EzyClub

GUIDE

Roles and access

For the Roles role

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https://ezyclub.au/guides

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Roles decide what each person can do in your club’s console. They belong to the person, not to a shared login, so everyone signs in as themselves and the audit log always shows who did what. This guide is for whoever holds the **Roles** role, usually the Secretary or the webmaster.

The roles

Role	What it unlocks
Committee	Opens the console. On its own: a read-only view of the member roster (not campaigns — that's Communications), plus events, site text, event-day tools and expense claims, which the whole committee shares.
Membership	Edit member records, categories, status and notes; applications; club registration; imports; reciprocal clubs.
Moderator	Classifieds and the gallery: approve, hide and arrange what members post.
Regalia	The club shop: products, stock and orders.
Communications	Compose and send campaigns and notices.
Treasurer	The books: transactions, bank import, expense claims, reports, year end and the AGM statement.
Roles	Grant and remove roles.
Club settings	Club details and branding, domains, email sending, payment accounts, platform support access.
Theme designer	The public site’s theme: templates, stylesheet and theme settings.
Accountant	Read-only access to the books (every report, the ledger, journals and the year-end pack, with exports), for the club’s outside accountant or auditor. Changes nothing.

A person can hold any mix. Every club divides the work differently; this is a common starting point:

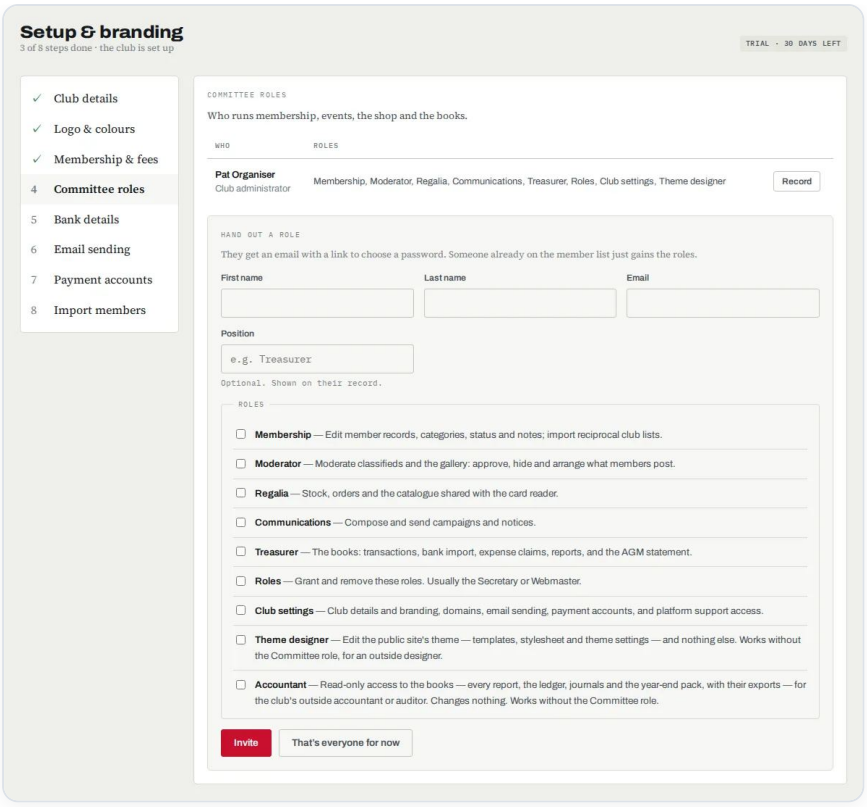
Position	Usual roles
President	Committee; often Roles as a second holder
Secretary	Membership, Communications, Roles, Club settings
Treasurer	Treasurer; Regalia if they also run the shop
Membership Registrar	Membership
Events Coordinator	Committee (events are open to the whole committee)
Newsletter or Magazine Editor	Communications, Moderator
Regalia Officer	Regalia
Webmaster	Club settings, Moderator; Roles as a second holder
General committee	Committee
The club's accountant or auditor	Accountant only

Giving someone a role

Someone new to the club

1. Open **Setup & branding** and choose step 4, **Committee roles**.
2. Under **Hand out a role**, enter their first and last name, email and (optionally) position.
3. Tick their roles and press **Invite**.

