

District 5910 Website – Quick Start Manual

Let's Roll Rotarians!

All Rotarians in District 5910 have access to the Members Section of the District Website

THE BASICS

After logging on to the system, members may update their personal profile and change their password. Logging in allows you to register online for district and club events, book yourself and others for volunteer positions, use the discussion forum, access the password-protected documents, and download the district directory.

There is an easy automatic way to get your login name and password if you are a new user, or have forgotten your password.

- Click on the **Login** tab or the Login button from the home page.
- In the **Members Login** page, click on the link **Forgot your password?**.
- In the **Get Password** page, choose your club name from the drop down list, type in your **last name** and **email address**.
- Click on **Get Login Info**
- Check your email for your login information.

Note: *Be sure to change your password when you login to keep your account secure!*

Why this might not work:

The system will perform a security check by matching the last name submitted with the email address provided. If the email address we have on file is different from the one you provide, we have no way of knowing you are yourself. In this case, you will have to get your username and password from ClubRunner support by emailing clubrunner@doxess.com.

TO CHANGE YOUR PASSWORD:

- **Login** to the District site.
- In the **For Members** section, click on **Change My Password**
- Type in your old password for verification purposes.
- Type in the new password **twice**.
- Click on the **Change Password** button to save your changes

TO EDIT YOUR PROFILE:

- Login as usual.
- In the "For Members" section, click on the link **Edit My Profile**.
- This will take you to **Edit Member Profile** page
- Make any changes in the fields displayed.
- Click on the **Save** button at the bottom to save your changes.

How private is my personal information?

- Club executives in **your club only** will be able to view and edit the information in your profile.
- The District's Site Administrator can reset your password.
- Your District executives can view and edit your profile.

ClubRunner is committed to protecting your privacy. Please read ClubRunner's [Privacy Policy](#).

THE DISTRICT DIRECTORY:

- Login to the District website using your username and password.
- Click on **District Directory** under the **Communication Services** heading.
- Select which directory you wish to view, and click on the type of file in which you would like to view it.

If you are a club executive, you can update your club and membership information, report monthly attendance, and SOON YOU WILL BE ABLE TO register members for district events and volunteer positions.

If you have a new member or find that one is missing from ClubRunner, you can add that member easily.

To add a member:

- **Login** and go to the **Admin** page.
- Click on **Membership Details**, located under the "For Club Executives" section.
- Click on **Add New Member**, located at the top right.
- Fill in that member's information, including their login name and password.
- Click on **Save**, or Cancel if you do not wish to add this member.

If you want to remove a member, there are 2 steps you can take. First you must change their status to an Ex-member. This is recommended in order to keep information on the member in case he or she returns, as well as keep in touch with them. If you want to indefinitely remove them from your website, you must delete them from the Other Users listing.

To mark a member as an Ex-member:

- **Login** and go to the **Admin** page.
- Click on **Membership Details**, located under the "For Club Executives" section.
- Click on **Mark EX** next to the member. You will be asked if you want to mark this member as an Ex Member, as a confirmation.
- Press **OK**. You should now see this member listed under the Other Users list.

Other Users is the term used for anyone who might login and participate in your club or district, but is not an official, active member. There are 5 types of Other Users:

- Ex Members
- Exchange Students
- Honorary Members
- Staff
- Others

To add a new user:

- **Login** and go to the **Admin** page.
- Click on **Other Users Details**, located under the "For Club Executives" section.
- Click on **Add New User**, located at the top right.
- Fill in that user's information, including their login name and password.
- Click on **Save**, or Cancel if you do not wish to add this user.

To remove a user:

- **Login** and go to the **Admin** page.
- Click on **Other Users Details**, located under the "For Club Executives" section.
- Click on **Delete** next to the user. That user's profile will open as a confirmation.
- Scroll down and click on **Delete** to remove this user, or **Cancel** if you don't want to delete the user.

