

Getting Started



Congratulations on your new ClubRunner site!

Your club is about to enjoy all the timesaving features of ClubRunner. This chapter is for clubs who have just subscribed to ClubRunner and need to get their website up and running. There are a few configuration tasks that need to be done.

Introduction

Whoever is using this guide to set up the club will need to have Site Administration access. If you are not the initial contact person during the subscription process, then please ask that person to grant you site administration access.

Get my username and password

There is an easy automatic way to get your username and password if you are a new user, or have forgotten your password.

- Click on the **Login** tab.
- In the **Members Login** page, click on **Forgot your password?**.

TIP

If this process does not work, or you have trouble logging in, contact support@clubrunner.ca with your name and club.

Member Login

Welcome members.
Please log in with your Login Name and password for access to your club's services and latest news and information.

Login Name:

Password:

Forgot your password?
New User? Click the [above link](#) to have your password sent to your email address.

- In the **Get Password** page, type in your **last name** and **email address**.



Get Password

Enter your Last Name and email address to receive your login name and password immediately by email.

Last Name:

Email Address:

- Click on the **Get Login Info** button.
- Check your email for your default login name and password.

Note: *Be sure to change your password when you login to keep your account secure!*

Why this might not work:

The system will perform a security check by matching the last name submitted with the email address provided. If the email address we have on file (either inputted by your club director or imported from the District) is different from the one you provide, we have no way of knowing you are yourself. In this case, you will have to get your username and password from ClubRunner support by emailing support@clubrunner.ca.

How to login

- Click on the **Login** tab.
- In the **Members Login** page, enter your username and password.



Member Login

Welcome members.
Please log in with your Login Name and password for access to your club's services and latest news and information.

Login Name:

Password:

Forgot your password?
New User? Click the above link to have your password sent to your email address.

- Click on the **Login** button.

Alternatively, you will also see a **Login** link underneath the **greeting** that appears on the Home Page of the site. Clicking on this link will take you to the same **Members Login** page as the tab.

My Club's Information

Verify that any information displayed about your club is accurate. This information is also automatically displayed on your District site. It is also important to verify that the generated map is accurate, which depends on how your meeting address is inputted.

Define the club's meeting place and time

Next you will input your club's meeting time and other information.

1. Click on the **Admin** tab.
2. Click on **Edit Club Info & Settings** in the **For Administrators** section.
3. This will bring you to the **Update Club Information** page, as shown below:

TIP

Make sure your meeting address is an actual street address, not just a location. This data will be used to display your meeting location on a map on both your home page and District club directory.

Update Club Information

Club Name:	<input type="text" value="Rotary Club of Edmonton Future"/>
Home Page Greeting:	<input type="text" value="Welcome to our club!"/>
First Month of Year:	<input type="text" value="July"/>
Meeting Week Day:	<input type="text" value="Friday"/>
Meeting Time:	<input type="text" value="12:00"/> <input type="radio"/> AM <input checked="" type="radio"/> PM <small>eg. hh:mm</small>
Meeting Place:	<input type="text"/>
Meeting Address:	<input type="text" value="100 main st"/>
Unit/Suite:	<input type="text"/>
City:	<input type="text" value="Edmonton"/>
Province/State:	<input type="text" value="AB"/>
Zip/Postal Code:	<input type="text" value="V1G 3Y6"/>
Country:	<input type="text" value="Canada"/>
Bulletin Editor:	<input type="text" value="Aaron Aaronson"/>
Bulletin Style:	<input type="text" value="Style A"/>
Bulletin Title:	<input type="text" value="eBulletin"/>
Home Page Style:	<input type="text" value="Corporate"/>
Colour Scheme:	<input type="text" value="Rainforest"/> View Color Schemes
Club Motto:	<input type="text" value="Service Above Self"/>

4. Verify your club name, meeting day and time, and address.
5. Choose a member to be the **Bulletin Editor**. This is for the purpose of setting a "reply-to" email when mailing out the bulletin.
6. Click on **Save**.

To check if the map will display properly:

1. Click on **Home** at the top.
2. Click on **Map** located at the centre of the homepage, underneath the address. Verify that the map is displaying properly.

If the map is incorrect:

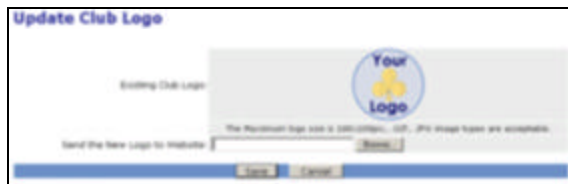
There may be a spelling mistake in the address, or a part of the address missing, such as the city or province. Go back to the top of this section of this guide and follow the steps again to input your club address. You may have entered the street address in the "Meeting Place" field instead of the "Meeting Address" field. If you still encounter problems with your map, you can create and upload your own map image by following these steps:

- Click on the **Admin** tab.
- Click on **Upload/Remove Meeting Venue Map**, located under the **For Administrators** section.
- Click the **Browse** button.
- Choose either an image or PDF document that displays your new map, and press **Open**.
- Press the **Save** button.

