

How do I manage club documents?

Michael C. - 2024-11-29 - Club Management

When you need to upload a PDF, text, Word or other files to your site so your members or guests can access it, you can put it into your **Club Documents**. Below are the steps on how to edit **Club Documents** in ClubRunner.

REQUIREMENTS:

- You will need Access **Level 50 (Club Executive)** or better (40 or 30) to Add/Edit/Delete club documents.
- Members with access level 70 (Member) or 60 (Editor) will have read only access to the club document files.
- All documents to upload must be **30 MB or smaller**
- The file types you are allowed to upload are: *bmp, doc, docx, eps, gif, html, htm, jpeg, jpg, pdf, png, ppt, pptx, pub, swf, tif, txt, vsd, xls, xlsx, rtf, and zip*

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Accessing the Documents List

1. Login to your ClubRunner website. Click on the **Member Login** link found in the top right corner of the homepage and enter your login information.
2. Now back on the homepage click on the **Member Area** link found in the top right corner.
3. Along the top of the screen you will see a number of tabs. Click on the **Organization** tab.
4. Now, click on the **Documents** link. This brings you to your **Private Documents** page.

Adding a New Document Folder

1. To add a new document folder, click on the **Add Folder** button found in the top right corner.

Private Documents

Documents and folders are sequenced alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.

<input type="button" value="Collapse All"/> <input type="button" value="Expand All"/>				
Name	Updated On	Updated By	Actions	
▼ Club Brochures and Handouts	May 13, 2015	Edward Smith	Add Add Multiple more...	
Christmas Carnival Flyer	Apr 02, 2018	Mickey D	Edit Get Link Delete	
Community Hike Trail Map	Apr 13, 2018	Mickey D	Edit Get Link Delete	
Gernsback Scholarship Application	May 13, 2015	Edward Smith	Edit Get Link Delete	
▶ Meeting Minutes and Notes	May 13, 2015	Edward Smith	Add Add Multiple more...	

- Next enter a **Name** for the new folder. You may optionally also enter a description of the folder.

Note: the Permalink field will automatically populate based on the Folder Name.

Add New Folder

Folder Settings

Name:	<input type="text" value="Sample Folder Name"/>
Permalink:	<input type="text" value="sample-folder-name"/>
Description:	<input type="text" value="Sample Folder Description"/>

- Click on the **Subfolder Of** field if you want to place the new folder specifically within another folder.

Add New Folder

Folder Settings

Name:	<input type="text" value="Sample Folder Name"/>
Permalink:	<input type="text" value="sample-folder-name"/>
Description:	<input type="text" value="Sample Folder Description"/>
Subfolder of:	<input type="text" value="-- Top Level Folder --"/>

- Next click on the **Save** button to create the new folder.

Add New Folder

Folder Settings

Name: *

Permalink: *

Description:

Subfolder of:

[Cancel](#) [Save](#)

5. Once the folder has been saved you will be taken back to the **Private Documents** screen. Here you should see your new folder within the list.

Note: You can always drag and drop to change the document and folder structures by hovering your cursor to the right of the document name (The cursor should turn into four arrows) and drag it to a new location.

Adding a Document

1. If you want to add a document file, click on the **Add** button.

Private Documents

[Add Folder](#) [Add](#) [Add Multiple](#) [Download All](#)

Documents and folders are sequenced alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.

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2. Next enter a **Title** for the new file. You have the option to also enter a description of the file.

Note: The Permalink field will automatically populate based on the Title Name.

Add Document to Root Folder

Document Settings

Title: *

Permalink: *

Description:

3. Click on the **Document Folder** field if you want to place the new file specifically within a folder.

Document Folder:

Club Brochures and Handouts ▾

-- Top Level Folder --

Club Brochures and Handouts

Meeting Minutes and Notes

4. Next you define the **Access Level** for the File. There are two options:
- **Public:** Any visitor can click on the link and access the document.
 - **Requires Login:** Only members with a valid login will be able to access the document.

Add Document to Root Folder

Document Settings

Title: *

Permalink: *

Description:

Document Folder: ▾

Access Level: ☐ Public ☒ Requires Login

5. Now, it's time to upload the file. Click on the **Choose File** button and select the file from your computer. Double-click on the file name to select it.

Note: The file types you are allowed to upload are: bmp, doc, docx, eps, gif, html, htm, jpeg, jpg, pdf, png, ppt, pptx, pub, swf, tif, txt, vsd, xls, xlsx, rtf, and zip.

Add Document to Root Folder

Document Settings

Title: *

Permalink: *

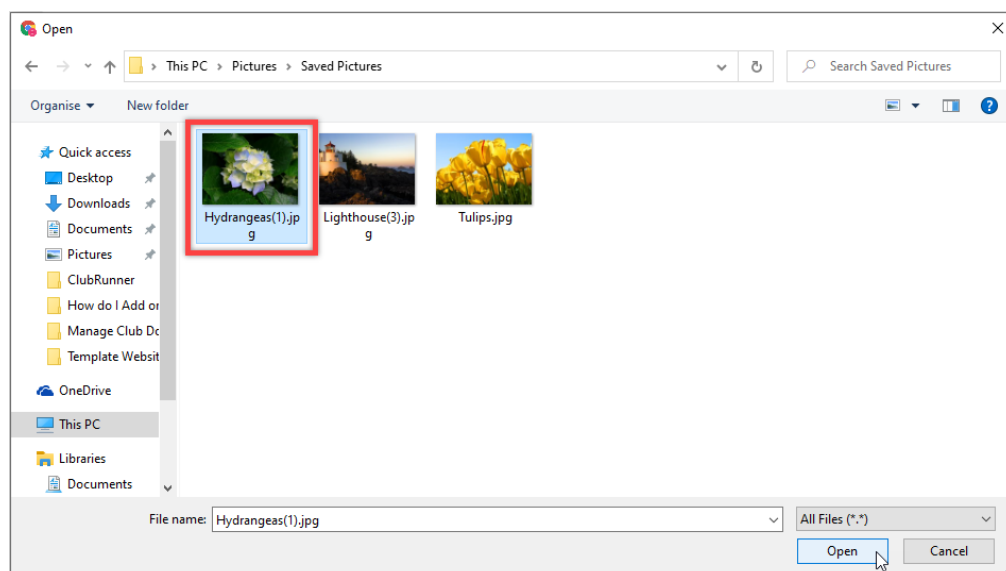
Description:

Document Folder:

Access Level: ☐ Public ☒ Requires Login

File: No file chosen

Maximum file size for upload is 15.00 MB.