Updating a member's profile is vital if you want that member to be listed accurately in the directory, and to be contacted if necessary.

To change a specific member's profile:

- Login, and go to the **Admin** page.
- Click on **Membership Details**, located under the "For Club Executives" section. Here you will see all your members. If they have an e-mail address in the system already, you will see that next to their name.
- Click on 'Edit' to view or change a member's profile.

TIP: The name that appears at the top right of the page is actually the person currently logged in to ClubRunner, and NOT the person whose information you are editing. Refer to the First Name and Last Name input boxes instead.

- Fill in as many details as you need, then click **Save**, located at the bottom of the page.

UPDATING CLUB INFORMATION

It is important to update your club's meeting time and place on the district website. This information is posted for all clubs in the Club Directory and "Where Clubs Meet" pages. To edit your club's information:

- Login and go to the Admin page.
- Click on **Club Information Page**, located under the "For Club Executives" section. This will bring you to the Update Club Information page.
- Verify your club name, meeting day and time, and address.

TIP: Make sure your meeting address is an actual street address, not just a location. This data will be used to display your meeting place on a map. We will check this in the next step.

- Click on Save.

To check the map:

- Click on the Home tab located at the top of the page.
- Click on **Where Clubs Meet**, on the left hand side of the page, under the section called "District Info".
- Locate your club from the list of all district clubs (they are ordered by meeting time), and click on 'Map'. A new window will appear that leads to Yahoo! Maps. Check that the location is correct.
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If the map is incorrect: There may be a spelling mistake in the address, or a part of the address missing, such as the city or province. Also make sure you didn't input the actual address under "Meeting Place", which should really be the name of the venue. If you still encounter problems with your map, email [Support](#) with your club name and address for support.

Your club's listing of executives and directors appears in several places:

- The District organization chart
- The District's auto-generated group mailing lists
- Your club's website (if you are on ClubRunner)

NOTE: Although your executives' names appear on a web page, their email addresses do not.

It is also important to state who your executives are so that any one of them will be granted access when they try to login to the District site. To specify your executives and directors:

- Login, and go to the Admin page.
- Click on **Define Club Executives**, in the "For Club Executives" section. This will take you to a page with many different positions listed. You do not need to fill each one in! Whatever you don't specify will simply not be listed on the site.
- To assign a person to a position, click on **Edit**.

- Choose the member's name from the drop down list.
- Press **Save**.

NOTE: If you do not see the member's name in the listing, you will need to add this member to your club directory. See Add or remove members from the previous screen.

Your District site has a listing of clubs and their website links. To change your club's website link, follow these steps:

- **Login**, and go to the Admin page.
- Click on **Club Information Page**, in the "For Club Executives" section. This will take you to a page with all your club's settings and information.
- Fill in your website address next to **Website**.

TIP: Don't forget the HTTP:// before your website address. The link will not work if you omit this part.

- **Press Save**

Each club has an attendance contact (called the Attendance Manager) who is the person that will be reached for information regarding the club's attendance.

By default this is the club secretary, but you can change this to be any member of your club.

To change the Attendance Manager for your club:

- Login to your District site.
- Choose the **Define Club Attendance Manager** option from the **For Club Executives** section.
- Choose the new contact person from the drop down list of your members.
- Press **Select**.

To change the Attendance Manager back to the club secretary:

- Login to your District site.
- Choose the **Define Club Attendance Manager** option from the **For Club Executives** section.
- Check off the box next to "Assign back to club secretary?".
- Press **Select**.

To report your club's monthly attendance, follow these steps:

Note: You must be a club executive to be able to report attendance for your club.

- **Login** to your District site.
- Click on **Club Attendance Report** under the "For Club Executives" section.
- Enter the number of members as of the end of the month shown.
- Enter the attendance percentage for that month.
- Press **Save**.

Note: For clubs using ClubRunner, you can report attendance either through the District site or through your club site. For help reporting through your club site, please refer to the help section on your site.