Upload the club logo

Your club logo appears on the home page, and can be any GIF or JPG image file. To change your logo:

1. Click on the **Admin** tab.
2. Click on **Edit Club Logo**, located under the **For Administrators** section. The next page will display your current logo.



3. To upload a new image, click on the **Browse** button and choose the new image file from your computer.
4. Click on **Save**.

Define club executives and directors

Now that you have logged in, you can verify your club's current executives and directors.

1. Click on the **Admin** tab located at the top of the home page.
2. Click on **Edit Executives & Directors** in the **Membership Manager** section, as show below.



3. This will bring you to the **Club Executives and Directors** page. Click on **Edit** next to the executive position you wish to change.
4. Select the **member** that corresponds to the executive listed in the title.
5. Click on **Save**. Repeat the above steps until you have defined all your club executives.

TIP

You do not need to fill in all the executive positions. Only the ones with a member assigned will show on your home page.

Add executive and director positions

You can add new executive positions to your site. Please note that these positions are shared across your District.

1. Click on the **Admin** tab located at the top of the home page.
2. Click on **Edit Executives & Directors** in the **Membership Manager** section.
3. Click on **Add New Position**, located at the top right.
4. Type in the **title** of the new position.
5. Press **Save**.

You can now select the member to fill this new position.

My Club Members

Verify that all your members are added to the system. Create accounts for members that have not been added.

Edit members' information

Next you will check your members' information. This step is vital if you want your members to receive all email correspondence and to be able to track their attendance. Inputting their additional information is also helpful for creating rosters and other materials.

1. Click on the **Admin** tab.
2. Click on **Members List**, located in the **Membership Manager** section.



3. Here you will see all your members. If they have an e-mail address in the system already, you will see an envelope icon next to their name.

Update Members							Add New Member
Email Name	Sort by First Name	Access	Action				
Aaronson, Aaron		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Bush, Kate		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Connery, Sean		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Davis, Ian		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Gibbons, Laura		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Goldberg, Alan		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Hanson, Louise		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Johnson, Darryl		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Johnson, Wendy		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Nelson, Sarah		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Pitt, Brad		60	Edit	Photo	Bulletin	Mark EX	Reset PW
Robbins, Tony		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Roberts, Julia		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Robertson, Martin		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Smith, John		30	Edit	Photo	Bulletin	Mark EX	Reset PW
Trevors, Jane		70	Edit	Photo	Bulletin	Mark EX	Reset PW
White, Carol		30	Edit	Photo	Bulletin	Mark EX	Reset PW
Wong, Cynthia		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Young, Peter		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Zimmerman, Brenda		70	Edit	Photo	Bulletin	Mark EX	Reset PW
Total: 20 Members							
		Return					

4. Click on **Edit** to view or change a member's information.

TIP

The name that appears at the top right of the page is actually the person currently logged in, and NOT the person whose information you are editing. Refer to the First Name and Last Name text boxes instead.

5. Fill in as many details as you need. The email address is the most important piece of information to include.
6. Scroll down to the bottom of the screen, until you see **Rights**. This allows you to set the website editing access rights for that member. It may be a good idea to set many members as **Editors**, however limit the number of **Site Administrators**.
7. Click on **Save**, located at the bottom of the page.

Continue to do this until you have edited all your member's details.

Add a new member

If you have a new member or find that one is missing from ClubRunner, you may add that member as a New Member.

TIP

Fields that appear in red are required. You will not be able to save the member profile unless they are filled in.

1. Click on the **Admin** tab.
2. Click on **Members List**, located in the **Membership Manager** section.
3. Click on **Add New Member**, located at the top right of the table.
4. Fill in that member's information, including their login name and temporary password. A good login name to use is the email address, or *firstname.lastname*.
5. Click on the **Save** button.

Delete a member, or change a member to an ex-member

If a member becomes an ex-member, it is important you update ClubRunner to reflect this change. The ex-member will stay in the system, under "Other Users". If you wish to completely remove this member from your database, please refer to the next section, under "Deleting a User".

1. Click on the **Admin** tab.
2. Click on **Members List**, located in the **Membership Manager** section.
3. Click on **Mark EX** next to the member you wish to mark as an ex-member. You will get a confirmation message.
4. Click on **OK**.

Now this member is an ex-member, and will not appear in the Member list. He or she will, however, appear under 'Other Users', covered in the next section.

