



## Discussion Forums

Last Updated Mar 03, 2020  
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## Discussion Forums

ClubExpress includes a powerful discussion forums module, allowing members to participate in online discussions on a variety of topics. Original messages and their replies are organized into threads that are listed within a forum. Forums in turn are grouped into categories, allowing a club or association to organize forums for different purposes.

Forums configured as an email list ("listserver") push messages out to forum members' email boxes and allow members to reply via email. The reply is posted to the forum and then sent back out to every forum member. But these forums can also viewed online like any other forum and are fully integrated into the rest of ClubExpress.

## Navigate Forums

[Home](#) > [Discussion Forums](#)

### Discussion Forums

You have message(s) awaiting approval
 [Search](#)
[Our Discussion Forums Policy](#)

#### General Interest Forums

*This is a category description.*

	threads	posts	last post
<b>Equipment</b> Public Active <i>This forum focuses on equipment, including what to buy for different skill levels and needs, how to assemble and how to maintain. Safety issues are handled in the safety forum</i>	18	31	12/18/2013 1:50 PM
<b>Board of Directors</b> Public Active <i>Anything to do with the operation of the club, including board meetings, finances, bylaws, facilities, etc.</i>	5	19	10/13/2013 9:25 PM
<b>Day Trips</b> Public Active <i>Discussion forum for arrange Day Trips with other club members.</i>	2	17	3/23/2013 12:26 PM
<b>Member Buy/Sell/Trade</b> Public Active <i>Forum for members looking to buy, sell or trade items with other members. NW Balloon Club is not involved with these transactions, which are between members directly. All transactions are at the member's own risk.</i>	3	5	7/14/2013 11:56 PM

This screen shows the forum categories and forums defined by your organization. Each forum includes a brief description of the forum's purpose, the number of threads and posts in the forum and the date and time of the last post.

Next to a forum's name is its Visibility setting (Public, Club Members Only or Forum Members Only) and its Status setting (Active, Not Active, Locked or Archived). Admins will see these settings for ALL forums. Moderators and coordinators will only see visibility and status links for the forums they moderate/coordinate.

Click Search to search for specific messages. Click Our Discussion Forums Policy (if shown) to view the club's policies for maintaining harmonious and smoothly-running forums.

**Administrators:** Club administrators have access to a special forum (The Administrators' Discussion Forum) that is available to all administrators across all clubs and associations using ClubExpress. It provides a place for admins to

ask questions and share their expertise with administrators from other clubs. It will be shown at the end of the list of forums.

Threads of Messages

Clicking the forum name displays a list of threads in the forum, as shown in the following screen:

Home > Discussion Forums > Equipment

Equipment

This is a list of the threads in the forum you selected. Click on 'Subject' or 'Last Post' to sort the threads into the corresponding sequence. Click on a thread name to view the messages in that thread.




Start New Thread

My Forum Preferences

Page 1 of 1

Search This Forum

Go To Forum: Equipment

Started By	Subject	Posts	Views	Last Post
 msmith	Used basket and frame 🚗	3	74	12/18/2013 3:43 PM by Marty
 Marty	Test message	1	8	5/15/2013 11:59 AM by Marty
 Marty	Sticky Release Valve 🚗	1	13	5/1/2013 10:41 AM by Marty

Each row is a separate thread, showing the author of the first post, the thread subject, number of messages in the thread, the number of times the thread has been viewed, and the date and author of the most recent post. You can change the sort order by clicking the Subject and Last Post headings. Clicking on a heading a second time changes the direction of the sort.

A thread can be “pinned” to the top of a forum so that it’s always visible. Pinned threads are shown with a different background color and a pin icon.

If messages were posted to a forum since your last visit, a special symbol is displayed in the Last Post column.

If there are more threads in the forum than will fit on a single screen (based on the number of messages per screen configured in your profile), the Prev, Next, and paging controls will be active, allowing you to move to any page of threads.

To select a different forum, click the Go To Forum drop-down in the top right corner. To start a new thread, click Start New Thread in the top left corner.

To modify your individual preferences for this forum, click the My Forum Preferences button. You will be taken to the preferences screen in your Profile.

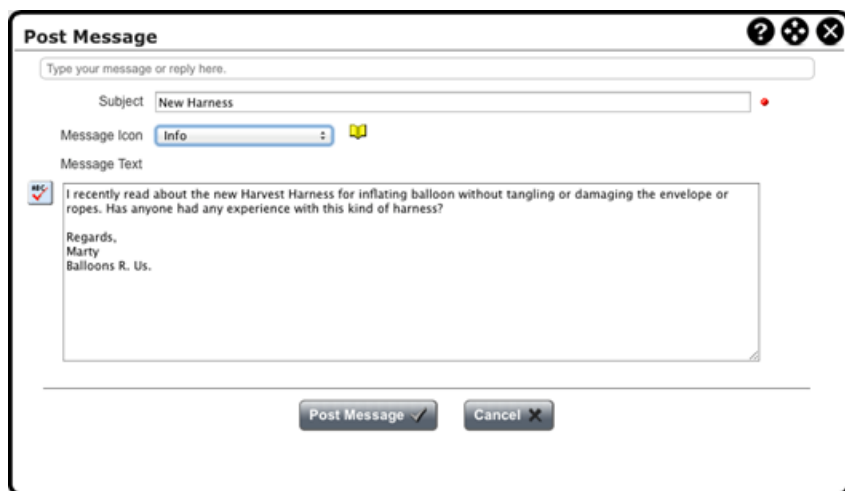
If you're configured as a Moderator of this forum, the Members button allows you to view and update “special” members in the forum, including those who are banned from posting in the forum and those whose messages must be moderated. You may also see a Forum Admin button, which allows you to change the properties of the forum. See below for more details.

You can also search in the current forum by entering a value in the Search This Forum box and clicking the Go button. All entered words must be present in the message for a match to be made.

**Example:** Searching for “red blue green” finds messages containing all three words, but you do not need to enter any special keywords. (Note: additional options are available on the search page.)

## Create Messages in a Forum

Click the Start New Thread button to start a new thread. You will initially see the simple message editor, shown below.

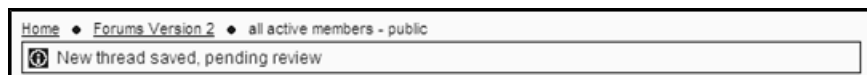


The screenshot shows a 'Post Message' dialog box. At the top, there's a text input field with the placeholder 'Type your message or reply here.'. Below that is a 'Subject' field containing 'New Harness'. To the right of the subject field is a small red dot. Below the subject field is a 'Message Icon' dropdown menu showing 'Info' with a small yellow icon to its right. Below the icon dropdown is a 'Message Text' field containing the text: 'I recently read about the new Harvest Harness for inflating balloon without tangling or damaging the envelope or ropes. Has anyone had any experience with this kind of harness? Regards, Marty Balloons R. Us.' At the bottom of the dialog are two buttons: 'Post Message' and 'Cancel'.

Specify the subject and optionally, a message icon from the drop-down list (the icon is displayed beside the drop-down). Then enter the message text and click Post Message. The message will be added to the forum.

