

Making the Most of EngageXU

Dustin Lewis (he/him)

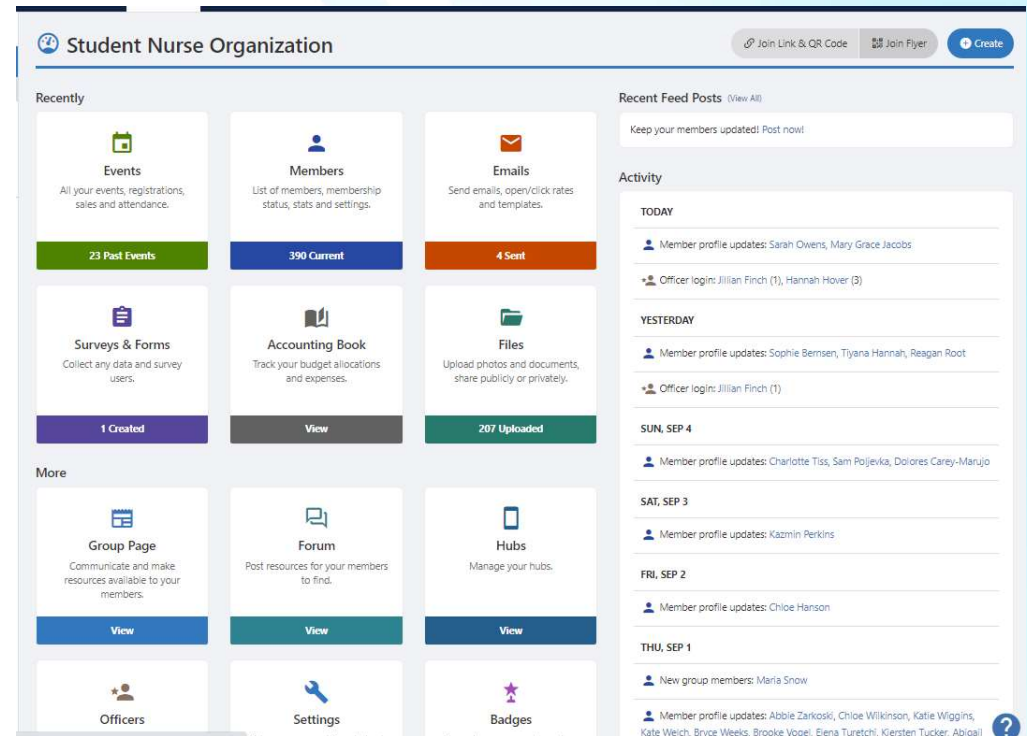
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STUDENT INVOLVEMENT
GALLAGHER STUDENT CENTER
COMMUTER SERVICES

