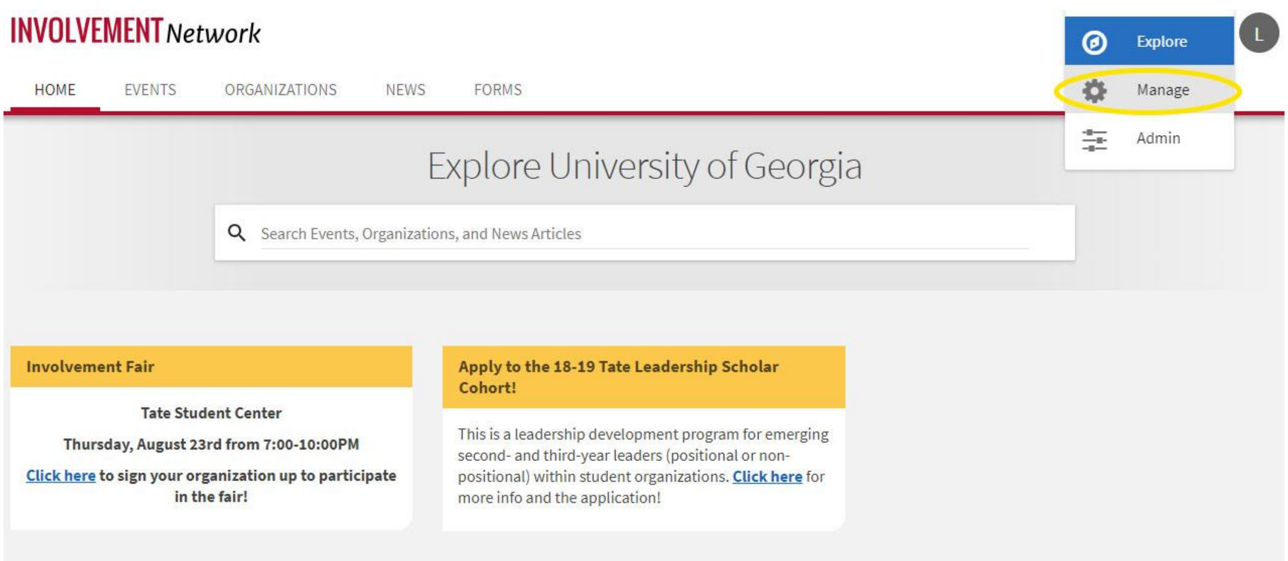
INVOLVEMENT Network MANAGING ROSTERS

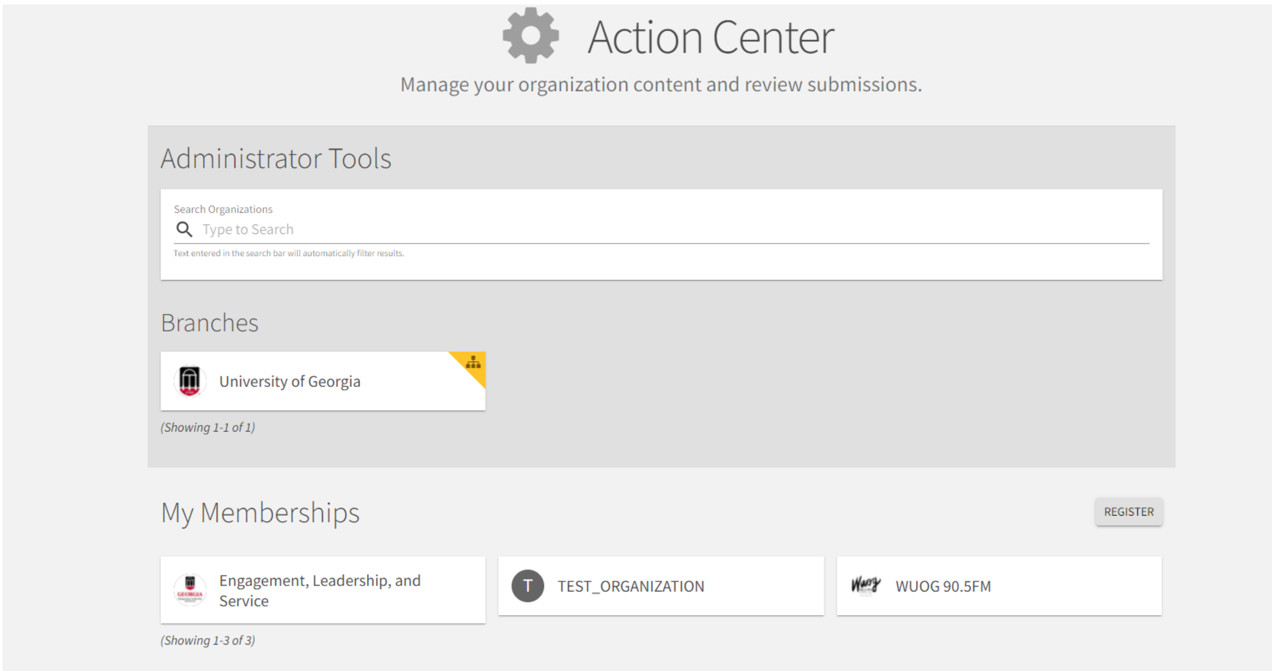
Managing your roster can help you manage your organization efficiently. The roster gives you the ability to add/remove members, assign leadership positions, manage access to Involvement Network tools (ex: forms, event submissions, etc.). Within this guide, you will find the following information to help you utilize the Roster feature:

