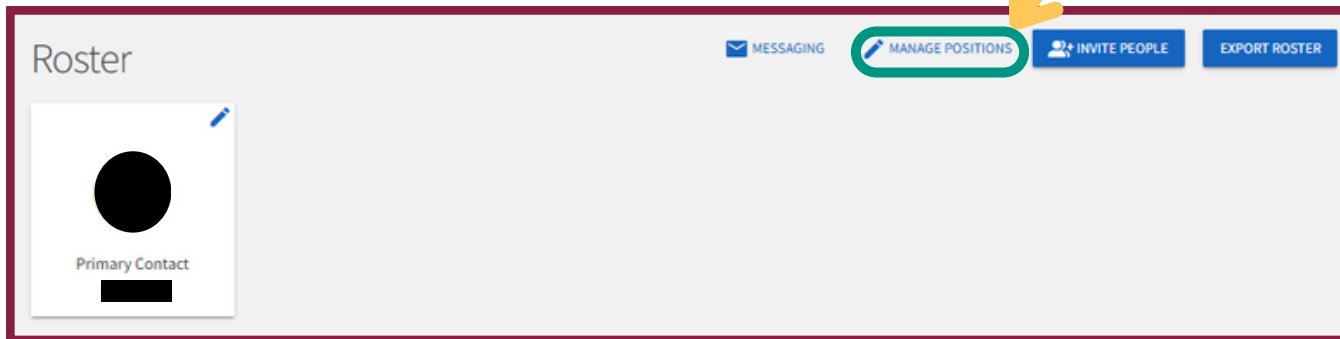
Showing 1 - 2 of 2

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.



The 'Manage Positions' page displays a table of positions. The table has four columns: Name, Template, Type, and Status. The '+ POSITION' button is located at the top left of the table. The 'Optional Officer 5' row is highlighted with a green circle, and an orange arrow points to it from the right.

Name	Template	Type	Status
Associate Director of Student Life & First-Year Experience	Vice President	Officer	Active
Campus Advisor	Campus Advisor	Officer	Active
Coordinator of Fraternity & Sorority Life and Student Organizations	Organization Created	Officer	Active
Director of Fraternity & Sorority Life	Organization Created	Officer	Active
Director of Student Life & First-Year Experience	President	Officer	Active
Executive Director of Student Affairs	Organization Created	Officer	Active
Member	Member	Member	Active
Optional Officer 5			
Optional Officer 6	Organization Created	Officer	Active
Optional Officer 7	Organization Created	Officer	Active
Optional Officer 8	Organization Created	Officer	Active
Optional Officer 9	Organization Created	Officer	Active
Primary Contact	Primary Contact	Member	Active
Secretary	Secretary	Officer	Active
Student Assistant	Organization Created	Officer	Active

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 screenshot shows a web form for managing a position. At the top left is a link '← BACK TO MANAGE POSITIONS'. The title of the form is 'Optional Officer 5'. Below the title are several fields: 'Position Name' with the value 'Optional Officer 5', 'Position Type' with a dropdown menu showing 'Officer', a checked checkbox for 'Show holders of this position on the organization's public roster', a checked checkbox for 'Active' with a note '(If not checked, the position will only be available as a Past Position)', a yellow 'NEW!' badge, and an unchecked checkbox for 'Receive organization contact form emails'. Orange arrows point from the surrounding text to each of these fields.

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 screenshot shows the 'Set Management Access' interface. It features three radio button options: 'No Access', 'All Access', and 'Limited Access'. Each option is highlighted with a green rounded rectangle and an arrow pointing to it from an explanatory text block. The 'All Access' option is selected. Below these options, the 'Limited Access' section is expanded, showing a list of management features with their current permissions set to 'None'. Each feature has a dropdown arrow on the right side.

