

# EngageXU: Maximizing the System

Jill Finch (she/her)

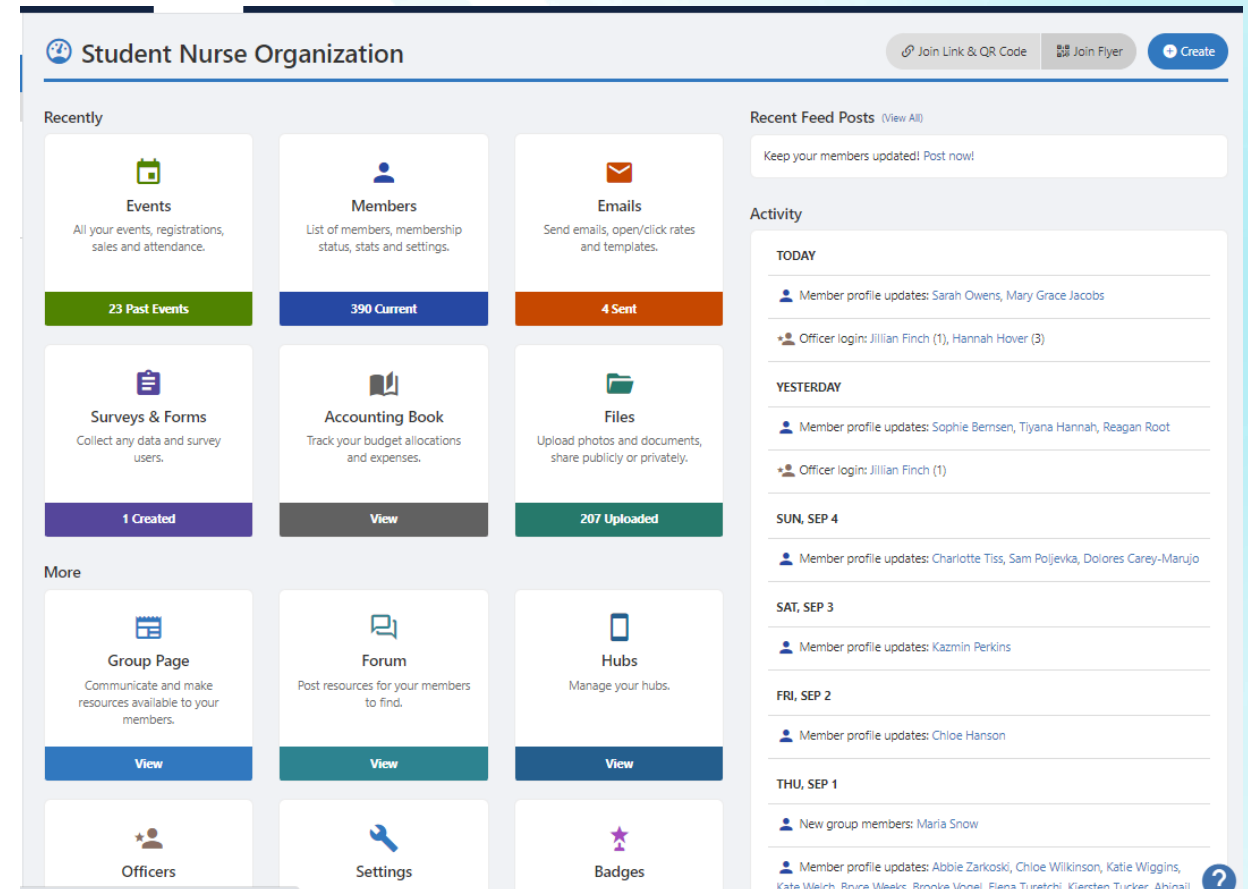
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STUDENT INVOLVEMENT  
GALLAGHER STUDENT CENTER  
COMMUTER SERVICES

# Dashboard & Feed

- Dashboard
  - Shows the areas of your group page you recently went to
  - Quick way to get to different sections of your group page
- Feed
  - Shows recent activity from members and officers



# Managing Officers

- You can add and delete officers
- Adjust permission
  - Active officer, visible to public, send emails, manage events & check-in
- Select officer position
  - This matters for approval purposes

