



Satori
Web Design, LLC

MEMBERS ONLY AREA HANDBOOK

HOW TO USE THE CONTENTMANAGER MEMBERS ONLY AREA

TERRY AMBROSE

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Chapter 1: Log In

Access to the Members Only area is controlled by user name and password. Only current members with a valid user name and password may enter the Members Only area. When you are added to the member database for your club, you will receive a user name and password via email. You must use this user name and password to enter the Members Only the first time. Once you have entered, you may change the user name and/or password if you choose. Passwords are encrypted in the database and cannot be retrieved by anyone. Thus, if you lose or forget your password, you must retrieve a new one.

1. To log in, go to your home page.
2. Click on the Members Only – Click Here button
3. On the login page, enter your user name and password
4. Click the “Login” button

Lost or Forgotten Passwords

Eventually, you may lose or forget your password for the Members Only area. If you do, you can retrieve your user name and a new password.

- Go to the login page
- Click on the Forgot Your Password? link
- Enter your last name
- Enter your email address
- Click the Send My Info button

You will receive an email with your user name and a new, temporary password. Use this information to log in, then change your password using the instructions in the Login Information section of these instructions.

Helpful Hint:

Use the Remember Me automatic login feature to avoid having to log in each time you access your Members Only Area. Here’s how:

1. When you log in, be sure to check the Remember Me checkbox
2. After you are in the Members Only Area, add the page to your Favorites (Internet Explorer) or to Bookmarks (Firefox)
3. The next time you log in, use the Favorite or Bookmark set in step 2, you’ll be logged in automatically.

Chapter 2: A Quick Tour of the Members Only Area

HOME CLUB INFO ACTIVITIES CALENDAR NEWS CLUB HISTORY SPONSOR DETAIL

PHOTO GALLERY OFFICERS COMMITTEES LINKS SPONSORS MEMBERSHIP INTEREST

MAJOR FUNDRAISER LYLE HEATH AWARD CLUB BLOG

- Members Only - Kiwanis Club of Saddlebrooke

Welcome Unknown Member, today is Friday, February 13, 2009

Make this my default start page (Current choice: Message Center)

Welcome to your new Personal Start Page. The Members Only area has been revamped to provide a broader range of features in an easier-to-use package. On your Personal Start Page, you can:

- Update your own contact information
- Send emails to other members using the Message Center
- View all of your emails previously sent through the Message Center
- Create discussion topics from emails sent via the Message Center
- View all member news, documents and events
- Find other members by name, industry or business

For detailed instructions on how to update your personal information and/or use the Members Only area, see our topic. There are a number of other topics covered on the Blog page at . Please note that you may make any of the available pages in your Members Only area your start page by checking the box to "Make this page my default start page" at the top of the page.

Website Tips [view](#)

Show Help Links

Member Options

SITE ADMIN

?HELP LOG OUT

NEWS & EVENTS

RESOURCES

MEMBERS

MESSAGE CENTER

MY PROFILE

At the top of the page, the blue buttons indicate which pages are on your site. You may jump to any of those public pages by clicking on the corresponding button. The gold area below that indicates that you are in the Members Only area. The first line will include your club name. The second, your name and the current date. The third line includes a checkbox that you can use to set your Members Only area start page. On the right-hand side of the page at the top is a Google search box. You may search the web or just your site for information. Below that are Member Options.

- If you have Site Administration privileges, the top button will be to Site Admin.
- The Help button opens the standard default opening page for Members Only
- Log Out lets you log out of the Members Only area.
- News & Events opens a page on which you can see all news and events for the club.
- Resources opens a page on which you may register for projects, express interest in joining committees, access club documents and club member blogs and more.
- Members opens the listing of members page where you may search for members by name, industry or business, and view member profiles.
- If your club has chosen to be able to let any member print a member roster, the Print Member Roster button will drop

SITE ADMIN

?HELP LOG OUT

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MESSAGE CENTER

MY PROFILE

down from the Members button and allow you to print a copy of the roster.

- Message Center provides access to the Message Center, where you can send emails to other members, create discussions, and view or retrieve your previously sent emails.
- My Profile allows you to update your own personal information for other members to view.

This page also includes an option for a webmaster-generated welcome message. If you are the webmaster, you will see an option to change this message when you go to the Members Only default start page (Help).

