

Mini-Guide for Maintaining Club Information on the District 6000 Website (www.rotary6000.org)

The screenshot shows the ClubRunner interface for Rotary District 6000. At the top, the ClubRunner logo and tagline "Connect. Collaborate. Communicate." are visible. Below this, the site name "Rotary District 6000" is displayed, along with a user greeting "Welcome, Carolyn" and "Version 3.0 Beta". A navigation menu includes "Admin", "For Clubs", "Grants", "For Members", "Membership", "Organization", "Communication", "Website", "Reports", "Attendance", "Events 2.0", and "Help". A secondary menu below it lists "Membership Lists", "Define Club Executives", "Edit Club Information", "RI Integration (New)", "RI Reporting (Old)", "Missing RI Member ID", and "Club Attendance Report".

The main content area features a "Welcome, Carolyn!" message with the note "Your last district login was on Thursday, August 29, 2013". A central dashboard contains nine tiles for management tasks: "My Profile" (update personal info), "My Club's Info" (update member data), "Calendar" (register for events), "Website" (design layout), "Communication" (send notices), "Reports" (view/export data), "Membership" (view/modify data), "Organization" (view/modify executives), and "Attendance" (update attendance). A left sidebar includes a "Welcome D6000 Rotarians" message, an "RI Integration" alert about 35 clubs not activated, and links for "Community Start a Discussion" and "Need Help? Access Support".

If your club has its own ClubRunner website, you should login to your own website instead of the district website to access the items below. If you don't have a ClubRunner website please read on.

If you have been defined as a Club Executive (officer) on the District website, when you login, you are taken to what ClubRunner calls the Launchpad page. All defined Club Executives have viewing and editing access rights to your club information. The following guide explains the club level access rights and responsibilities for maintaining club data. Maintenance of your club information is easily accomplished and very user friendly.

A download from the Rotary International District 6000 database was done in 2004 for the then new District 6000 website. After this initial download, it was not possible to have downloads from RI to keep the District website updated. Any changes or additions to your membership and/or club information need to be updated on an ongoing basis. **Keeping the District website updated does not automatically upload that information to the RI database. Therefore, all information sent to RI should continue unless you have switched on "Data Integration with RI".**

Having club and membership information entered and current on the District website allows visitors to the website to have current information on your club to assist them with visiting your club. In addition, many District requirements and communications rely on accurate club and membership data on the website. Some of the reasons it's necessary to maintain your club and membership data on the District website:

- If a new member is not added to your membership list, he/she will not be able to Login to the website to register for Events.

- If a member's "Member Profile" is not kept updated, other members and the District cannot accomplish communication with them.

- Current and Club Executives for next year can be defined on the website allowing visitors to the website the opportunity to make contact with them. Any change in club executives should be communicated by phone or email to the District to keep their records current.

While the club Secretary is generally given the responsibility for maintaining the District website, all Club Executives (that are defined on the website) have access to your club and membership categories and can maintain this data. Always click on "SAVE" after making any changes or additions. If a Club Executive does not have access to a computer to keep your club data updated, please call the District Office toll free at 1-877-976-8279 and the website manager will make those changes for you.

Active Members List:

This will provide you with a list of your club members in alphabetical order by last name. On the page, you can click on a member's email address to send them an email. You can also do the following from the page:

- 1) **Print Club Members List:** You can copy and print your members list from this page.
- 2) **Adding a New Member:** Click on the blue "Add New Member" icon above Reset Password. This will allow you to add a new member and their contact information. This then becomes their **Member Profile**.

Any and all information is appreciated in the Member Profile, but specifically their email address, mailing address and business and home phone numbers are the most important. If a member has his/her email address in their Member Profile, they will receive an automatic email confirmation each time they are registered for a District event on the website. It also provides a way for Club Executives to communicate via email with them by simply 'clicking' on their email address from your members list.

Member Type: This drop down box in the Member Profile allows you to mark this person's profile with the appropriate member type: Active or Honorary.

At the bottom of the Member Profile page assign a Login Name and Temporary Password for each new member. Generally the Login Name consists of the first name(dot)last name followed by a four-digit number (i.e. carolyn.scharff2010). The user can change their password at any time by going to the Administration page and clicking on the "For Members" category. Click "Add Member" when you finish entering all the information in the Member Profile.