6. Now click on the **Save** button found in the bottom right corner.

Add Document to Root Folder

Document Settings

Title: *

Permalink: *

Description:

Document Folder:

Access Level: ☐ Public ☒ Requires Login

File: Hydrangeas(1).jpg
Maximum file size for upload is 15.00 MB.

[Cancel](#) [Save](#)

- Once the file has been uploaded and saved you will be taken back to the **Private Documents** screen. Here you should see your new file within the list.

Private Documents

[Add Folder](#) [Add](#) [Add Multiple](#) [Download All](#)

Documents and folders are sequenced alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.

[Collapse All](#) [Expand All](#)

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📄 Sample File	Sep 29, 2020	Edward Chu	Edit Get Link Delete

Adding Multiple Documents

- If you wish, you may upload several documents at once. From the **Private Documents** screen click on **Add Multiple**.

Private Documents

[Add Folder](#) [Add](#) [Add Multiple](#) [Download All](#)

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- You are taken to the upload interface. First, identify the folder to which you wish to upload your documents using the **Document Folder** drop down menu.

! Documents can be public, exercise caution when storing documents with private information and a public access level.


Upload Documents to Root

Document Folder: -- Top Level Folder -- 

- Top Level Folder --
- Club Brochures and Handouts**
- Meeting Minutes and Notes






3. Next, select the **Access Level** for the documents by clicking on **Public** or **Requires Login**. If you select **Public**, non-members can potentially access the document. If you select **Requires Login**, only logged in members may view it.

Upload Documents to Root

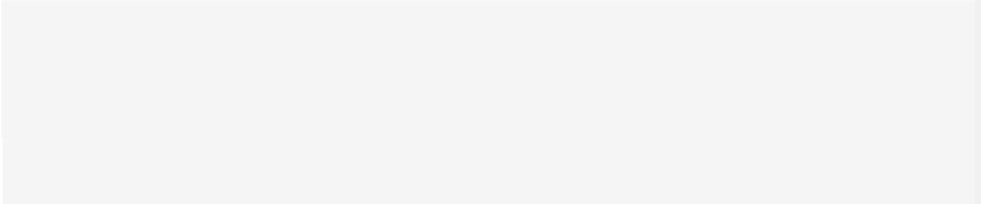
Document Folder: -- Top Level Folder -- 

Access Level: ☐ Public ☒ **Requires Login**

4. Now, you may add multiple documents to the upload queue. There are two possible methods for this.
5. You may directly drag and drop files from a folder on your computer into the upload field. To select multiple files, hold down the **Ctrl key** and click on each one. To select a group of files, click on the first file, then hold down the **Shift key** and click on the last file.

Name	Date modified
 ClubGroupPhoto.jpg	2020-09-29 3:55 PM
 ClubPresentation.docx	2020-09-29 3:54 PM
 New PlanMaker document.docx	2020-09-29 3:53 PM
 New Presentations 2016 document.doc	2020-09-29 3:53 PM
 Presentation Script.txt	2020-09-29 3:53 PM

6. Alternately, you may click on the **Add File** button. You will need to add the files one at a time with this method.

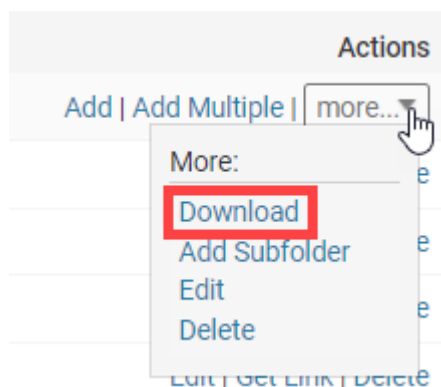
Filename	Size	Status
		
<div> </div>		
		44 KB 0%

7. When you have selected all the necessary files, click **Start Upload**. If the upload is successful, a confirmation message will appear and you are returned to the **Private Documents** page.

Filename	Size	Status
ClubPresentation.docx	8 KB	0%
New PlanMaker document.docx	5 KB	0%
New Presentations 2016 document.doc	32 KB	0%
Add files	Start upload	44 KB 0%

Downloading Documents

1. You have the option to download files by folder or all at once. To download the contents of a given folder, click on the More drop down menu under the Actions header. Then select **Download**. Your files will automatically start downloading in the form of an archived ZIP file.



2. To download all your club documents at once, click on the **Download All** button above the file and folder list. All your files will be archived in a single ZIP folder and downloaded to your computer.

Notes:

- The save location of your downloaded files is dependent on your software and personal settings. For many users the default save location is their **Downloads** folder, but this can vary.
- If there are no documents available to download, the Download All button will not be available.

Private Documents

Go

Add Folder

Add

Add Multiple

Download All

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Collapse All

Expand All

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<div><div></div><div></div><div>Sample File</div></div>	Sep 29, 2020	Edward Chu	Edit Get Link Delete

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- [How do I use grab points?](#)