ACCESSING THE ROSTER

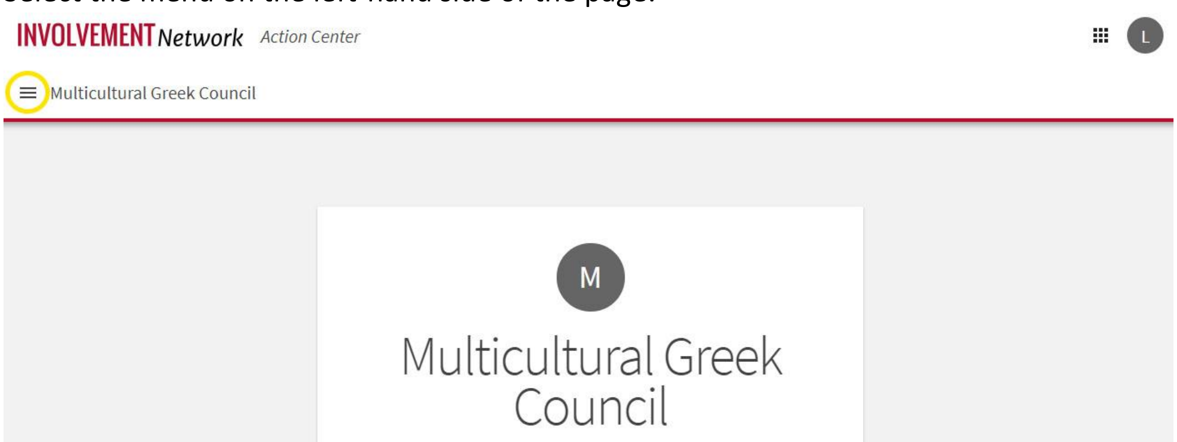
1. Log in to the Involvement Network at http://involve.uga.edu.
2. Select "Manage" from the menu next to your user icon (top, right corner).



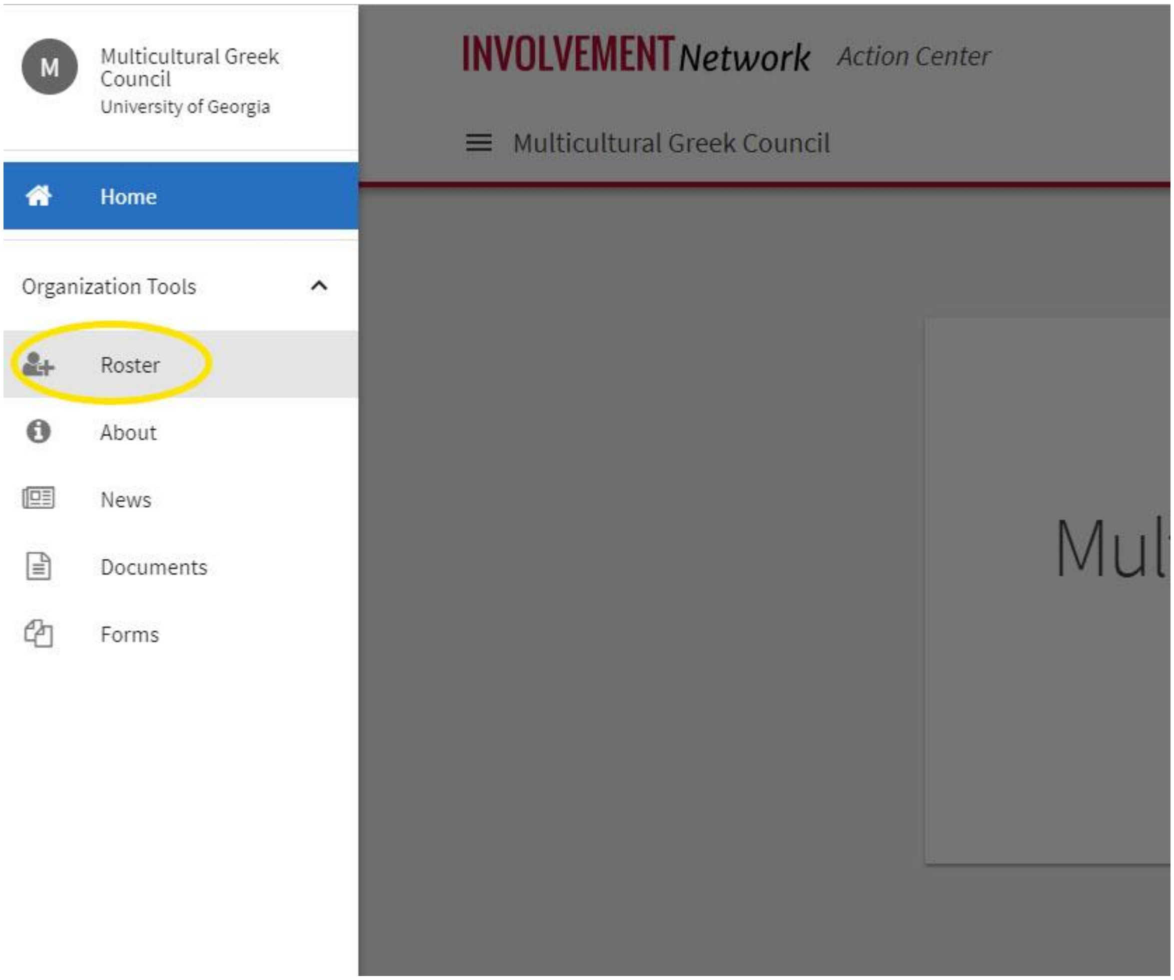
3. Search & Select the Organization you would like to manage.



