

WILLIAM & MARY TribeLink

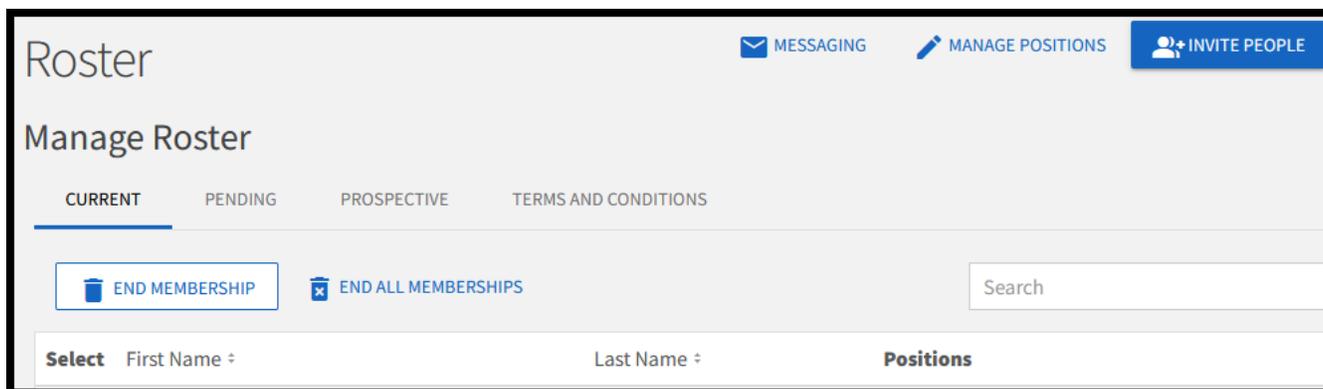
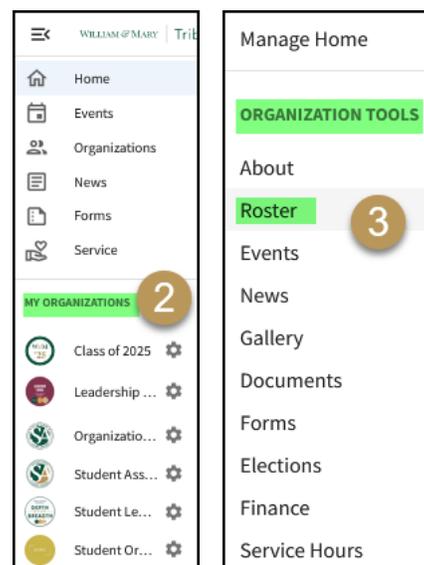
How To Manage Your Organization's Roster

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 manage the organization's roster, 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.

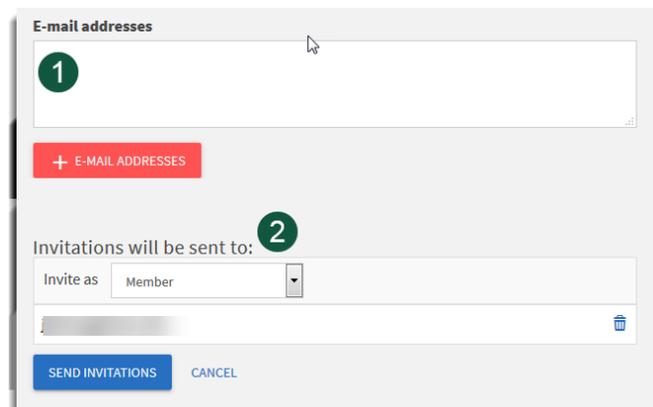
- 1) Log into TribeLink (tribelink.wm.edu)
- 2) Click on the gear icon next to your organization name in the left hand menu on your screen under "My Organizations"; this will open a menu of organization tools. If you have not expanded the left hand menu, simply click on the organization profile picture and this will open the menu of organization tools.
- 3) Select "Roster"
- 4) On the Manage Roster page you will see several different management tools:
 - Current - this is the current roster of approved members
 - Pending - this is a list of people you've invited to join the organization, but have not acted the invitation yet
 - Prospective - this is a list of people who have requested to join the organization, but are waiting for organization approval
 - Terms and Conditions - there may be some positions that have expectations from the administration that they need to review and acknowledge upon being assigned to that position; you can check on the status of acknowledging those terms and conditions here
 - Messaging - organizations can use this feature to send emails or texts to members listed on the current roster (see Messaging Members guide for details)
 - Manage Positions - this is where organizations can assign/create/manage positions (see Manage Positions guide for details)
 - Invite People - this is one way to add people to the roster
 - End Membership - you can remove members individually by clicking the "select" box next to their name and clicking this button
 - End All Memberships - this will remove all members from the 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 (1) of the organization members and send them an invitation. You must use their W&M email address in TribeLink.
 - You will then select the position (2) you want to invite them to join as; in most cases you will simply invite them to be "Member." You can assign Positions after they join (instructions are in the Manage Positions guide).
 - Click "Send Invitations" button
 - You can check on the status of the invitation in the "Pending" tab on the Manage Roster page; you can resend or delete invitations as necessary.
- An individual member can send a request to join the organization through TribeLink, by clicking the "Join Organization" button located on the organization's public 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's 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.



Additional Questions?

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

[Roster Walkthrough](#)