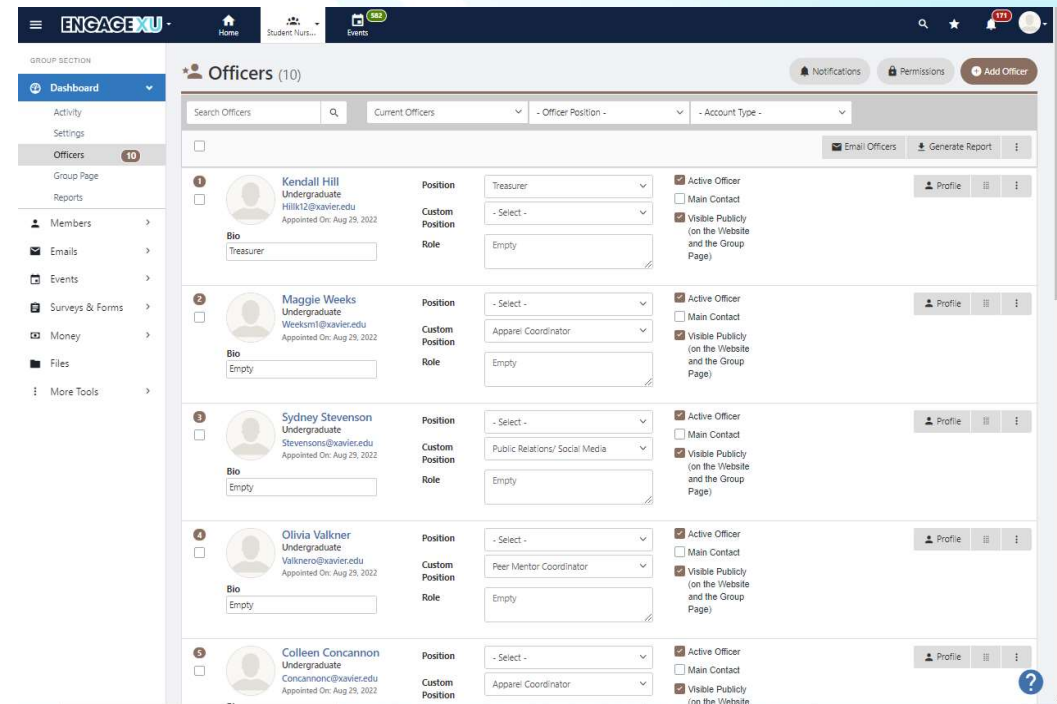
Dashboard & Feed

- **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



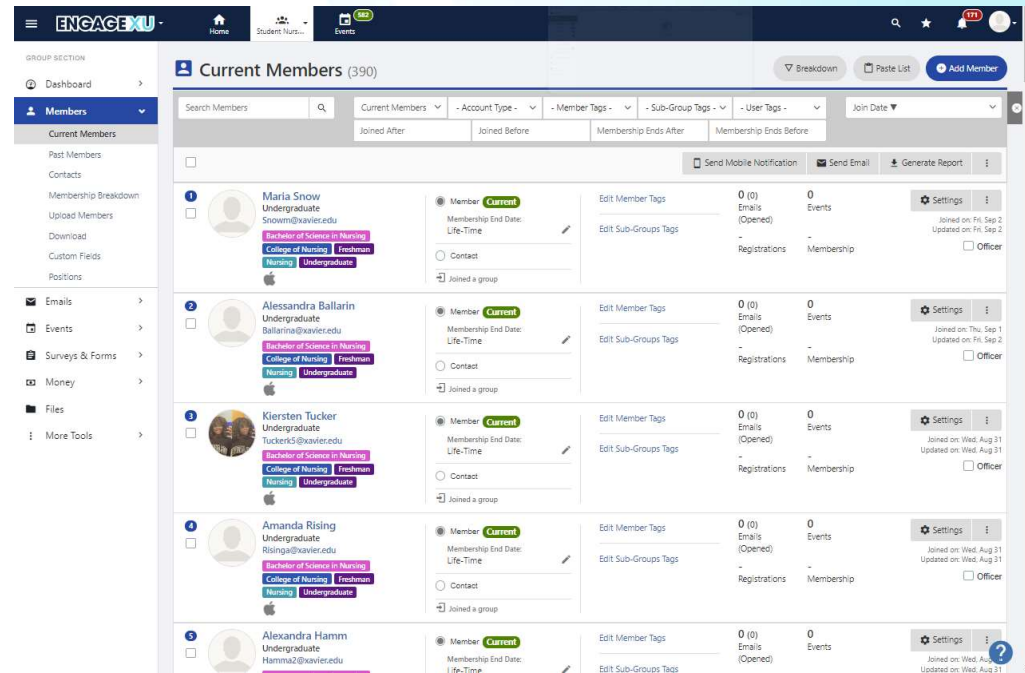
Managing Officers

- 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



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



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				
		Show Archived		Upload Transactions (Admin Only)
Budgets	Allocations/Revenues	Expenses	Balance	
FY22	\$4,233.90	\$1,086.00	\$3,147.90	
Group Funds	\$0.00	\$0.00	\$0.00	
Total	\$4,233.90	\$1,086.00	\$3,147.90	

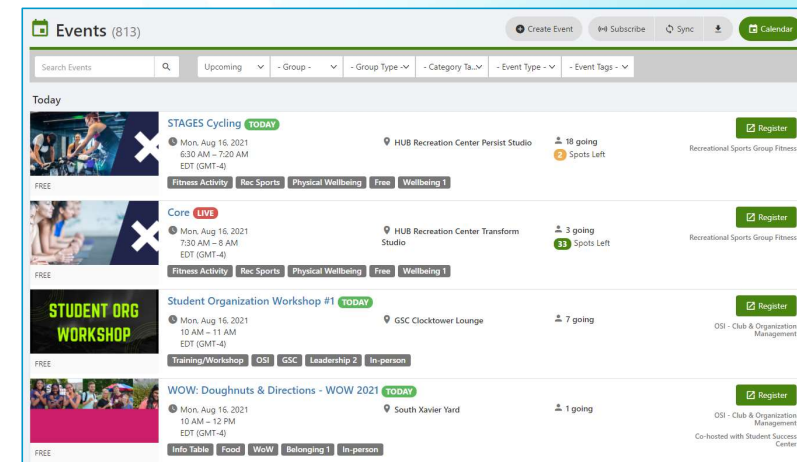
Current
Balance

discover
DEVELOP | LEAD

Events 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.