4. Select the menu on the left-hand side of the page.



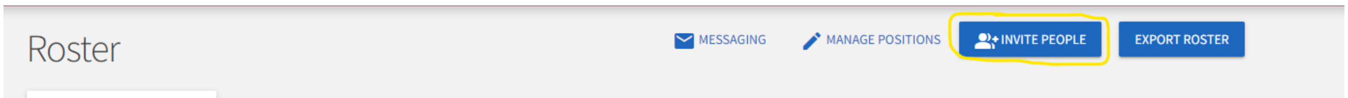
5. Select “Roster.”



[Return to Top](#)

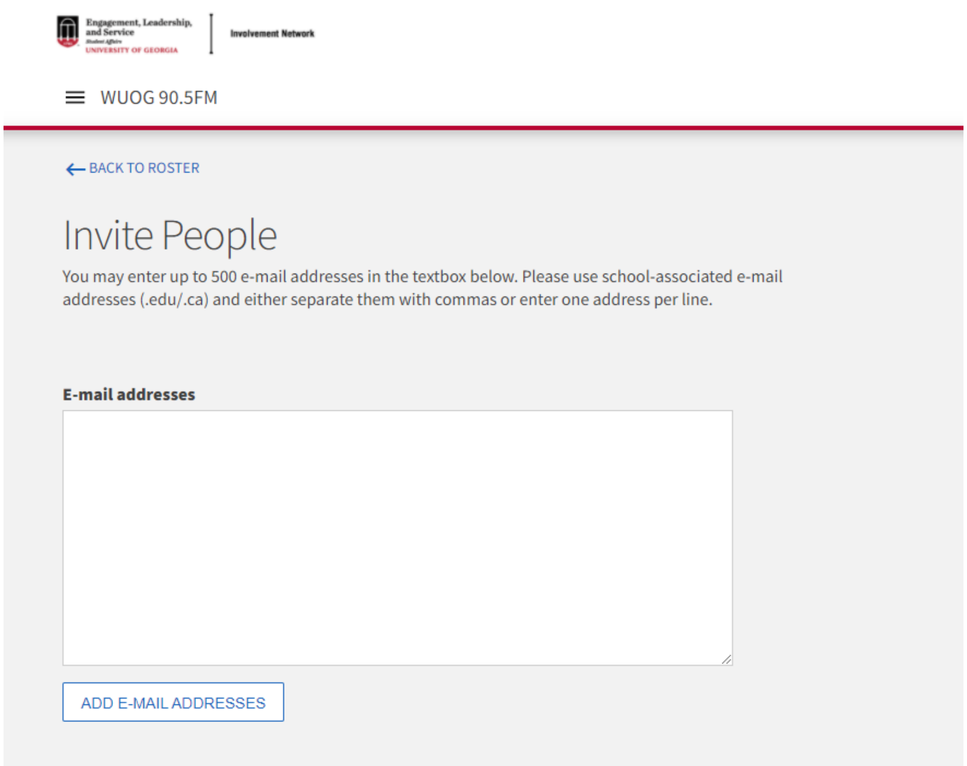
INVITING MEMBERS

1. If the member you are updating does not appear on the roster, select the blue "Invite People" button at the top of the page.