Set Management Access

☐ No Access
People with this position can access NO management features

☒ All Access
People with this position can access ALL management features

☐ Limited Access
People with this position can access the management features selected below

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

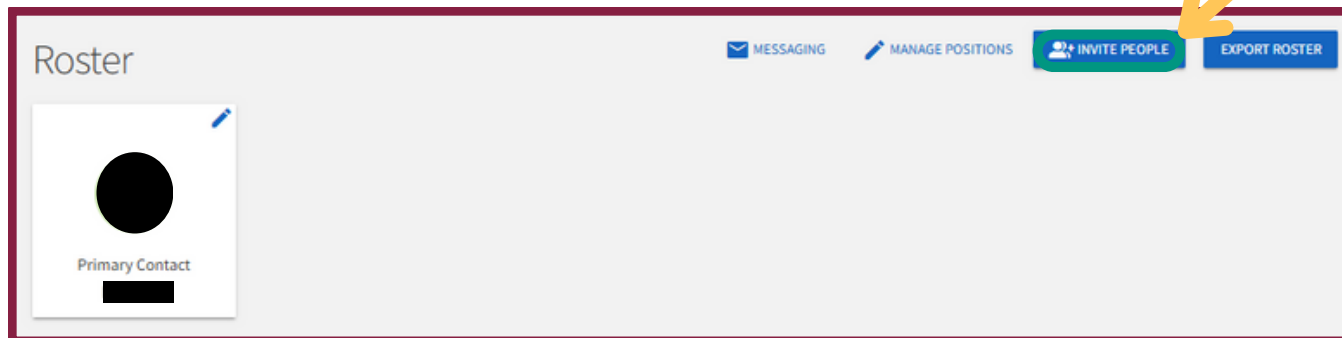
The "All Access" button allows that position to fully make changes to your organization.

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.

Feature	Access Level
Documents	None
Events	None
Finance	None
Forms	None
Messaging	None
News	None
Organization Elections	None
Photo	None
Profile	None
Roster	None
Service Hours	None
Wall	None

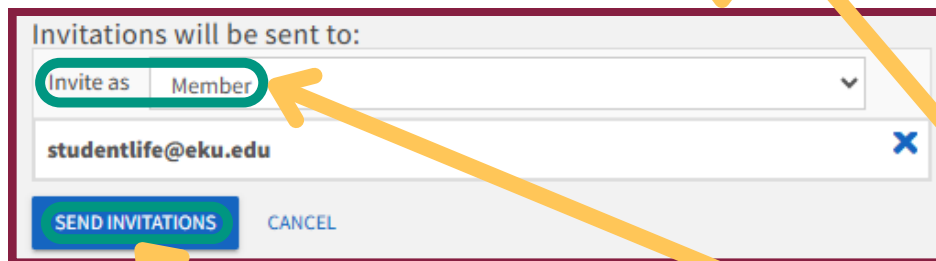
Inviting People to Your Organization:

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

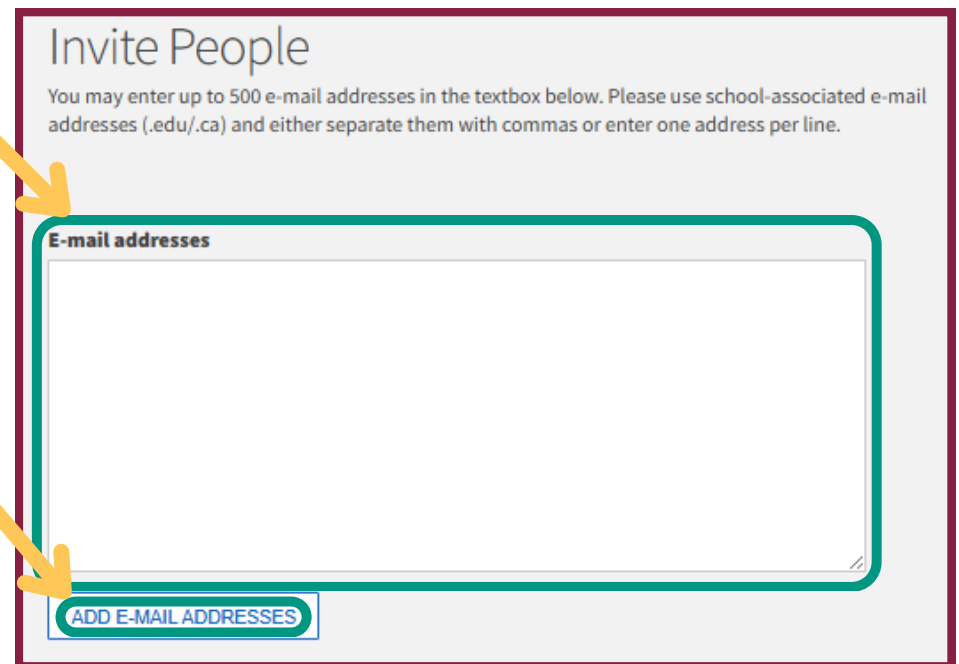


Enter the email address for the member you want to invite to join your organization.

