



An Agency’s Guide to Registering and Using EngageUAlbany

Created by: Cheryl Simmons, Modified on: August 13, 2018

Are you an agency?

You are an agency if you are a nonprofit or charitable organization that has volunteer opportunities or “needs” that you would like students, faculty, or staff to fulfill. If you are an agency that has registered through *United to Volunteer* – The United Way of the Greater Capital Region’s platform - you do not need to reregister as we are proudly collaborating and your needs will be posted on both platforms.

If you are a student group looking to promote opportunities and track volunteer hours for you and your members please check the Departments & Student Groups tab for more information.

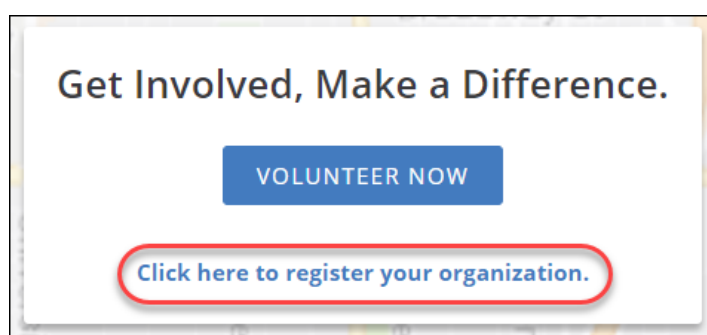
Registering your agency

There are two ways to access the agency registration page of EngageUAlbany. Both ways begin right on the home page.

Note: To register your agency, you must not be logged in. If you are already logged in, log out to access the landing page. You'll be asked to log back in as part of your registration.

Method #1

Go to [EngageUAlbany](#). Under the Volunteer Now bar, you'll see the **Click here to register your organization** link.



Click this link to access the registration form!

Method #2

1. Go to [EngageUAlbany](#) and click the **Login** button, located in the top right-hand corner of your screen.
2. Under the **Login** heading, click the link for **Agency Login Here**.

Either of these methods will take you to the fields needed for signing up an agency. Once you've completed these fields, click **Request Account**.

Note: The email address you provide will be associated with the primary agency manager unless otherwise specified.

Note: Clicking **Request Account** indicates that you have read and agree to the site's terms and conditions, if applicable.

You should be taken directly to your agency manager page. If you aren't, just click the **Manage Agency** button at the top of your screen.

You are now ready to create your agency's profile.

Your Agency's Profile Page

Your agency's profile page contains important information volunteers need in order to:

- Know your agency's purpose
- Contact your agency
- Locate your agency
- View and sign up for your agency's volunteer opportunities
- Learn about and plan to attend your agency's events

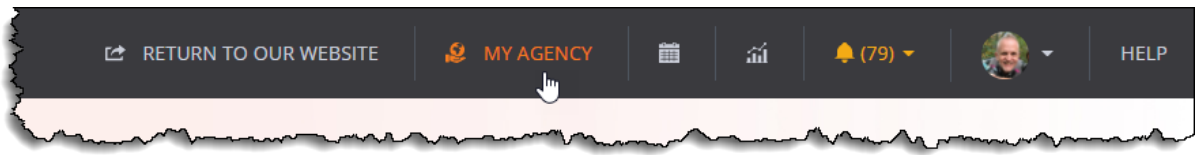
After signing on as an agency in EngageUAlbany, update your agency's profile page as soon as you can.

Accessing the Agency Management Area

The agency management area is where you can edit your agency's profile, add and edit needs and events, and approve volunteer hours that have been submitted.

To access the agency management area:

1. Log in to EngageUAlbany
2. Click the **My Agency** button at the top of the screen.



Note: If you manage two or more agencies, the button will say **Manage Agencies**. Clicking it will display list of your agencies, and you can select the name of the agency to edit.

Editing Your Agency's Profile

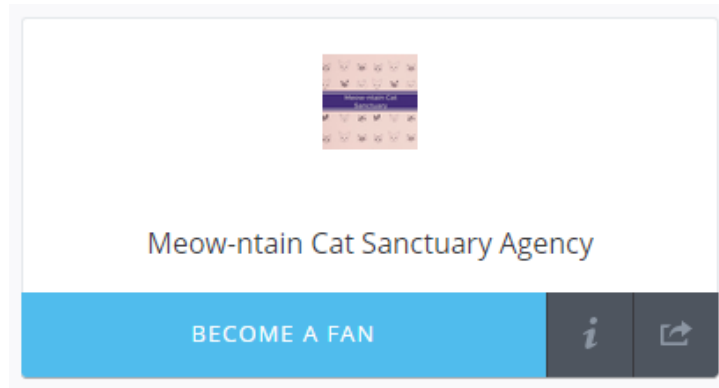
Your agency's profile is divided into eight main areas:

- [Agency Logo](#)
- [Agency Managers](#)
- [Basic Information](#)
- [Contact Information](#)
- [Location](#)
- [Links](#)
- [Descriptions](#)
- [Photos](#)

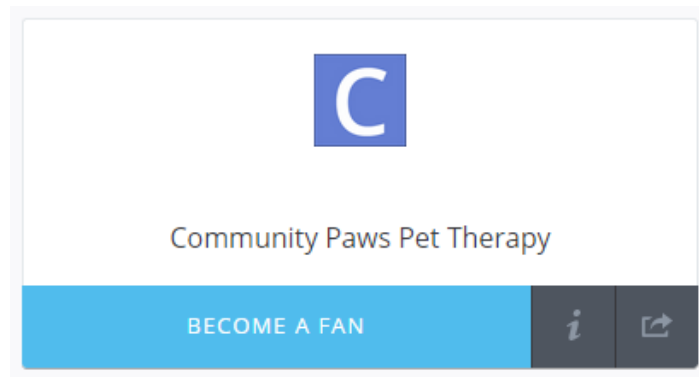
Most areas contain information fields, and all have an **Update Agency Info** button. Clicking this button saves all of the information in your profile, regardless of what areas have been edited since the last update.

Agency Logo

Your agency logo is an important part of your agency profile; it appears in agency listings, as well as on the main page of every need and event you post. It shows up as follows in grid view:



If you don't upload a logo, then the first letter of your agency's name will be displayed in a colored box in place of a logo:

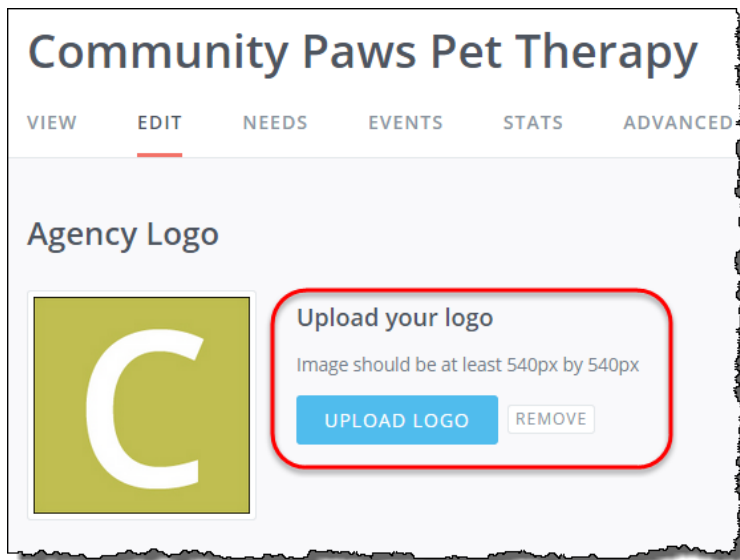


Note: The color of the box changes with each new view.

Uploading Your Agency's Logo

To upload your agency's logo to EngageUAlbany:

1. Go to your agency management area.
2. Under the "Agency Logo" heading, click **Upload Logo**.



3. Browse to the logo, select it, and click **Open**.

Note: The image should be at least 540 pixels by 540 pixels. You'll be able to resize it in the next step.

4. (as needed) Click and drag the borders to resize the image.
5. Click **Save Agency Logo**.

Note: To remove a logo, click **Remove** under the **Upload your logo** heading. To replace an existing logo, first remove it and then upload a new one.

Making Your Logo Appear Larger

Some logos may appear larger than others in the agency card. Here are a couple of tips for making your logo appear as large as possible in the space provided:

- Use a logo that is roughly as wide as it is tall. Perfect squares and circles are best.
- Use the cropping tool to crop out as much surrounding white space as you can, or crop the photo before uploading it.

Agency Managers

In EngageUAlbany, an *agency manager* is someone who can access the agency management area for a particular agency. This individual can edit the agency's profile, post needs, post events, and approve hours on behalf of the agency.

Each agency must have at least one manager. For agencies with multiple managers, one person serves as the primary agency manager while all others are secondary.

This section of this article covers [the difference between primary and secondary agency managers](#) and explains how to [add a new manager](#), how to [delete a manager](#), and how to [change a manager's status from secondary to primary](#).

Primary and Secondary Managers

To register an agency, you must submit an email address. The system associates this email address with the *primary agency manager*.