Any member who changes his or her start page should check for a message periodically by using the “Help” menu item.

Chapter 3: Change Your Login Information

MY PROFILE

Basics:

Your user name and password combination are unique to you. Here are a few things to remember about user names and passwords.

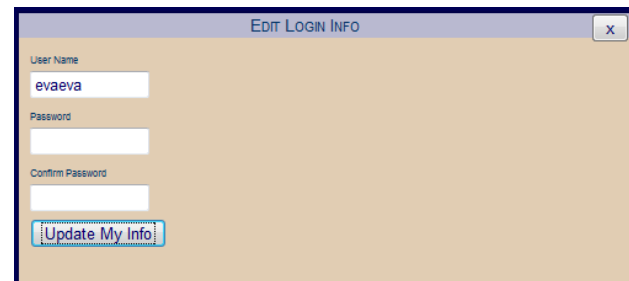
- User Names can only be viewed by you or your webmaster
- Passwords are encrypted in the database and cannot be retrieved by anyone
- Both User Names and Passwords must be between 6 and 16 alphanumeric characters, i.e., they may be all alphabetic, all numeric or any combination

Changing Your User Name and/or Password:

- Log in to the Members Only area
- Click on My Profile in Member Options
- Click on the Login Information “edit” link.
- Enter a new user name. Your current user name will be shown. You may choose to leave this the same.
- Enter a new password in the Password field
- Confirm the password in the Confirm Password field
- Click the Update My Info button.

If you only want to change your password, leave the user name the same and enter new password information.

If you only want to change your user name, leave the password fields blank and enter a new user name.



The screenshot shows a web browser window titled "EDIT LOGIN INFO" with a close button (X) in the top right corner. The form contains three input fields: "User Name" with the text "evaeva" entered, "Password" (empty), and "Confirm Password" (empty). Below the fields is a button labeled "Update My Info".

Chapter 4: Update Your Profile



MY PROFILE

Updating your profile is handled the same way as the login information. There are eight profile sections: Name, Address, Business, Bio and Personal, Photo, Contact Information, Offices and Awards, and Committees. Your Member Profile is important for two reasons. First, it provides other members with information about how to contact you. Second, it allows you to set what information is made available to other members using your Member Display Preferences.

Member Display Preferences

Your Member Display Preferences control what information of yours displays to other members and, if you are elected to an office or appointed to a committee, whether your name will show to the public. You must set these preferences for the information to be made available. You should view your profile, then select which information you will allow to be shown by checking or unchecking the corresponding checkboxes.

Your Member Display Preferences include:

- If your address will be shown to other members
- If your contact information will be shown to other members
- If your business information will be shown to other members
- If your biographical and personal information will be shown to other members
- If your photo will be shown to other members
- If your name will show on the Officers page if you are elected to an office
- If your photo will be shown on the Officers page if you are elected to an office
- If your name will be shown on the Committees page if you are on a committee

Editing Your Information

The following sections may be updated by clicking the “edit” link in the upper right-hand corner of the section:

- Name
- Address
- Business Information
- Biographical and Personal
- Contact Information

The following sections do not use the “edit” link:

- The Photo section uses an “Upload” link instead of “edit,” but allows you to upload a photo.
- The Offices and Awards section can only be updated by the webmaster. There is a link to contact the webmaster.
- The Committees section is updated each time you check or uncheck a committee checkbox. Committee chairs are notified when you request to join or quit a committee.


Updating with the Edit Link

- Click the edit link in the section you want to update
- Make changes to the information
- Click the Update My Info

Uploading a Photo

- Click the “upload” link in the Photo section
- In the dialog box that opens up, click the “Browse” button. This will open a new dialog box that lets you navigate around on your computer.
- Find the photo you want to upload on your computer.
- Select the photo by double clicking on the photo or by single clicking, then clicking the OK button (or “Open” depending upon your operating system)
- Click the “Use this File” button
- Close the dialog box using the “x” button in the upper right-hand corner of the dialog box

Chapter 5: News and Events



NEWS & EVENTS

Club news and events are listed under the News and Events menu option. You may view news stories, newsletter, calendar entries and links in this section. Here are the sections and what will be available in each. These options are provided to make it easier to find a particular type of information. To view the information for any of these areas, click on the title, the information will display in the right-hand panel. You may also search for information on your site by using the Google search at the top of the page.

