



Managing the Directory

2016 - Winter Edition

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Overview

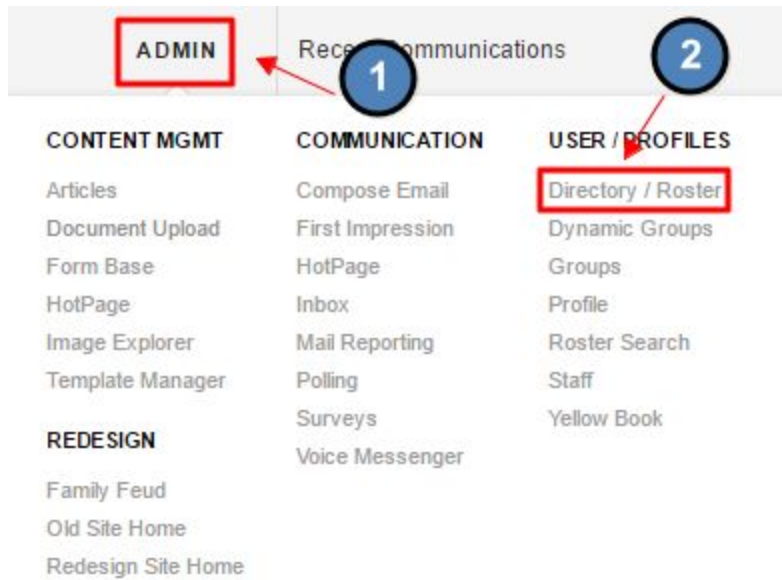
The **Directory** houses all **active members and staff members** on the website. It is necessary for anyone using the website to be in the **Directory** in order to have website access, however, you may turn off any user's ability to access the website at any time. The **Directory** is typically set up with a **sync** to the club's **accounting system** using Clubessential's application **RosterSync**, or it may be synced using the **Office Products**. Both systems allow club admins to update their **accounting software** for member changes that will then update on the website **Directory** (Office systems update automatically so changes must occur within the Office accounting suite, while 3rd party systems must be updated manually by running RosterSync).

Use Case(s)

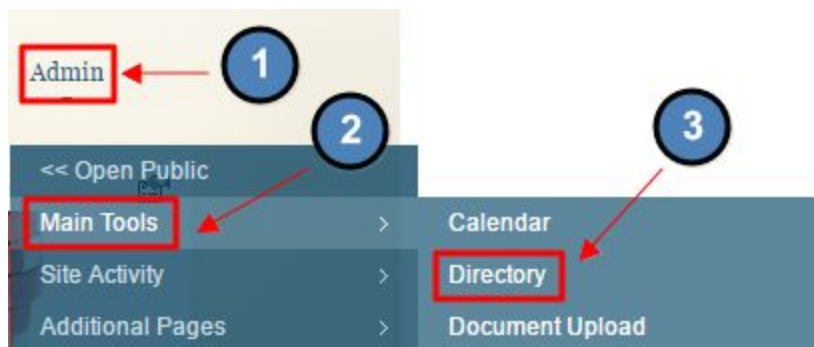
In order for any member, or staff member, to have access to the website, they must first be active in the **Directory**. The **Directory** is used to house member information such as: **membership status, membership start and expiration date, contact information, affiliated groups or organizations, and account information**. The **Directory** is also used to provide login information, and website privilege level (no access, member access, editor access, admin access).

Accessing the Tool

Admins: Hover over **Admin** bar in the left hand corner of the screen, select **Directory**.



Editors: Hover over **Admin** in the main navigation, select **Main Tools**, and then **Directory**.



While in the **member profile**, you may also use the **Impersonate User button** to use the site as that particular member. If this option is not enabled for your club, contact Clubessential Support for assistance.

VIEW PROFILE



The fields that are displayed in the **Club Members tab** can be customized to offer other information provided in the **Directory**. Clubessential Support can assist with customizing this layout as needed.

Note: Fields that are listed in the **Club Members** tab will show to members.

At the bottom of the **member's list**, is a legend that is important to note for future troubleshooting with member's accounts and recognizing website privilege level.




Staff Tab

The **Staff Tab** offers similar options as the **Club Members tab**, but it is limited to **Staff Members**.

DIRECTORY

Admin Bar: [Edit Field Settings](#) [Edit Roster Layout](#) [Add Membership](#) [Print](#)


[Club Members](#) **Staff** [My Profile](#) [Search](#) [Export](#) [Settings](#) [User Statistics](#) [Edit Disclaimer Text](#)



Join us this Thursday for a special Chocolate Tasting!

Last Name First Name Member Number Email Address [Search](#) [Show All Staff](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z


	<u>Name</u>	<u>Local Address</u>	<u>Phone</u>
	Name Mark Able Email: mable@clubessential.com Start: 10/6/2010	Austin, TX 78731	555-555-5555
A	Site Admin Email: mragan@clubessential.com Start: 7/15/2014		

You can **search staff members** using their **last name, first name, member number, or email address**.

