

Branch Administrator Resource Guide

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Information

As a brand new branch administrator, you have access to all kinds of great tools to help you manage organizations and activities within your branch. We've assembled this guide to help you locate the most important resources to get the ball rolling within your branch. Click on any of the links below to view more about a specific topic.

What is a Branch Administrator?

Read our [Branch Administrator Overview](#) for a summary of what Branch Administrators can do and learn how to assign additional Branch Administrators.

Depending on your specific access and needs, your community administrator may also choose to give you certain forms of [limited access](#) beyond your branch - these additional privileges are not covered in this article, so do not be afraid to use the search functionality or refer to your consultant for more information.

Branch Administrator Training

In order to ensure you don't miss any great tools and features in your branch, be sure to watch the following three core trainings:

- [Branch Administer Training 1](#): Engage Navigation & Organizational Tools
- [Branch Administer Training 2](#): Organization Management & Registration
- [Branch Administrator Training 3](#): The Event Process

In order to access these trainings, you will need to create an account on our training site. If you need a little extra help, be sure to check out this [brief video on navigating the training site](#).

Navigating Engage

As a branch administrator, you have access to the *Explore* and *Manage* views of Engage. To get started, be sure you are comfortable [navigating](#) between these views.

Managing Organizations

As a branch administrator, you have access to most tools within our [Managing Organizations section](#). In particular, start by reviewing:

- [Organization Statuses, Types, and Categories](#)
- [The Life Cycle of Managing Organizations](#)
- [Managing the Organization Re-Registration Process](#)

Managing Events

Start with the [basics](#), then review your [event submission process](#) and make sure you understand [how to review Events](#) as well.

Other Tools

Don't forget that your branch is its own organization too, and will act as an example to your other users! Study up on [Forms](#) and other [important organization tools](#) at your disposal.

You also have the unique ability in your branch to [configure the notifications](#) users will receive related to registration submissions, events, and more from organizations in your branch.

Training Other Users

As you introduce general users to the organizations within your branch, you may decide to offer training for your portion of the campus community. Consider the following resources as a first step.

- Our [Student Leader Resource Guide](#) is a great first stop for any organization officer
- Familiarize yourself with [Positions & Rosters](#) so you are equipped to answer organization officer questions, as well as the [Account/User Drawer](#) for more general questions.
- Consider [using Engage itself](#) to support your training efforts!
- Whether your branch works with students or staff, our [Train the Trainer](#) webinar provides great tips for training a variety of offices on Engage, or you can consult our [Resources for Functional Areas](#) for videos of more specific training content

KB Product

Engage

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