

Rotary Club of Carroll Creek



Website User Manual

LOGGING INTO THE SYSTEM

In order to access the system you must first obtain a username and password from a current Administrator. Once you have obtained the username and password you are ready to begin administering the online Rotary Club of Carroll Creek Data Management System.

1. Open up your web browser.
2. In the address bar type in the following address: <http://www.carrollcreekrotary.org>
This will bring you to the Rotary Club of Carroll Creek home page.
3. Click on the link labeled "Member Login" to get to the login page.
4. Type in the username that was provided for you in the box labeled username.
5. Type in the password that was provided for you in the box labeled password.
6. Click "Login".
7. Be sure to log out by clicking "Logout" at the top right of your screen when you are finished.

Once you are logged in, you can then navigate through the different member areas of the website.



SEARCH OR VIEW THE MEMBER DIRECTORY

This allows you to view the list of all the Carroll Creek Members. To view details on a Member click on his/her name and their Member profile will be displayed. To search for a certain Member type their name in the Search box and click on the SEARCH button.

Saving a search will allow you to download profile information of the searched Member into a Microsoft Excel compatible file.

1. Click on Members Directory in the yellow bar.
2. Click your mouse in the check boxes of all information you would like to save.
3. Click the SAVE SEARCH RESULTS button.
4. When the File Download window pops up, select "Save this file to disk" by clicking your mouse in the circle next to it, then click the OK button at the bottom.
5. Select the destination for your file, and rename the file if you wish. Then click the SAVE button.
6. When the download is complete click the CLOSE button on the Download window if it remains open.

COMMITTEES

Clicking this link will show you a list of all committees. You can also print out a complete list of the committees. Once you click on view members beside a committee, it will display the members within that committee. It will also give you the ability to print out the members in that list or email all members or specific members within the selected committee.

TO: **A**

- Andrew M. Baum
- Douglas N. Boyle
- Kimberly Smith Chaney
- Jill B. Cody, M.A.
- Edmond B. Gregory
- Michael J. McGowan
- Danny B. O'Connor
- Mark A. Pitts, D.D.S.
- Ethel Killingsworth Schricker
- Thomas B. Trott Sr

B ALL MEMBERS

SUBJECT:

MESSAGE:

Email committee members

1. Click on the email committee icon
2. Either select the boxes next to the specific people (**Shown as A above**) you want to email or click on the ALL MEMBERS checkbox (**Shown as B above**) which will highlight all of the members in that committee.
3. Put in a subject
4. Put in a message
5. Click on the send email button.

Email a club group or group Manager (Email List Server)

Clicking this link will take you to a page from which you can send an email to a committee or Group Manager.

E-Mail Club Members

Committee:

Subject:

Message:

Email a Committee:

1. Select the committee you would like to email from the dropdown menu.
2. Type your subject in the Subject box.
3. Type your message in the Message box.
4. Click the SEND button.

REQUEST A CONTENT CHANGE:

Request a Content Change

Group Manager:

Subject:

Message:

1. This can be found on the left blue bar on the screen. Select the Group Manager that you would like to send email to from the dropdown box.
2. Type your subject in the Subject box.

3. Type the message including the content change you are requesting in the Message box.

4. Click the Submit button.

EMAIL THE ENTIRE CLUB

This feature will allow you to email all the Members of the club with the same message.

1. Click on the Email entire club link to get to the email page.

2. Enter your subject in the Subject box.

3. Enter your message in the Message box.

4. Click the SEND EMAIL button.

ADMINISTRATIVE CAPABILITIES

Add, Edit, and Delete content on the site

Click on the site administration link in the yellow menu to access the site administration functions.



Members

Here is where you can create new Member Profiles, edit current profiles and delete Members from the database. It is also here that you will create and edit Members' usernames and passwords.

Add a Member

1. Click Add under the Members label.

2. Enter content for the fields provided by typing in the Text box:

*** = New to the website**

First Name: Enter new Member's first name. NOTE: This is a required field.