DIRECTORY

Admin Bar: [Edit Field Settings](#) [Edit Roster Layout](#) [Add Membership](#) [Print](#)


[Club Members](#) **Staff** [My Profile](#) [Search](#) [Export](#) [Settings](#) [User Statistics](#) [Edit Disclaimer Text](#)



Join us this Thursday for a special Chocolate Tasting!

Last Name First Name Member Number Email Address [Search](#) [Show All Staff](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	<u>Name</u>	<u>Local Address</u>	<u>Phone</u>
	Name Mark Able Email: mable@clubessential.com Start: 10/6/2010	Austin, TX 78731	555-555-5555
A	Site Admin Email: mragan@clubessential.com Start: 7/15/2014		

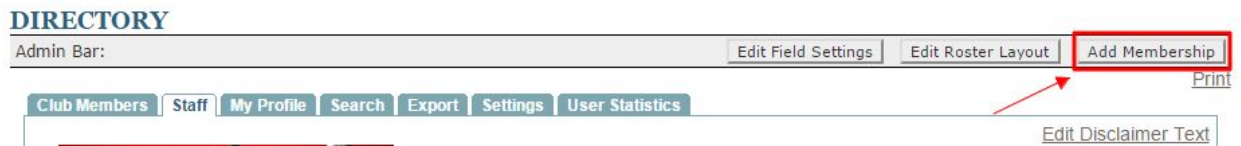
Staff members are listed by the letter corresponding with the **first letter** in their **last name**.

Show All Staff will list **all Staff members** at once.



Last Name First Name Member Number Email Address Search **Show All Staff**

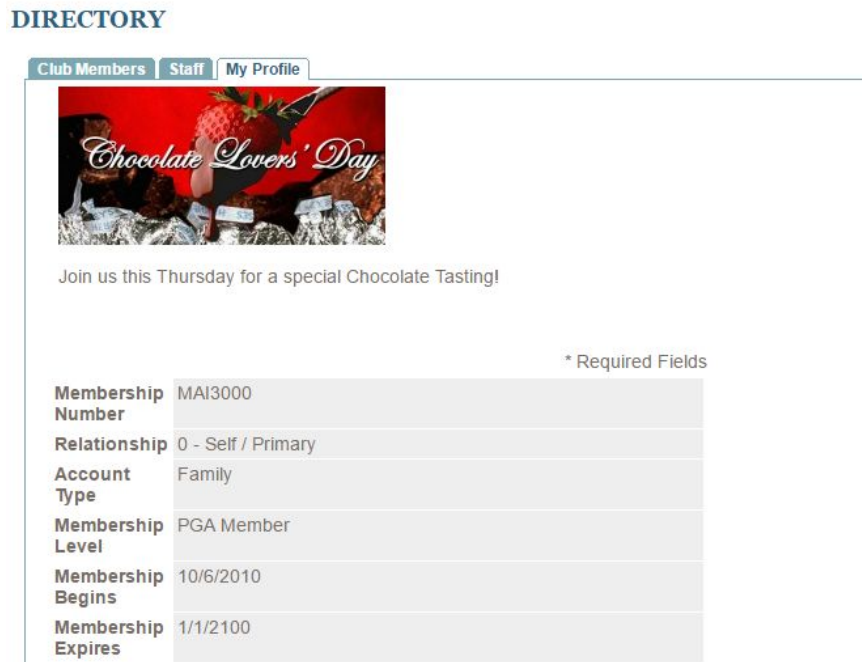
Staff members are typically **added manually** as most clubs do not have staff in the accounting system, so **staff members** must be added using the **Add Membership button**. This will be discussed later in this guide.



DIRECTORY
Admin Bar: Edit Field Settings Edit Roster Layout **Add Membership** Print
Club Members Staff My Profile Search Export Settings User Statistics
Edit Disclaimer Text

My Profile

The **My Profile** page will pull up the **profile** listed with the account that one is logged into.



DIRECTORY
Club Members Staff My Profile

Chocolate Lovers' Day
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* Required Fields

Membership Number	MAI3000
Relationship	0 - Self / Primary
Account Type	Family
Membership Level	PGA Member
Membership Begins	10/6/2010
Membership Expires	1/1/2100

The **Profile** will list **all account information** on file for the member.

Editing Profiles will be discussed later in this guide.

Search Tab

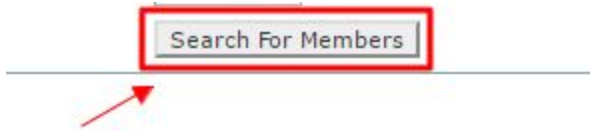
The **Search tab** allows you to **search** for **members, staff, admins, or editors** based on **specific criteria**.