Most Recent Information

This section is an overview of upcoming calendar events, club news and current Kiwanis International news. Click on any of the links to see the details of that event or news story.

Events

View events from any period of time under the Events area. Events are shown for the next 30 days by default, but you may change that time period by selecting different dates using the calendar icons. If you select a new start and/or end date, be sure to click the Show My Dates button to view the results.

News Stories

View news from any period of time under the News Stories area. Stories are shown for the previous 60 days by default, but you may change that time period by selecting different dates using the calendar icons. If you select a new start and/or end date, be sure to click the Show My Dates button to view the results.

Newsletters

Identical to News Stories section, but displays newsletters instead.

Documents

Identical to News Stories section, but displays club documents instead.

All News and Docs

Identical to News Stories section, but displays all news stories, newsletters and documents.

Links

All member links are displayed in this section.

Chapter 6: Sending an Email

MESSAGE CENTER

The Message Center allows you to send emails to other club members. You also have other options, including delayed sending, including attachments, creating a follow-up discussion and more. The following instructions assume that you have logged into the Members Only Area.

The screenshot shows the 'Compose Message' interface for the Kiwanis Club of Saddlebrooke. The header includes the club name, a welcome message for Wednesday, February 25, 2009, and a 'close message center' link. The form is divided into several sections: 'Compose Message' with fields for Subject (highlighted with a red box), Urgency (set to Moderate), Your Name (required), Your e-mail address (required), and BCC (with a note to separate multiple recipients by a comma). There are also checkboxes for 'Personalize Message with Recipient Name', 'Show Distribution List in Message', and 'Create Discussion Topic for Recipients'. A 'Message' field with a 'USE TEXT EDITOR' button is at the bottom. The 'Select Recipients' section lists members: Eva Astipolito (EvaEva), Kathy Ambrose, Stan Holcenberg, and Wilson McKenna, with a 'Check All' option. The 'Optional Features' section includes 'Attach A File' and 'Select Future Send Date', both with question mark icons. A 'Public Groups' section lists various groups like 'Budget and Oversight', 'Club Meeting and Administration', 'Come to Saddlebrooke', 'Historian and Club Records', 'House and Reception', and 'Human and Spiritual Values', each with a checkbox. A 'My Groups' section includes 'New Group', 'A New Group delete', and 'My Friends delete'. A 'help' link is also present.

Sending a Basic Email

- Click Message Center in the Member Options menu
- Click on Send Email. A dialog box will open with the form for sending an email.
- Enter a subject for your message.
- Make sure your name and email address are included in the form
- Type your message in the “Message” text box
- Select recipients from the list of members
- Click Send Message at the bottom of the form (cannot be seen on image above)



Personalizing Email Messages

By default, the ContentManager program will personalize each email to each recipient. Suppose you want to send the following short message: “The meeting for later today has been cancelled.”

You want to send this message to three members: Bob Jones, Bill Smith, and Sally Williams. By default, the program will address preface each email with the first name of that member. So, the email to Bob will read:

“Bob...

The meeting for later today has been cancelled.”

If you **do not** want the message to be personalized, uncheck the “Personalize Message with Recipient Name” checkbox.

Adding a Distribution List

Receiving a personalized email could be confusing to some people. They might wonder, “was I the only one who got this?” The solution is simple. Check the box to “Show Distribution List in Message”. If we do this, our message to Bob would read:

“Bob...

The meeting for later today has been cancelled.

Cc:

Bob Jones

Bill Smith

Sally Williams”

Discussion Topics

If you want your recipients to easily comment on the message and be able to share their comments, you can use the option to “Create Discussion Topic for Recipients.” Discussion Topics will be covered in detail later, but you may create one just by checking the box when you create your message.

Use Text Editor

A WYSIWYG text editor lets you create formatted messages. The text editor appears much like a Microsoft Word environment and allows you to format text, insert images, build tables, and create hyperlinks. For more information on what the text editor does, visit our Help Forum topic [WYSIWYG text editor](#) or go to www.satoriccontentmanager.com/forum/viewtopic.php?t=18.

Chapter 7: Email – Advanced Optional Features

MESSAGE CENTER

There are three advanced options: future send date, attachments and groups. We'll cover the first two here. The following instructions assume that you have already clicked "Send Email" in the Message Center.