In your profile, you can also set an option to use a version of the advanced content editor.

If you are moderated in the forum or the forum as a whole is moderated, you will see this message displayed after you create and save the post. (Note that if you are also a moderator, your message will post immediately.)



The screenshot shows a forum notification bar. It has a breadcrumb trail: 'Home • Forums Version 2 • all active members - public'. Below the trail is a message icon and the text 'New thread saved, pending review'.

### Adding Attachments to a Message



To add attachments (if allowed by the forum), click the paperclip icon at the bottom of the window. The screen will refresh to show the following panel:

Attachments (up to five allowed)

A screenshot of the attachment panel. It features a single text input field. To the right of the field are two buttons: 'Browse...' and 'Remove'. Below the input field is an 'Add' button.

Click the Browse button and select a file from your computer or network. It will be added to the message. If you want to add another file, click the Add button to display another “Browse” field, as shown below.

Attachments (up to five allowed)

A screenshot of the attachment panel after clicking the 'Add' button. It now displays three text input fields stacked vertically. Each field has a 'Browse...' button to its right. A 'Remove' button is positioned to the right of the 'Browse...' buttons. An 'Add' button remains at the bottom left of the panel.

You can attach up to 5 files to each message and the maximum size of each message, including attachments, is 2MB. If you want to remove a file, click the Remove button beside that filename.

When you post the message, the files are not physically attached. Instead, the message includes links back to each file. Clicking the link gives you the option of opening the file or saving it to your local hard disk. You must be connected to the Internet to view or save attachments.

## View Messages in a Forum Thread


In the Thread List screen, clicking a thread subject allows you to view the individual messages within the thread. There are two views, shown in the following two screens.


[Home](#) > [Discussion Forums](#) > [Equipment](#) > [Messages](#)


Equipment

Great site on ballooning extravaganzas for the who...

[Return to Forum](#) [Switch To Flat View](#)

 Legend

[Reply](#) 




7/10/2008 10:05 AM


I'm with Martin! This site is great!


msmith

Quoted Text



Thanks for the link!




msmith 7/10/2008 9:58 AM 





msmith 7/10/2008 10:02 AM




msmith 7/10/2008 10:05 AM




Marty 8/10/2012 4:23 PM 



Jonesy 7/19/2012 5:10 PM



Jonesy 2/8/2013 8:05 PM



Jonesy 2/8/2013 8:05 PM

[Return to Forum](#)

“**Thread View**” shows the current message at the top of the screen with a thread list underneath showing the hierarchy of messages and replies. If the current message has attachments, they are listed below the body of the message. Clicking the link allows you to open or save the file.

In the tree, the current message is indicated with a red arrow in the Author column. New messages since your last visit are flagged with a special symbol. Messages with attachments have a paperclip indicator. To view a different message in the thread, click the message’s Subject in the tree view.

If the member who posted a message has enabled this option, you can click his or her name to display his or her bio in a popup window. This view respects the author’s pre-defined visibility settings. Administrators can click the Status link to display a popup with the member’s actual name and email address, as well as message handling options.

You can also view messages in “**Flat View**”, similar to the sample below:

Home > Discussion Forums > Equipment > Messages

## Equipment

Great site on ballooning extravaganzas for the who...

[Return to Forum](#) [Switch To Threaded View](#)

Author	Last Post	
msmith	7/10/2008 9:58 AM	<a href="#">Reply</a>
Check out <a href="https://democlub.express.com">https://democlub.express.com</a> for more info!		
msmith	7/10/2008 10:02 AM	<a href="#">Reply</a>
Thanks for the link!		
msmith	7/10/2008 10:05 AM	<a href="#">Reply</a>
I'm with Martin! This site is great!		
<div>Quoted Text</div> Thanks for the link!		
Jonesy	7/19/2012 5:10 PM	<a href="#">Reply</a>
just a test reply. With an edit.		

This view shows every thread message fully expanded. You cannot see the hierarchy of messages, but it is easier to browse and read everything without having to continually click to a new message. New messages since your last visit are flagged with a special symbol. Messages with attachments have an attachment section below the body of the message. Flat view can also be sorted by Post Date.

For each view, users can separately configure the number of messages to show. If there are more messages than can be shown on one page, the Prev, Next, and paging controls will be active, allowing you to move to any page of messages within the current thread. To return to the list of forum threads, click the Return to Forum button in the top right corner.

### Subscribing to a Thread

When this option is enabled, you will see a Subscribe button at the top of the screen. Click it to subscribe to a thread. Whenever a new message is posted to the thread, you will be notified by email.

If you are already subscribed, the button changes to Unsubscribe. Click it to no longer receive notifications by email. There is also a screen on the Profile to view and update all forum subscriptions.

Members can only subscribe to a thread if this option has been enabled for the forum. If the forum is configured as a list-server (forum posts are emailed to members), subscriptions are only available if the member is not already receiving each forum message by email. Members will receive the complete posting via email. If the forum is not configured as a listserver, subscriptions are always available; members receive a notification about a new posting, including a link to the site to read the message.



If a thread is deleted, a subscription to that thread is also deleted. If a thread is moved to another forum, the subscription will be moved as well. Subscription messages always use the member's primary email address from the member Contact Info screen.

### Replying to a Message



Click the Reply icon to reply to a specific message. You will see a screen similar to the following:

This screen displays either the basic message editor or a version of the advanced content editor, depending on how your profile is configured.

If the sender of the message to which you are replying allows private replies, you will see a Reply Type option at the top of the screen. You can either reply as a public message to the forum or send a private reply via email. If you send a private reply, the screen will include a CC: field with your email address listed by default; you can leave it as is to receive an email copy of your message, change it or blank it out.

If you click the Quote Previous Message link, the system inserts the contents of the message you are replying to, using a GroupBox control. You can edit the quotation by double clicking inside the GroupBox, perhaps to remove parts of the reply that are not relevant to your comments. (Please do not modify or delete the container of the quoted text. This helps us manage the quotes and display them nicely in discussion forums.)

When you click Post Message, the message is saved and sent, either to the forum or, if you clicked “Private Reply”, as an email to the other member.

## Post Messages from a Mobile Device

If you are using a smartphone or tablet to create a new message, the full editor is specially optimized for a mobile device:

A screenshot of a mobile application interface for posting a message. The status bar at the top shows 'Verizon', signal strength, Wi-Fi, time '2:56 PM', and battery '75%'. Below the status bar is a navigation bar with icons for home, globe, settings, user profile, and help. The main screen is titled 'Post Message'. It features a text input field with the placeholder 'Type your message or reply here.' Below this is a 'Subject' label and an empty text box. Underneath is a 'Message Icon' label and a dropdown menu showing '<< None Selected >>'. A rich text editor toolbar is positioned below the dropdown, containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), font size (12px), font type (Ac Regular), and various alignment and list options. The text area below the toolbar contains the message: 'Regards, Marty Balloons R. Us.' Below the text area is a paperclip icon for attachments. At the bottom are two buttons: 'Post Message' with a checkmark icon and 'Cancel' with an 'X' icon.