ATTENDANCE MANAGER

The Attendance Manager gives clubs an easy way to report their attendance online and allows District to compile the attendance statistics in monthly reports.

ClubRunner includes a reporting tool for clubs to report their monthly club attendance figures directly on the District website. These figures are compiled and can be accessed and updated by the District.

NOTE: A user must have the **Attendance Editor** access right granted in order to access those figures.

In addition, the main attendance console lets you know at a glance when the last reported month was for each club. An email reminder can be sent to the club with the click of a mouse. The main console will also tell you when the last reminder was sent out.

Each club must have a designed attendance contact, called the **Attendance Manager**. This is defaulted to the club secretary, but can be changed to any member of the club. The Attendance Manager would receive all reminders related to attendance.

All clubs have access to their own attendance reporting. If a club has their own ClubRunner site, they can report attendance directly through their club site. For help on this, please consult the Online Help on the club website.

To input a club's attendance:

- Login to the District website, and go to the **Admin** page.
- Click on **Clubs Attendance Management**, under the "District, Clubs and Membership" section.
- Click on **Enter Club's Attendance Figures**.
- Click on **Input** next to the appropriate club. You will see input boxes for 2 pieces of information: number of members and percentage of attendance. This will appear for each month so far in the year up until last month.
- Enter the numbers into the appropriate boxes.
- Press **Save**, or Return to cancel changes.

CLUB EVENT PLANNER 101

Guess What? This is another Seminar!

We will touch on

HOW TO ADD YOUR EVENT TO THE DISTRICT CALENDAR

Planning an event often requires the same administrative tasks, performed over and over again. EventPlanner was created to assist clubs with the time-consuming tasks associated with running a successful event.

Promoting the event and mailing out invitations tends to be the source of much of the stress facing service clubs today, especially if mailing addresses or email addresses are not readily available.

EventPlanner will help you construct an invitation and be able to email it to all members, or their club presidents. Everyone can register online and get a response email with their own confirmation number. You then maintain a centralized guest list, rather than rely on separate lists compiled by different members and clubs. And it gives you a snapshot of the guest list at any time from anywhere.

You can even email all registered attendees automatically, without worrying about their email addresses.

EventPlanner also houses a volunteer management facility, where you can define tasks that need to be done prior to or during the event, and send out requests for help. People can then book themselves into the allotted slots, thus giving you a snapshot at any point in time as to what slots are still empty. Emailing all your volunteers can also be done automatically.

Lastly, don't forget the name tags! Because you have your list of attendees nicely compiled on ClubRunner, it can generate an electronic copy of all the name tags on Microsoft Word format, ready to print directly from the browser!

Plan your next event with EventPlanner, and let it do all the work for you!

To create a new event:

- Login and go to the **Admin** page.
- Click on **Events Management**.

Can't access it? You need to be granted the proper access rights. Contact your club president or appointed Site Administrator and ask to be granted **Editor** rights.

- Click on **Add New Event**, located at the top right.
- Type in the **Name** of the event, and a description of the event under **Event Detail**.
- If you have an image for the event, click on the **Browse** button and select the image from your computer.
- Enter the **Event Fee**.
- Enter the **Location**. Note: this is just the name of the venue.
- Enter the **Location's address**. Make sure to be as accurate as possible because the map will use this address to generate.
- Choose 'Yes' next to **Show in Home Page**.
- Choose whether or not you want to allow online registration for this event.
- Press **Save**.

To edit details of your event:

- Login and go to the **Admin** page.
- Click on **Events Management**.
- Click on **Edit** next to your event.
- Modify any part of the event.
- Click on **Save**.

DISTRICT EMAIL COMMUNICATIONS

ClubRunner simplifies the way District communicates via email, whether it be within the District, to certain groups of club executives or committees, or to every member in the District, while at the same time preserving privacy and security.