ROSTER SEARCH

Admin Bar:		Edit Field Settings	Edit Roster Layout	Add Membership
Print				
Club Members Staff My Profile Search Export Settings User Statistics				
Enter all the search criteria in the blank roster profile below and click search to return a list of matches to this criteria				
User Type		Any	▼	
Admin Level		Any	▼	
<hr/>				
Membership Number		Contains	▼	<input type="text"/>
Relationship		Any	▼	
Account Type		Any	▼	
Membership Level		Any	▼	
Membership Begins		Equals	▼	<input type="text"/> <input type="button" value="Calendar"/>
Membership Expires		Equals	▼	<input type="text"/> <input type="button" value="Calendar"/>
<hr/>				
Title		Contains	▼	<input type="text"/>
First Name		Contains	▼	<input type="text"/>
Middle Name		Contains	▼	<input type="text"/>
Last Name		Contains	▼	<input type="text"/>
Suffix		Contains	▼	<input type="text"/>
Display Name		Contains	▼	<input type="text"/>
<hr/>				
Username		Contains	▼	<input type="text"/>
Primary Email		Contains	▼	<input type="text"/>
Secondary Email Address		Contains	▼	<input type="text"/>
Third Email Address		Contains	▼	<input type="text"/>
<hr/>				
Home Address				
Street 1		Contains	▼	<input type="text"/>
Street 2		Contains	▼	<input type="text"/>
City		Contains	▼	<input type="text"/>
State		Contains	▼	<input type="text"/>
Zip		Contains	▼	<input type="text"/>
Country		Contains	▼	<input type="text"/>
Home Phone		Contains	▼	<input type="text"/>
Cell Phone		Contains	▼	<input type="text"/>
Home Fax		Contains	▼	<input type="text"/>
Year Round Resident? (Y/N)		Contains	▼	<input type="text"/>
From Date:		Equals	▼	<input type="text"/> <input type="button" value="Calendar"/>
To Date:		Equals	▼	<input type="text"/> <input type="button" value="Calendar"/>

Any information that is used in the **Directory** can then be searchable to find appropriate members, staff, admins, or editors.

Simply follow the prompts for information you're looking for and then **click Search for Members** at the bottom of the screen to return results.



Export Tab

The **Export tab** is used to **export directory fields** into a **.csv** file for use **offline**.

ROSTER EXPORT UTILITY

Admin Bar: Add Membership

Print

Club Members | Staff | My Profile | Search | **Export** | Settings | User Statistics

Select the Users to Export: Members Only

Available Directory Fields

- Unique ID
- Username
- Visible
- Total Logins
- First Login
- Last Login
- Display Name
- Membership Number
- Relationship
- Account Type
- Membership Level
- Membership Begins
- Membership Expires
- Title
- First Name