Specify the subject and, optionally, a message icon. The editor box is in the middle of the screen; if you have a signature, it will be inserted automatically. Tap at the top of the text box and your device’s keyboard will appear to enter the forum post.

The toolbar rows above provide the following functions:

- Bold, italic, underline, and strikethrough
- Font size
- Font type, using any of the custom fonts added to your website

- Text color and background color
- Numbered and bulleted lists
- Indent and outdent
- Alignment
- Create link
- Add image (from your local camera or photo list)
- Remove formatting

For many of these icons, you can either tap the icon and continue typing with the new property enabled, or highlight a block of text and tap the icon to apply that format to the block.

The Attach File icon is below the text box. Tap it and you can add up to 10 files from your device, including photos, as attachments.

Tap the Post Message button to post your message to the forum, or the Cancel button to exit the editor without posting. You will be prompted to confirm this action and if you tap OK, any message content you have added will be lost.

If you are replying to a previous message, there are additional options:



**Post Message**

Type your message or reply here.

Subject      Safety classes

Reply Type      ☐ Reply to Forum

☒ Private Reply (via email)

CC To:

info@clubexpress.com

[Quote Previous Message](#)

The subject is filled in and you have the option of replying to the forum or of sending a private reply via email (if allowed by the member.) You can also optionally send a CC: to another email address.

If you tap the Quote Previous Message link, the message will be inserted into your reply, indented and with a shaded background to distinguish it from the reply itself. The previous message can be edited for brevity and clarity, for example, just to retain the comment that you are replying to.

## Post Messages via Email

In addition to posting a thread by clicking the Start a Thread button, forum members can start new threads by sending an email to the forum's email address, if the forum has been set up to allow posting via email.

Forum members can also reply to messages sent from the forum via email. There is a footer included in each message that includes a link to the thread that the message belongs to.

**To start a new thread via email**, email the address of an active forum you are a member of (i.e. [BuySell@myclub.com](mailto:BuySell@myclub.com)). Your email will create a thread. The title will be whatever you have entered in the Subject field of your email.

You can also reply to a forum message that you receive by email. Simply click the Reply button in your email software. Make sure you delete any extraneous text (other messages, footer information, etc.) before you send the email.

**Note:** When you post a message to one or more forums via email, our server will look at all addresses in the To: and CC: fields to see if any match a forum that the server is managing. Unknown email addresses are ignored. In addition, the "From:" address will be verified against the forum's membership list to ensure that you are allowed to post. You must send the message from the email account associated with your forum membership in order for the message to be posted into the forum.

If an incoming message has more than five attachments, it is posted with the first five, and a note is sent back to the sender that this was done. If a forum does not allow attachments and an incoming message has them, it is posted without its attachments, and a similar note is sent back to the sender.

The email list options, especially being able to send new messages to a forum via email or reply to existing messages by email, require that ClubExpress be hosting your club's email accounts. If you currently have email for a domain pointing to a 3rd party email server, configuring this domain for a listserve will not work. But you can also buy a second domain (for example, "MyClubForums.org" for use just with discussion forums.)

The forum system automatically ignores "Out-of-Office" messages that user may create when they go on vacation or are out for other reasons. In rare occasions, if a message being posted by email has language similar to an "Out-of-Office" message, it will not be delivered to the forum. If this happens, edit the message and resend it.

## Forums in the Member Profile

When discussion forums are available, a Forums General Preferences choice is added to the user Profile screen. This choice allows you to control your individual preferences for viewing messages and threads, authoring messages, and the personal information displayed.

A second choice, Forum Memberships, allows you to subscribe to forums (and unsubscribe as well) and to customize your preferences in each forum that you are a member of.

## Forum Message Searching Tips

From the main Forum screen, click the Search button. The following screen is displayed:

The screenshot shows a web interface for searching through discussion forums. At the top, there is a breadcrumb trail: Home > Discussion Forums > Search. Below this is a blue header bar with the word 'Search' in white. A text box below the header contains instructions: 'Search for messages by entering text in the "Search For" field, and pressing the "Search" button. Optionally you may select a specific forum to search. Note that no more than 100 messages will be returned. Fields marked with a red dot require an entry.' Below the instructions is a blue bar with the text 'Search For Messages'. Underneath this bar are several input fields and options: a 'Search For' text box with a red dot indicating it is required; 'Search Type' options with radio buttons for 'All Words' (selected), 'Any Words', 'Exact Phrase', 'Advanced (Boolean)', and 'Fuzzy'; a 'Post Date Range' dropdown menu set to 'Any Time'; and a 'Select Forum' dropdown menu set to 'All Forums'. A 'Search' button with a lightning bolt icon is located to the right of the dropdown menus.

Type in one or more words for which to search and specify a search type, date range and forum:

### All Words

The system will find every message that includes all of the specified words.

**Example:** If you specify "red blue green", the system does an internal search for "red AND blue AND green", finding matching messages that include all three words. You do not need to include the word "AND" in your search.

Note that the system will ignore more than 120 “noise” words in your search value, such as “a”, “the”, “is”, “and”, etc.

### Any Word

The system will find every message that includes any of the specified words.

**Example:** If you specify "red blue green", the system does an internal search for "red OR blue OR green", finding matching messages that include any of the listed words. You do not need to include the word "OR" in your search.

### Exact Phrase

The system will find the exact phrase that you entered.

**Example:** If you specify "red and green balloons", the system finds messages that include that exact phrase (case insensitive).

### Advanced (Boolean)

With this option enabled, the system allows you to construct an advanced search, including the following special operators:

- AND
- OR

- NOT
- NEAR
- ( ) - Parentheses to indicate grouping
- " " - Quotation marks to indicate an exact phrase
- \* - Asterisk to indicate a wildcard (for example, "bl\*" to find "black" and "blue") Note that a wildcard search term must be enclosed in double quotes as shown above.

This option is for users who have more experience with programming models or other search systems.

#### Fuzzy

This option uses an internal thesaurus to search using words with similar meanings to the phrase you entered. Note that AND, OR, \*, etc. do not work with this option. Enter a simple phrase and the system will find messages including that phrase and related phrases.

#### Post Date Range

You can further filter the search to messages posted within a specified date range, including the past week, month, two months, six months, year, or an explicit date range.

#### Select Forum

Specify a forum or use the <All Forums> option search across all active forums.

When you click Search (or just press the [Enter] key), a screen similar to the following will appear:

Home > Discussion Forums > Search

## Search

Search for messages by entering text in the "Search For" field, and pressing the "Search" button. Optionally you may select a specific forum to search. Note that no more than 100 messages will be returned.  
Fields marked \* require an entry.

