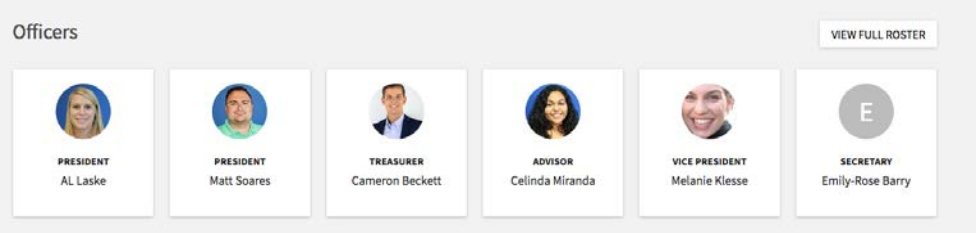
Roster Walkthrough

Assuming you have the appropriate access within your org's portal, you can use the *Roster* tool to manage people in your organization's portal. This Quick Tips highlights the important aspects of managing your roster, keeping your information up-to-date, and making sure the right people have the right levels of permission they need in your portal.

Basic Navigation

When you land on your organization's page (see "Action Center Quick Tips" here for navigation information), scroll down to see the organization's Roster. The roster will show you a list of some of your organization's members and information about your organization's primary contact (see "Organization Primary Contact Quick Tips" here for more information).

When you click the "View Full Roster," you will see officers of the organization along with their photo and position, and then a list of general members who do not hold positions. Clicking on a user's name will open their Community Directory information, including basic contact information or any other additional information the user has chosen to publicly show.



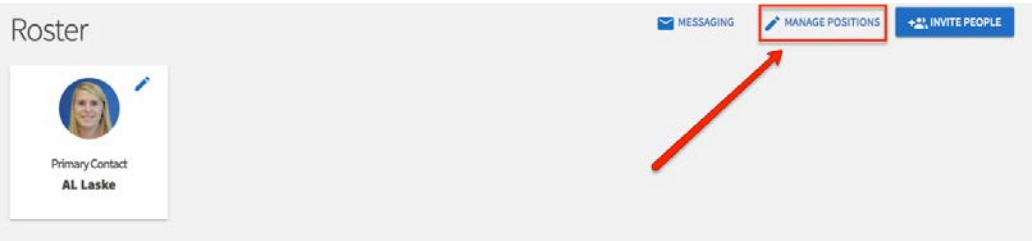
Messaging

As a Roster manager, you have the ability to send messages to your organization's members. Click *Messaging* at the top of the Roster page in *Action Center* (see "Action Center Quick Tips" here for navigation information) to create a message relay. Relays allow you to create a temporary email address to send a message to only certain members based on the positions they hold.

Managing Positions

As an officer of your organization, or a person with access to manage the Roster tool, you have the ability to create Positions specific to your organization. For more info about Positions and how they are useful within your org's portal (e.g., helping you manage a member's access levels), see "Creating Positions and Assigning Org Tool Menu Access Quick Tips" here.

Click on *Manage Positions* in the Action Center for the organization to explore this toolset.



On this page, you can see a full list of the positions available to your organization. While some of these have been created by Student Activities, you are able to create others that are more tailored to your org. Click *+Position* to create a new org-specific position (see “Creating Positions and Assigning Org Tool Menu Access Quick Tips” here for more information).

Managing the Roster

As an officer of your organization, or a person with access to manage the Roster tool, you also have the ability to manage who is on the organization roster and the different roles they hold. Go to the Action Center (see “Action Center Quick Tips” here) for your organization to explore these options.

Inviting people: Invite people to join your org’s portal by clicking *+Invite People* at the top of the *Roster* page. Click here to access “Inviting New Members to Join an Organization Portal Quick Tips” for more information.

Ending memberships: Locate the member(s) you would like to remove from the org’s portal and check the box on the far left of the members' names. Click *End Membership* at the top of the user list. A confirmation box will appear to let you know that ending this user's membership in the portal will also remove all of their positions and permissions. You can also end all memberships (i.e., remove all members from the portal) at once. Click here to access “Removing Members from an Organization Portal Quick Tips” for more information.

Approving memberships: As an officer, you also have control over who joins your organization. When you land on the "Manage Roster" page (see “Organization Tool Menu Quick Tips” here for more information), you will see tabs for Current, Pending, and Prospective members. *Pending* members are those you have invited into the portal, who have not yet accepted your request. *Prospective* members are those who have requested to join your portal and are waiting on a decision. Click here to access “Approving Organization Portal Membership Requests Quick Tips” for more information.

Assigning people to Positions: In the "Manage Roster" section (see “Organization Tool Menu Quick Tips” here for more information), you can also edit the positions your different members hold. Click *Edit Positions* to the right of a member’s name. A list of all available positions will appear. Assign a member to a position by clicking the appropriate checkbox and clicking *Save*. Assigning positions to members, especially officers, is important because it allows them to have different access levels to documents, forms, events or other tools. Click here to access “Assigning People to and Changing Positions Quick Tips” for more information.