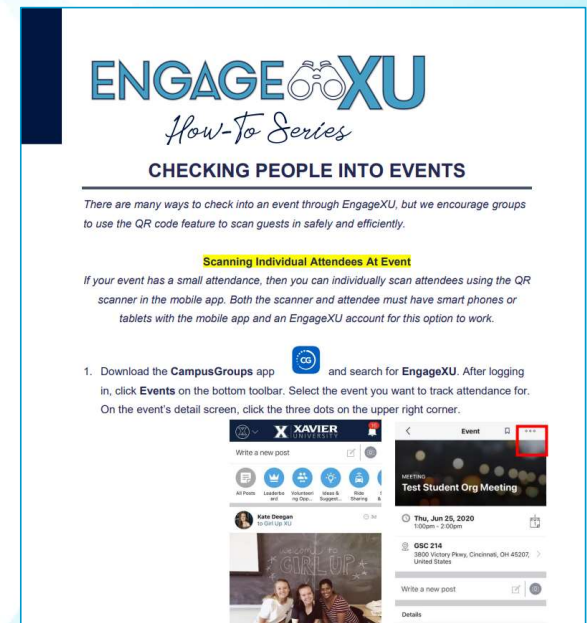
Submitting Activities in EngageXU

- All events must be submitted at least 2 weeks (14 days) prior to the activity or it will be denied – no exceptions.
- All advances, purchases, and reimbursements must be submitted after the event has been fully approved or they will be denied.
- Travel Forms should be submitted 3 weeks in advance.
- Speakers are a minimum of 2 weeks

Tracking Attendance in EngageXU

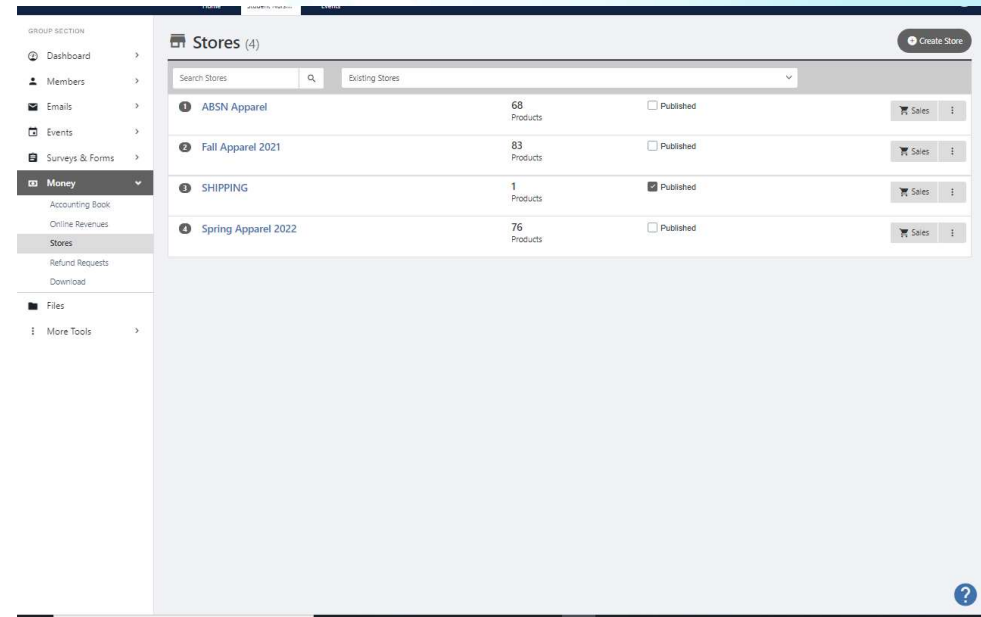
- Attendance

- Lookup and check-in attendees using your phone or a laptop
- Scan their QR codes using your phone
- 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!
- Gather names on paper AND remember to enter them into the event within 48 hours afterward