### Search For Messages

Search For

Search Type ☒ All Words ☐ Any Words ☐ Exact Phrase  
☒ ☐ Advanced (Boolean) ☐ Fuzzy

Post Date Range

Select Forum

**Search**

### Search Results (3 messages found)

Subject	Author	Posted	Forum
<a href="#">Merchandise and Shipping Cost</a>	Tulio	12/22/2011 11:27 AM	ClubExpress Administrators
<i>Need to see if we can have the ability to ship and charge shipping by weight as opposed to by \$\$.</i> We understand they packaging and boxes may differ in size and weigh. We would be glad to adjust that in our shipping price.. We have some items that cost \$7 and weight less than an envelope. We have other items that cost the about same and weight much, much more. Using weight will			
<a href="#">New Harness</a>	Marty	12/18/2013 1:50 PM	Equipment
<i>I recently read about the new Harvest Harness for inflating balloon without tangling or damaging the envelope or ropes. Has anyone had any experience with this kind of harness? Regards, Marty Balloons R. Us.</i>			
<a href="#">re: Storefront and shipping</a>	Dan, ClubExpress	12/13/2011 1:53 PM	ClubExpress Administrators
<i>Tulio, you can create multiple shipping methods based on carrier (UPS, FedEx, USPS, etc.), based on value (low range to high range - which often correlates well to the number of items), and shipping speed (for example, surface, 2day, overnight, etc.) You can create as many methods as you need. The problem with weight-based shipping is that we could calculate a weight based on the number of item</i>			

The first 100 matches are shown, including the message subject, author and date/time posted, as well as the forum in which the message appears and the first few lines of the message body. When you click the link in the Subject column, it will take you directly to that message. Click Return to Search to go back to the search screen.

Previous search values and forum selection will be remembered.

## Administrator Details

Clubs have full control over forum membership. Forums can be defined where all members have access by default, or where members can opt-in, or where a moderator adds members manually. Clubs can also build forums around an interest group, a committee or a member type, and ClubExpress will maintain forum membership automatically.

ClubExpress supports multiple views, message posting icons, forum handles, message attachments, user pictures, rich content within messages and many user-configurable options. There is also a full suite of administration tools at the forum, thread and message levels.

Forums can be configured to be moderated, where new messages must first be approved before they are made visible. Individual members can also be moderated so that only their messages must be approved. Administrators and moderators can also block members from posting completely if they are not following forum rules.



Forums can be placed on the public side of the club's web site, to make their content available to any site visitor. But in this position, they will be read-only; all editing functionality is disabled.

### The Administrators' Discussion Forum

Club administrators have access to a special forum that is available to all administrators across all clubs and associations using ClubExpress. It provides a place for admins to ask questions and share their expertise with administrators from other clubs. It will be shown at the end of the list of forums.

## Forum Administration

There are two ways to manage forums:

1.  Administrators and Function Coordinators can click the Pencil icon in the Control Panel (People and Communications tabs) to access the admin side of the function.
2.  When viewing any forum screen, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

A screen similar to the following is displayed.



The results grid shows the name, category, status, membership type and count of members for each forum.

If your club or association has many forums, the search panel can be used to limit the display. Enter a portion of the title, select a category, select one or more status values or a membership option and click Search.

### Configure – Forum Categories

Click the Configure button to see a popup menu with configuration options. Click Forum Categories to administer forum categories. You will see a screen similar to the following:















## Discussion Forums

Home > Discussion Forums > Discussion Forums Manager > Forums Category Administration

### Discussion Forums Category Administration

Forums are organized into categories which can be updated from this screen. Click "Add Category" to add a new category. Click "Edit" to change an existing category and its description. Click "Delete" to remove a category. Note that you cannot delete a category if one or more forums is associated with it. Click "Forum Sequence" to organize forums associated with the category in the desired order. Click "Category Sequence" to change the order in which forum categories appear.

Category	Forums	Status	Maintain
General Interest Forums	20	Active	  
Private Forums	3	Active	  
Job Postings	1	Active	  
Archived Forums	5	Inactive	  

[Add Category](#)

[Category Sequence](#)

[Return to Previous Page](#)


This screen allows you to specify the categories into which forums are organized. Click the Add Category button to add a new category; the following popup dialog is displayed:

### Add/Edit Category

Specify the forum category and a description if appropriate. Click "Save" or "Cancel" to return to the category list screen.

Category:

Description:

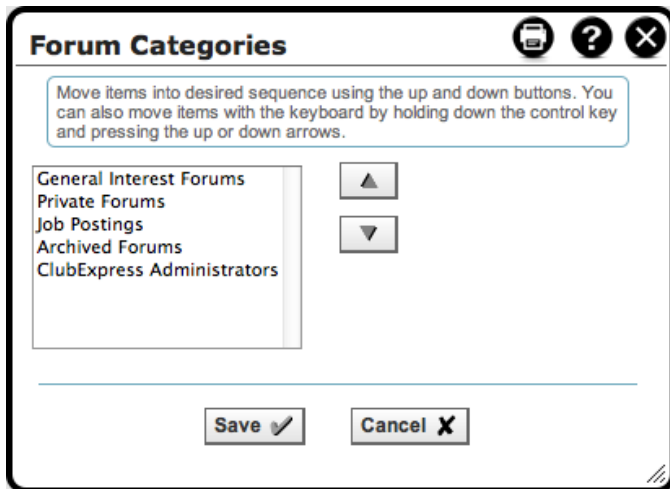
 Max 500 characters - 500 characters left

Active: ☒

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

Specify the name and description (up to 500 chars) of the forum category. You can also specify whether the category and the forums within the category are active. Click Save to save your changes and return to the list of categories, or Cancel to return without saving.

The Category Sequence button controls the order in which categories are shown.



Click the Edit icon to modify an existing category.



Click the ForumsSequence icon to control the order in which individual forums are displayed within a category. You will see a similar sequence dialog, allowing you to modify the order in which forums are displayed within the category. (Forums are assigned to a category on the forum properties screen. Use the same screen to change the category to which a forum is assigned.)

### Configure – Forums Defaults


Select Configure – Forum Defaults to update forum global options and defaults for each forum member. You will see the following screen:

Home > Discussion Forums > Discussion Forums Manager > Edit Forum Defaults

## Forum Defaults

### Start New Thread Text

This is the 'Start New Thread' text that will appear on the top and the bottom of each forum on which members may post.

Start a Thread Text  

## Forum Defaults

These are the default values that will be assigned to each new forum when it is started. You can change the values for each forum.

