WILLIAM & MARY
TribeLink

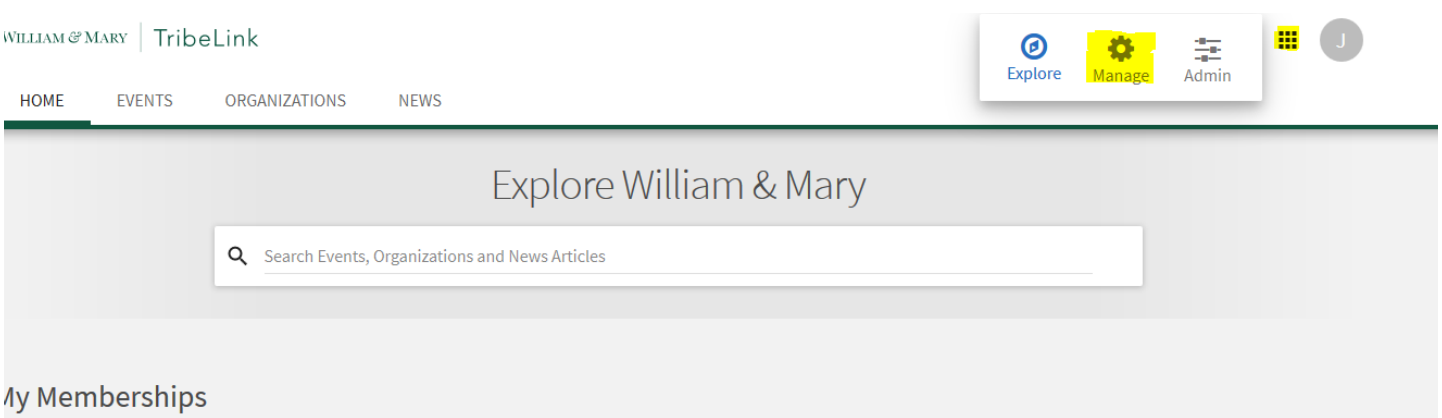
How To
Manage Your Organization's Roster

Each recognized student organization is responsible for managing their own roster, which includes adding/ removing members. This guide provides information and instructions for these various processes. It is important to keep the roster up to date as this determines who has access to organization information and functions in TribeLink. A good practice is to regularly review the organization's roster, as well as build a step into the organization's transition process where positions are updated in TribeLink. It is the responsibility of each organization, through the individuals with the appropriate management access to ensure the accuracy of the roster and position assignments.

General Instructions to Access the Roster Management Page

To add/remove members and to create/manage positions, you will first need to access the organization's Roster Management page within TribeLink. Here 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



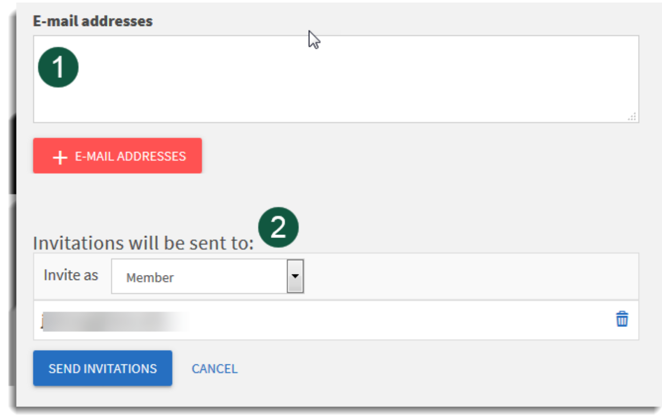
3) In the Action Center, select the organization you would like to manage
4) When you are on the organization's home page, you will use the menu on the left hand of the screen to access the various management functions you have

5) Select Roster. You can now add members to and/or remove members from the organization roster.

Adding Members to the Roster

There are two ways an individual member can be added to an organization's roster; both processes involve two steps.

- A member of the organization, with roster management access, can send invitations to individuals to join the organization through TribeLink. This invitation must be accepted by the individual in order to be added to the roster.
  - On the Roster page, click the "Invite People" button.
  - Enter in the email addresses of the organization members and send them an invitation. You must use their W&M email address in TribeLink.



- An individual member can send a request to join the organization through TribeLink, by clicking the "Join Organization" button located on the organization's page. This request must be approved by a member of the organization with roster management access in order for the individual to be added to the roster. ***Some organizations do not have this functionality and can only utilize the method of organization initiated roster additions.***
  - Review all requests to join under the "Prospective" tab on the "Manage Roster" page.
  - You can accept or deny each request to join. You may also send a message to people who have requested to join; this can be to share additional information about an application, an audition, etc.

Important Note: Only individuals who are actually members of your organization should be added to the roster as being on a roster gives a member access to organization member only functions within TribeLink AND the organization membership will appear on the individual's Involvement Record.

Removing Members from the Roster

When a member's involvement comes to an end (this can be at any point during their time at W&M or upon graduation), they should be removed from the roster. Just like adding a member, this process can be initiated by the organization or the individual, but the process only involves one step.

- A member of the organization, with roster management access, can remove members from the organization roster by selecting the check box by the members' names under the "Manage Roster" page and then clicking on the "End Membership." button above the roster.

- Individual members can remove themselves by going to the Membership History section of their individual user drawer menu which is accessible from the individual' users profile picture in the upper right corner. After identifying the organization they wish to leave, they click on the "Leave Organization" button.

When a member is removed from the roster (either by the organization or by themselves) their access to organizational functions will cease and an "end date" will be added to their membership history/Involvement Record. Organizations should plan on dedicating some time at the end of each semester to remove any members who have recently graduated.

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Additional Questions?

Email tribelink@wm.edu or check out the Collegiate Link Help Center for online resources like:
[Roster Walkthrough]