The screenshot shows the 'Officers' management page in the ENGAGEXU system. The page title is 'Officers (10)'. The left sidebar contains a 'GROUP SECTION' menu with options: Dashboard, Activity, Settings, Officers (10), Group Page, Reports, Members, Emails, Events, Surveys & Forms, Money, Files, and More Tools. The main content area shows a list of five officers, each with a profile picture, name, position, and various settings. The officers listed are:

ID	Name	Position	Custom Position	Role	Active Officer	Main Contact	Visible Publicly
1	Kendall Hill Undergraduate Hillk12@xavier.edu Appointed On: Aug 29, 2022	Treasurer	- Select -	Empty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Maggie Weeks Undergraduate Weeksm1@xavier.edu Appointed On: Aug 29, 2022	- Select -	Apparel Coordinator	Empty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Sydney Stevenson Undergraduate StevensonS@xavier.edu Appointed On: Aug 29, 2022	- Select -	Public Relations/ Social Media	Empty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Olivia Valkner Undergraduate Valknero@xavier.edu Appointed On: Aug 29, 2022	- Select -	Peer Mentor Coordinator	Empty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Colleen Concannon Undergraduate ConcannonC@xavier.edu Appointed On: Aug 29, 2022	- Select -	Apparel Coordinator	Empty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# Managing Members

- As an officer you can add and delete members
- On the member page you can do the following:
  - Send mobile notification
  - Send emails to members

The screenshot displays the ENGAGEXU interface for managing members. The page title is 'Current Members (390)'. A search bar and various filters (Account Type, Member Tags, Sub-Group Tags, User Tags, Join Date) are visible at the top. The main content area lists five members, each with a profile card and management options.

Member ID	Name	Role	Membership Status	Membership End Date	Actions	Statistics	Settings
1	Maria Snow	Undergraduate	Current	Life-Time	Edit Member Tags, Edit Sub-Groups Tags, Contact, Joined a group	0 (0) Emails (Opened), 0 Events, Registrations, Membership	Settings, Officer
2	Alessandra Ballarin	Undergraduate	Current	Life-Time	Edit Member Tags, Edit Sub-Groups Tags, Contact, Joined a group	0 (0) Emails (Opened), 0 Events, Registrations, Membership	Settings, Officer
3	Kiersten Tucker	Undergraduate	Current	Life-Time	Edit Member Tags, Edit Sub-Groups Tags, Contact, Joined a group	0 (0) Emails (Opened), 0 Events, Registrations, Membership	Settings, Officer
4	Amanda Rising	Undergraduate	Current	Life-Time	Edit Member Tags, Edit Sub-Groups Tags, Contact, Joined a group	0 (0) Emails (Opened), 0 Events, Registrations, Membership	Settings, Officer
5	Alexandra Hamm	Undergraduate	Current	Life-Time	Edit Member Tags, Edit Sub-Groups Tags, Contact, Joined a group	0 (0) Emails (Opened), 0 Events, Registrations, Membership	Settings, Officer

# Accounting Book

Connected with the university's Banner system – Xavier's official record system.

EngageXU > Group > Accounting Book

Only Officers (admins) can access the Accounting Book for your group.

Adjust [Permissions](#) if you want to further limit access to any Officers.

Use [Show Archived](#) to view previous years' allocations, revenue and expenses.

Accounting Book					<a href="#">Show Archived</a>	<a href="#">Upload Transactions (Admin Only)</a>
Budgets		Allocations/Revenues		Expenses		Balance
FY22		\$4,233.90		\$1,086.00		\$3,147.90
Group Funds	<b>Current Balance</b>	\$0.00		\$0.00		\$0.00
<b>Total</b>		<b>\$4,233.90</b>		<b>\$1,086.00</b>		<b>\$3,147.90</b>

