

WILLIAM & MARY TribeLink

How To Manage Your Organization's Positions

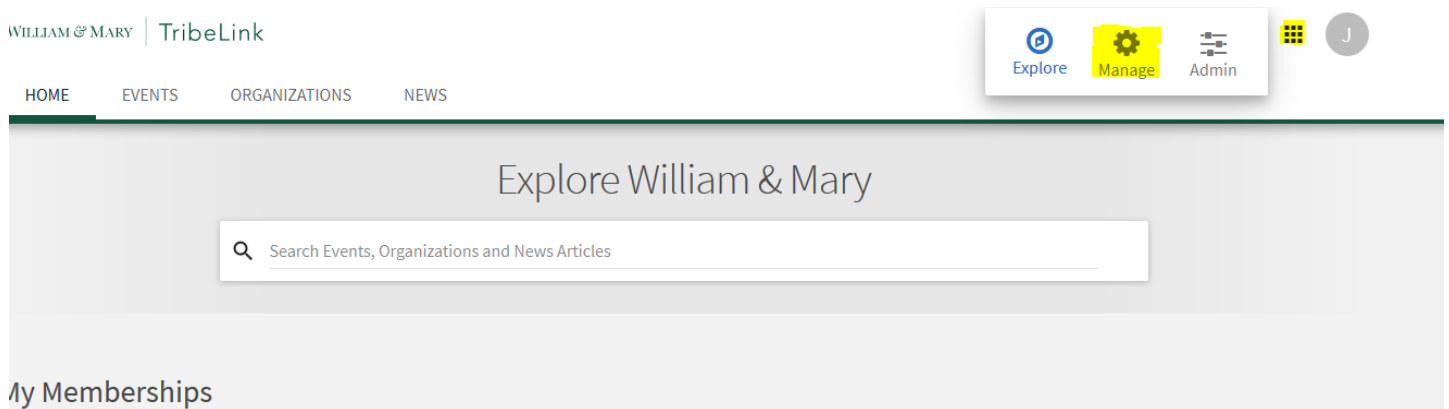
TribeLink gives each organization the flexibility to create positions in TribeLink that align with their leadership/ organization structures; you are not limited to the positions already created in TribeLink. Creating and managing/assigning positions is the responsibility of the organization and can be done by any member with the appropriate management access.

When creating positions, the organization can determine what level of administrative access, if any, each position has to manage the organization's TribeLink page. When positions are assigned to an individual, that individual can then manage the organization's page according to the administrative access assigned to the position.

General Instructions to Access the Roster Management Page

To create/manage positions, you will first need to access the organization's Roster Management page within TribeLink. Below are some instructions to get to that page; instructions for the specific functions can be found throughout this resource.

- 1) Log into TribeLink
- 2) Select "Manage" using the grid shaped icon in the top right corner of the screen - this will take you to the Action Center



- 3) In the Action Center, select the organization you would like to manage
- 4) When you are on the organization's home page, you will use the menu on the left hand of the screen to access the various management functions you have
- 5) Select Roster



Additional Questions?

Email tribelink@wm.edu or check out the Engage Help Center for online resources like:

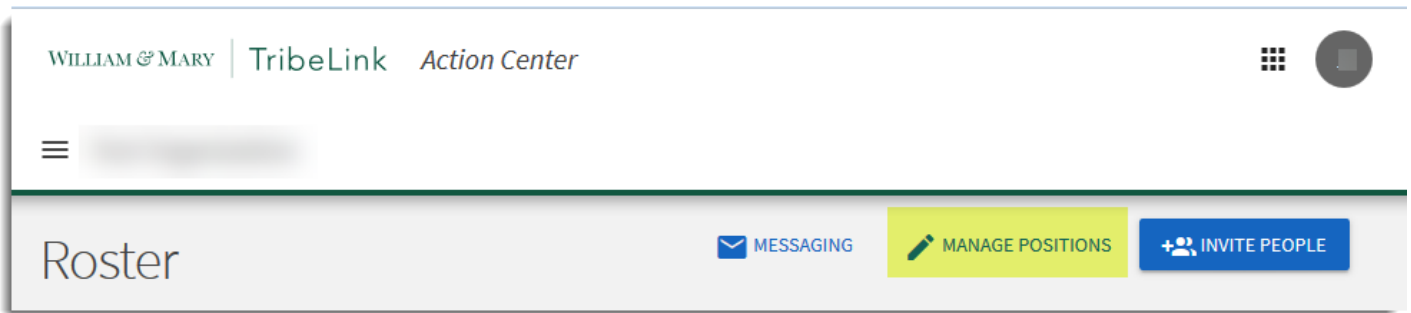
[Creating Positions specific to your Organization](#)

[Changing Positions in your Organization](#)

Managing Positions for the Organization Roster

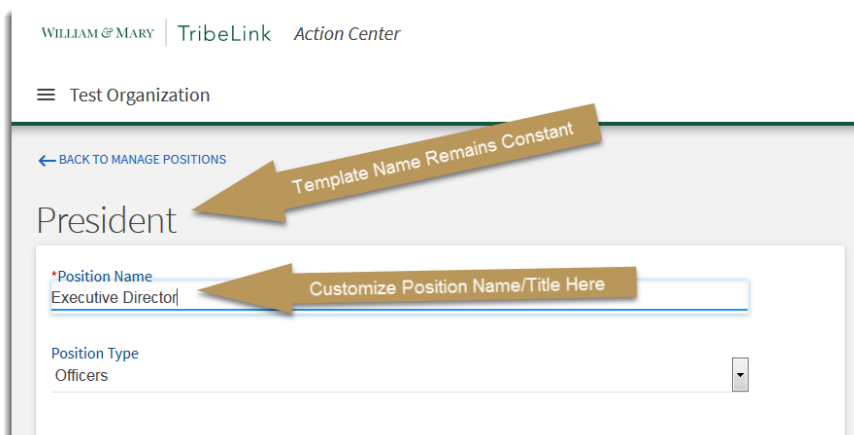
Start on the Roster page and click on the “Manage Positions” button.