Add To Export

Select All

Included Directory Fields

Move Up

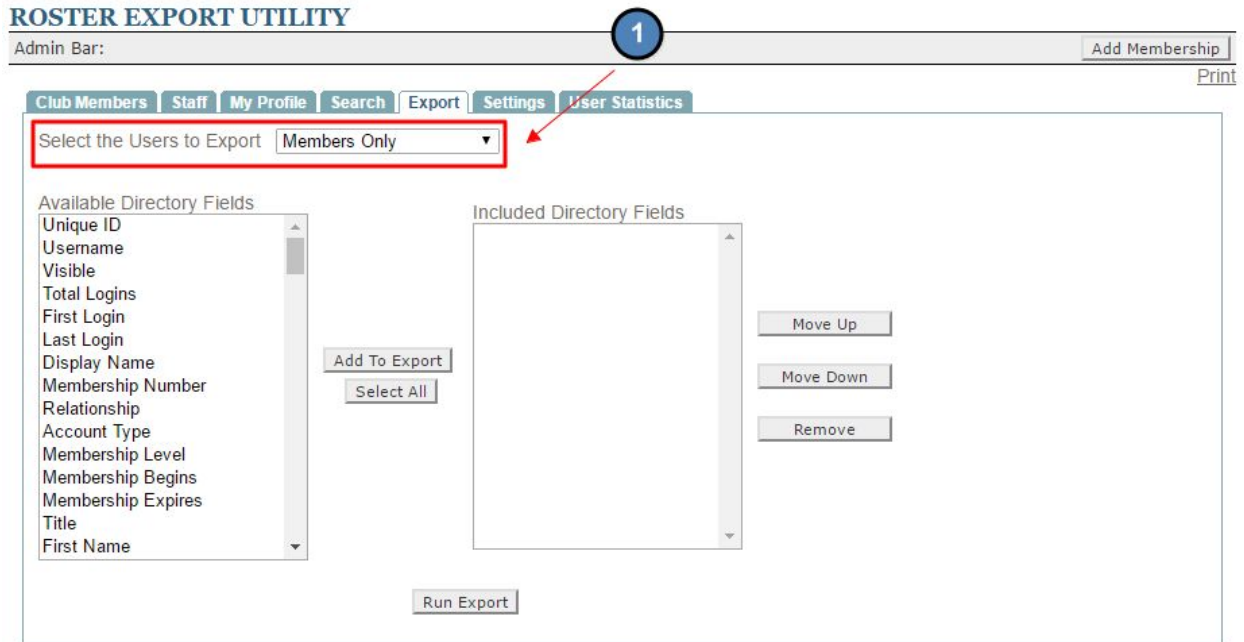
Move Down

Remove

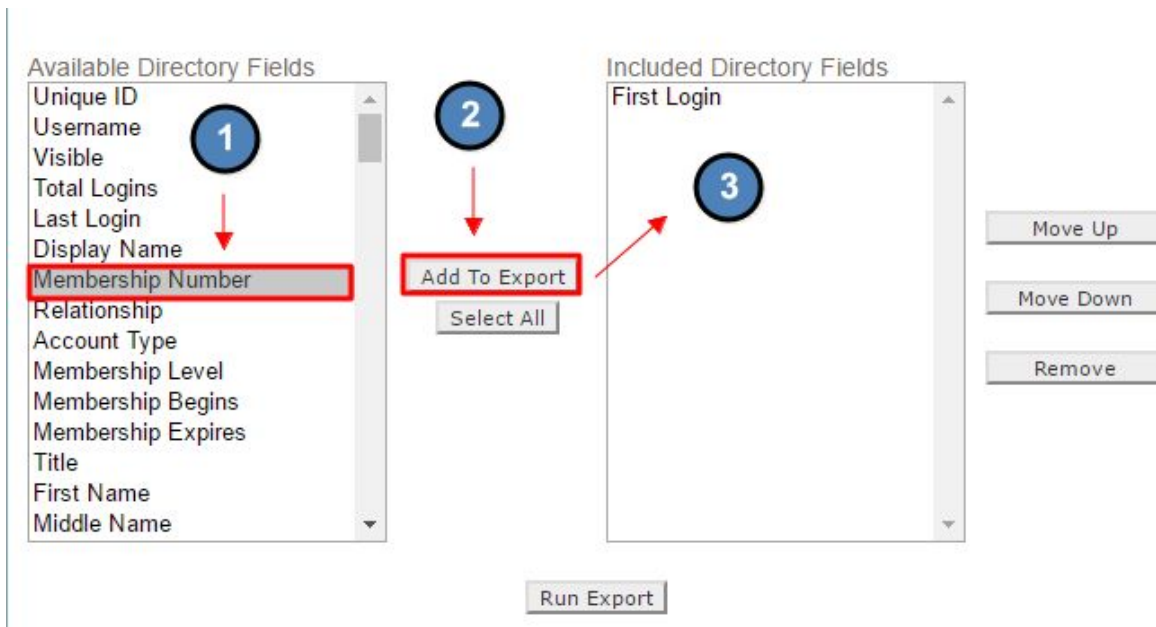
Run Export

First, using the **Users to Export** drop-down, choose to pull fields for **Members, Staff, or Both Members and Staff**.