2. Add the member's email address to add them to the roster.

   Tip: To ensure the member will receive the invitation, you can confirm their email in the UGA Directory (https://peoplesearch.uga.edu/) or have them confirm their listed "Campus Email Address" within their Involvement Network account.

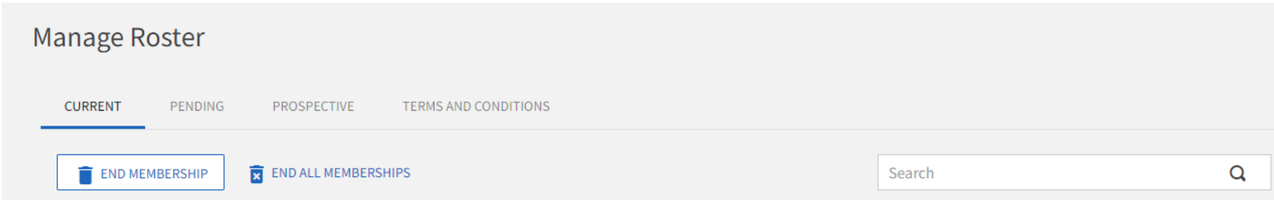


3. Be sure to select the type of invitation (i.e. Member, Staff, etc.) and hit the blue “Send Invitations” button.

[Return to Top](#)

APPROVING MEMBERSHIPS

1. After navigating to the organization’s roster, scroll down to the “Manage Roster” section. You will see lists for current, pending, and prospective members. "Pending" members are those who have been invited to join the organization but have not yet accepted that invitation. "Prospective" members are those who discovered your organization and have indicated they would like to join.

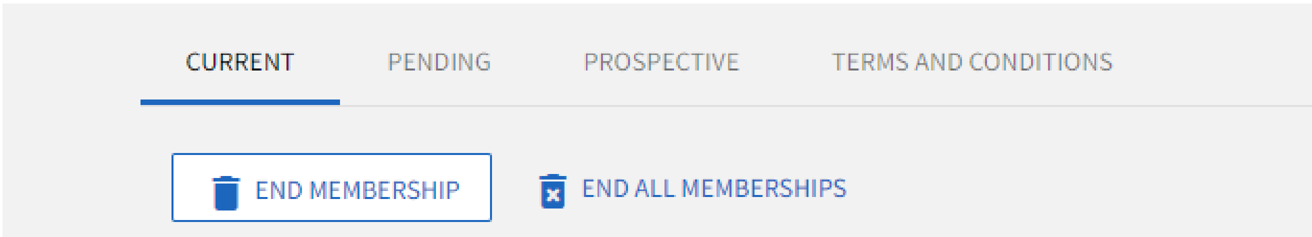


2. To notify a pending member of their invitation, check the box to the left of each individual and click “Resend Invitation.” For prospective members, navigate to the “*Prospective*" tab and review the users who are awaiting membership approval. Click “Approve” or “Deny” to make a decision about that user's membership. You can also send any prospective member a message by selecting the checkbox to the left of their name and selecting “Send Message.”

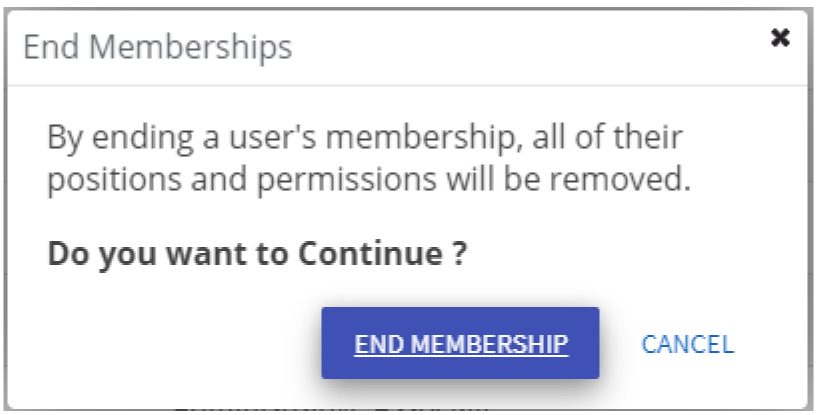
[Return to Top](#)

ENDING MEMBERSHIPS

1. After navigating to the organization's roster, scroll down to the "Manage Roster" section of the page. Locate the member(s) you would like to remove and check the box on the far left of the members' names. Click "End Membership" at the top of the user list.