In addition to the agency-manager capabilities mentioned above, a primary agency manager can add and delete secondary managers.

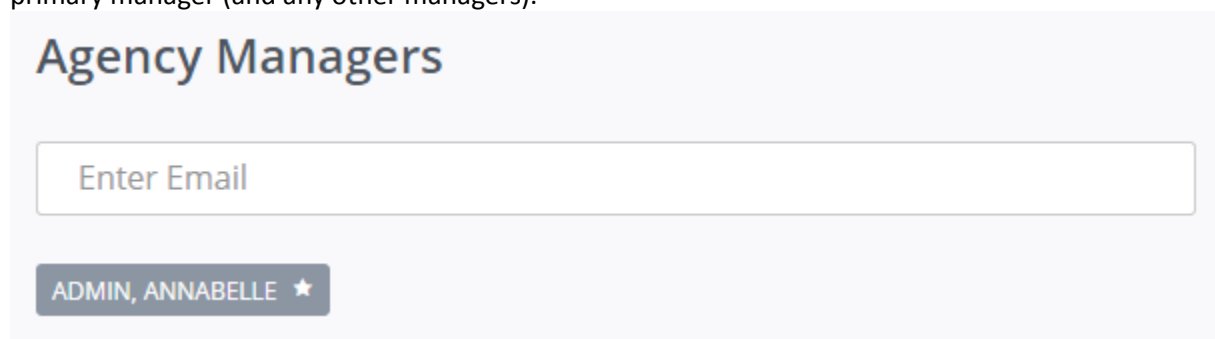
Secondary agency managers can be added to an agency once it's been created. They have all of the agency manager capabilities mentioned above but cannot add or delete other managers of their agency.

Note: EngageUAlbany allows up to 12 managers per agency.

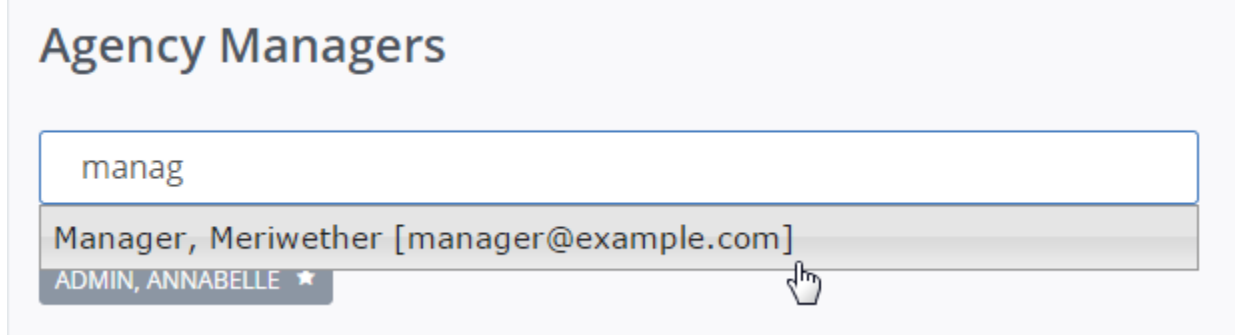
Adding a Secondary Manager to an Agency

To add additional managers to an agency:

1. Go to your agency management area. Under the "Managers" heading, you'll see the name of the primary manager (and any other managers).



2. Begin typing the email of the individual to be added. If that email is registered with EngageUAlbany, it will show up and you can select it.



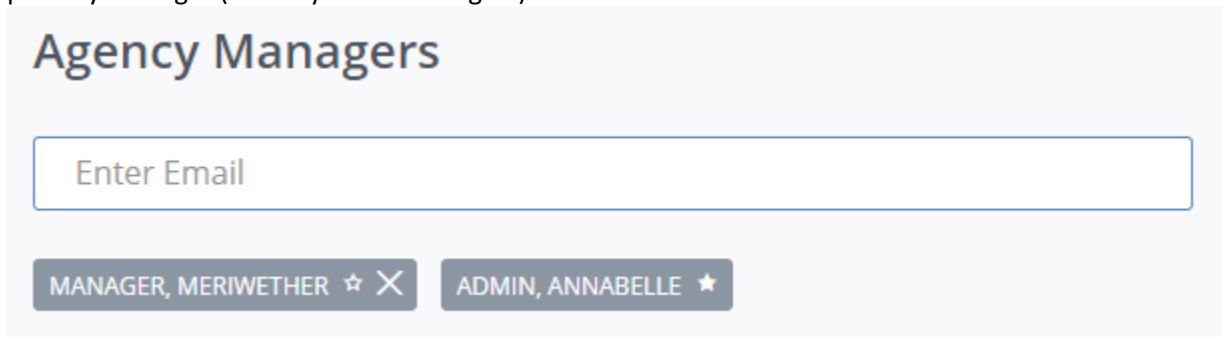
It is not necessary to click the **Update Agency Info** button; the manager information is saved automatically.