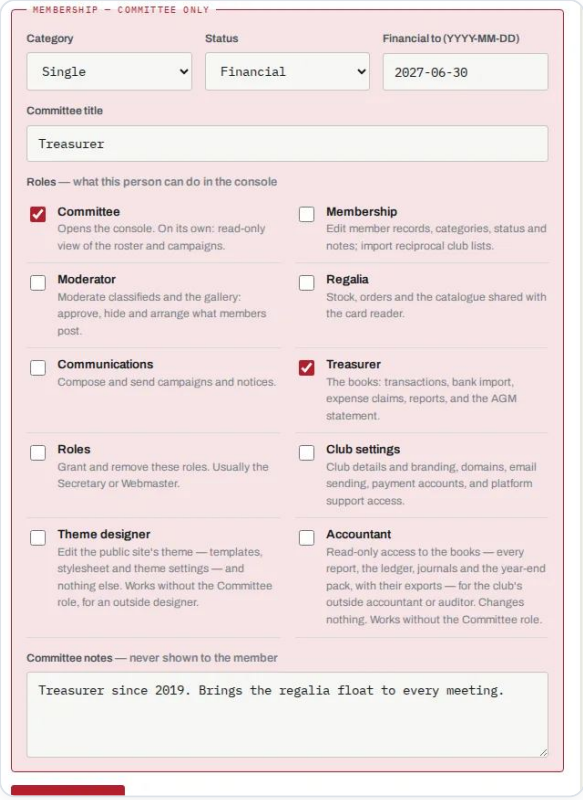
They get an email with a link to choose a password. The link is also shown on screen once, in case the email doesn't arrive. If the email address already belongs to a member, that member simply gains the roles. The setup wizard needs the Club settings role as well as Roles; without it, add the person as a member first (**Members › Add member**) and give the roles on their record.



Handing out roles from the setup wizard.

Someone already on the member list

1. Open **Members**, find the person and open their record.
2. In the red **Membership — committee only** box, tick or untick their roles, and set their committee title if you like.
3. Press **Save changes**.



Roles on a member's record.

This needs both the Roles role (to change roles) and the Membership role (to open member records). A change takes effect on the person's next click, whether you add or remove, and goes in the audit log.

> Ticking any console role also gives **Committee**, so the person gets into the console. The two outside-helper roles are the exception: **Theme designer** and **Accountant** each work on their own, without Committee, so an outside designer or accountant sees only their part and nothing else of the console.

Taking a role away

1. Open the person's member record.
2. Untick the roles they no longer need. Untick **Committee** as well, and every other role, to take them out of the console altogether.
3. Press **Save changes**.

Nobody can remove their own Roles role; another holder has to. That way the club can't accidentally lock itself out.

Outside helpers

Two roles are meant for people who aren't on the committee. Each is given on a member record like any other role, so the helper needs a record of their own. Add them with **Add member**, in a category that suits (many clubs keep an honorary one), rather than sharing someone's login.

- **Accountant** works on its own, without Committee: the person sees only the books, read-only, and can download the reports and the year-end pack. See For the club's accountant.
- **Theme designer** edits the public site's theme. See the warning above and Designing the club's website.

Good practice

- **Least is best.** Give each person the roles their job needs, and no more.
- **Two people with Roles.** If the only holder is away or leaves, nobody can change anyone's access.
- **Hand over at the AGM.** After each election, add the new office bearers' roles and remove the outgoing ones' the same week.
- **No shared logins.** Each person signs in as themselves, so the audit log means something.
- **Review twice a year.** Members › open each committee member's record and check their roles still match their job.