Set up members' access rights

Everybody can edit their own profile, view the club directory, register for events, add and edit friends, and change their password.

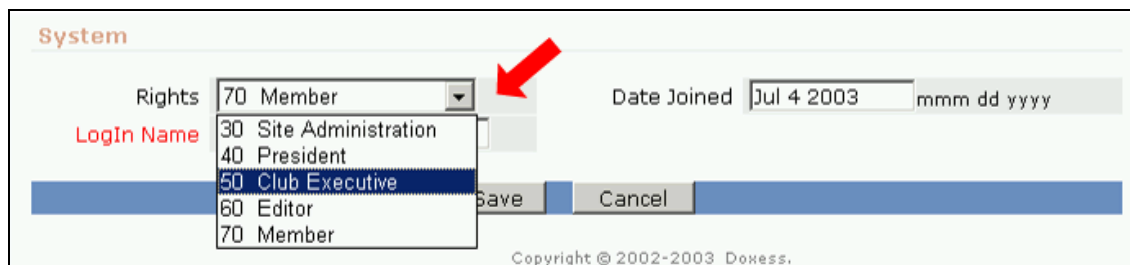
For administrative tasks, a member needs the proper access right. There are five levels of access for members in your club.

30	Site Administrator
40	Club President
50	Club Executive
60	Editor
70	Member

Note: Even though level 40 is called "Club President", you don't have to be your Club's President in order to have that level of rights.

To define (or change) a member's access level:

- **Login**, and go to the **Admin** page.
- Click on **Members List**, in the **Membership Manager** section.
- Locate the member's name, and click on **Edit** to the right of their name.
- At the bottom of the page, you will see a field called **Rights**.
- Select the appropriate level from the list shown.



- Click on **Save**.

The table below outlines the various administrative functions available on the site, and whether each level of rights is allowed to do it.

Functionality	30	40	50	60	70
Edit club settings (meeting time and date, etc)	Y				
Delete user accounts	Y				
Add new members and users	Y	Y			
Mark members as Ex-Members	Y	Y			
View and edit members' profiles (*)	Y	Y	Y		
Email Services (including Pres., Pres.-Elects, and Sec. in other clubs)	Y	Y	Y		
Edit the homepage	Y	Y	Y	Y	
Create and manage events	Y	Y	Y	Y	
Edit and send the eBulletin	Y	Y	Y	Y	
Email Services	Y	Y	Y	Y	Y

* You can't assign an access level to another member that is higher than your own. Thus, only a Site Administrator can give another member Site Administrator access.

Other Users

Other users are persons you wish to have an account on your site. This allows ex-members, honorary members, and exchange students to participate in your site and login, receive the bulletin, register for events, and contribute to the site just like members. The only difference is that they are not counted as active members in attendance reporting.

Add a user

To add a user to the system:

1. Click on the **Admin** tab.
2. Click on **Other Users List** located in the **Membership Manager** section.
3. Click on **Add New User**, located at the top right.
4. Fill in the person's information.
5. Be sure to specify their **Member Type**.
6. Give the user a login name and password.
7. Click on **Save**.

Delete a user

If you no longer wish for a user to be on the system and receive e-Bulletins and other messages, or to be able to login, you can remove him or her from ClubRunner.

TIP

To delete an active member, you must first set them as an ex-member, then delete them from the "Other Users" list.

1. Click on the **Admin** tab.
2. Click on **Other Users List** located in the **Membership Manager** section.



3. Click on **Delete** next to the user you wish to remove. The information for that user will appear next, as a confirmation. Scroll down to the bottom of the page.
4. Click on **Delete** if you are sure you want to delete this user. If you have changed your mind and don't wish to delete the user, click on **Cancel**.