Last Name: Enter new Member's last name. NOTE: This is a required field.

Member Picture: The Member picture should be a small JPG or JPEG image file located on your computer system, preferably 150x200 pixels. To enter a Member picture click the BROWSE button and locate the image file on you computer system. Select the image file and click OPEN to enter their photograph in the database.

*** Member Thumbnail Picture:** The Member thumbnail picture should be a small JPG or JPEG image file located on your computer system, preferably 75x100 pixels. To enter a Member picture click the BROWSE button and locate the image file on you computer system. Select the image file and click OPEN to enter their photograph in the database.

Username: Enter a username for the new Member. It must be a unique name. If there is another Member that uses that username you will be asked to go back and enter a new one. NOTE: This is a required field.

Password: Enter a unique password for the user. Please note that the password is case sensitive. NOTE: This is a required field.

Nickname: Enter new Member's Nickname.

Birth date: Enter new Member's Date of birth in this format: mm/dd.

Anniversary: Enter new Member's anniversary in this format: mm/dd.

Spouse: Enter new Member's Spouse's name.

Spouse DOB: Enter new Member's Spouse's date of birth in this format: mm/dd.

Children: Enter new Member's children's names and any other information they wish to provide.

Phone Numbers

Work: Enter new Member's work phone number in the format: (301)-555-5555.

Fax: Enter new Member's fax number if any in the format: (301)-555-5555.

Home: Enter new Member's home phone number in the format: (301)-555-5555.

Mobile: Enter new Member's mobile or cell phone number if any in the format: (301)-555-5555.

Addresses

Email address: Enter new Member's email address.

Home address: Enter new Member's home street address.

City: Enter new Member's city of residence.

State: Enter new Member's state of residence.

Zip code: Enter new Member's postal zip code.

Work Firm: Enter the name of the new Member's place of employment.

Job title: Enter the new Member's job title.

Address: Enter the street address of the new Member's place of employment.

City: Enter the city of the new Member's place of employment.

State: Enter the state of the new Member's place of employment.

Zip code: Enter the postal zip code of the new Member's place of employment.

Classification: Enter the type of business that the new Member's firm does.

Rotary Committees: Enter all the committees that the new Member participates in as a Rotary Club Member.

Date Joined: Enter the date that the new Member joined the Rotary Club in this format: mm/dd/yyyy.

* **Brief Member Description:** This description would go into public portions of the website and for the new members section of the website.

Civic, Community, or Non-Profit Organizations: Enter any other civic, community or non-profit organizations that the new Member has or does participate in. Once all the data has been entered click the SUBMIT button. If you have left any required fields blank, or if the username you have assigned to the new Member is already assigned to a Member you will be presented with a warning and asked to correct the relevant field. Make corrections to the field by typing in the Text box and clicking the SUBMIT button again.

* **Entrepreneur Options:** This section allows the club to highlight members on the frontpage of the website.

Active as entrepreneur?: Select either yes or no. No is the default

Start Date: The date that you would like this member to start showing up on the homepage

End Date: The end date you would like this member to stop showing up on the website

Brief Description: This is the description that will be displayed on the homepage

Edit a Member

1. Click Edit/Delete under the Members label.
2. Select a Member from the drop down menu and click Edit to display the Member's current profile information.
3. Enter or change any of the Member's information by clicking in the relevant field and typing over the existing data. *SEE ADD A MEMBER for a description of each field*

4. Click the SAVE CHANGES button to enter the changed data.

Delete a Member

1. Click Edit/Delete under the Members label.

2. Select the Member you would like to delete from the drop down menu.

3. Click the Delete button.

4. You will be sent to a conformation page warning that there is **no way to recover deleted data**. If you are sure you want this Member deleted click the YES button. If not, click the NO button and you will be returned to administration area of the website. **Once you have deleted a Member he/she will not have access to any of the Rotary Club of Carroll Creek Member features of the web site.**

Calendar of Events

Here is where you can create new calendar events, and edit or delete existing events. Any additions or changes made here will be displayed on the Calendar of Events page. To view the calendar, click on the link to Calendar of Events on the left side of the screen.