DISCOVER  
**develop**  
LEAD

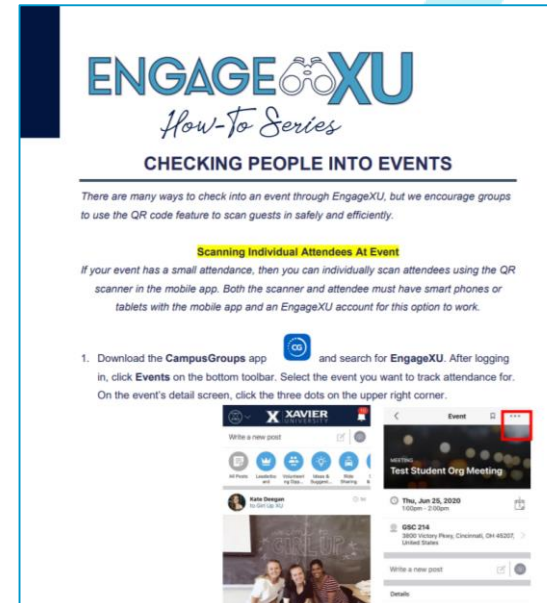
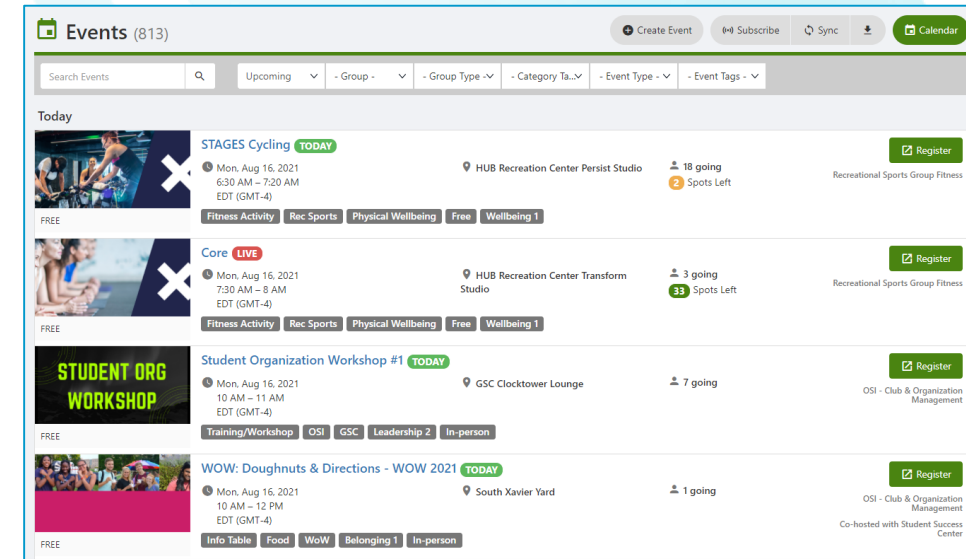
# Events & Attendance in EngageXU

- Events

- When submitting an event, you will automatically complete a supplemental form for your event to be approved.
- When submitting an event, please have as much **accurate detail** as possible, including confirmed spaces (if applicable) and promo/graphics.
- If you go back later and change details, the form will route for approval a second time.