Future Send Date

The Future Send Date option allows you to send a message at any future date. Using this option, you can schedule messages to be sent to members at a predetermined date and time. For instance, you might want to send a message on the morning of a meeting to remind attendees of the meeting.

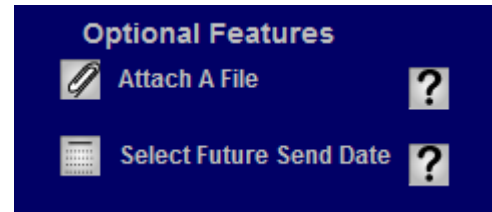
- Click the "Select Future Send Date" link in the Optional Features section
- Use the calendar that opens in a dialog box to select a date
- Select a time for the message to be sent (all times are Eastern)
- Close the dialog box with the "x" in the upper right-hand corner.

Complete and send your message as usual. Your message will be sent on the date selected at approximately the selected time

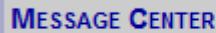
Attachments

You may add attachments to your email message using a process much like uploading a photo for your profile.

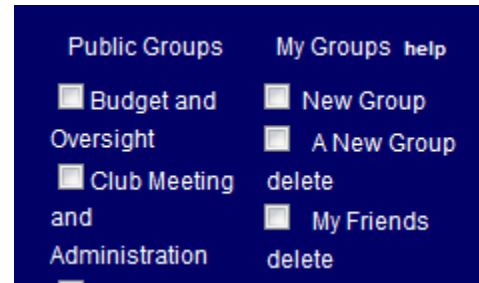
- Click the "Attach a File" link in the Optional Features section
- Click "Browse". This will open a dialog box that will let you navigate on your computer.
- Find the file on your computer. Double click the file name or click and then click "OK" (or "Open" depending upon your operating system)
- Click "Use this File"
- Repeat until all attachments have been added, then close the dialog box using the "x" in the upper right-hand corner.



Chapter 8: Email Groups

A rectangular button with a dark blue border and a light gray background, containing the text "MESSAGE CENTER" in blue, uppercase letters.

There are two types of groups that you may use to send emails. Public groups are those that exist for all members to use. These consist of committee members, officers, etc. “My Groups” are those that you create and are available only to you.



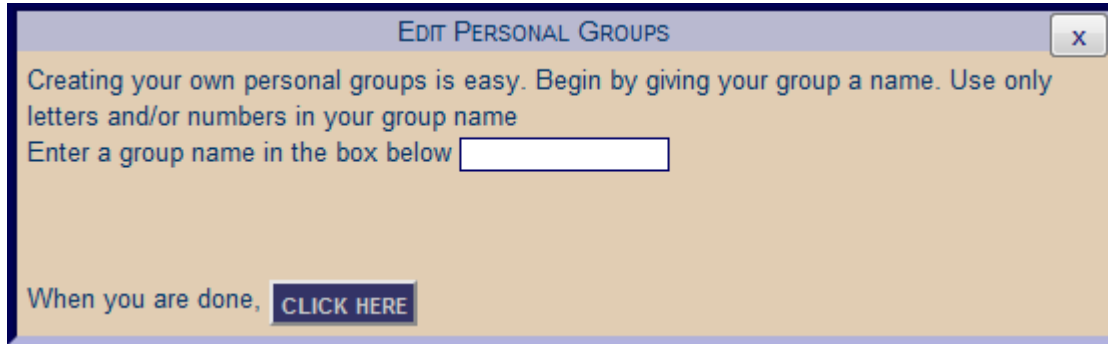
Public Groups

To use a public group, check the box for that group. This will cause the checkboxes for each member of that group to be checked in the recipient list.

My Groups

You may have as many personal groups or “My Groups” as you would like. Use the members of your personal group just like you would the Public Groups. To create a new personal group:

- Check the “New Group” checkbox under My Groups.
- Enter a name for your group. Make it unique so you don’t get your groups confused.

A screenshot of a dialog box titled "EDIT PERSONAL GROUPS" with a close button (x) in the top right corner. The background is light tan. The text inside reads: "Creating your own personal groups is easy. Begin by giving your group a name. Use only letters and/or numbers in your group name". Below this is the instruction "Enter a group name in the box below" followed by a white text input field. At the bottom left, it says "When you are done," followed by a dark blue button with the text "CLICK HERE" in white.