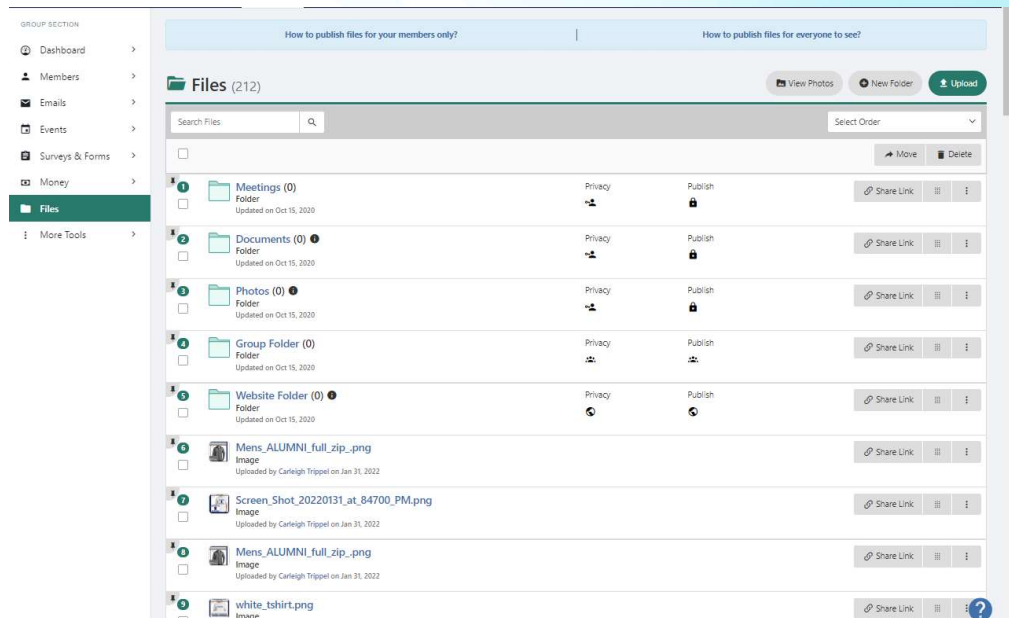
EngageXU Store

- 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



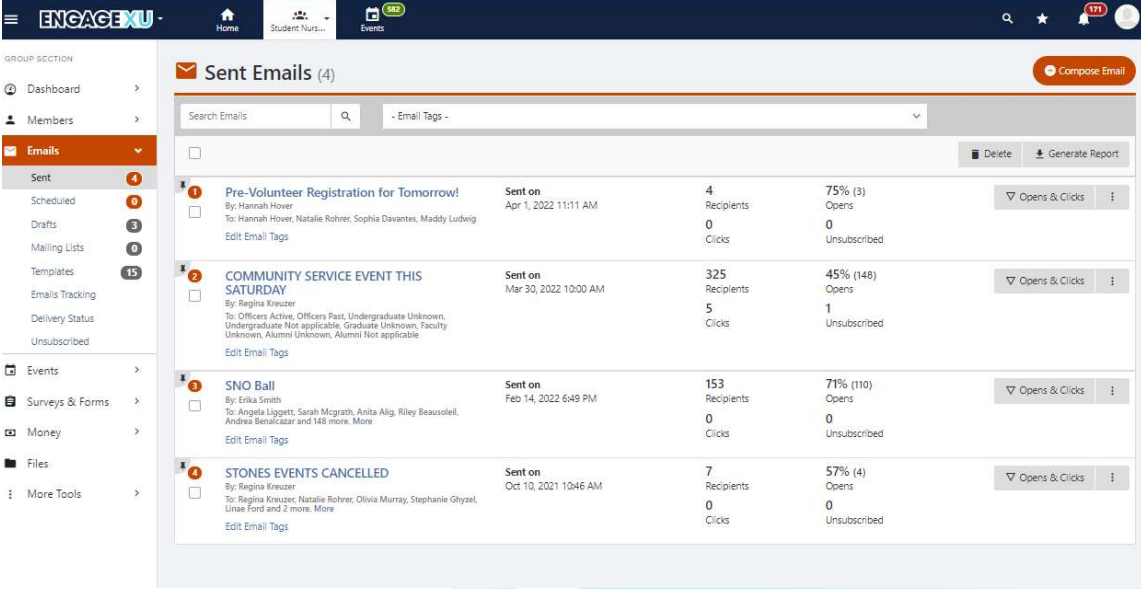
Uploading Files into your Group

- 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



ENGAGEXU

GROUP SECTION

- Dashboard
- Members
- Emails**
 - Sent (4)
 - Scheduled (0)
 - Drafts (3)
 - Mailing Lists (0)
 - Templates (15)
 - Emails Tracking
 - Delivery Status
 - Unsubscribed
- Events
- Surveys & Forms
- Money
- Files
- More Tools

Sent Emails (4)

Search Emails

Delete Generate Report

		Sent on	Recipients	Opens	Clicks	Unsubscribed	Opens & Clicks
1	Pre-Volunteer Registration for Tomorrow! By: Hannah Hover To: Hannah Hover, Natalie Rohrer, Sophia Davantes, Madty Ludwig Edit Email Tags	Apr 1, 2022 11:11 AM	4	75% (3)	0	0	Unsubscribed
2	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 Edit Email Tags	Mar 30, 2022 10:00 AM	325	45% (148)	5	1	Unsubscribed
3	SNO Ball By: Enlia Smith To: Angela Liggett, Sarah McGrath, Anita Allg, Riley Beausoleil, Andrea Benalcázar and 148 more. More Edit Email Tags	Feb 14, 2022 6:49 PM	153	71% (110)	0	0	Unsubscribed
4	STONES EVENTS CANCELLED By: Regina Kreuzer To: Regina Kreuzer, Natalie Rohrer, Olivia Murray, Stephanie Ghysel, Linnea Ford and 2 more. More Edit Email Tags	Oct 10, 2021 10:46 AM	7	57% (4)	0	0	Unsubscribed



Thank you for attending!

Stop by and see us any time in Gallagher 210