This will allow you to either edit position “templates” or create your own positions that are aligned with the organization’s operations.



Customizing Pre-Created Positions on the Organization Roster

There are a few position templates that are already established in TribeLink for organizations to use if applicable/required (President, Financial Manager, Secondary Contact, Delegate, Representative, Advisor); these pre-set templates allow for improved communication from Student Leadership Development to various leaders of organizations, based on role/responsibility. For example, if SLD is trying to communicate with the officers who are responsible for the financial management of organizations (Financial Managers), we can send a communication to all Financial Managers.



Recognizing that organizations may have different names for similar positions, there is the ability to customize the pre-set positions/templates. You can customize how these positions appear on the roster, for example, if the organization calls the “president” by another formal title, like “Executive Director” or “Commander,” you can customize the actual name of the position. You can also customize some of the administrative privileges for the templates.

Creating Additional Positions on the Organization Roster

On the Manage Positions page, click on the button “+ Positon” to create a new position if needed. Check to see if the position already exists for your organization to use before creating a new position.

Name the position, as appropriate for your organization.

Select the position type

- Members: this position type may be used to discern types of membership/committees
- Officers: this position type may be used for leadership roles
- Representatives: this type will primarily be used by organizations that convenes or is comprised of representatives or delegates of various organizations/groups like Hall Council, A Capella Council, etc.

Now you will be able to customize the position, including managing administrative access the position has in TribeLink.

Customizing the Positions

The checkbox below position type is for you to determine whether or not you want the position to show up on the roster of your organization. If this box is checked, the position (and the member holding it) will appear on the roster page above the list of all members. If you choose to make positions visible on the roster, the member(s) holding that position must also manage their own personal Privacy Settings in TribeLink before it will appear on the public roster.

If a position is no longer active, uncheck the “Active” box.

When individuals click on the “contact” button on an organization’s TribeLink page, the message is sent to the Primary Contact. If your organization would like to add other positions to receive those messages, check the box “Receive organization contact form emails.”

Set the management access for the position. Different positions will need access to different functions within your organization’s TribeLink page, and you can determine what those are.

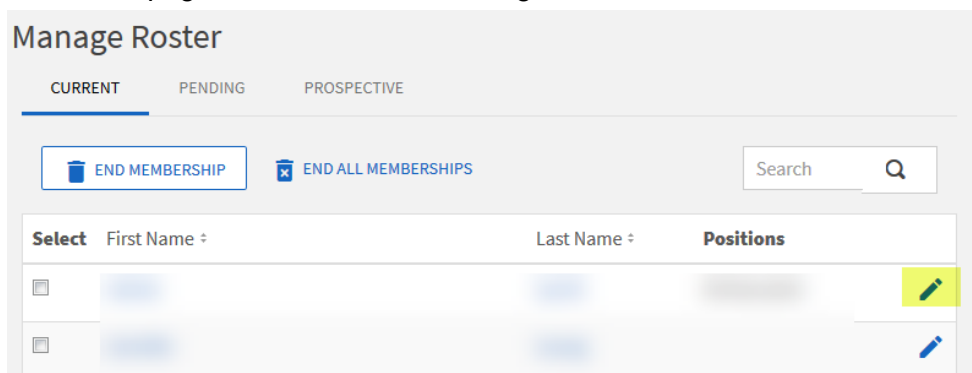
- No Access
- All Access
- Limited Access - select which specific functions this position should have administrative access to manage. When selecting specific functions, you can also select the level of administration for some functions, like “view” only, rather than “full” meaning a person can also edit.

Click the “Create” or “Save” button.

Assigning Positions on the Organization Roster

- To manage positions, start at the Roster page and click on the “Manage Roster” button.

- Identify the individual to whom you need to assign a position (or remove a position) and click the “Edit Positions” button next to their name.



The screenshot shows the "Manage Roster" interface. At the top, there are tabs for "CURRENT", "PENDING", and "PROSPECTIVE". Below the tabs are two buttons: "END MEMBERSHIP" and "END ALL MEMBERSHIPS". To the right is a search bar with a magnifying glass icon. Below these elements is a table with the following columns: "Select", "First Name", "Last Name", and "Positions". The table contains two rows of data, each with a checkbox in the "Select" column and a pencil icon in the "Positions" column.

- To add a position for the individual, click on the appropriate checkboxes in the “Manage Positions.” You can also remove a position from an individual, by unclicking the checkbox.
- A position can be held by multiple people AND an individual can hold multiple positions.
- Once a position is assigned, the individual(s) holding the position will have the administrative access designated for that specific position.

It is the responsibility of the individuals managing this function to ensure the accuracy of the position assignments. When updating position assignments, you can also unassign a position for an individual by unchecking the box in the “Manage Positions” box for the individual.

*****Please note that the position of “Primary Contact” is not managed using this process. There is an additional resource to help you navigate that specific process.*****

Note about the Advisors. This position can only be assigned by the Office of Student Leadership Development. If you need to add an advisor or edit your advisor information, please email tribelink@wm.edu with your requested addition/change.