ClubRunner maintains a centralized, up-to-date list of all groups and email addresses. Whenever a member replaces another in a position, the email group is automatically updated. This means that you don't have to keep compiling email lists and changing them. Any change made through a member profile or a club website will be instantly reflected.

Reminder!!!!

How private is my personal information?

- Club executives in **your club only** will be able to view and edit the information in your profile.
- The District's Site Administrator can reset your password.

- **Your District executives can view and edit your profile.**

ALL EMAIL IS SENT BLIND. EMAIL ADDRESSES ARE NEVER SEEN Except by District Administrators and certain executives in YOUR CLUB FOR YOUR CLUB ONLY,

ClubRunner is committed to protecting your privacy. Please read ClubRunner's [Privacy Policy](#).

To use the Message Center, you will need the **District Communication** access right.

To create a new email:

- Login and go to the **Admin** page.
- Click on **Email Message Services** in the **Communication Services** section. This will take you to a page listing all the past emails you've sent. *If this is the first time you're doing this, the list will be blank.*
- Click on **Add New Email** on the top right of the page.
- Type in your **Subject** and the **body** of the message.
- Click on **Save** when you are finished.

Clicking on Save will NOT send the message, but only saves it in the system to be able to be sent later.

Once you've created the body of the email, you can upload any attachments to send with the email.

If you are not in the **Email Services** page already, then...

- Login and go to the **Admin** page.
- Click on **Email Message Services** in the **Communication Services** section. This will take you to a page listing all the past emails you've sent.

In the **Club Email Services** page, you should see a list of all the emails you've created. *If you are just starting, that list will be blank.*

- To the right of the email you've created, click on **Attach**.
- This will take you to the **Manage Attachments** screen. Any files you've previously uploaded will show. Below the list are four fields, with a "Browse" button next to each.
- Click on the **Browse** button next to the first field.
- This will open up a Choose File dialog box
- Navigate to where your attachment is located, then select it, and click **Open**.
- This will insert a file path in the first field. If you have any more attachments, click on the next **Browse** button.
- Once you're done specifying the attachment files, click on the **Upload** button at the bottom of the page. This will begin the file transfer process. *If your attachments are large, this may take a few minutes.*
- Once the upload is complete, you will return to the **Club Email Services** page.

Now that you've composed your email, you are ready to define your recipients and send it. If you are already at your Club Email Services page, skip the first 2 steps below:

- Login and go to the **Admin** page.
- Click on **Email Message Services** in the **Communication Services** section.
- Click on **Email** next to the email you want to send.
- Check each group you want to receive your email. To see who is in each group, click on **View**.
- Check the **Send a list of all recipients** option if you want everyone to know who else got the message (although this does not list their email addresses).
- Uncheck the **Send a copy to myself** option if you don't want to receive a copy of this message in your inbox.
- When you are ready to send the message, click on **Send**.

TIP: Clicking on Send Test Email to Myself Only allows you to see what everyone would get before you actually send it.

TIP: Clicking on Show List gives you a compiled list of all your recipients.

To create a custom distribution list that everyone can use:

- Login and go to the **Admin** page.
- Click on **Email Message Services** in the **Communication Services** section.
- Click on **Distribution List** at the top right.
- Click on **Add New List**.
- Type in the list name.
- Press **Save**.

Now the list is defined, and you need to specify who is in it:

- Click on **List** next to your new list.
- Click on **Add to List**.

You can either select the members by club, or individually as a search on the first name.

- Select the member(s). To select multiple people, hold down the **CTRL** key and click on each member.
- Press **Done!**.

This new list will appear in the Select Recipients page under "Custom lists".

NOW --- Let's Have Some Fun!

Editing a ClubRunner website requires absolutely no knowledge of HTML or any web authoring skills. Any content that appears on the website is typed through the browser and managed entirely by the system. You can add, edit or delete the contents by going to the Admin pages and selecting the appropriate link.