Announce the new ClubRunner site to my club's members

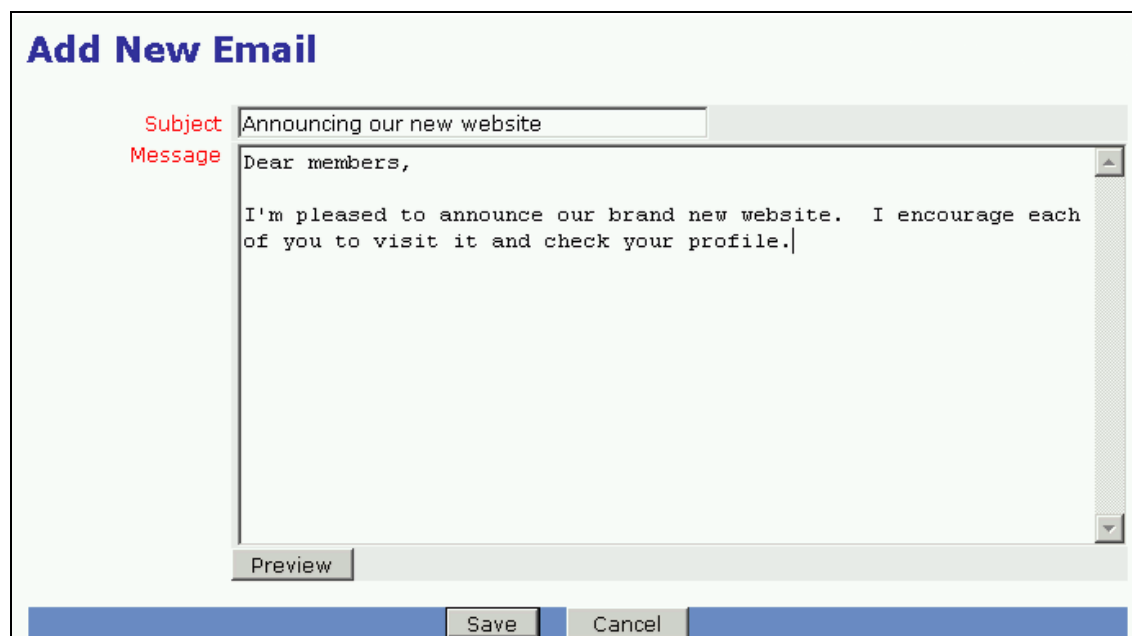
What better way to announce the new site than through ClubRunner's **Message Centre**? Be sure to read the Message Centre help section to learn how Message Centre helps you with announcements and communication with your own club's members and also with other clubs in your district.

Here is how to send an email announcement to every member in your club:

1. Log in and go to the **Admin** page.
2. Click on **Email Message Centre** in the **My ClubRunner** section.



3. Next click on **Add New Email** located at the top right of the page.
4. Type in the **Subject** and **Body** of the email message.

A screenshot of the 'Add New Email' form. The title is 'Add New Email'. There are two main input fields: 'Subject' and 'Message'. The 'Subject' field contains the text 'Announcing our new website'. The 'Message' field contains the text 'Dear members, I'm pleased to announce our brand new website. I encourage each of you to visit it and check your profile.' Below the message field is a 'Preview' button. At the bottom of the form are 'Save' and 'Cancel' buttons.

5. Click on the **Save** button when you are finished.
6. If you'd like to attach the Member Cheat Sheet (or any other file) to the announcement, click on the **Attachments** link located to the right of the email you just created, as shown below.

Club Email Services

Date Last Sent	Description	Owner	Show All Emails	Distribution List	Add New Email
	Announcing our new website	Carol White	Email	Attachment	Edit Delete

[Return](#)

- Click on the **Browse...** button, and locate the Member Cheatsheet. *You will have to download and save the document on your computer first.* Click on **Upload** when you are finished.

Manage Attachments

Subject: Announcing our new website

Uploaded Attachment Files

File Name	Size	Action
No file attached with this email		

Upload attachment files:

2. Press Upload

1. Choose your file

[Return](#)

- Otherwise, click on the **Email** link next to your announcement.
- Expand the **Club Members** folder. Since you wish to send this to all members, click on the **Check All** button to select all the members in your club.

Select Recipients

Click the plus sign to expand each list

Select Email Recipients	
<input checked="" type="checkbox"/> Club Members	Check All
<input type="checkbox"/> Other Users	Check All
<input type="checkbox"/> Friends	Check All
<input type="checkbox"/> Club Presidents	Check All
<input type="checkbox"/> President Elects	Check All
<input type="checkbox"/> Club Secretaries	Check All
<input type="checkbox"/> Club Executives (Custom List)	Check All

Send a list of all recipients as a link
 Send a copy of this email to myself

[Send](#) [Return](#) [Send Test Email To Myself Only](#)

10. If this is the first time you are using Message Centre, click on the button that says **Send Test Email to Myself Only**. This will allow you to check if you are happy with the way the message looks, and also to verify that the attachment has uploaded correctly.

11. Otherwise, click on the **Send** button and you're done!

Note: This only works well if most of your member emails have been input into the system. If email addresses are not inputted, then an alternative would be to announce it at your next club meeting, and hand out copies of the Member Cheatsheet so that members can input their email address themselves.

Print login 'cheatsheets' for members

When announcing your new club site, members might appreciate a paper handout outlining the first few steps to be taken.



This cheatsheet outlines the following:

- How to retrieve your username and password
- How to login
- How to edit your member profile

Make copies of this one-page "Getting Started" document (located in the back of this guide) and distribute it at your next club meeting. It can also be downloaded from the Online Help.