Deleting a Secondary Manager

Only a primary manager (or an admin) can delete a secondary manager from an agency. The instructions below pertain specifically to agency managers who are the primary managers for their agencies.

To delete a secondary manager:

1. Go your agency management area. Under the "Managers" heading, you'll see the name of the primary manager (and any other managers).



In the image above, note that Annabelle Admin has a solid star next to her name, indicating that she is the primary manager. Meriwether Manager has a clear star, indicating that he is the secondary manager.

2. Click the **X** next to the secondary manager's name to delete it, and then click **Yes** to confirm the deletion.

Making a Secondary Agency Manager Primary

The primary agency manager has the ability to make someone else the primary manager for their agency.

Important: Each agency has only one primary manager. If, as the primary manager, you make someone else the primary manager, you will automatically become a secondary agency manager and will no longer be able to make changes to the other managers listed.

To change a secondary agency manager to a primary one:

1. Go to your agency management area. Under the "Managers" heading, you'll see the name of the primary manager (and any other managers).

Agency Managers

MANAGER, MERIWETHER ☆ ✕

ADMIN, ANNABELLE ★

Note that the primary manager (Annabelle Admin) has a solid star next to her name. This solid star indicates primary manager status, while the outline of a star (such as the one next to Meriwether Manager's name) indicates secondary manager status.

2. Click on the secondary manager's star outline, and then click **Yes** to confirm that you want to make that individual the primary manager.

Once you have given someone else primary manager status, you will no longer see the **X** that allows you to delete another manager. You'll also see only the solid star that indicates the primary manager. In the example below, we are still logged into Annabelle Admin's account, but she is no longer the primary agency manager.

Agency Managers

ADMIN, ANNABELLE

MANAGER, MERIWETHER ★

Basic Information

The "Basic Information" section of the profile contains the fields described below.

Agency Name	The name of your agency; completed automatically based on your entry when signing the agency up.
Customize Link	<p>This field helps you create a direct link to your agency's profile page. The link will consist of:</p> <ul style="list-style-type: none">(1) the site's web address(2) /agency/detail/(3) the unique label that you enter in this field <p>For example, if Community Paws Pet Therapy's profile is located on the albany.galaxydigital.com site and the agency manager enters "cppt" as the customized link, their profile page will be located at albany.galaxydigital.com/agency/detail/cppt.</p>
Hours of Operation	Because this is a free-text field, you do not have to use any special format to enter days and times.
Causes	Use this field to identify the causes your agency supports. Your selections will be used to match volunteers with agencies that interest them.
Agency Video	Once you've uploaded your agency video to YouTube or Vimeo, enter your video's YouTube or Vimeo URL here.

Contact Information

The "Contact Information" section of the profile consists of fields described below. The Email, Phone, Fax, Contact Person, and Contact Title information is displayed publicly on your site.

Email	Enter the email address your agency uses for general inquiries.
Phone, Fax	Enter your agency's phone and fax (if applicable) numbers.
Contact Person	Enter the name of the agency's primary contact.
Contact Title	Enter the primary contact's title.

Note: A person does *not* have to have an EngageUAlbany user account in order to be listed as a primary contact.

Enter the emails you would like to have copied on all need responses and RSVPs sent to the agency managers.

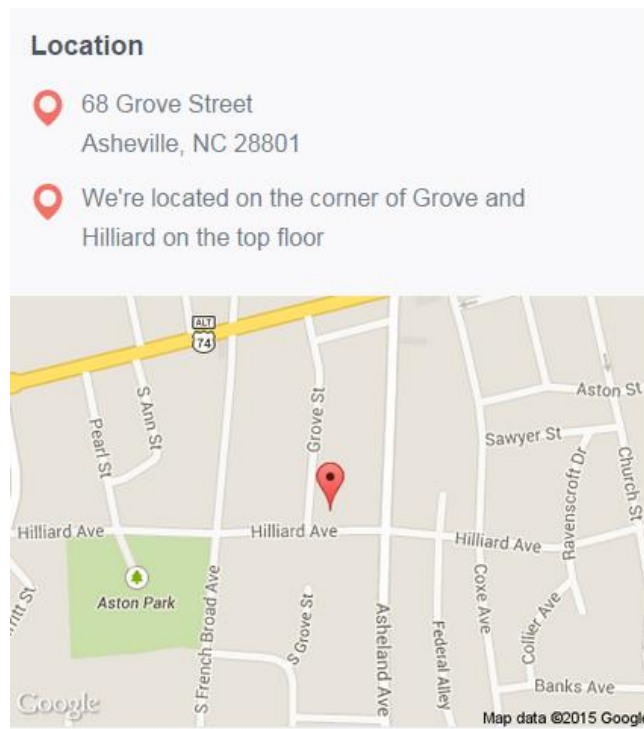
Additional Contact Email Addresses

Note: A person does *not* have to have an EngageUAlbany user account in order to be listed as an additional agency contact.