Add a Calendar Event

1. Click on Add under the Calendar of Events label.

2. Type in new event information in the title box.

3. Type in the date on which the event is to occur. Please use the format mm/dd/yyyy

4. Click the Add Event button.

IMAGE ON NEXT PAGE

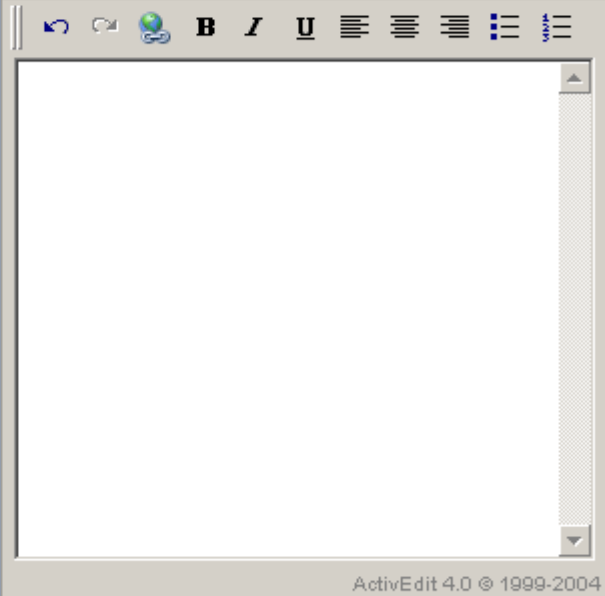
Event Title:

Event Location:

Event date: (mm/dd/yyyy)

Event Time: (ex: 9:00 pm)

Event Description:



ActivEdit 4.0 © 1999-2004

Edit a Calendar Event

1. Click on Edit/Delete under the Calendar of Events label.
2. Select the event you would like to edit from the drop down menu.
3. Click the Edit button to display the current text and date of the selected event in the Edit boxes.
4. Type in any changes to the calendar event in the Edit box.
5. Type in the new date of the event if desired.
6. Click the Save Changes button.

Delete a Calendar Event

1. Click on Delete under the Calendar of Events label.
2. Click your mouse in the check box of all content you would like to delete.
3. You will be sent to a conformation page warning that there is **no way to recover deleted data**. If you are sure you want this data deleted click the YES button. If not, click the NO CANCEL button and you will be returned to administration area of the website.

PROGRAMS

Add a program

1. Click on Add under the Programs label
2. Add a title
3. The program picture should be a JPG or JPEG image file location on your computer system. **Unlike the other sections, the size of the picture does not matter as our system will automatically resize the photo for you.** Click the BROWSE button and locate the image file on your computer system. Select the image file and click OPEN to add the photograph to the website.
4. Add a description. (You have full editing capabilities here. Refer to the activEdit tutorial)

Edit a program

1. Click on edit/delete under the Programs label
2. Select the program you wish to edit
3. Click on the EDIT button
4. Type in any changes you have
5. Click on the SAVE CHANGES button

Delete a program

1. Click on edit/delete under the Programs label
2. Select the program you wish to delete
3. Click the DELETE button
4. You will be sent to a conformation page warning that there is **no way to recover deleted data.** If you are sure you want this data deleted click the YES button. If not, click the NO CANCEL button and you will be returned to administration area of the website.

News

Here is where you can post new notices and announcements for all Members to view. You can also edit and delete any notice or announcement as information changes or becomes irrelevant. Any additions or changes made here will be displayed on the Notices/Announcements page. To view your changes click the link to Notices/Announcements on the left side of the screen.

Add a news item

1. Click Add under the Notices/Announcements label.
2. Type in the content you would like to add in the new Notice/Announcement box. The date will be added to the new notice/announcement automatically.
3. Click SUBMIT button.