Advise your new member of their assigned Login Name and Temporary Password and how they can change it under the "For Members" category on the Administration page.

- 3) **Editing Existing Member Contact Information:** Click on the member's name on the membership-list page, click Edit, then add or correct the necessary information and click "Save".
- 4) **Finding a Member's Password:** If a member has never logged in or has forgotten their password, they can click on Login, then on 'New and existing users – Retrieve login and/or reset password' and the information will be emailed to them or contact the District 6000 Administrator who can reset the password.
- 5) **Members Leaving Your Club:** You can mark a member as an ex-member by clicking on "Mark Ex" on that member's line on the membership-list page.

Other Users List:

- 1) **Add New Member:** Clicking on the blue “Add New Member” at the top allows you to enter a profile for someone other than an active member. Examples of when you would use the ‘Other User’ category for a non-Rotarian would be if you have a Staff person, such as an executive secretary, that is a non-Rotarian or Exchange Students, Leave of Absence, Corporate Member, Prospective Member, Interact or Rotaract. By establishing them with an Other User’s profile, they will then have access to the website. When the profile is complete, including the Login Name and Password, click “Add Member”.

Inactive Member List:

- 1) **Ex-Member Rejoins:** If an ex-member rejoins, click on that member’s name, then on the gray Rotary tab, click edit and change the Membership Type to Active. Click “Save”.

Club Information Page:

This contains all the information of your club, including the location and time of your meetings. A website user can click “When and Where Clubs Meet” on the home page under ‘General Information’ and find the address and time of your meetings. They can also click on ‘Map’ to get driving instructions providing you have the street address of your meeting location entered. It is very important to keep this updated so that anyone wanting to visit your club can have accurate information. Click on “SAVE” after updating any club information.

Define Club Executives:

This item allows you to edit existing club executives or add a new position.

- 1) Clicking on the blue “Add a New Position” allows you to establish a new club position such as an executive secretary. Click on “SAVE” after adding a new position, then select the member holding this position by clicking on “Edit”.
- 2) Clicking on “Edit” on a club position will give you a drop down boxes to change the position or select another member for this position should you have a change during the year. Clicking on “Clear” removes the person’s name but not the position. Click on “SAVE”.
- 3) Clicking on “Delete” on a club position deletes the position.

Club’s executives for next year must be selected and entered by December 31st of each year. The minimum offices that should be defined are: President, President Elect, Treasurer, Secretary, Foundation Chair, Membership Chair and Public Relations Chair. At the page bottom, click “Carry over Executive & Director Positions to the Next Year”, THEN go to Next Year and select each officer.

- 1) Click on “Edit” next to each officer position. There’s no typing involved, just select the appropriate member from your members list and click “SAVE”.

The Member Profile for each Club Executive must contain their mailing address, home and/or business telephone numbers, email address and their Classification. This information is needed by the District Governor Elect as he/she begins planning for their Rotary year. If you don’t define next year’s executives on the website, you will be contacted to supply that information.

Club Attendance Report

This is where you enter your club's attendance data. This should be entered by the 15th of each month for the previous month's attendance. Click on "SAVE" after entering all fields of data. Each month's reporting remains on the website for the Rotary year giving you a record of your club's attendance.

If you have not recorded the previous year's attendance in its entirety you also have the ability to enter the previous year's attendance figures by clicking on the blue "Enter Previous Year's Attendance" near the top right of the page.

Define Club Attendance Manager

If someone, other than the club secretary, is responsible for reporting your club's attendance, you should define that person here. Communication on club attendance from a District level will be directed to the person defined as the Club Attendance Manager and to the Club President.

- 1) To change your Club's Attendance manager select the appropriate member from the drop down membership list and click on "SELECT".

Switch on Data Integration with RI (automatic)

By completing the process in this section, changes made on a ClubRunner club or district website will automatically update to Rotary International, eliminating the need to report changes in two places! **If you have questions about this process, contact the District office at the number below.**

If you have any questions or require assistance in maintaining your club and membership data, please feel free to call the District office at 877-976-8279 (toll free).