Visibility

Who Can Post ☒ All Forum Members  
☐ Moderator Only

Allow Editing Posts ☒ Yes - members can edit their messages  
☐ No - messages can be edited by admins only

Posting Method ☐ Online Only  
☒ Online and Via Email

File Attachments ☒ Allowed  
☐ Not Allowed

Moderator Approval ☐ No - messages post immediately  
☒ Yes - moderator approval required

Sending Emails ☒ Messages are sent to forum members via email  
☐ Messages can be read online only

Forum Mode ☐ Discussion Forum Mode  
*NOTE: Emails are sent 'to' the member, and 'from' the forum - all replies are back to the forum.*  
☒ Listserver Mode  
*NOTE: Emails are sent 'to' the list, and 'from' the original message poster. Replies go to the forum or to the original poster.*  
Select reply-to: ☐ Forum ☒ Original Message Poster

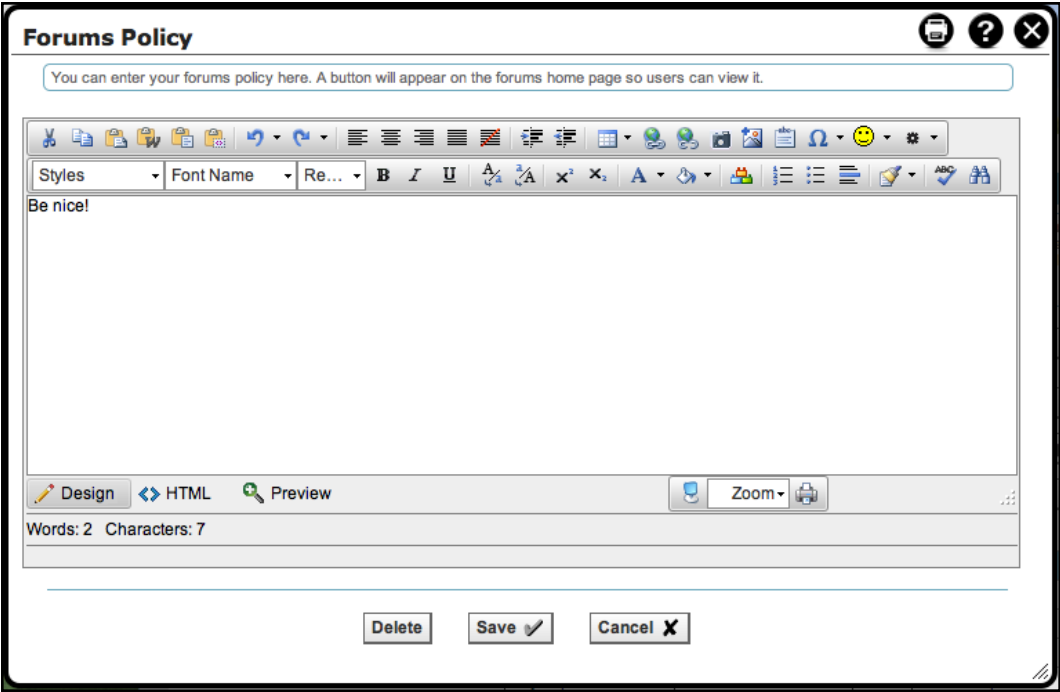
Subscriptions ☐ Allow users to subscribe to threads, to receive notifications when messages are posted  
*Subscriptions are available to club members only, and only when not already receiving immediate message posts. If the forum is configured to send emails, the notifications will include the full text of the messages. If the forum allows online reading only, then the notifications will contain only a link to the thread page.*

Message Threading ☒ Strong  
*Strong threading uses a token added to the message subject so replies can be attached to their parent messages. This guarantees that message threads will be properly preserved (assuming that the subject token is not modified by the user). However, some users find this token distracting.*

In the first section, specify the text to be used for the Start New Thread button. (Some users may not be familiar with the concept of a thread of messages; some clubs prefer to change this to “Post New Message” or something similar.)

### Configure – Forums Policy

Select Configure – Forums Policy button to define your club’s global policies for forum behavior, message posting and replying. You will see the following popup dialog:




The advanced content editor allows you to define forum policies using the full range of formatting options.



Click Delete to delete an existing forums policy; click Save to save your changes; or click Cancel to exit without saving your changes.

If forum policies are defined, a new button – Our Forums Policy appears on the main forum screen, making it easy for members to view this policy before they start participating in forums.

Maintain Options

The following options are available in the Maintain column:

Icon	Description
 (Edit)	Click the Edit icon to modify properties for this forum.  Note that for audit and liability reasons, ClubExpress does not allow you to delete forums completely. Instead, click Edit and set the forum’s Status to “Archived”. It won’t appear in the Forum Manager unless you explicitly enable the archive option.

Icon	Description
 (Members)	View forum Members and make changes to member status within forums.
 (Reports)	Run Reports on members for this forum.

Maintian Options

## Add Forum

When you click the Add Forum button the following popup dialog is displayed:



Use this dialog to specify the name and configuration of the new forum. Each option is described in the following sections.

### General Info

#### Title and Description

Specify the name of the forum and a description of its purpose (up to 500 chars.) Be as descriptive as possible so that members know which forums to use for their questions and discussion. Spellchecking is available.

#### Category

Specify the category in which this forum should appear. In Edit mode, this option allows you to move a forum to a different category.

#### Status

Forums have one of four status values:

Status	Description
Active	The forum is visible to members and admins, and open for people to post messages and replies

Status	Description
Locked	The forum is visible to members and admins, but messages and replies cannot be posted. This is a “read-only” forum.
Not Active	The forum is not visible to members but it is visible to administrators, coordinators and moderators. Messages and replies are not allowed.
Archived	The forum is not visible to anyone by default. For audit and liability reasons, ClubExpress does not allow you to delete forums. But you can archive them so that they are not normally shown.

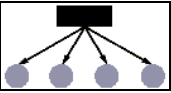
Forum Statuses

### Membership

The membership of a forum can be defined in a number of ways.

Forum Membership Types

Type	Description
All Active Members	All active club members are automatically members of this forum. Note that members can individually opt out of participating from their Profile – Forum Memberships screen
Member Opt-in	This forum is shown to all active club members on their profile – Forum Memberships screen, and they have the option of opting in to participate in forum discussions.
Moderator Defined	A forum moderator, forums module coordinator or club administrator defines membership in these forums.
Interest Members	Forum membership is maintained automatically, based around an Interest group in the Interests module; if members are in the interest group, they will be in the forum. When this option is selected, a new

Type	Description
	field will appear allowing you to specify the interest group to which the forum should be linked.
	Forum membership is maintained automatically, based around a committee in the Committees module; if members are in the committee, they will be in the forum. When this option is selected, a new field will appear allowing you to specify the committee to which the forum should be linked.
Member Type	Forum membership is maintained automatically, based around a membership type; if members have the specified type, they will be in the forum. When this option is selected, a new field will appear allowing you to specify the member type to which the forum should be linked.
 Subgroup	Forum membership is maintained automatically, based around a subgroup such as a chapter, district or region. When this option is selected, the organization hierarchy is displayed and you can select a subgroup at any level.
Member Additional Data	Forum membership is based on member answers to an additional data question. This option is available only for questions with a defined answer list: select list, radio buttons, checkbox list, and true/false; other answer types can be used. When this option is selected, you will see two additional fields, one to specify the question and the other to select a response from the options linked to that question.

Except for the “Member Opt-In” selection, all of these options put members into a forum without their consent. However, members must still activate themselves for each forum in order to participate. This is done on the Profile – Forum Memberships screen.

Also note that forum memberships are not maintained in real time. When changes are made, there is a slight queuing delay before the forum member list is updated.

**Example:** If you create a forum based around a committee, you will need to wait up to hour before the forum will be populated with the members of the committee. Similarly, if you add members to a committee or remove them from the committee, you must wait for up to an hour before posting a message to that forum in order for the forum member list to be updated.