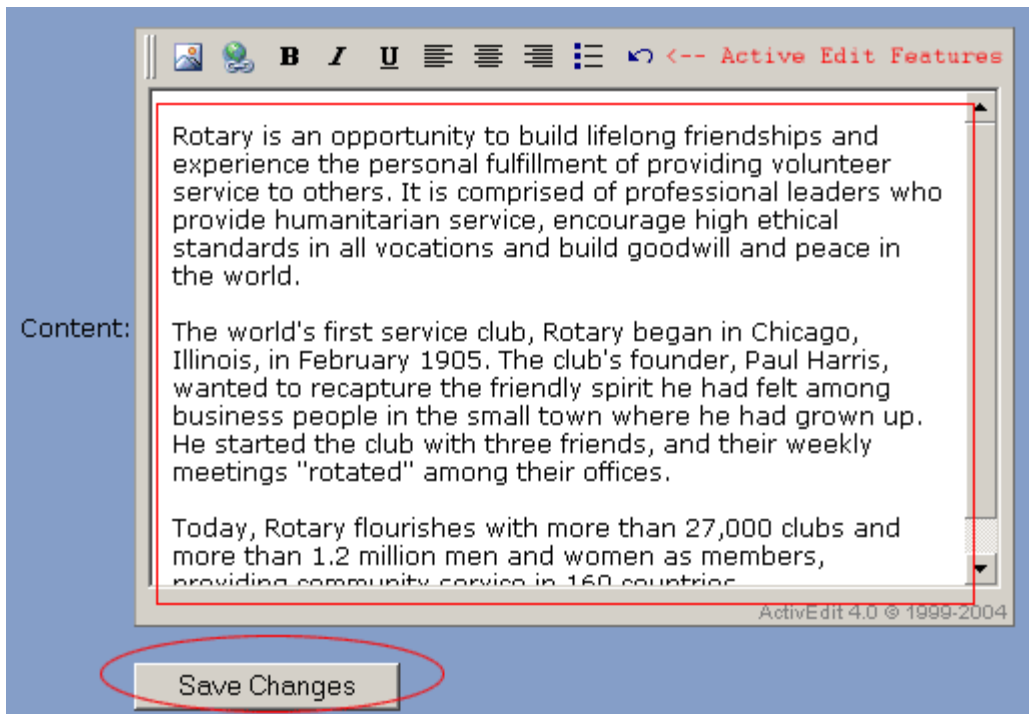
Edit a news item

1. Click Edit under the Notices/Announcements label.
2. Select the notice/announcement you would like to edit and click the GO button to display the current content in the Edit box.
3. Type any changes in the Edit box.
4. Click the SUBMIT button.

Delete a news item

1. Click Delete under the Notices/Announcements label.
 2. Click your mouse in the check box of all content you would like to delete.
 3. You will be sent to a conformation page warning that there is **no way to recover deleted data**. If you are sure you want this data deleted click the YES button. If not, click the NO CANCEL button and you will be returned to administration area of the website.
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UPDATE CONTENT



1. Click on the update website content under the update content label.
2. Select the page you wish to update and then click on the UPDATE PAGE button.
3. Update the content and click on the Save Changes button.

ARCHIVES

In order to post an archive, it must have an appropriate category for the item you want to upload. If the item already has a correct category, jump to the **ADD AN ARCHIVE FILE** section. Otherwise, jump to the **ADD A CATEGORY** section.

Title:

Category: [Add new category](#) **B**

Sub Category: [Add new sub category](#) **C**

File:

Description:

Type: **F**

Add an archive file

1. Click on Add archive files under the Archives label.
2. Insert a title (A)
3. Select a category (B) → If the category does not exist that you wish to select, click on the “Add new category” link.
4. Select a subcategory (C) → If the sub category does not exist that you wish to select, click on the “Add new sub category” link.
5. The archive file can be of any type. Click the BROWSE button and locate the file on your computer system. Select the file and click OPEN to add the file to the website. (D)
6. Enter a description about the file you are uploading. (E)
7. Select the type of file you will be uploading. If you are uploading a document such as a Word, PDF, PowerPoint, excel, etc document then you would select the “**Searchable document**” option from the dropdown, otherwise you would select the “**Non Searchable document**” option from the dropdown. (F)
8. Click on the ADD ITEM button.