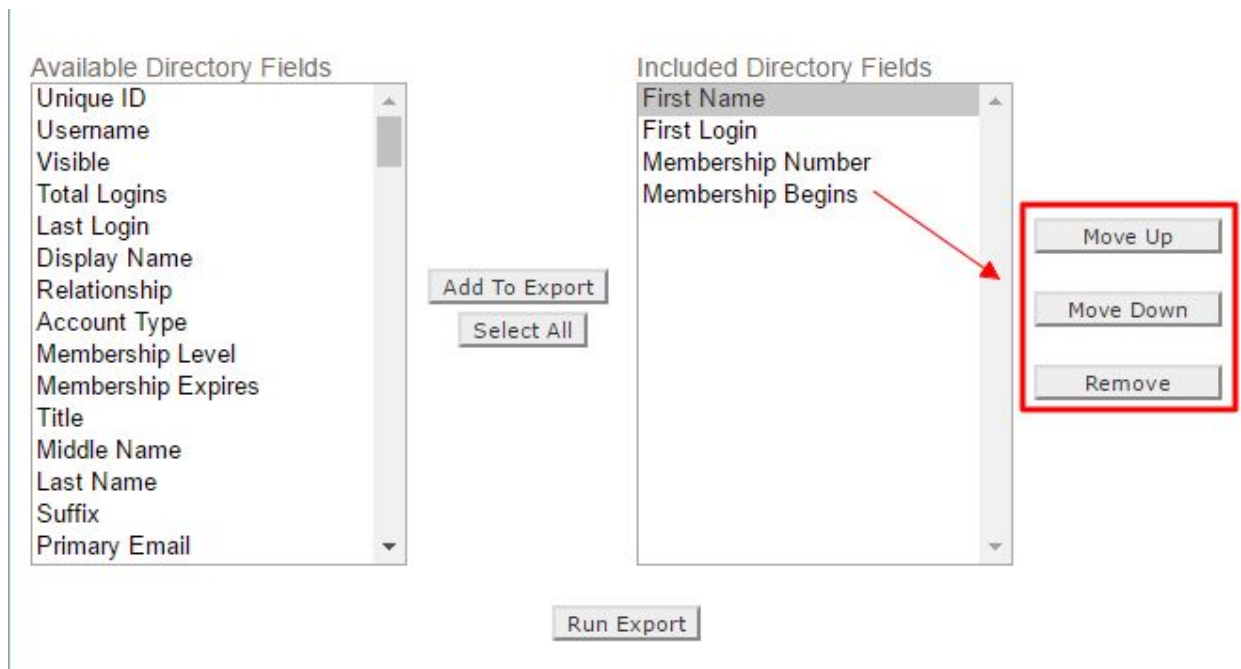
ROSTER EXPORT UTILITY



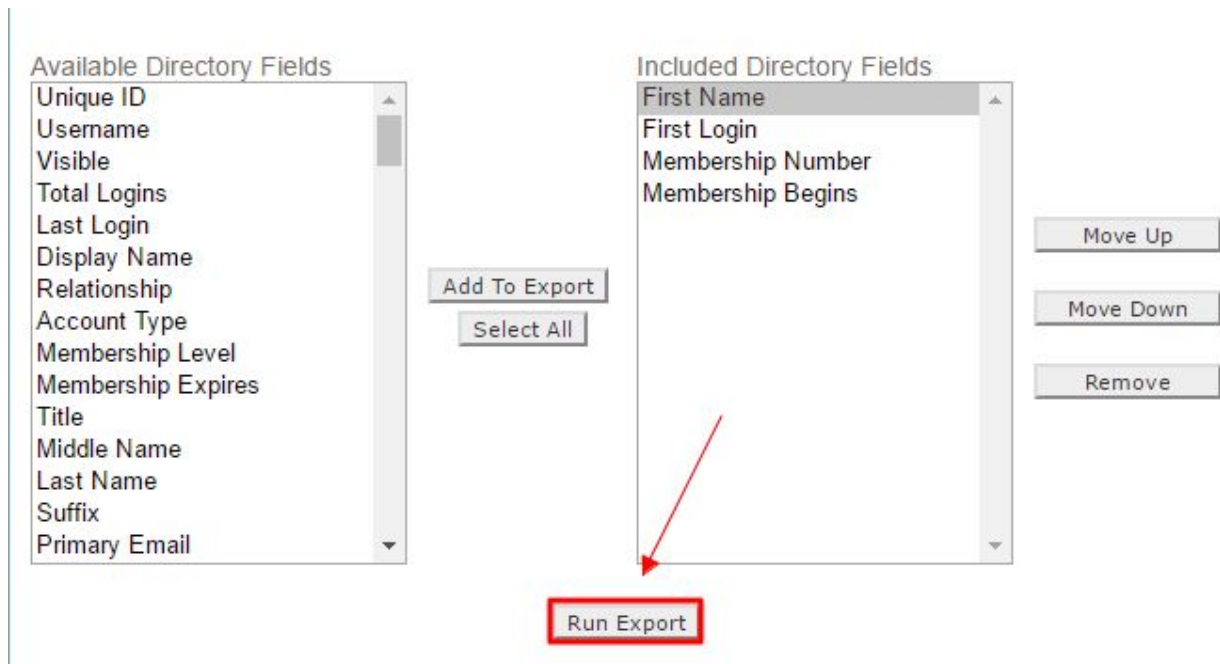
Using the **Available Directory Fields** box, click fields you would like to **export** and then click the **Add to Export** button.



Once all fields are in the **Included Directory Fields** box, you can choose to **reorder or remove** fields by using the **Move Up, Move Down, or Remove Buttons**.



To create the **export**, click **Run Export**.



This will then **generate a downloadable .csv** file with the information based on the **fields** chosen.

Settings Tab

The Settings tab offers various settings for the **Directory** such as: **tab settings, profile settings, relationship name settings, and notification settings.**

ROSTER SETTINGS

Admin Bar: Add Membership

Print

Club Members Staff My Profile Search Export Settings User Statistics

Tab Settings

Tab Default Name	Display to Members	Display Text
Members	<input checked="" type="checkbox"/>	<input type="text" value="Club Members"/>
Staff	<input checked="" type="checkbox"/>	<input type="text" value="Staff"/>
MyProfile	<input checked="" type="checkbox"/>	<input type="text" value="My Profile"/>
Search	<input type="checkbox"/>	<input type="text" value="Search"/>

Save Tab Settings

Profile Settings

Enable Username Change	<input checked="" type="checkbox"/>
Enable Password Change	<input checked="" type="checkbox"/>
Allow User to Change Their Photo	<input checked="" type="checkbox"/>
Default Photo URL (ex: /Images/NoPhoto.jpg)	<input type="text" value="/Images/NoPhoto.jpg"/>
Allow Users to Hide Themselves	<input checked="" type="checkbox"/>
Hide "Other Members" Section of Profile Pages	<input type="checkbox"/>
Hide Members Marked Invisible in "Other Members" Section of Profile Pages	<input type="checkbox"/>
Enable Text Message Input	<input checked="" type="checkbox"/>
Enable Profile vCard Download	<input checked="" type="checkbox"/>

Save Profile Settings

The Tab Settings allow admins to customize the names of the Directory Tabs. Unchecking the checkbox next to a tab name will remove this tab from display from members.