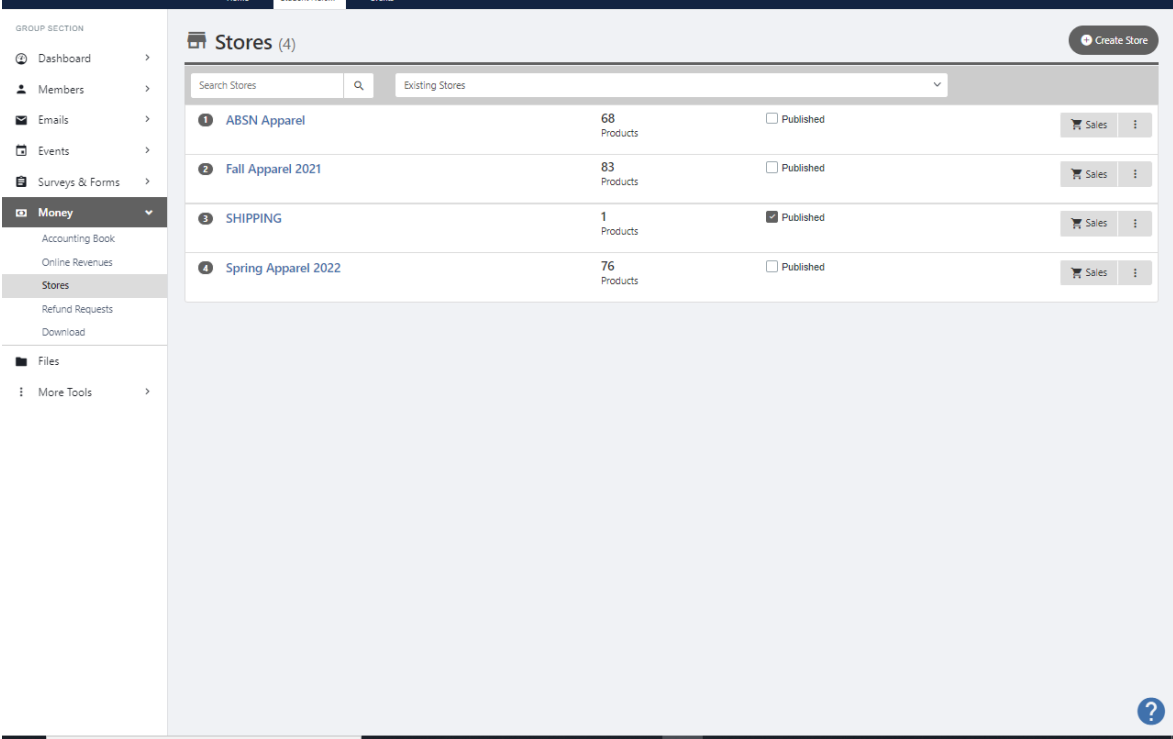
- Attendance

- Lookup and check-in attendees using your phone or a laptop
- Scan their QR codes using your phone or check-out a card swipe device from Student Involvement.
- Have the event QR code printed and allow attendees to scan and check themselves in BUT you should verify that they were successful by showing you their check-in on their phone!



# EngageXU Store

- Groups can setup a store in Engage
- Used to sell apparel to members of your group
  - As an officer you can view as seller or buyer
  - Funds go directly into your account