Edit an archive file

1. Click on Edit/Delete archive files under the Archives label.
2. Update title
3. Select a category → If the category does not exist that you wish to select, click on the “Add new category” link.
4. Select a subcategory → If the sub category does not exist that you wish to select, click on the “Add new sub category” link.
5. The archive file can be of any type. Click the BROWSE button and locate the file on your computer system. Select the file and click OPEN to add the file to the website.
(*This option is only if you want to replace the current file*)
6. Update the description which is about the file you are uploading.
7. Select the type of file you will be uploading. If you are uploading a document such as a Word, PDF, PowerPoint, excel, etc document then you would select the “**Searchable document**” option from the dropdown, otherwise you would select the “**Non Searchable document**” option from the dropdown.
(*This option is only if you want to replace the current file*)
8. Click on the SAVE CHANGES button

Add Category

1. Click on Add Category under the Archives label.
2. Select whether you want to add main category or a sub category.
3. Add category name
4. Add category description

5. Click on ADD CATEGORY

Edit Category

1. Click on Edit/Delete Category under the Archives label.
2. Select the category you wish to edit and then click on the EDIT button.
3. Update the title
4. Update the description
5. Click on the SAVE CHANGES button.

Delete a category

1. Click on Edit/Delete Category under the Archives label
 2. Select the category you wish to delete and then click on the DELETE button
 3. You will be prompted to verify you really want to delete this category, if you still do click on the YES DELETE button.
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MEMBER ACCOMPLISHMENTS

Add an accomplishment

The screenshot shows a web form for adding an accomplishment. It features three main input areas: a text box for the title (containing 'A'), a photo selection area (containing 'B' and a 'Browse...' button), and a rich text editor for the description (containing 'C'). The rich text editor has a toolbar with icons for bold, italic, underline, bulleted list, numbered list, and link. At the bottom of the form, a button labeled 'Add Accomplishment' is circled in red. The footer of the rich text editor reads 'ActivEdit 4.0 © 1999-2004'.

1. Click on Add under the Member Accomplishments label
2. Add a title
3. The picture should be a JPG or JPEF image file location on your computer system. **Unlike the other sections, the size of the picture does not matter as our system will automatically resize the photo for you.** Click the BROWSE button and locate the image file on your computer system. Select the image file and click OPEN to add the photograph to the website.
4. Add a description. (You have full editing capabilities here. Refer to the activEdit tutorial)

Edit an accomplishment

1. Click on edit/delete under the Member Accomplishments label
2. Select the accomplishment you wish to edit
3. Click on the EDIT button
4. Type in any changes you have
5. Click on the SAVE CHANGES button

Delete an accomplishment

1. Click on edit/delete under the Member Accomplishments label
2. Select the program you wish to delete
3. Click the DELETE button
4. You will be sent to a conformation page warning that there is **no way to recover deleted data**. If you are sure you want this data deleted click the YES button. If not, click the NO CANCEL button and you will be returned to administration area of the website.

FORMS

In order to post a form, it must have an appropriate category for the item you want to upload. If the item already has a correct category, jump to the **ADD A FORM** section. Otherwise, jump to the **ADD A CATEGORY** section.

The screenshot shows a form submission interface with a blue background. It contains the following elements:

- Title:** A text input field with a red letter 'A' above it.
- Category:** A dropdown menu showing 'Club Bulletins' with a red letter 'B' above it. To the right is a link that says 'Add new category'.
- File:** A text input field with a red letter 'C' above it, followed by a 'Browse...' button.
- Add Form:** A button at the bottom, circled in red.