Tab Settings

Tab Default Name	Display to Members	Display Text
Members	<input checked="" type="checkbox"/>	<input type="text" value="Club Members"/>
Staff	<input checked="" type="checkbox"/>	<input type="text" value="Staff"/>
MyProfile	<input checked="" type="checkbox"/>	<input type="text" value="My Profile"/>
Search	<input type="checkbox"/>	<input type="text" value="Search"/>

Save Tab Settings

Under Profile Settings, check or uncheck boxes for various profile settings.

Profile Settings	
Enable Username Change	<input checked="" type="checkbox"/>
Enable Password Change	<input checked="" type="checkbox"/>
Allow User to Change Their Photo	<input checked="" type="checkbox"/>
Default Photo URL (ex: /Images/NoPhoto.jpg)	<input type="text" value="/Images/NoPhoto.jpg"/>
Allow Users to Hide Themselves	<input checked="" type="checkbox"/>
Hide "Other Members" Section of Profile Pages	<input type="checkbox"/>
Hide Members Marked Invisible in "Other Members" Section of Profile Pages	<input type="checkbox"/>
Enable Text Message Input	<input checked="" type="checkbox"/>
Enable Profile vCard Download	<input checked="" type="checkbox"/>

Relationship Name Settings can be altered by typing in alternate names, and then clicking Save Relationship Names.

Relationship Name Settings	
Relationship 0 (Primary Member)	<input type="text" value="Self / Primary"/>
Relationship 1 (Secondary Member)	<input type="text" value="Spouse / Secondary"/>
Default Relationship 2 and Up	<input type="text" value="Child / Additional"/>
More Relationship Names	There are no additional relationship names Edit Additional Relationship Names

Under Notification Settings checkmark or uncheck options like **Email Member on Username Change** to alter the **notifications** members receive when making changes in the **Directory**.

Admins or Editors may receive **emails** when a **member, staff, admin/editor** changes information by adding an **email address** in the **Address(es) to Send Notification To** and **Send Notification Email When Admin Updates Profile fields**.

Notification Settings

Hide "Private Messages" Checkbox	<input type="checkbox"/>	
Email Member on Username Change	<input checked="" type="checkbox"/>	
Email Member on Password Change	<input checked="" type="checkbox"/>	
Send Notification Email When Member Updates Profile	<input checked="" type="checkbox"/>	
Address(es) to Send Notification To		<input type="text" value="admin@grandkeyclub.com"/> (Separate Multiple Addresses with a Semicolon)
Send Notification Email When Admin Updates Profile	<input checked="" type="checkbox"/>	
Address(es) to Send Notification To		<input type="text" value="admin@grandkeyclub.com"/> (Separate Multiple Addresses with a Semicolon)

User Statistics

The **User Statistics** tab will list **all users** in the **Directory** with information on their **First Login, Last Login and Logins During Time Range**.


LOGIN REPORT

Admin Bar:

[Print](#)

Club Members
Staff
My Profile
Search
Export
Settings
User Statistics

[Edit Disclaimer Text](#)



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Start Date

End Date

[Show All](#) | [More Usage Statistics](#)


A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Profile	Name	Mem # (Rel)	First Login	Last Login	Logins During Time Range																				
View	Aaron, Randy	MBG3001 (0)	10/7/2010 6:39:56 PM	1/22/2014 3:15:12 PM	0																				
View	Aaron, Rebecca	Demo11234 (0)			0																				
View	Aaron, Rex	MAI3001 (0)			0																				

Using the **Datepicker**, you can change the **date range** to pull data within a certain timeframe. **Click Refresh** to load the new dates.

LOGIN REPORT

Admin Bar: Add Membership | Print

Club Members | Staff | My Profile | Search | Export | Settings | **User Statistics** | [Edit Disclaimer Text](#)



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Start Date: End Date: [Show All](#) | [More Usage Statistics](#)


Profile	Name	Mem # (Rel)	First Login	Last Login	Logins During Time Range
View	Aaron, Randy	MBG3001 (0)	10/7/2010 6:39:56 PM	1/22/2014 3:15:12 PM	0
View	Aaron, Rebecca	Demo11234 (0)			0
View	Aaron, Rex	MAI3001 (0)			0

Clicking **View** next to the **user's name** will take you to the **user's profile** to make **profile updates** as needed. (For instance, if someone still has access to the website that shouldn't and that user has logged in).

LOGIN REPORT

Admin Bar: Add Membership | Print

Club Members | Staff | My Profile | Search | Export | Settings | **User Statistics** | [Edit Disclaimer Text](#)



Join us this Thursday for a special Chocolate Tasting!

Start Date: End Date: [Show All](#) | [More Usage Statistics](#)

Profile	Name	Mem # (Rel)	First Login	Last Login	Logins During Time Range
View	Aaron, Randy	MBG3001 (0)	10/7/2010 6:39:56 PM	1/22/2014 3:15:12 PM	0
View	Aaron, Rebecca	Demo11234 (0)			0
View	Aaron, Rex	MAI3001 (0)			0


Click **More Usage Stats** to jump to the **Site Statistics Module** to run a detailed report on **user logins** that can be **exported** to a **.csv file**.

