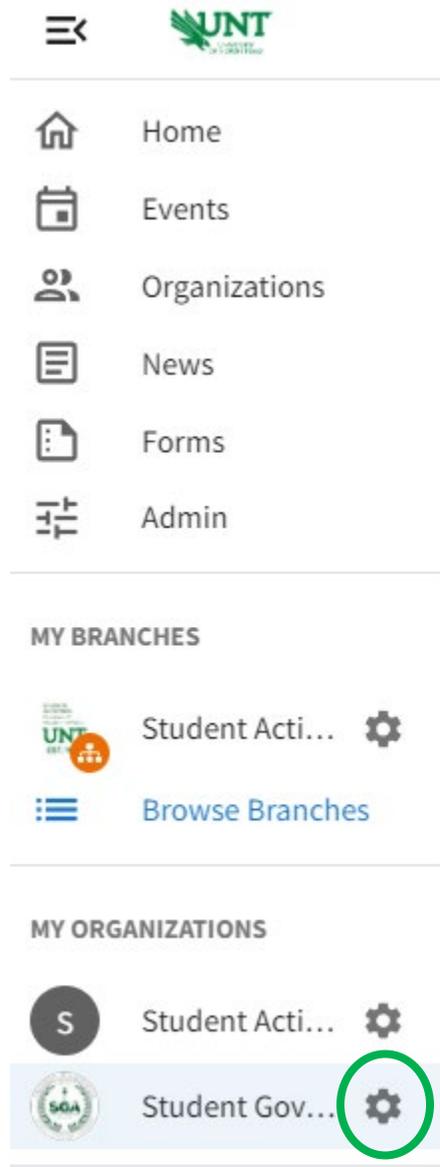


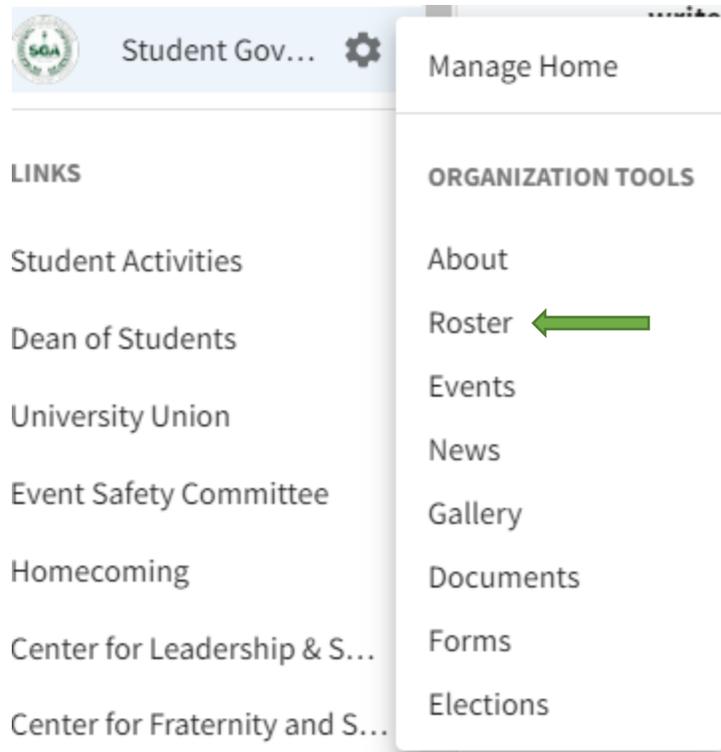
## Roster Walkthrough

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.

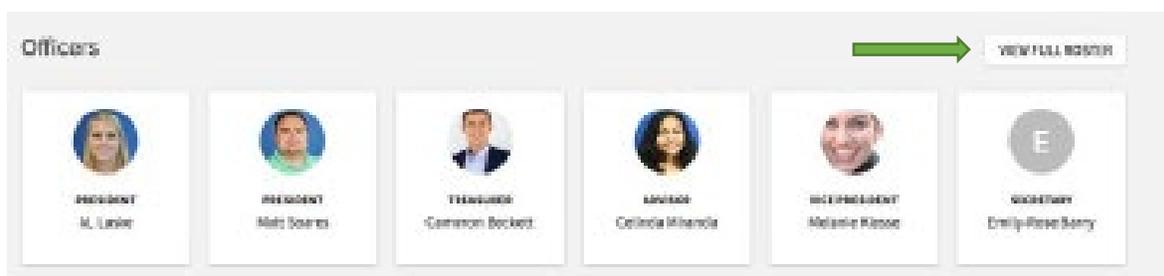
### Basic Navigation

Navigate to your organization's page and scroll down to see the organization's Roster. You can also access your roster from the three-line icon on the left side of the page. Go to my organizations and click on the gear.





The roster will show you a list of some of your organization's members and information about your organization's primary contact.



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.

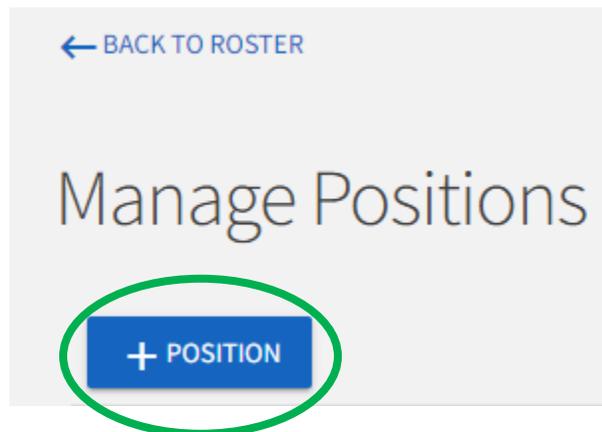
## Messaging

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.



## 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.

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.

