

# Executive Team

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## Updating Your Executive Team

On Rubric, executive management is only available through two paths. The **club account**, or an individual with an executive role that has **society setting** permissions.

If you have not been set as an executive with society settings permissions, or this is your first time accessing the group page, you will need to use the **club account**. If you **have** been set as an executive with society settings permissions, you can switch to the club account via your student account and edit the executive team.

You will first need to login to your account on [hellorubric.com](https://hellorubric.com).

- If you are logging in with the club account - use the **Club Portal** from the Login drop-down.
- If you are logging in as a user - use the **Student Portal** from the Login drop-down.
  - From there, click on your icon in the top-right corner, and switch to the club management page.

Then, navigate to the executive setting page.

1. Click on the black icon in the top-right corner of the screen.
2. Select "Society Exec" from the drop-down list.

There are two tables in this section. The top table is for creating or editing pre-existing **roles**.

1. Click "Create New Role" for new positions.
  - Fill in the fields - the **name** of the position (per your constitution) and the **permissions** of the role.
  - Any given role can be assigned to **multiple** people (i.e. two Co-Presidents can both be given the same permissions, using one President role).
2. You can also edit the current positions.
  - Click on the three dots located to the right side of a position, and click "Edit" position.
    - The one roles that **cannot** be deleted, or have their name changed, are the default ones set by Rubric - President, Treasurer, Secretary, and Vice President.

The bottom table is for **assigning** executive roles to your members.

1. Click "Add club executive" to assign a new role to a member.
  - This field requires their name, **UAlberta** email, and the role assigned - **do not add their student ID number**.
2. Click the three dots next to a listed member to change their assigned role, or remove them from the executive list.

These individuals can now access the **club management page** by logging into their student accounts and switching the page view. The **level of access** a given executive is permitted is based on their **permission setting**.

## Executive Role Permissions

Below you will find a comprehensive breakdown of what permissions, when assigned to an executive role on Rubric, give what level of access to your organization's page.

<b>COMMUNICATIONS</b>	Communications gives access to messaging features on Rubric ( <b>SMS/Email</b> in the top navigation bar). This includes sending out mass messaging to members, and tracking the engagement of your audience.
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<b>MEMBERSHIPS</b>	Memberships gives access to managing who joins your group, and their information ( <b>Memberships</b> in the top navigation bar). This includes tracking retention, creating and editing membership types, importing/exporting rosters, ending memberships, and seeing individual member information.
<b>SOCIETY SETTINGS*</b>	Society Settings gives access to the administrative features of your group ( <b>Society Settings</b> from the top-right icon). This includes editing the executive team, executive permissions, the club's primary email, the icon of your club, and the bank account details.
<b>UNION FORMS</b>	Union Forms gives access to all forms involving the Student's Union ( <b>Forms</b> in the top navigation bar). This includes registration submissions, verification letter requests, newsletter submissions, event submissions, and club information requests. You can also view all past submissions to any union forms.
<b>EVENTS</b>	Events gives access to the event details of your club ( <b>Events</b> in the top navigation bar). This includes recently hosted event details, selling tickets, rejected event details, revenue and spending, attendance, and more.
<b>MERCHANDISE</b>	<i>This feature has yet to launch on our Union's Rubric.</i>
<b>SETTLEMENTS</b>	Settlements gives access to the organization's financial information ( <b>Funding</b> in the top navigation bar). This includes all payments, pending payments, or reimbursements made to the club using Rubric. Note that this feature can only be used when <b>bank information</b> is inputted to the society settings.

*\*We **strongly** recommend that the society settings only be given to the President (or equivalent) for the organization's security purposes.*

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