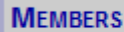
- Use the “Click Here” button when you’ve entered a name
- Select the members for your group
- Click “Done”

You may edit a previously created personal group by clicking on the name of the group.

Combinations of Groups

You may select any combination of groups and individuals to be included in an email. Members will be removed or added to the recipient list as groups or member checkboxes are checked or unchecked. If a member is in more than one group, that member will only be removed from the recipient list when the all of his/her groups have been deselected.

Chapter 9: Finding Members

A rectangular button with a dark blue border and a light gray background. The word "MEMBERS" is written in blue, uppercase letters in the center.

Member information is available from two menu options: Members and Print Member Roster (if this is active for your club). The information available in the Member Listing is limited by the display preferences set by each member. Information available in the Print Roster option is not limited by the member's display preferences, but this option may not be active for your club.

Members

Member Listing

This menu item displays a listing of members, which you may sort by first or last name, business, industry or “special date”, i.e., birthday, spouse's birthday or anniversary. Click any of the heading buttons to sort by the criteria.

View any member's profile in the list by rolling your mouse over the name of the member in the member listing. Send an email from your own email program to any member in the list by clicking on the email address for that member.

Search for Members

Begin typing the first or last name for the member in the Search Members box. A list will drop down, click on the name of the member to view the member's profile.

Filters

You may filter the listing of members by using the Group or Committee filters. This will provide you with a listing of members who are only in the selected group or committee. (Note that the “group” feature is not active on all sites.)

Print Member Roster

A rectangular button with a dark blue border and a light gray background. The words "PRINT MEMBER ROSTER" are written in blue, uppercase letters in the center.

If your club has chosen to have this option active (the default condition), you may view a printable member roster that corresponds to the format used by many clubs.

Chapter 10: Project Signups

RESOURCES

If your club chooses to collect project signup hours electronically, the club may build a listing of projects and members may add hours to those projects. Access Project Signups from the Resources page.

Adding Hours

- Click Project Signups
- Click on the name of an approved project (pending projects are not yet available)
- Enter you number of hours worked
- Select the date worked using the calendar icon
- Click “Add My Hours”

Adding New Projects

If the project you’d like to use is not available, you may request a new project by clicking on the “I want to create a new project” link at the bottom of the list. To add a new project:

- Click the “I want to create a new project” link
- Enter a name for the project that is different from all other projects
- Enter a short description of the project
- Click “Create My Project”

Depending upon the approval process requested by your club, your project will either become available immediately for use or will be put into a pending status until it is approved by the webmaster.

View Hours

View your hours by clicking the “Show My Reported Hours” link. View hours for any time period by selecting different dates using the links to change the start or end dates. Your hours will display in a listing. You may remove hours from the list by unchecking a checkbox.

Chapter 11: Committees – Managing Your Participation



There are two ways to manage your committee participation.

- Member Profile – Committees
- Resources – Committees

Both of these sections let you manage your participation. Please note that you may **request** to join or quit a committee, however, your request is not final until approved. This chapter covers the features of the Resources – Committees section, not club procedures.


Member Profile – Managing Committee Participation

- Click My Profile in Member Options
- View the listing of all club committees and check or uncheck the boxes for each committee you would like to join or resign from.

Resource – Managing Committee Participation

- Click Resources in Member Options
- View a listing of all club committees, including member-only committees by clicking on the Committees link in Resources.
- Request to join or quit a committee by checking or unchecking the corresponding checkbox.
- View other members of a committee by rolling your mouse over the View Members link

Chapter 12: Finding Member Documents and Resources



RESOURCES

Member documents and resources are different than news stories and documents in that these documents and resources are intended just for members, not the public. These resources may include bylaws, procedures, forms, or any other information that has been identified as being a resource for members. Items are shown by default for the most recent 60-day period, however, you may view other dates by selecting different start and end dates or view all items by checking the “view all” checkbox. To view any item, click on its name (which is a link).

If your webmaster determines that certain resources are going to be used regularly, he or she may assign those items to the left-hand shortcut list of resource links. If there are items that you would like to see added to the shortcut list, contact your webmaster.

Webmaster Note:

Only news items that have not been uploaded may be added as shortcut items. This means that the news story or document must contain text created through the WYSIWYG text editor in News and Doc Admin.