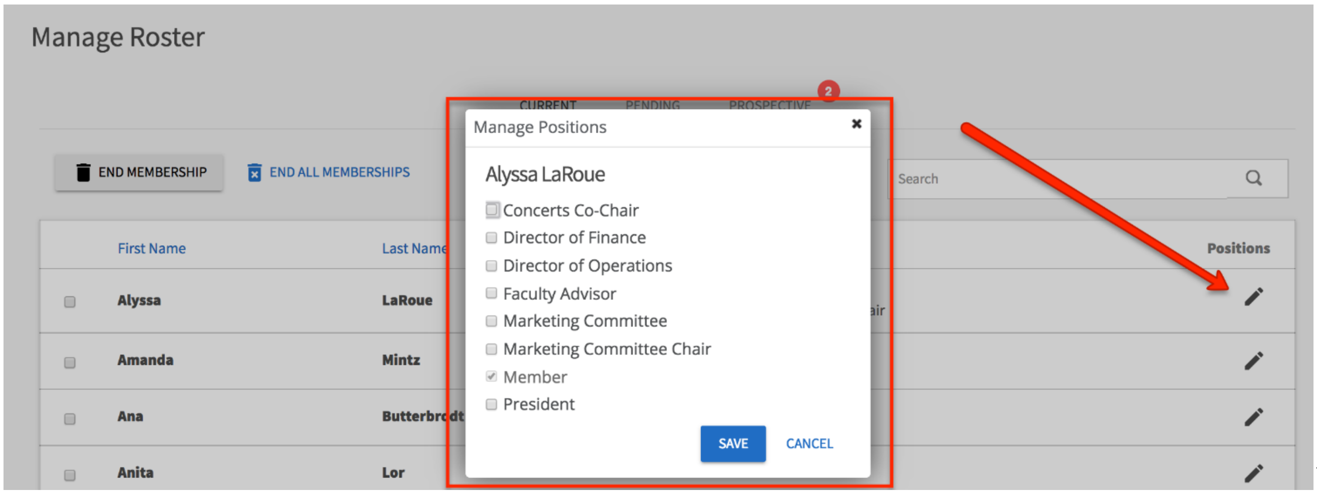
2. A confirmation box will appear to let you know that ending this user's membership will also remove all of their positions and permissions. Click "End Membership" to confirm the deletion.



[Return to Top](#)

ASSIGNING MEMBER POSITIONS

1. After navigating to the organization's roster. Search for the member you want to assign a position to. Select the pencil icon beside the member you would like to assign a position to. A list of all available Positions will populate. Click the check box next to the position you would like to add or remove from that user, and then select Save. The user's permissions within the organization will be updated based on the Positions they hold.



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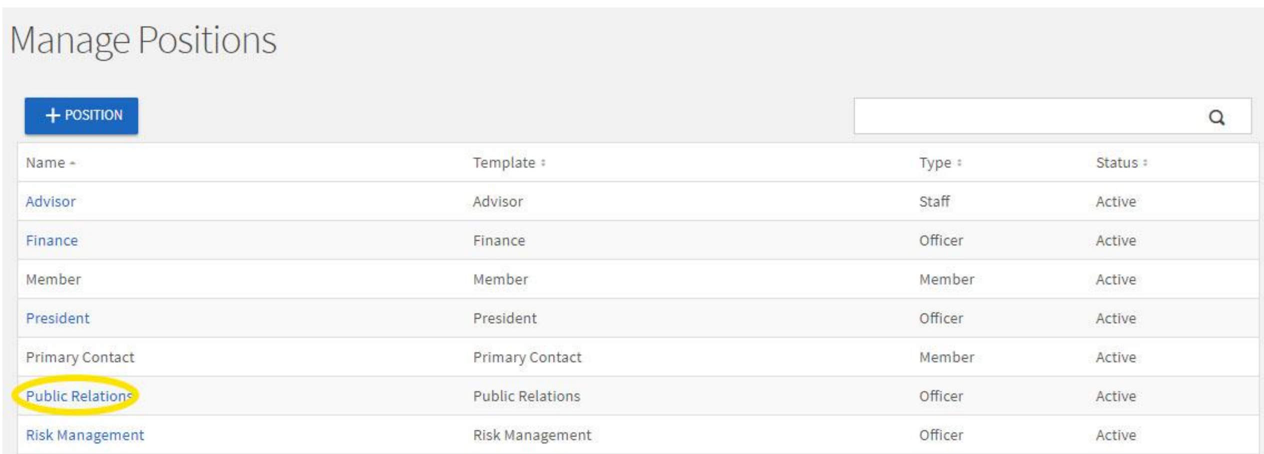
[Return to Top](#)

CREATING/UPDATING ORGANIZATION-SPECIFIC POSITIONS

1. After navigating to the organization's roster, select "Manage Positions" at the top of the page to add and/or edit positions and their access to the organization's Involvement Network page.