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



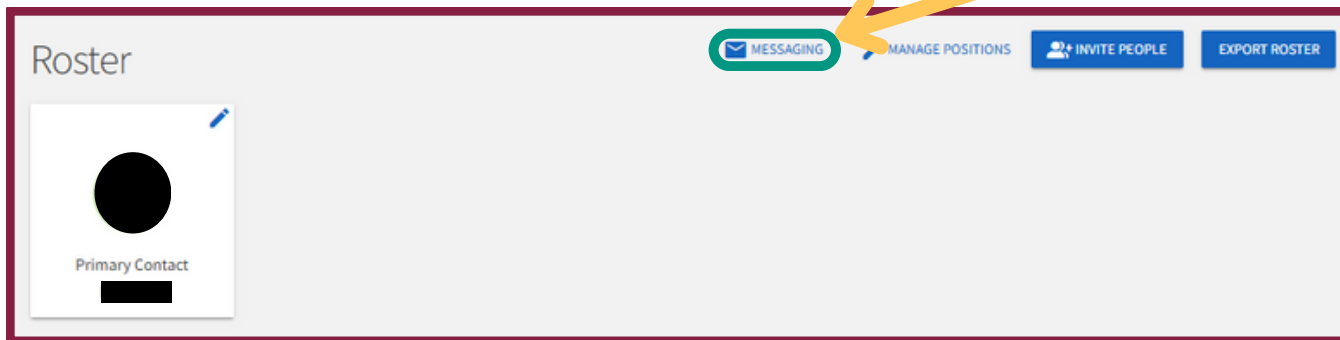
To send your invitations to join your organization, click the "Send Invitations" button.



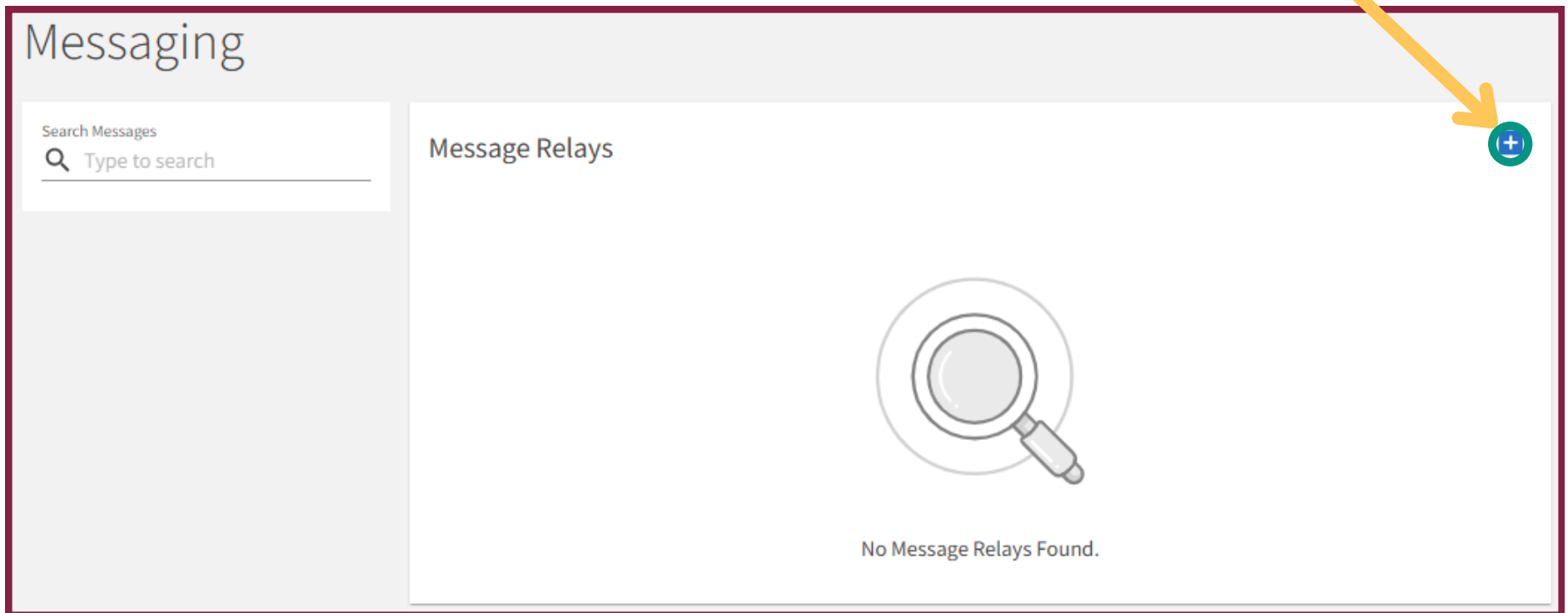
You can change the position you are inviting the member to by changing the "Invite As" section to what you want them to hold.

