



Getting Started Guide

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1 Introduction

Congratulations on your new subscription to ClubRunner!

Your club is about to enjoy all the timesaving features of ClubRunner. ClubRunner is a powerful suite of e-Communication software that runs entirely on the Internet. That means you have nothing to install, and can use it from any computer in the world with Internet access. To learn more about ClubRunner and all about its features and benefits, visit www.clubrunner.ca.

1.1 Purpose Of This Guide

This guide 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. 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.

This guide will outline all the steps that need to be taken along with detailed instructions and plenty of screen shots to guide you.

SUPPORT

If you encounter any difficulties or technical problems during this process, please email ClubRunner Support at support@clubrunner.ca.

1.2 Frequently Asked Questions (FAQ)

1.2.1 Who created ClubRunner?

ClubRunner was developed by a Canadian software company named Doxess. The company has been in business since 1988, and specializes in Internet applications and services.

Visit Doxess at www.doxess.com for more information about their products and services.

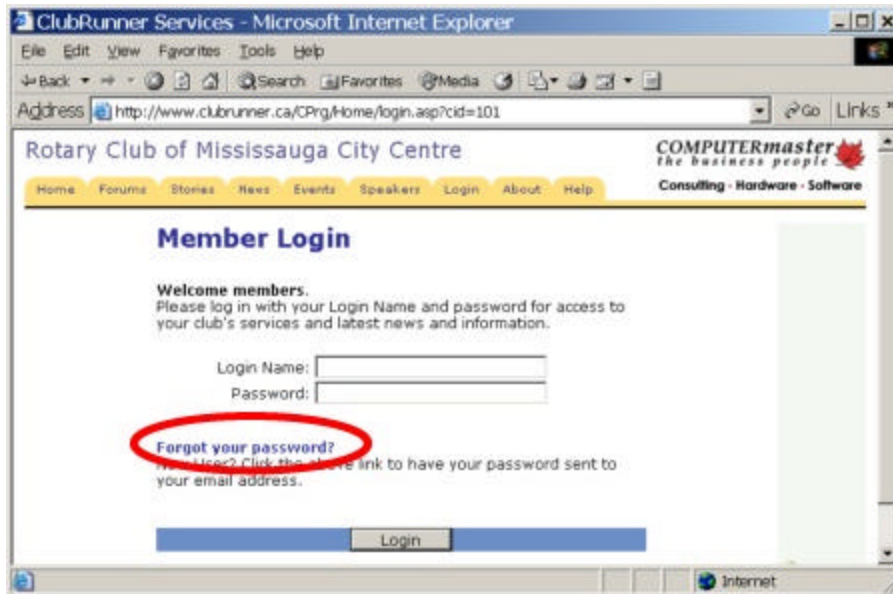
1.2.2 Who can I contact if I have questions or problems?

You can email clubrunner@doxess.com with any questions or concerns. You may also call us at (905) 608-2321 Ext 29.

2 Logging In

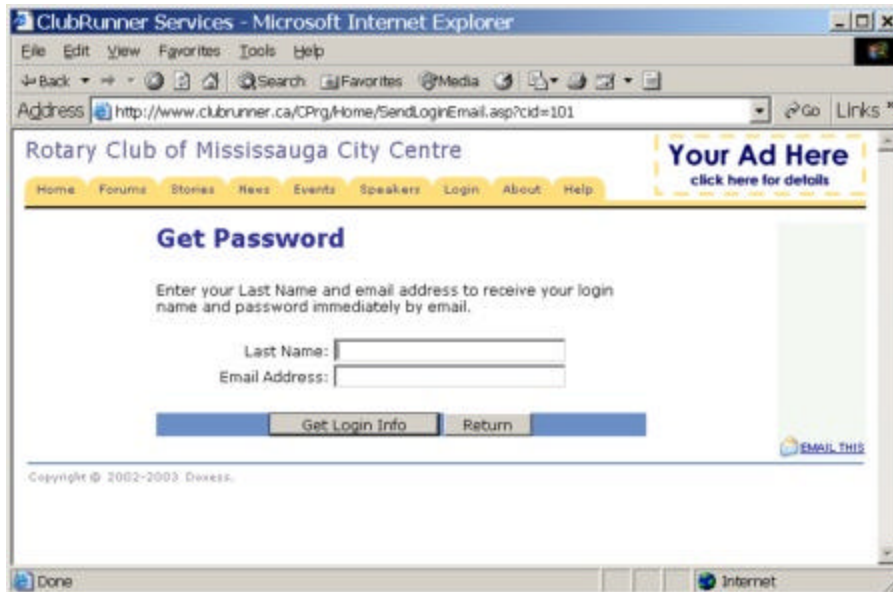
2.1 Finding Out Your Username and Password

Go to the Login tab on the District web site (or your club's web site, if you have one). Click on the "Forgot Your Password?" link as shown in the figure below.