### Visibility

The visibility or “presence” of the forum can be defined in a number of ways:

Forum Visibility Levels

Level	Description
Public	If the forums module is placed on the public side of the website (where it is read-only by default), anyone will see that this forum exists.
Club Members Only	If the forums module is placed on the public side of the website, this forum will not be visible. But any logged in member will see that this forum exists.
Forum Members Only	The existence of this forum is known only to those who are members of the forum (as well as club administrators and forum module coordinators.)

## Posting Messages Section

### Who Can Post

Select All Forum Members to allow anyone who’s a member of the forum to start threads and reply to messages. Select Moderator Only to block regular forum members from posting; only forum moderators (and module coordinators and full administrators) can post messages. This latter option is used for “announcement” forums.



### Allow Editing Posts

Select Yes to allow members to edit their messages or No to block this. Some clubs and associations do not allow members to edit their messages in order to protect the club in the event that a “flame war” breaks out on the forum. Members should be more circumspect knowing that they cannot change what they have posted. (Note that administrators and forum coordinators always have the ability to edit or delete messages in a forum.)

### Posting Method

Select Online (Web Site) Only to block posting by email. Forums members can only post new messages and replies through the website interface. Select Online (Web Site) and Via Email to allow posting online or by email. This option requires that the forum have an email address, which in turns requires that ClubExpress be handling at least one domain name for your club or association.

If the second option is selected, a new field appears to specify the email address for the forum. You must also select one of the domain names being handled by ClubExpress for your club or association. In addition, a special option appears at the bottom of the page to control how messages are threaded together.

### File Attachments

Use this option to control whether the forum allows attachments to messages.

### Moderator Approval

Select No to allow any member to post messages that will immediately be visible. Select Yes to require that new messages and replies be approved by a moderator before they are visible. Note that if the message poster is also a moderator of the forum, his or her message will post immediately, without requiring approval.

The description of this screen continues below.

## Message Delivery Section

### Message Delivery

**Sending Emails** ☒ Messages are sent to forum members via email  
NOTE: For a busy forum, you can specify that digest emails will be sent multiple times per day. This applies only to members who have elected to receive digest or subjects emails.

Send digest messages

☐ Messages can be read online only

**Forum Mode** ☐ Discussion Forum Mode  
NOTE: Emails are sent 'to' the member, and 'from' the forum - all replies are back to the forum.

☒ Listserver Mode  
NOTE: Emails are sent 'to' the list, and 'from' the original message poster. Replies go to the forum or to the original poster.

Select reply-to: ☐ Forum ☒ Original Message Poster

**Subject Tag**   
The subject tag is added to the message subject (enclosed in square brackets) when delivered via email. It is generally a short version of the forum name so that users can easily identify the source of email.

**Subscriptions** ☒ Allow users subscribe to threads, to receive notifications when messages are posted  
Subscriptions are available to club members only, and only when not already receiving immediate message posts. If the forum is configured to send emails, the notifications will include the full text of the messages. If the forum allows online reading only, then the notifications will contain only a link to the thread page.

**Message Threading** ☒ Strong  
Strong threading uses a token added to the message subject so replies can be attached to their parent messages. This guarantees that message threads will be properly preserved (assuming that the subject token is not modified by the user). However, some users find this token distracting.

☐ Weak  
Weak threading uses internal message headers to attach replies to their parent messages. Some email programs do not properly set these internal headers, defeating the message threading. When the headers are missing, the system will try to match the subject of the message to an existing thread.

### Sending Emails

When the first option is selected, the forum will distribute every new message and reply to all forum members via email. This is the typical setting for a “listserver” or email-based forum.

For busier forums, you can also configure how many times digest messages will be sent out during the day. Options are once, twice, three times or four times.

**Example:** If you pick four times, digests will be sent every 6 hours. (Note that the individual send times cannot be configured; the system spreads these out throughout the day to balance the loads on our servers.)

When the second option is selected, the forum does not distribute messages via email. They are posted to the forum and can only be read online.

### Forum “Mode”

This option is only displayed if the forum sends messages out via email. It governs how the system handles replies to forum messages.

In Discussion Forum Mode, the message looks like it's coming "From" the forum and "To" the member. Replies are sent back to the forum. The sender's email is not listed anywhere in the message.

In Listserver Mode, the message looks like it's coming "From" the original message sender and "To" the forum (which has then forwarded it to the reader). When this option is selected an additional choice appears, governing what happens when users click their Reply button:

- Select Forum to have replies sent to the forum.
- Select Original Message Poster to have replies sent to the poster and not to the forum. Users can also click Reply All to send to both the forum and poster. This is the model used by Yahoo Groups and traditional listservers.

**Note:** ClubExpress must be handling email for your club if you want to use the email list option. Another option is to obtain a domain name specifically for email-based forums (for example, "MyClubForums.org").

### Subject Tag

For email-based forums, specify the text that will be pre-pended to the Subject text of the message. This text is usually an abbreviated version of the forum name; members will use it to know which forum the message is coming from.

### Subscriptions

Check this option to allow members to subscribe to a thread. This option only applies to members who are not already receiving each message via email. If the forum is configured to send emails, members will receive the full text of each message posted to a forum. If the forum is not configured to send emails, members will receive a notification only, including a link to jump to the website to view the message online.

### Message Threading

This option only appears if Posting Method is configured for "Online (Web Site) and Via Email".

Selecting the Strong option adds a short unique "token" to the message subject. This system can read this token and know exactly which forum and thread the message belongs to. This token guarantees that message threads will be properly preserved (assuming that a receiving member has not modified or removed this token. However, some users find it distracting.

Selecting the Weak option uses internal message headers to attach replies to their parent messages, as described in the email standards. However, some email servers do not properly set these internal headers, which would otherwise cause this threading option to break. When the message headers are missing or not properly defined, the system will try to attach a message to a thread based on the Subject of the message.

Click Save to save your choices and return to the Forums Manager, or Cancel to return without saving.

**Note:** When you create any type of new forum except Moderator Defined or Member Opt-In, it may take up to 30 minutes before the forum is ready to accept posts. The member list needs to be populated first.

## Understanding Forum Moderators

The forums module introduces a new level of security that doesn't exist in other modules: the "moderator". Where club "administrators" control everything on the website and in the membership database, and "coordinators" have admin rights over one module or admin function, a moderator has admin rights over just one forum within the forums module.



Moderators can add or remove individual members, set member flags (message approval required, member banned, etc.) and approve or block individual messages or threads. Moderators will also see a pencil icon in the Page Tools Widget floating on the right side, at the thread and message level, giving them the tools required to fully moderate a single forum.

## Moderating Messages

If a moderator has messages awaiting approval, there will be a link on the forum home page indicating the number of messages awaiting approval.