ClubRunner takes the text you entered, as well as the image you provide and automatically stores them and displays them in the form of a web page. You can control the order in which stories and other items appear. In fact, if you do know a bit of HTML, you can add it within your text and it will be reflected when ClubRunner displays it.

To be able to Edit just about anything in ClubRunner – other than membership/club information - You must be its "owner" – But ownership is just an email away!
Send your request to:

Webmaster In Training – Kris Nordstrom McBride
KRISRCLC@aol.com

Dear Trainee – I want a site page/journal/whatever for _____

SITE PAGES – The Keys to The Kingdom!

A Site Page is a page that appears within the structure of your normal website, complete with the top tabs section and its own navigation column. A Site Page can have its own links, HTML pages, and journals, all of which appear within its own structure. It is essentially its own internal website.

Site Pages have the capability of being owned by a particular member, allowing him or her to modify its contents without necessarily being given access to the entire website.

Useful applications include: Committee and project pages, director bios, history of the district, background information, etc. EACH CLUB CAN HAVE A SITE PAGE!

Site Pages appear on the home page, on the left column, under **District Info**.

Only members with Home Page Editing rights can create a Site Page. However any member can be designated as the owner and can edit its contents.

To edit Site Page contents:

- Login and go to the **Home** page.
- Under **Pages** on the left hand side, click on the Site Page you wish to modify. You will notice some Edit commands appearing. Only the Site Page owner and Site Administrators will see these.
- Click on **Edit Page Contents**.
- To add a new link to your Site, click on **Add New Page Link**.
- Next you will need to upload the HTML and image files to display when the user clicks on this new link. Click on **Files**.
- You will see a listing of all the files that will appear. To add a new file, click on **Upload New File**.
- Click the **Browse** button and select the file from your computer. If you wish, type in the name of the Editor.
- Click on **Save**.
- This will bring you back to the Files page. If you want to display any more files under that link, repeat the previous step. Remember you can change the order of appearance of these files by editing the Sequence Number.

If you want to create another content link, repeat the above steps. Otherwise click **Return**.

NOTE: The very first page someone sees after clicking on your Site Page link is a Welcome page with an image, heading and text. This is initialized to an "Under Construction" picture. To change this page, look for the text "Click here to edit this page" at the bottom.

A nested Site Page is basically a Site Page that is accessible through another Site Page. For instance, if you have a committee site, you may choose to include links for sub-committees, and each of those would have its own site.

To add a nested site page:

- Login and go to the **Site Page** to which you want to add the nested site page.
- Click on the link that says **Edit Pages**. Here you will be able to view all the nested site pages.
- Click on **Add New Page**.
- Type in the title for this new site page.
- Click on **Save**.

To modify the contents of this site page, go back to the home page, choose the main Site Page, then click on the new Site page link. Now you can edit the contents of this page just as you did the main site page.

PHOTO JOURNALS:

A journal is an easy way to create a series of photos and entries on one page. Useful applications include: exchange student reports, committee reports, event photo album, etc.

Journals appear on the home page, on the right hand side. The owner of the journal can update journals on an ongoing basis. He or she simply needs to login, then view the journal. The commands to edit the contents will appear on the actual journal to that person only.

Only members with administrative rights can create a photo journal. However any member can be designated as the owner and can edit the journal.

To edit and add new journal entries:

- Login to the site and go to the **Home** page.
- Click on the journal link under **Journals**.

You will notice some Edit commands appearing. Only the owner and Site Administrators will see these.

- Click on **Edit Contents**. You will see a page showing all the journal entries made so far, as well as a picture and description.
- To add an entry, click on **Add New Entry**. To edit an existing entry, click on **Edit** next to it.
- Type in the necessary information. Note that content is not required.
- Click on **Save**.

To edit the description and change the picture:

- Click on **Edit Picture and Description**
- Enter the description and picture as needed
- Click on **Save**.