Managing your Student Organization’s Roster in WIN

**Inviting people to your organizations’ roster in WIN**

1. Select “Roster” from left navigation, then “Manage Roster”
2. Top right hand corner of new screen, click “Invite People” button
3. Type any email addresses for students you would like to invite to join the student org
4. Which position would you like to invite them as? The default automatically invites them as a member but you can change this to “President,” “Treasurer,” or any other positions you have created in your roster (see below for instructions) under the “Invite As” drop-down list
5. Then select “Send Invitations” which will add the students to the pending tab until they accept

**Creating positions for your organization**

1. Select “Roster” from left navigation, then “Manage Positions” (also in left navigation)
2. This will bring you to any current positions for the organization
3. Click “Create New Position” button
4. Enter position name of your choice (e.g., Social Chair)
5. Choose where you want this position to appear in your roster: under “Members” or “Officers”
6. If you want this new position to be visible to the rest of the student org, which we recommend, select: “Show holders of this position on the organization’s roster”
7. Set Management Access: what the new position will have access to on the org’s WIN page
   a. If you choose “Limited Access”:
      i. Areas will appear such as, “Documents,” “Customization,” and “Events”
      ii. Choose what area(s) you would like the new position to have access to and how much access to each area (View or Full)
8. Select “Create” to save this new created position

**Assigning positions to people within your organization**

1. Select “Roster” from left navigation, then “Manage Roster”
2. For the student you wish to change or add a position to, select “Edit Positions” and choose the new position(s)

Make sure you have members of your organization assigned to the Second, Third, Fourth, Financial, and Accessibility Contact positions. This is a requirement to maintain your status as a Registered Student Organization and have access to all associated benefits. Furthermore, these positions must be filled by UW-Madison students enrolled at least half time (6 credits for undergraduate and 4 credits for graduate students).
Changing your organization’s Primary Contact in WIN

1. Select “Roster” from left navigation, then “Manage Roster”
2. If you have access to make changes to the Roster, you will see a button that says “Change” next to the Primary Contact
3. Click on “Change” button and a drop-down list will appear of all of the organization members in the Roster. Select the person and click the “Save” button

Make sure the person in the Primary Contact position is a UW-Madison student enrolled at least half time (6 credits for undergraduates and 4 credits for graduate students).

Sending messages to your organization members

1. Select “Roster” from left navigation, then “Messaging”
2. This feature allows messaging internally through WIN (and via email, based on individual notification settings) and Text Messaging – choose the tab based on what you want to send
3. In the Message tab, select “Send Message”
4. Create a message statement
5. Either select “All Members” or “Only Certain Members” to receive the message
   a. If you selected “Only Certain Members”, select which positions you want to message
   b. If you selected “All Members”
      i. Send to all members of the organization OR
      ii. Send to the majority of the org but select certain students or positions to not receive the message
         1. Select the “Edit” tab
         2. Select which members you do not wish to message to be sent to
6. Click Preview to have the message sent just to you so you can check it OR
7. Click Send and the message will go to recipients’ WIN inboxes and their preferred email address (as long as they haven’t turned off notifications in their WIN preferences)
8. To send text messages to your organization members, make sure your members have entered their mobile number and carrier in their Notification Settings
9. In the Texts (SMS) tab, select “Send Text”
10. Follow steps above in step 5 to select who you are going to send the text to
11. Compose the body (no more than 140 characters) and send
12. Note that recipients will not be able to reply to the text message you send

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