LOGIN REPORT

Admin Bar: Add Membership | Print

Club Members | Staff | My Profile | Search | Export | Settings | **User Statistics**

[Edit Disclaimer Text](#)



Join us this Thursday for a special Chocolate Tasting!

Start Date: End Date: Refresh Show All **More Usage Statistics**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Profile	Name	Mem # (Rel)	First Login	Last Login	Logins During Time Range																				
View	Aaron, Randy	MBG3001 (0)	10/7/2010 6:39:56 PM	1/22/2014 3:15:12 PM	0																				
View	Aaron, Rebecca	Demo11234 (0)			0																				
View	Aaron, Rex	MAI3001 (0)			0																				

Adding a Membership

Memberships may need to be **added manually** on the website for circumstances such as adding **Staff members**. Since most club's **member directory** will be based on an **accounting sync** there is no need to **add members manually**, in fact it is **not recommended to add members manually in most cases**. Members should always be added to the **accounting system** first to allow the **sync** to pull information into the website.

The **Add Membership** button is located in the **Admin Bar** of the **Directory**. This will be available on any tab within in the **directory**, so you may use it in any location of the **directory** itself.

Click the **Add Membership** button to begin adding a **new membership**.

DIRECTORY

Admin Bar: **Add Membership** | Print

Follow the **text field prompts** to add in relevant information. Fields with a **red asterisk** next to them are **required** and information must be added.

ADD MEMBERSHIP

Admin Bar:



[Club Members](#) | [Staff](#) | [My Profile](#) | [Search](#) | [Export](#) | [Settings](#) | [User Statistics](#)



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Please provide the following Membership information

***denotes required fields**

Membership Number	<input type="text"/>	*
Account Type	Select... ▼	
Membership Level	Select... ▼	
Display Name	<input type="text"/>	
Membership Begins	12/7/2016 	
Membership Expires	1/1/2100 	

Fill in the boxes below using the New Member's information

Relationship	0 - Self / Primary ▼
Title	<input type="text"/>
First Name *	<input type="text"/>
Middle Name	<input type="text"/>
Last Name *	<input type="text"/>
Suffix	<input type="text"/>

Display this membership in the Directory
(only affects member viewing, not admin.)

Web Account Information

Username *	<input type="text"/>
Password *	<input type="password"/>
Confirm Password *	<input type="password"/>



Ask user to change username/password on next login

Lock User From Logging In

User Type	1 - Member ▼
Admin Level	No Admin Access ▼

When **adding a Membership Number** for a **Staff** member, it is recommended to use their **last name** and not an actual number as to not conflict with actual member numbers. If you are adding a member manually, be sure that the member number is not in use and is recorded in the accounting system so there are not duplicates. Duplicate membership numbers will lock both accounts out of the website until unique membership numbers are assigned.

Please provide the following Membership information * denotes required fields

Membership Number	johnson *
Account Type	Select... ▼
Membership Level	Select... ▼
Display Name	Jerry Johnson
Membership Begins	12/7/2016 
Membership Expires	1/1/2100 

Add a **username** and **password** for the user and provide this to the user for their first login.

Fill in the boxes below using the New Member's information

Relationship	0 - Self / Primary ▼
Title	
First Name *	Jerry
Middle Name	
Last Name *	Johnson
Suffix	
<input checked="" type="checkbox"/> Display this membership in the Directory (only affects member viewing, not admin.)	

Web Account Information	
Username *	JJohnson
Password *	Admin123!
Confirm Password *	Admin123!

Ask user to change username/password on next login
 Lock User From Logging In

Beneath the **username** and **password field**, there are **two checkboxes** for ‘**Ask user to change username/password on next login**’ and ‘**Lock User From Logging In**’. The first option is always checked by default, this will prompt the user to update their information upon first login. The second option is only used if the user must be locked out of the website.

<i>Web Account Information</i>	
<i>Username *</i>	JJohnson
<i>Password *</i>	Admin123!
<i>Confirm Password *</i>	Admin123!
	<input checked="" type="checkbox"/> Ask user to change username/password on next login
	<input type="checkbox"/> Lock User From Logging In
<i>User Type</i>	1 - Member ▼
<i>Admin Level</i>	No Admin Access ▼
<i>Primary Email</i>	jjohnson@oldgrandkeyclub.com <input checked="" type="checkbox"/> Receive Emails?
	<input type="checkbox"/> Receive notification of private messages

The **User Type** and **Admin Level** are extremely important when setting up a new account since this will denote if the **user** is a **member** or **staff** and provide the appropriate **privilege level**.