[Home](#) > [Discussion Forums](#)

### Discussion Forums

You have message(s) awaiting approval

[Search](#) [Our Discussion Forums Policy](#)

Clicking the link takes you to a page similar to the following:

[Home](#) > [Forums](#) > [Forum Message Approval](#)

### Forum Message Approval

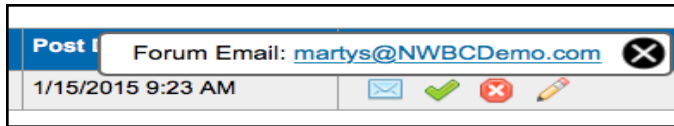
Author (click to email)	Forum / Subject	Post Date/Time	Maintain	
<a href="#">Martin Smith (MartyNickName)</a>	Equipment / New Engines	1/15/2015 9:23 AM		<div>What about the new engines?</div> <div>Regards, Marty Balloons R. Us.</div>
<a href="#">Martin Smith (MartyNickName)</a>	Equipment / Test Message	1/15/2015 9:24 AM		<div>Another test</div> <div>Regards, Marty Balloons R. Us.</div>

You will see all pending messages and can take the following actions:




- Click the member's name to see a standard popup, including the email address specified with their Profile.



- Click the Forum Email icon to popup a small display showing the email address that the member is using for this forum (which may be different from the email address linked to their account).



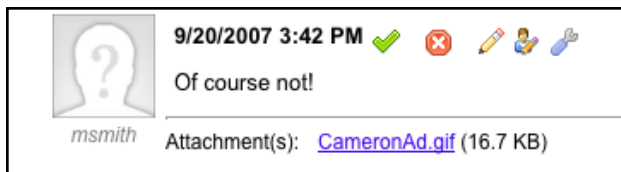
Click the link to open a new email, or copy and paste it into an email already created. There is a Close button if you can wait five seconds and the small popup will disappear.

-  Click the Approve icon to approve the message so that it's visible to all members of the forum.
-  Click the Block icon to block the message. It will still be in the forum but only moderators, coordinators and administrators can view it.
-  Click the Edit icon to edit the message. You will see the message editor to change its content. This option is available so that you can fix problems before approving the message.

Once a message has been handled, it will disappear from this display.

### Moderating Messages in the Forum

When moderators, module coordinators, or administrators view messages in a forum, the Approve and Block options appear as available icons:



Click the Approve icon to immediately approve the message.

Click the Block icon to immediately block the message.

Clicking the Message Admin (wrench) icon displays a dialog similar to the one shown above, but with the additional approve and block options.

?

+

×

## Message Administration

Move, delete, block, or approve a message. Click "OK" or "Cancel" to return to the message list screen.

Message Subject: Ballooning in England

☐ Approve Message Content
 ☐ Delete Message - Content Only
 ☐ Delete Message - Completely (including all replies)
 ☐ Block Message
 ☐ Make Message A New Thread In This Forum
 ☐ Move Message To Another Forum
 ☐ Send Email To Message Poster?

OK ✓

Cancel ✕

## Manage Forum Members



Click the Members icon in the Maintain column beside a forum to see the current members of the forum and to change member status. You will see a screen similar to the following:

[Home](#) > [Discussion Forums](#) > [Discussion Forums Manager](#) > [Discussion Forums Member Manager](#)

### Discussion Forums Member Manager

Use this screen to set options on members that will apply to only to the displayed forum. Click the 'Search' button to search for members that participate in this forum. You would typically select to 'show special members', which are members that currently have special options set (such as opted out, banned, and moderated). Click 'Edit' to set or clear the options for a specific forum member. The other links in the Maintain column perform their expected functions.

#### Search For Members of Balloon Restoration

Last Name

☒ Show 'Special Members' Only ☐ Show All Members

Member Name	Email	Status	Moderator	Opted-Out	Maintain
Anderson, Andy (2215)	Abby@abc.com			Yes	
Bamberger, Bob (213)	info@clubexpress.com			Yes	
BARRY, ANDREA (2144)				Yes	

The default is to view "Special Members" only:

- members who are banned from the forum;
- members whose messages are moderated;

- members who are designated as moderators; and
- members who have opted-out of receiving messages from the forum.

If you are searching for a specific person, enter a portion of his or her name and click the Search button.

If your club is large and you're viewing an "All Members" forum, be careful selecting "Show All Members" and clicking the Search button without a search value entered; the resulting screen will list every member of the club!



To modify the status of a member, click the Edit icon beside that member's name. You will see the following dialog:

Select the appropriate option and click Save to save your choices, or Cancel to close the dialog without making a change. Changes take effect immediately.

## Special Members for All Forums

In the Forums Manager, click the Special Members button to view and change special members for all forums. You will see a screen similar to the following:

Home > Discussion Forums > Discussion Forums Manager > Discussion Forums Member Manager

### Discussion Forums Member Manager

Use this screen to set options on members that will apply to ALL forums. Click the 'Search' button to search for members that participate in forums. You would typically select to 'show special members', which are members that are currently opted out or banned from all forums. Click 'Edit' to set or clear these options for a specific forum member.

**Search For Forum Members**

Last Name

☒ Show 'Special Members' Only ☐ Show All Members

Member Name	Email	Status	Maintain
Bamberger, Bob (213)	info@clubexpress.com	Moderated	
Clancy, Lee (1875)	rwcons@comcast.net	Banned	

The default is to view “Special Members” only:

- members who are banned from all forums; and
- members whose messages are moderated in all forums.

If you are searching for a specific person, enter a portion of his or her name and click the Search button.

If your club is large, be careful selecting “Show All Members” and clicking the Search button without a search value entered; the resulting screen will list every member of the club!

To modify the status of a member, click the Edit icon beside that member’s name. You will see the following dialog:

**Forum Member Information**

Choose the options for this forum member. These options will apply to ALL forums.

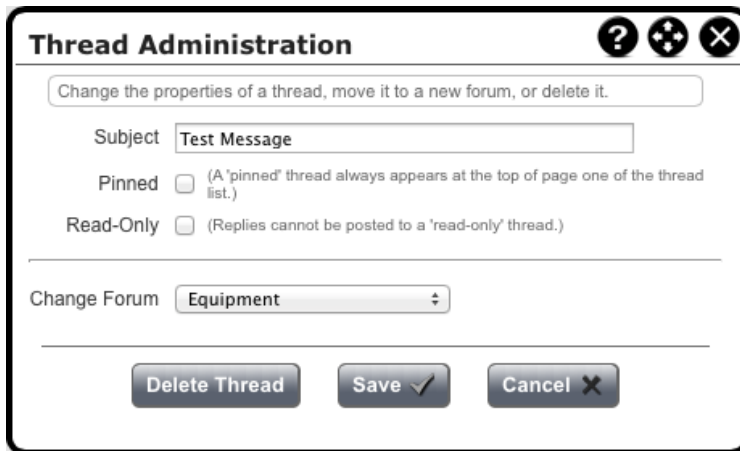
Status ☐ Active ☒ Moderated ☐ Banned

Select the appropriate option and click Save, or click Cancel to close the dialog without saving. Changes take effect immediately.

## Manage Threads



In Forum Messages view, administrators, forum module coordinators and individual forum moderators will see a special Admin link in the right-most column for each thread. Clicking this link displays the following popup dialog:



The dialog box is titled "Thread Administration" and contains the following elements:

- A header bar with a question mark icon, a plus icon, and a close icon.
- A text input field for "Subject" containing "Test Message".
- A "Pinned" checkbox with a description: "(A 'pinned' thread always appears at the top of page one of the thread list.)".
- A "Read-Only" checkbox with a description: "(Replies cannot be posted to a 'read-only' thread.)".
- A "Change Forum" dropdown menu currently set to "Equipment".
- Three buttons at the bottom: "Delete Thread", "Save" (with a checkmark icon), and "Cancel" (with an X icon).