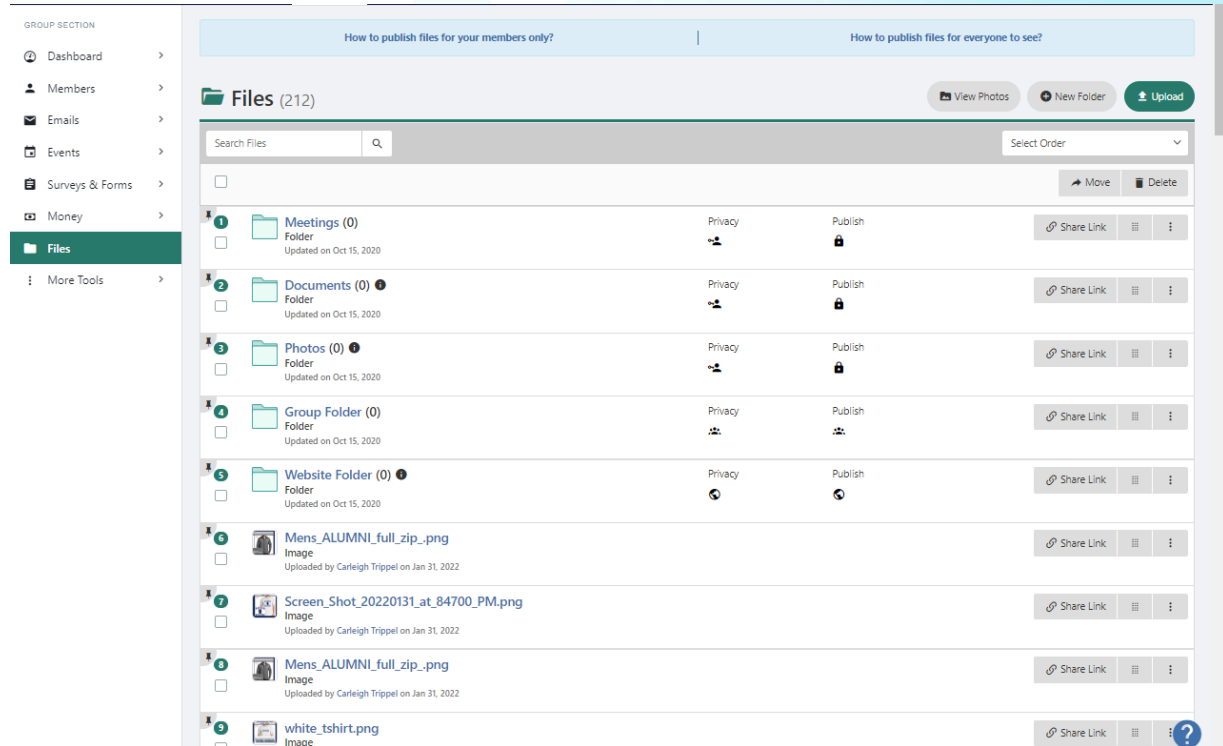


The screenshot displays the 'Stores (4)' management page in the EngageXU system. A sidebar on the left lists navigation options under 'GROUP SECTION', including Dashboard, Members, Emails, Events, Surveys & Forms, Money (selected), Accounting Book, Online Revenues, Stores, Refund Requests, Download, Files, and More Tools. The main content area shows a table of four stores with search and filter options.

Store Name	Products	Published	Actions
1 ABSN Apparel	68 Products	<input type="checkbox"/>	🛒 Sales ⋮
2 Fall Apparel 2021	83 Products	<input type="checkbox"/>	🛒 Sales ⋮
3 SHIPPING	1 Products	<input checked="" type="checkbox"/>	🛒 Sales ⋮
4 Spring Apparel 2022	76 Products	<input type="checkbox"/>	🛒 Sales ⋮

# Uploading Files into your Group

- Ability to upload files and photos into your group
- Options for files/photos
  - Public or Private
  - Share with other members





# Emailing Members

- Officers of your group can email members
  - Emails can be scheduled
  - Many different formats
  - Officers can see how many people opened emails and read them

The screenshot displays the ENGAGEXU email management interface. The top navigation bar includes the ENGAGEXU logo, a home button, a user profile for 'Student Nurs...', and an events calendar with a notification badge for '171'. The left sidebar shows a 'GROUP SECTION' menu with options: Dashboard, Members, Emails (selected), Events, Surveys & Forms, Money, Files, and More Tools. The 'Emails' section is expanded, showing sub-categories: Sent (4), Scheduled (0), Drafts (3), Mailing Lists (0), Templates (15), Emails Tracking, Delivery Status, and Unsubscribed.

The main content area is titled 'Sent Emails (4)' and features a search bar, a dropdown for '- Email Tags -', and buttons for 'Delete' and 'Generate Report'. Below this is a table of four sent emails:

		Sent on	Recipients	Opens	Unsubscribed	
<input type="checkbox"/>	<b>1</b> Pre-Volunteer Registration for Tomorrow! By: Hannah Hover To: Hannah Hover, Natalie Rohrer, Sophia Davantes, Maddy Ludwig <a href="#">Edit Email Tags</a>	Apr 1, 2022 11:11 AM	4	75% (3)	0	Opens & Clicks
<input type="checkbox"/>	<b>2</b> COMMUNITY SERVICE EVENT THIS SATURDAY By: Regina Kreuzer To: Officers Active, Officers Past, Undergraduate Unknown, Undergraduate Not applicable, Graduate Unknown, Faculty Unknown, Alumni Unknown, Alumni Not applicable <a href="#">Edit Email Tags</a>	Mar 30, 2022 10:00 AM	325	45% (148)	1	Opens & Clicks
<input type="checkbox"/>	<b>3</b> SNO Ball By: Erika Smith To: Angela Liggett, Sarah Mcgrath, Anita Alig, Riley Beausoleil, Andrea Benaicazar and 148 more. <a href="#">More</a> <a href="#">Edit Email Tags</a>	Feb 14, 2022 6:49 PM	153	71% (110)	0	Opens & Clicks
<input type="checkbox"/>	<b>4</b> STONES EVENTS CANCELLED By: Regina Kreuzer To: Regina Kreuzer, Natalie Rohrer, Olivia Murray, Stephanie Ghzyel, Linae Ford and 2 more. <a href="#">More</a> <a href="#">Edit Email Tags</a>	Oct 10, 2021 10:46 AM	7	57% (4)	0	Opens & Clicks



# Thank you for attending!

Stop by and see us any time in Gallagher 210