2. You can create a position or edit position permissions by selecting the title of the position. Member and Primary Contact cannot be changed.


Manage Positions

+ POSITION

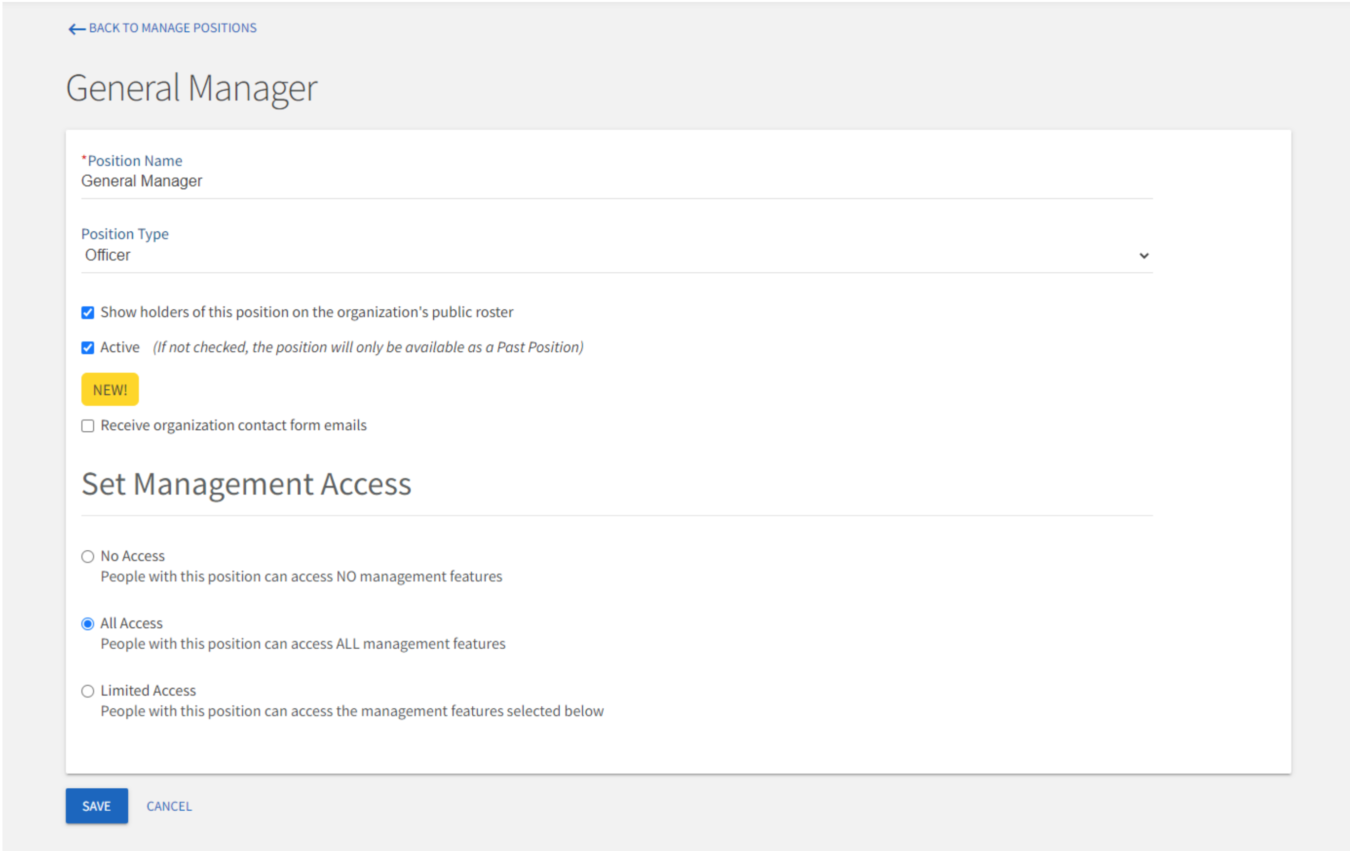
Name	Template	Type	Status
Advisor	Advisor	Staff	Active
Finance	Finance	Officer	Active
Member	Member	Member	Active
President	President	Officer	Active
Primary Contact	Primary Contact	Member	Active
Public Relations	Public Relations	Officer	Active
Risk Management	Risk Management	Officer	Active

3. From here, you can name the position and/or determine how much access is permitted. For example, you may want your Advisor to have "All Access" but you may want your Events Chair to have "Limited Access" to certain functions, such as events.