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 message 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.

The screenshot shows the 'Create Message Relay' form. It includes a 'Title *' field with a placeholder 'Test' and a note 'Used as a default Subject line when sending the email.' Below this is the 'Select Recipients *' section, which has two columns: 'Send to members holding these' and 'And/Or these specific'. The 'Send to members holding these' column contains a list of roles with checkboxes: 'Executive Director of Student Affairs', 'Member' (checked), 'Optional Officer 5', 'Optional Officer 6', 'Optional Officer 7', 'Optional Officer 8', 'Optional Officer 9', 'Primary Contact', and 'Secretary'. A 'Select All' button is at the bottom of this list. The 'And/Or these specific' column has a 'Search Members' button. A 'CREATE' button is at the bottom left of the form. Annotations include a green box around the 'Title' field, a green box around the 'Select All' button, and a green box around the 'CREATE' button. Yellow arrows point from the 'Search Members' button to the 'Select All' button and from the 'Select All' button to the 'CREATE' button. A large yellow arrow points from the text 'Select the members you want to send the messaging relay to.' to the 'Select All' button.

Create Message Relay

Title *

Title *

Test

Used as a default Subject line when sending the email.

Select Recipients *

Send to members holding these

And/Or these specific

Position

Search Members

☐ Executive Director of Student Affairs

☒ Member

☐ Optional Officer 5

☐ Optional Officer 6

☐ Optional Officer 7

☐ Optional Officer 8

☐ Optional Officer 9

☐ Primary Contact

☐ Secretary

☐ Select All

270 Eligible Recipients

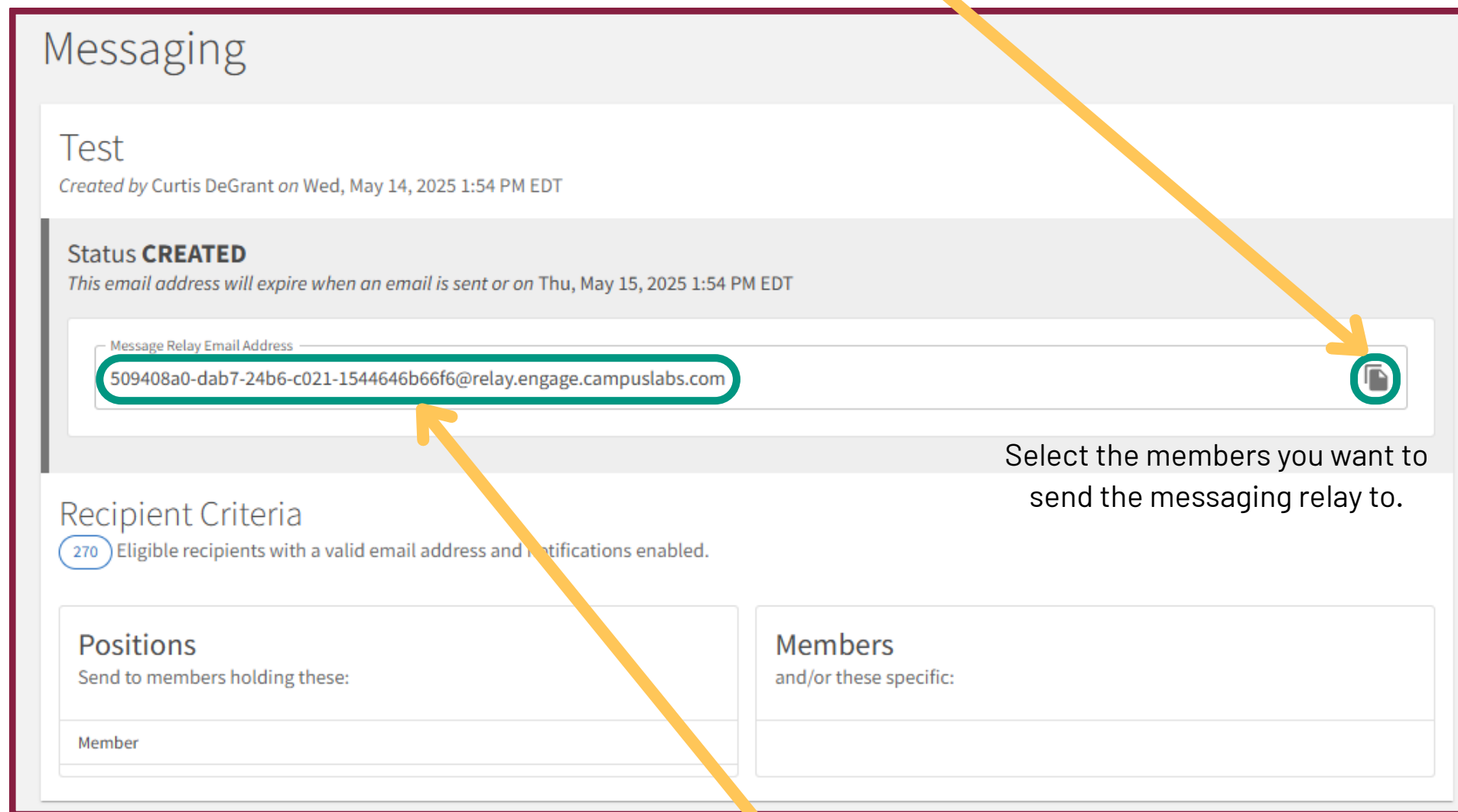