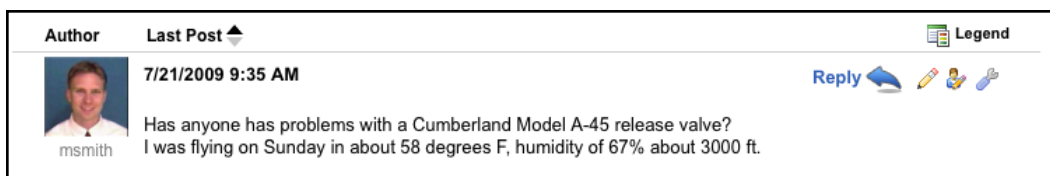
Use this dialog to perform the following changes:

- Specify a new subject for the thread;
- Pin the thread to the top of the forum. This option is often used for frequently asked questions, or for a message explaining thread policies.
- Make a thread Read-Only. Replies cannot be posted to a read-only thread. This option is often used in conjunction with the pin option, to create a read-only thread at the top of the forum.
- Specify a new forum. The whole thread, including all replies, is moved to the new forum. This option is often used to move commercial messages to a special forum; it can also be used to move objectionable messages to a hidden location without deleting them.
- Delete the thread and all its messages. This option is not generally recommended; if someone posted an objectionable or inappropriate message, it is often better to remove it to a hidden forum for audit purposes or to protect the club. You will be prompted to confirm this action.

Click OK to confirm your action and return to the list of threads, or click Cancel to return without performing any action.




## Manage Messages

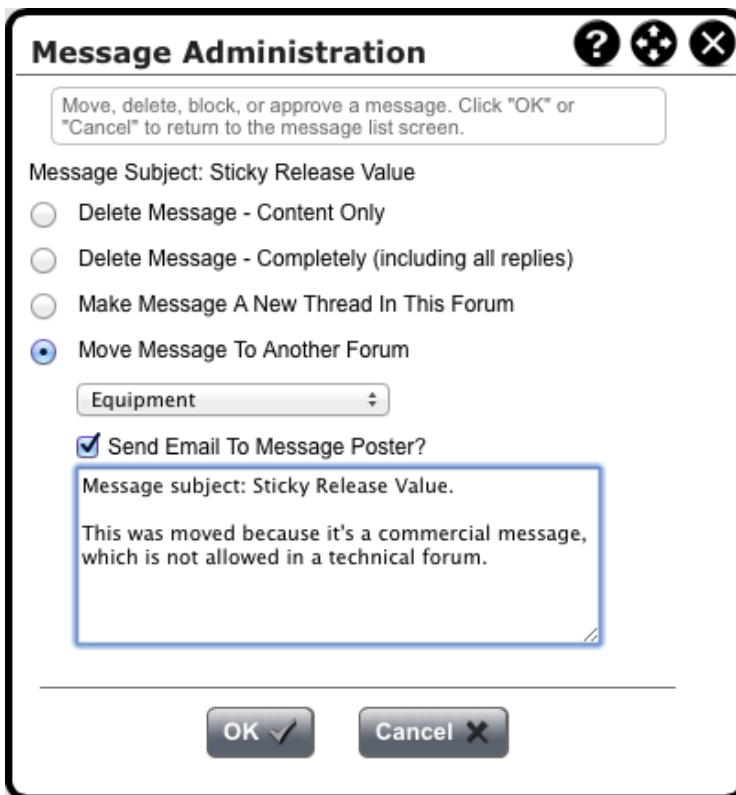
In Threaded or Flat view, administrators, forum module coordinators and individual forum moderators will see additional options for each message:



The interface shows a message card with the following details:

- Author:** msmith (with a profile picture)
- Last Post:** 7/21/2009 9:35 AM
- Message Text:** "Has anyone has problems with a Cumberland Model A-45 release valve? I was flying on Sunday in about 58 degrees F, humidity of 67% about 3000 ft."
- Actions:** A "Reply" button with a blue arrow icon, and a "Legend" button with a document icon.

-  Click the Edit (pencil) icon to edit the content of the message itself. You will see the popup content editor window.
-  Click the User Status (person) icon to change that user's status in this forum. You will see the Forum Member Info dialog, allowing you to make the current user a moderator, moderated, or banned. You can also opt-out this user from the forum.
-  Click the Message Admin (wrench) icon to move or delete the message, or separate it to a new thread. You will see the following dialog:



The dialog box is titled "Message Administration" and contains the following elements:

- A header bar with a question mark, a refresh icon, and a close button (X).
- A text box with instructions: "Move, delete, block, or approve a message. Click 'OK' or 'Cancel' to return to the message list screen."
- A label "Message Subject: Sticky Release Value".
- Four radio button options:
  - Delete Message - Content Only
  - Delete Message - Completely (including all replies)
  - Make Message A New Thread In This Forum
  - Move Message To Another Forum** (selected)
- A dropdown menu currently showing "Equipment".
- A checked checkbox labeled "Send Email To Message Poster?".
- A text area containing the message subject and a notice: "Message subject: Sticky Release Value. This was moved because it's a commercial message, which is not allowed in a technical forum."
- At the bottom, two buttons: "OK" with a checkmark and "Cancel" with an X.

Using this dialog box, you can perform the following changes:

- Delete Message – Content Only. The message shell is retained so that threads are not broken but the text of the message is replaced with a standard message that the content was deleted by the moderator. Use this option if the content of the message is objectionable or dangerous in some way and you need to get rid of it without retaining a copy.
- Delete Message – Completely (including all replies). Select this option to completely remove the message and all direct replies. Use this option to remove all evidence that the message and its replies ever existed.
- Make Message A New Thread In This Forum. Use this option if the message strays from the original purpose of the thread and really belongs in a new thread. All direct replies to the message will also be moved to the new thread.

- **Move Message To Another Forum.** Use this option if the message strays from the original purpose of the thread and the current forum; for example, if it's a commercial message in a technical forum. You can also use this option to move a message that is objectionable in some way to a hidden, moderator-only forum, if you need to retain a copy. All direct replies to the message will also be moved to the new forum.

When you select this option, you will be prompted to select a forum. You also have the option of notifying the message poster that the message was moved, including some text perhaps to explain why this was done.

Click OK to confirm your action and return to the messages in the current thread, or click Cancel to return without performing any action.

### Editing Attachments

If you want to delete attachments linked to a message, select the Edit Message Content option. You will see a screen similar to the following:

Attachments	
File (click to view)	Delete
<a href="#">Photo01.jpg (31.5 KB)</a>	<input type="checkbox"/>
<a href="#">Photo02.jpg (22.2 KB)</a>	<input type="checkbox"/>

Click the filename to open or save a file. Check the box to delete the file. Your changes take effect when you click the Save Changes button.