   Users who fill Positions with "No access" will not be able to manage any tools within the organization. "All access" allows Position holders to manage every tool within the organization's site - these are the users who will have the most power within your organization. Limited access allows you to select the level of access the Position should have for each tool within the organization site. When you are finished determining the level of access for the position, click "Create."

   Note: Once the position has been created, it may take a few minutes before it can be assigned to a member.

   Tip: If you do not see the position immediately, give the system a few minutes while the position is being generated.



See below for information about what each level of access will allow for each tool.

Tool	None	View	Full
Registration Forms	Cannot view registration form submissions.	Can view the organization's registration submission, but cannot edit it.	Can edit and resubmit the organization's registration form.
Documents	Only able to see documents that have been shared publicly or with that user's position.	Able to view all documents, but cannot edit, delete, or create them.	Has full access to documents, including the ability to create, edit, and delete them.
Messaging	Does not have access to the messaging tool, but will receive messages sent to them.	Can view messages sent from the organization but cannot create new message relays.	Has full access to send message relays to members of the organization
Events	Only able to see events that have been shared publicly, within their organization, or ones they have been invited to.	Able to view all event details and submissions, but cannot edit, delete, or create them.	Has full access to events, including the ability to edit and delete them, manage invitations, manage event attendance, and submit event requests.
Finance	Cannot access the finance tab.	Can view transactions and requests, but cannot edit or create them.	Can submit purchase and funding requests on behalf of the organization.
Wall	Can view and contribute to the wall.	Can view and contribute to the wall.	Can view and contribute to the wall.
Roster	Can view the public roster of members but has no	Can view all members of the organization, organization created positions, but cannot	Can manage the roster, including the ability to create and edit

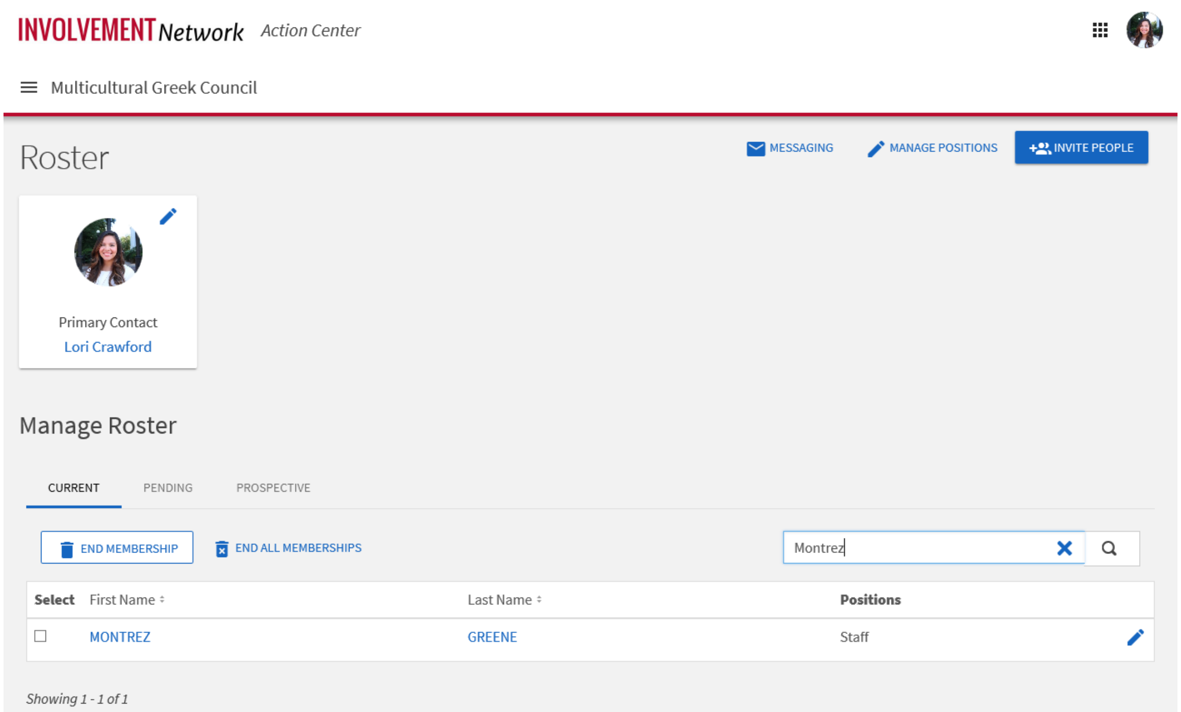
	management access for the roster or Positions.	make edits to the roster or create new organization positions.	positions, invite members, and approve memberships.
Profile	Can only see the basic profile of the organization.	Can view the full organization's profile but cannot update it.	Can edit the organization's profile.
News	Only able to see news posts that have been shared publicly or with the organization.	Able to view all news posts, but cannot edit, delete, or create posts.	Has full access to news, including the ability to create, edit, and delete posts.
Forms	Only able to see forms that have been shared publicly or with that user's position.	Able to view all forms, but cannot edit, delete, or create them. User can also view form submissions but cannot approve or deny them.	Has full access to forms, including the ability to create, edit, and delete forms and manage form submissions.
Photos	Only able to see photo galleries that have been shared publicly or with that user's position.	Able to view all photo galleries, but cannot edit, delete, or create them.	Able to manage all photo galleries, including the ability to edit, delete, and create them.
Elections	Only able to see elections that have been shared publicly or with that user's position.	Able to view all elections and election results, but cannot edit, delete, or create them.	Able to create, edit, and delete elections and view results.

