Managing your Student Organization’s Roster in WIN

Inviting people to your organizations’ roster in WIN

1. Select “Roster” from the navigation bar, then “Manage Roster” (to the right of the screen)
2. In left hand corner of new screen, click “Invite People” button (will be blue)
3. Type any email addresses for students you would like to invite to join the student org and select “Add E-mail Addresses.”
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 the navigation bar, then “Manage Positions” (to the right on the screen)
2. This will bring you to any current positions for the organization
3. Click “+ 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 the navigation bar, then “Manage Roster” (to the right of the screen)
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 the navigation bar, then “Manage Roster” (to the right of the screen)
2. If you have access to make changes to the Roster, you will see a blue edit button that says next to the current Primary Contact’s name
3. Click on the edit button and a list will appear of all of the organization members in the Roster. Select the person and click the “Select” 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 the navigation bar, 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 “Create Relay”
4. Select Recipients by clicking the “edit” button for positions and/or members.
5. Enter a Message Title in the text box.
6. Select the “Generate” Button
7. Click on the Temporary Relay Message Link which should open a new email message. Otherwise copy this address into the “to” option of an email.
8. Compose your message and send when ready.

Resource created by the Center for Leadership & Involvement (CfLI)

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