	<input checked="" type="checkbox"/> Ask user to change username/password on next login
	<input type="checkbox"/> Lock User From Logging In
<i>User Type</i>	2 - Staff ▼
<i>Admin Level</i>	Site Editor ▼
<i>Primary Email</i>	jjohnson@oldgrandkeyclub.com <input checked="" type="checkbox"/> Receive Emails?
	<input type="checkbox"/> Receive notification of private messages

Admin Levels:

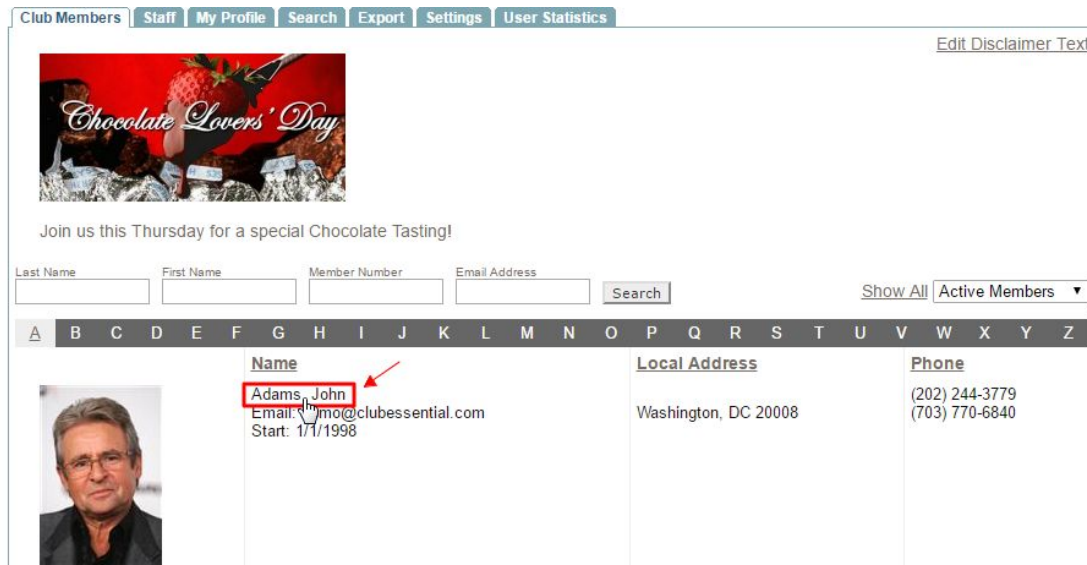
- **No Admin Access:** access to the website, but no Admin or Editor access
- **Editor:** access to Editor functions (typically used for staff that may edit pages on the website and use limited modules)
- **Admin:** access to Admin functions (full managers of the website)

Once the appropriate information has been added to the **profile**, click **Create Membership** at the bottom of the page to **add the membership**.

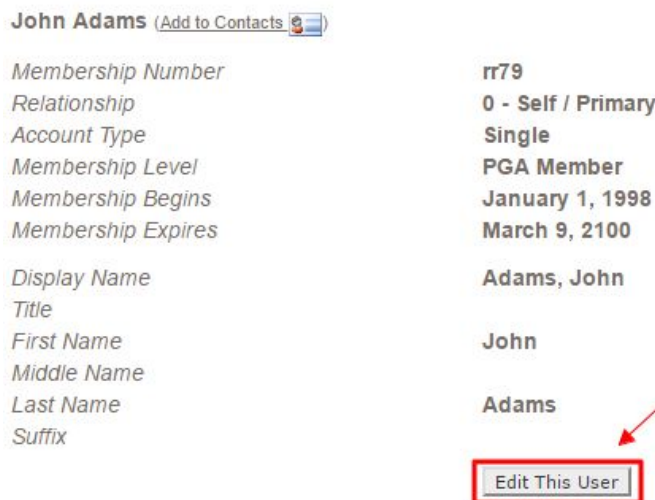
If you receive a **pop-up** denoting the **password is not secure**, click **OK** to **override** as this is a **temporary password** only used for the **first time login**.


Editing Profiles

You may **edit a member or staff member's profile** by **clicking on their name in the directory**.



Once in their **profile**, **click the Edit This User** button.



John Adams ([Add to Contacts](#) )

<i>Membership Number</i>	rr79
<i>Relationship</i>	0 - Self / Primary
<i>Account Type</i>	Single
<i>Membership Level</i>	PGA Member
<i>Membership Begins</i>	January 1, 1998
<i>Membership Expires</i>	March 9, 2100
<i>Display Name</i>	Adams, John
<i>Title</i>	
<i>First Name</i>	John
<i>Middle Name</i>	
<i>Last Name</i>	Adams
<i>Suffix</i>	

Edit This User

From here, you can **update any field** as needed. **Click Save Member** at the bottom of the screen to update the information.

FAQs

Q: A member that was recently added to the directory is unable to be found by other members, why?

A: Find the member in the directory as an Admin or Editor - if the member's name is Red then the member is hidden in the roster. You can change this by clicking their name > edit this user > and then make sure that the Display this user in the Directory checkbox is marked > save.

Q: I have a staff member that needs to receive emails from the website, but they cannot edit or login to the website - how do I add them?

A: Add the staff member as usual with the appropriate information, but click the Lock User From Logging In checkbox. Further, do not provide the login credentials to the user. Make sure the staff member is an Admin Level or No Admin Access.

Best Practices

1. It is best to never add members manually as members should be synced from the accounting system only.
2. When adding Staff members, be sure to set their user type to Staff so the staff member shows in the staff directory and not in the member directory.