Return to Top

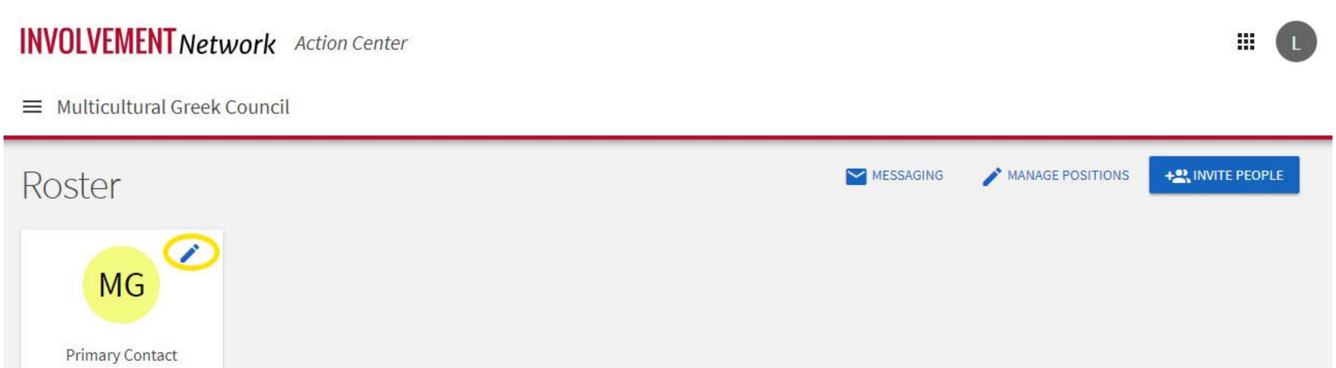
UPDATING NEW PRIMARY CONTACTS

Note: *After updating the new primary contact, you will likely lose the current level of access you have to the organization's page.*

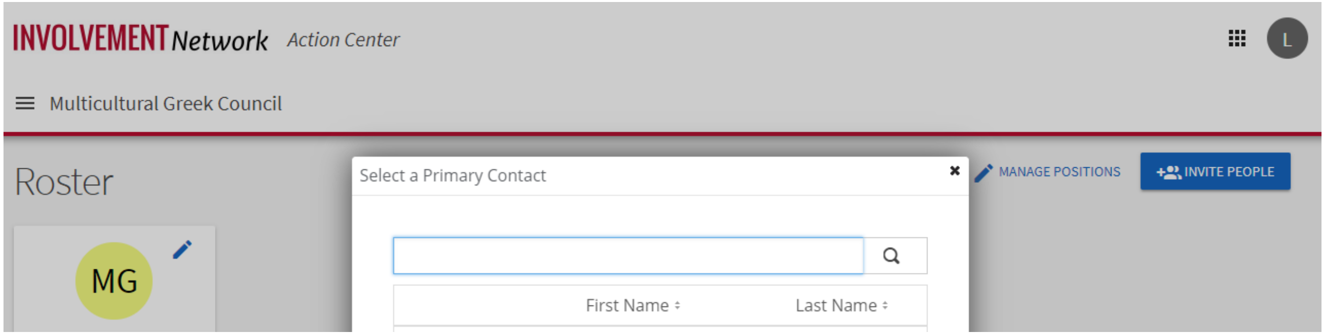
1. To update the Primary Contact, ensure the member you would like to make the new Primary Contact is already on the organization's roster using the search function. If the member does not appear on the roster, follow the instructions for Inviting Members.



2. After ensuring the member is a part of the organization's roster, click on the pencil next to the Primary Contact.



3. Search and Select the member you would like to make the new Primary Contact. The selected member will become the Primary Contact and will have full access to manage the organization page moving forward.



Return to Top