Roster

Here you can manage current members, invite new members to join your organization, assign membership classifications or officer positions, and grant administrative access to the features of your site. Only officers with all access or full access to the Roster can manage the organization membership and officer positions.

Accessing Organization Roster
1. Select the Roster tab from the pop-out menu next to organization name in the top left corner.
2. The complete roster for your organization is now displayed.

Invite New Members
1. Click on Invite People in the top right corner.
2. Enter the email addresses of the individuals you wish to send invitations for membership.
3. Select a designation from the Invite as dropdown if you would like to assign a specific position or officer designation to the person you are inviting. Leave the designation as “member” if the person does not need to be assigned a position.
   a. If the position you want to use has not yet been created, you can always add a designation after the user has accepted your invitation to the group.
4. Click Send Invitations when all people have been added to the list.
Approve New Membership Requests
In addition to being invited to join your organization, prospective new members can request to join by clicking the Join Organization button on your organization’s home page. These members must be approved by organization officers before they are added to the organization’s roster.

1. From the organization’s pop-out menu, select the Roster tab on the left.
2. Select the tab labeled Prospective in the middle of the page.
   **Pending members are those your organization has invited to join. Prospective members are those who have found the organization and indicated they would like to join.**
3. Review the users who are awaiting membership approval.
4. Click Approve or Deny next to each user.
5. Confirm each action.

Assign Positions to Officers or Members
1. From the organization’s Roster, locate the member you would like to assign an officer position.
2. Click Edit Positions to the right of the member’s name (pencil icon).
3. Select the appropriate position from the list of positions available.
   a. If the appropriate position does not already exist, see below for instructions on creating new positions.
4. Click the Save button.
5. The roster page will reload with the position now assigned to the member will be displayed.

Create New Positions Specific to Your Organization
1. From the Roster page, click the Manage Positions link.
2. A list of all the current positions available for your organization will be listed. Some of these can be organization created, while others may be system-wide positions.
3. Click the + Position button at the top of the page.
4. Identify the name of the position.
5. Select the position type:
   a. Officer – Will be displayed at the top of your membership roster.
   b. Member – Will be displayed in the general roster listing.
6. Set the following options as appropriate:
   a. Show holders of this position on the organization’s roster: Check this box if you would like this position designation to be visible to users.
   b. Is Active: The position is available for a user to hold. If this is not checked, the position will only be available as a past position.
7. Set Management Access:
   a. No Access allows no administrative access but the user will still be able to see any content designated for organization members.
   b. All Access allows administrative access to all features of the organization’s site. Only users with All Access can edit the roster.
      i. If some of your officers do not want to receive membership requests for the organization, you should change them to Limited Access and give them only “View” access to the roster.
   c. Limited Access allows you to select each feature of the organization’s site that the position should not have access, have full access, or only be able to view.
8. Click Create.
Change Administrative Access for Existing Positions
1. From the Roster page, click the **Manage Positions** link.
2. Click the name of the position you would like to edit.
3. Select the position type
   a. **Officer** – Will be displayed at the top of your membership roster.
   b. **Member** – Will be displayed in the general roster listing.
4. Set the following options as appropriate:
   a. **Show holders of this position on the organization’s roster:**
      Check this box if you would like this position designation to be visible to users.
5. Set Management Access:
   a. **No Access** allows no administrative access, but the user will still be able to see any content designated for organization members.
   b. **All Access** allows administrative access to all features of the organization’s site. Only users with All Access can edit the roster.
      i. If some of your officers do not want to receive membership requests for the organization, you should change them to Limited Access and give them only “View” access to the roster.
   c. **Limited Access** allows you to select each feature of the organization’s site that the position should not have access, have full access, or only be able to view. Finally, click “Create.”

Removing Members from the Organization Roster
1. From the pop-out menu, click **Roster** to be brought to the Manage Roster page.
2. Locate the member you would like to remove.
3. Check the box on the far left of the member’s name.
4. Click **End Membership** at the top of the screen.
5. Confirm deletion.

Roster Messaging
Anchor Link allows you to send e-mails and text messages to your entire membership roster or subsets of your membership.

**E-mail Messaging**
Anchor Link allows you to send e-mails to your entire membership roster or subsets of your membership. These e-mails can sent via any mail platform, and can include links and attachments. **Note: Relays can take up to 24 hours to send, based on the number of recipients.**

You will be given a temporary relay address to which you will send your message.
1. From your organization’s page, click **Roster** in the pop-out menu then click **Messaging** that will appear on the top of the page.
2. Click the Create Relay button.
3. Select the recipients for your message
   a. You can send to specific position holders, as well as...
   b. All Members – everyone on your organization’s roster

4. You will be given a temporary relay address. If you use Outlook, simply click the address. If you would like to use a different email server, simply copy and paste the address into the “Send To” region. This address will expire in 24 hours.

**Text Messaging**
The same process and options are available to send text messages to those users who have identified a mobile phone number in their notification settings. Access the Texts (SMS) tab on the Messaging page to send/view text messages.

Due to the nature of SMS messaging, this method of communication is not instantaneous and should not be used as the only means of communication when you need to ensure delivery of a message.