Member Login

This will take you to the "Get Password" screen.



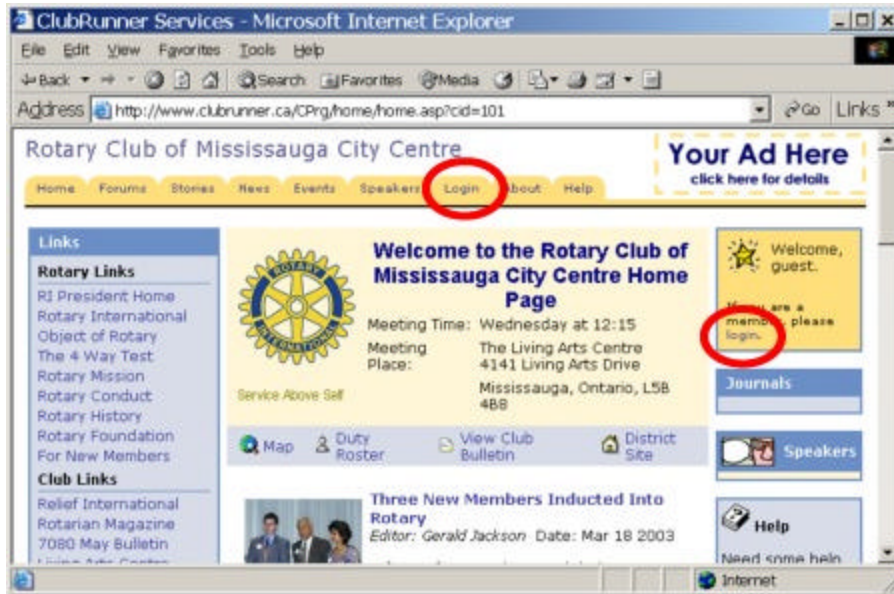
Get Password

You will be asked to enter your last name and your email address, and then click on "Get Login Info". You should receive an email with your login information shortly.

Please note that the last name and email address you provide must match what is on record for security purposes. If you are unable to get your password, please email support@clubrunner.ca with your name and club and it will be emailed to you.

2.2 Login to your Club Website

Start at your club home page. To login, click on the Login tab located at the top of page, or click on the Login link at the top right of the Home page, as shown in Figure 2.1.



Home Page

This will take you to the **Member Login** page. Enter your login name and password in the appropriate boxes and click on the Login button. If your login has been successful, you will be directed to the **Admin page**. You should see your name at the top right.

The Admin tab is a members only page where you will go to contribute to the site, create events, change your members' information, and more.

2.2.1 If you have trouble logging in

This is due to an invalid password or login name. You can try to login again by retyping them, and clicking on the Login button. If you still cannot get into the system, email support@clubrunner.ca with your login name and password and you will get a new password assigned.

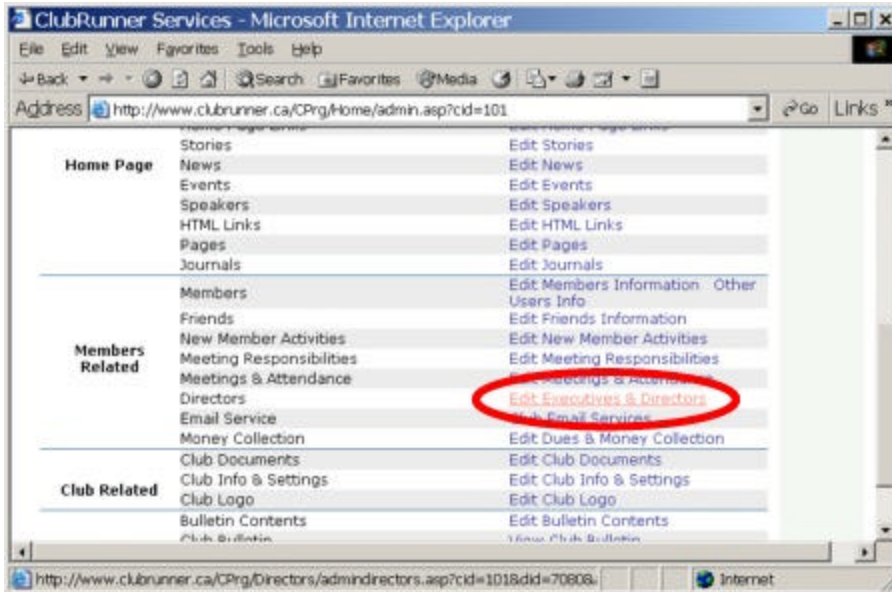
For future reference, write your login information here:


Login name:	
Password:	

3 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**, found in the 'Members Related' section, as shown below.