Important: The email address entered here is for viewers who wish to contact your agency by email. It is *not* used for automated notifications. Only the agency managers and additional contacts receive automated EngageUAlbany notifications.

Location

The address you enter here will be shown on the map on your profile page. Here's an example from one agency's profile page:



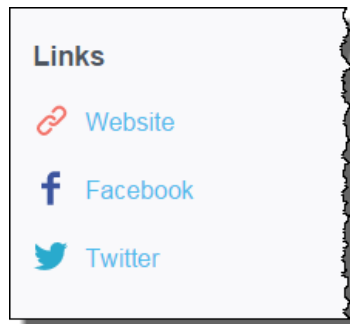
Note: If you don't want your address to be public or shown on a map, you can enter a P.O. Box instead of a street address.

The **Additional Location Information** field can be used for the following types of information:

- Parking instructions, if needed
- Landmarks to help people find you
- Instructions for getting to a suite or other office within a larger building
- Information about multiple locations

Links

Use this section to provide your website URL, along with your Facebook and Twitter pages. These links will appear as *Website*, *Facebook* (with Facebook logo), and *Twitter* (with Twitter logo), respectively.



Descriptions

The "Descriptions" area of your profile consists of two sections:

- **Who We Are** - Your agency's history, mission, and vision
- **What We Do** - Your agency's programs and the various efforts your agency take to realize its vision

Because the descriptions are so important, they appear at the top of your agency profile page, next to the logo.

Agencies > S.T.E.A.M. Club

S.T.E.A.M. Club

BECOME A FAN

Who We Are


We provide engaging after school programming that excites and motivates learners to become fully engaged with their environment.

What We Do

We focus on Science, Technology, Engineering, Arts, and Math programming. Ongoing projects are the primary focus but one-time projects happen as well. We welcome all students for any amount of time. Vouches are available from school office.

Agency Needs

Mar 31, 2015



Causes

Tip: For easier viewing, try to limit your descriptions to just a couple of paragraphs.

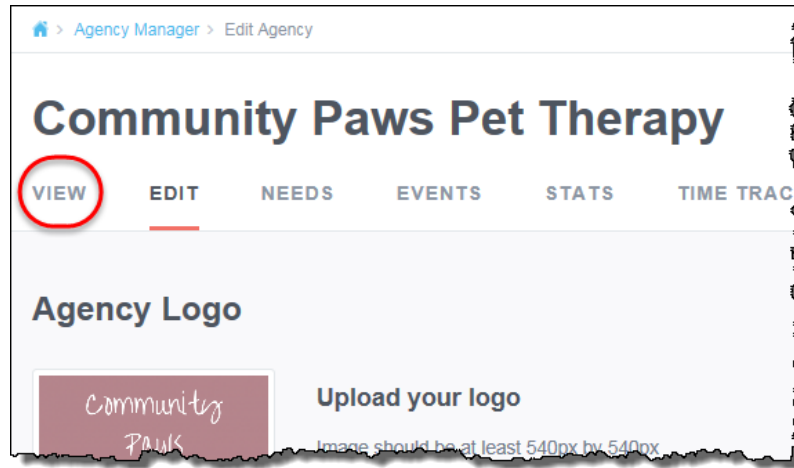
Photos

You can add up to 12 agency photos. Photos are displayed in slideshow format at the bottom of the page. Photos must be image files (jpg/jpeg, png, or gif) in order to load properly.

To add a photo:

1. In the "Photos" section of your profile editing page, click **Add New Photo**.
2. Browse to the photos you want to add and select them.
3. Either click **Open** or simply drag and drop the photos into the **Add New Photos** box. This action adds the pictures to your page.
4. Click **Okay**, or click **Refresh Now** to view the pictures on your profile editing page.

To see the slideshow of your photos, scroll to the top of the page and click **View**.



The photos are automatically displayed as a slide show, but a user can also manually scroll through them by clicking the arrows in the bottom left-hand corner of the picture.