Add a form

1. Click on Add Form under the Forms label.
2. Insert a title (**A**)
3. Select a category (**B**) → If the category does not exist that you wish to select, click on the “Add new category” link.
4. The form file can be of any type. Click the BROWSE button and locate the file on your computer system. Select the file and click OPEN to add the file to the website. (**D**)
5. Click on the ADD FORM button

Edit a form

1. Click on Edit/Delete Form under the Forms label.
2. Update title (**A**)
3. Select a category (**B**) → If the category does not exist that you wish to select, click on the “Add new category” link.
4. The form can be of any type. Click the BROWSE button and locate the file on your computer system. Select the file and click OPEN to add the file to the website. (*This option is only if you want to replace the current file*) (**D**)
5. Click on the SAVE CHANGES button.

Add Category

1. Click on Add Category under the Forms label.
2. Add category name
3. Add category description
4. Click on ADD CATEGORY

Edit Category

1. Click on Edit/Delete Category under the Forms label.
2. Select the category you wish to edit and then click on the EDIT button.
3. Update the title
4. Update the description
5. Click on the SAVE CHANGES button.

Delete a category

1. Click on Edit/Delete Category under the Archives label
 2. Select the category you wish to delete and then click on the DELETE button
 3. You will be prompted to verify you really want to delete this category, if you still do click on the YES DELETE button.
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Committees

Here is where you can add, or delete committees and assign or change who is a Member of each committee.

New Committee name:	<input type="text" value="Add new committee name here"/>			
Members:	Select either Chair, Co-Chair, Member or None			
	Chair	Co-Chair	Member	None
Abelow, Ralph	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Ausherman, Lisa	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Bastis, D.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Add a Committee

1. Click Add under the Committees label.
2. Enter the name of the new committee in the Text box.
3. Select which Member you would like to be part of this committee by clicking his/her name in the Members selection box. To select more than one Member to join the committee hold down the CTRL key and select each Member by clicking on his/her name at the same time.
4. Click the SUBMIT button when you have selected all the Members to join the committee.

Edit a Committee

1. Click Edit under the Committees label.
2. Select the committee you would like to edit from the dropdown menu.
3. Click the GO button. This will highlight all of the current Members of this committee in the Members window.
4. To add a new Member to the committee hold the CTRL key and select the Member's name with the mouse. Do this for each Member to add to the committee.
5. To remove a Member from the committee hold the CTRL key and deselect the Member's highlighted name with the mouse. Do this for each Member to remove

from the committee.

6. Click the SUBMIT button.

Delete a Committee

1. Click Delete under the Committees label.

2. Select the committee that you would like to delete from the drop down menu.

3. Click the SUBMIT button.

4. You will be sent to a conformation page warning that there is **no way to recover deleted data**. If you are sure you want this data deleted click the YES button. If not, click the NO button and you will be returned to the Remove Content page.

VERITY

Clicking on the Update Verity link ensures that all forms and archives are included in searches on the website.

1. Click on update verity under the Verity label. (This will also happen automatically each night.)

PDF CREATION

Clicking on Manually create PDF ensures that all member edits will be included when printing out the member directory.

1. Click on Manually Create PDF under the PDF Creation label.

WEBSITE PERMISSIONS

This section allows the website administrators to update all of the permissions on the website.

The permissions are broken down into two links. Update website and Update content. This is broken out simply because there is too much info to display on one page.

	Sections of the website												
	Members	Calendar of Events	News	E-Mail	Archives	Member Accomplishments	Forms	Committees	Verity	PDF Creations	Content	Programs	Website Permissions
Abelow, Ralph	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aushman, Lisa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bastis, Brian	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Batson, Darrell	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Baum, Andy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1. Click on either update website permissions or update content permissions under the Website Permissions label.
 2. The checkboxes should be preset based on the committees they are members of. If something needs to be overridden, simply check the box to give that user permission or uncheck the box (if already checked) to take away permissions.
 3. Click on the Update Permissions button.
-

UPDATE PASSWORD

New Password:

Confirm Password:

1. Click on the Update Password link under the Update Password label.
2. Add your new password
3. Type your password again in the confirm field.
4. Click on the UPDATE PASSWORD button. You will now use this password the next time you login to the website.