 Edit Executives and Directors

This will bring you to the Club Executives and Directors page.

3. 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.

4 Club Information

4.1 Meeting Place and Date

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**, located under the Club Related section.

This will bring you to the **Update Club Information** page, as shown below:

Update Your Club Information.

3. Verify your club name, meeting day and time, and address.

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. We will check this in the next step.

4. Choose a member to be the **Bulletin Editor**. This is for the purpose of setting a “reply-to” email when mailing out the bulletin.
5. 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.

4.1.1 If the map is incorrect

There is probably 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 might have entered the street address in the ‘Meeting Place’ field instead of the ‘Meeting Address’ field. If you still encounter problems with your map, email support@clubrunner.ca with your club name and address for support.

4.2 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 Club Related 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**.

5 Club Members

5.1 Editing 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 **Edit Members Information**, located under the Member Related section.

Here you will see all your members. If they have an e-mail address in the system already, you will see that next to their name. You will also see a percentage of their attendance so far in the year. These are based on the meetings you have entered into ClubRunner.

3. Click on **Edit** to view or change a member's information. Their file will appear as follows:

Editing a member's information.

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

4. Fill in as many details as you need. The **email address** is the most important piece of information to include.
5. 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.

- Click on **Save**, located at the bottom of the page.

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

5.2 Adding 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.

- Click on the **Admin** tab.
- Click on **Edit Members Information**, located under the Member Related section.
- Click on **Add New Member**, located at the top right of the table.
- 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.

TIP: Fields that appear in red are required. You will not be able to save the information unless they are filled in. Remember you can always change the information once it is saved.

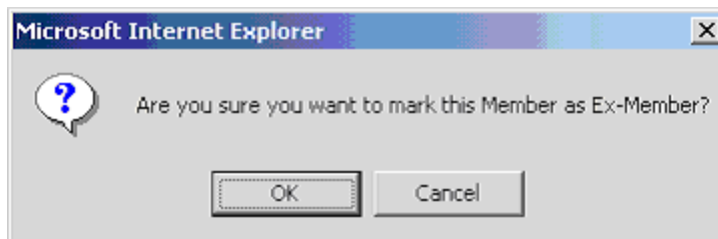
- Click on **Save**.

5.3 Deleting a Member, or Changing 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".

- Click on the **Admin** tab.
- Click on **Edit Members Information**, located under the Member Related section.
- Click on **Mark EX** next to the member you wish to mark as an ex-member.

You will get a confirmation message, like the one below:



Confirming a Member as an Ex-Member.

- 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.

6 Other Users

'Other Users' is where you can add certain non-members to your club's database. This is for the purpose of allowing them to receive e-Bulletins and register for events, login, contribute to the website, and generally to keep them in the loop. They can be:

- Ex-members
- Exchange students
- Honorary members
- Staff
- Other (miscellaneous)

6.1 Adding a User

To add a user to the system:

5. Click on the **Admin** tab.
6. Click on **Edit Users Information** located under the Member Related section.
7. Click on **Add New User**, located at the top right.
8. Fill in the person's information.
9. Make sure to specify their **Member Type**, as shown below.

The screenshot shows a web form for adding a user. Fields include First Name (Sarah), Last Name (Parker), Email (sparker@domain.com), Mobile (416-555-1234), Birthday, Partner/Spouse, Anniversary, Home, Address 1, Address 2, City, Province/State, Phone, Home Fax, and Pager. The 'Member Type' dropdown menu is open, with 'EX Member' selected. A red circle highlights the 'Member Type' label and the dropdown menu.

Specifying the User's Member Type

10. Give the user a **login name** and **password**.
11. Click on **Save**.

6.2 Deleting a User

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

To delete a user:

1. Click on the **Admin** tab.
2. Click on **Edit Users Information** located under the Member Related 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.

TIP: If you wish to delete a member, you must first set them as an Ex-Member, and then delete them from the "Other Users" list.