CREATE

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.

Messaging Your Organization (3):

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



The screenshot shows a 'Messaging' interface. At the top, it says 'Test' and 'Created by Curtis DeGrant on Wed, May 14, 2025 1:54 PM EDT'. Below this is a 'Status CREATED' section with a note: 'This email address will expire when an email is sent or on Thu, May 15, 2025 1:54 PM EDT'. The main section is 'Message Relay Email Address', which contains the email address '509408a0-dab7-24b6-c021-1544646b66f6@relay.engage.campuslabs.com'. A green rounded rectangle highlights this address, and a green clipboard icon is to its right. Below this is the 'Recipient Criteria' section, which shows '270 Eligible recipients with a valid email address and notifications enabled.' There are two sub-sections: 'Positions' (Send to members holding these:) and 'Members' (and/or these specific:). The 'Positions' section has a table with one row labeled 'Member'. The 'Members' section is empty. Two yellow arrows point to the email address and the clipboard icon. A text box on the right says 'Select the members you want to send the messaging relay to.'

Messaging

Test

Created by Curtis DeGrant on Wed, May 14, 2025 1:54 PM EDT

Status **CREATED**

This email address will expire when an email is sent or on Thu, May 15, 2025 1:54 PM EDT

Message Relay Email Address

509408a0-dab7-24b6-c021-1544646b66f6@relay.engage.campuslabs.com

Recipient Criteria

270 Eligible recipients with a valid email address and notifications enabled.

Positions

Send to members holding these:

Member

Members

and/or these specific:

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



Student Life & First-Year Experience