



ClubRunner 101

District Assembly
April 6, 2019



TODAY'S OBJECTIVES

- Create familiarity with ClubRunner navigation and functionality
- Review ClubRunner access levels and permissions
- Identify ClubRunner resources
- Familiarize attendees with the following core ClubRunner functions based on role/need:
 - Updating personal information
 - Adding an event
 - Sending e-mail
 - Membership management
 - Recording attendance
 - Updating executives & directors
 - Integration with Rotary.org

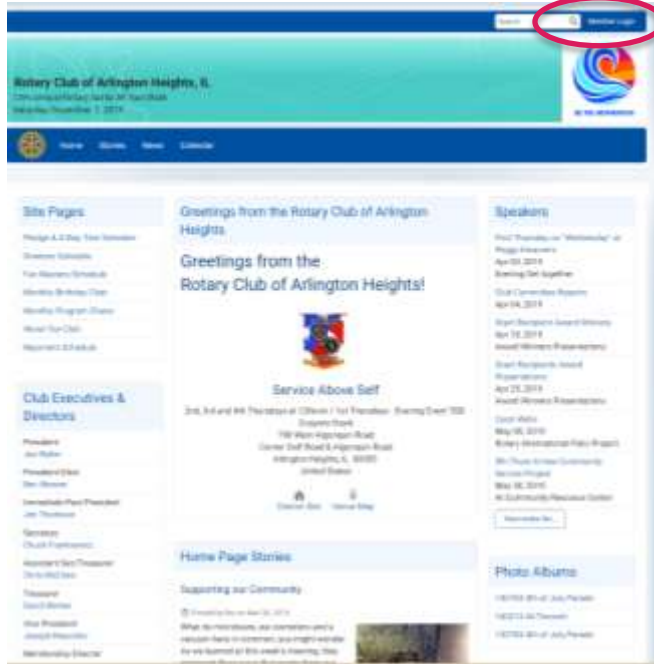


Every Club's Homepage is different.....



But the location for member login is always the same

Logging In



1. Click Member Login



2. Enter User Name & Password

Rotary Club of Arlington Heights, IL
12th Annual Rotary Santa 5K Run/Walk
Saturday, December 7, 2019

Home Stories News Calendar

Site Pages

- Pledge & 4 Way Test Schedule
- Greeters Schedule
- Fun Masters Schedule
- Monthly Birthday Chair
- Monthly Program Chairs
- About Our Club
- Reporters Schedule
- Make a Payment

Club Executives &

Greetings from the Rotary Club of Arlington Heights

Greetings from the Rotary Club of Arlington Heights!

Service Above Self

2nd, 3rd and 4th Thursdays at 12Noon / 1st Thursdays - Evening Event TBD

Speakers

- First Thursday on "Wednesday" at Peggy Kinanne's
Apr 03, 2019
Evening Get together
- Club Committee Reports
Apr 04, 2019
- Grant Recipient Award Winners
Apr 18, 2019
Award Winners Presentations
- Grant Recipients Award Presentations
Apr 25, 2019
Award Winners Presentations
- Carol Wallis

Once you've logged in, you will have access to the **Member Area**.

Click here to go to the Admin Page.

Navigation

Most Tasks can be started from the Administration Menu

A screenshot of the Rotary Club of Arlington Heights website. The top navigation bar includes links for Admin, My ClubRunner, Communication, Bulletin, New Bulletin (Beta), Contacts, Membership, Organization, RI Integration, Attendance, Website, New Website (Beta), Reports, Events, Volunteers, and Help. The left sidebar contains links for Members, Download the Mobile App, and Help. The main content area is titled 'Administration' and lists various tasks. Three blue callout boxes with red circles pointing to specific links are overlaid on the page: 'Updating personal information' points to 'My ClubRunner', 'Sending E-mail' points to 'Email Message Center', and 'Adding an Event' points to 'Edit Events 2.0'.

Rotary Club of Arlington Heights

Welcome, Linda [Logout] Admin Home Page

Admin My ClubRunner Communication Bulletin New Bulletin (Beta) Contacts **Membership** Organization RI Integration Attendance Website New Website (Beta) Reports Events Volunteers Help

Member Lists Dashboard Member Designations Friends Bulletin Subscribers Request Member Update New Member Program Download Member Data Search Member Lists

Members

- Active Members List
- Other User List
- Inactive Members List

Download the Mobile App

Access your member directory on the go

Help

- Request Login
- On Demand Website
- Website
- Submit a Ticket

Administration

New to ClubRunner or need a refresher? Register for free ClubRunner webinars here.

Read up on our latest updates here

- My ClubRunner**
- Edit My Profile
- Change My Password
- Upload My Photo
- My Home Page
- My Home Member Activities
- My Friends
- View Club Directory
- View Club Photo Directory
- Attendance Reports 2.0
- Unrecorded Member Activity
- Email Message Center**
- View My Email
- My Attendance
- My Committee
- My Billing Account Balance

Website Manager

- Website Designer 3.0
- Edit Home Page Links
- Edit Events
- Edit Events 2.0**
- Edit Events
- Edit Download Files
- Edit Site Pages
- Edit Photo Albums
- Edit Club Documents

Bulletin Subscribers

New Member Program

Guests Bulletin

Attendance & Anniversary Report

Gender Distribution (Summary)

Download Member Data

Member Designations

Print Member List (Single Version)

Attendance Report

Monthly Club Report

Quarterly Attendance Report

Edit Date Picker - What Date, What

Navigation on the Administration Menu

The screenshot shows the administration interface of the Rotary Club of Arlington Heights. The top navigation bar includes links for Admin, My ClubRunner, Communications, Bulletin, New Bulletin (Beta), Contacts, Membership, Organisation, RI Integration, Attendance, Website, New Website (Beta), Reports, Events, Volunteers, and Help. Below this, a sub-menu for Membership is expanded, showing options like Member Lists, Dashboard, Member Designations, Friends, Bulletin Subscribers, Request Member Update, New Member Program, Download Member Data, and Search Member Information. The main content area is titled 'Administration' and lists various tools under 'My ClubRunner' and 'Membership Manager'. Red circles and lines highlight specific items: 'Membership Manager', 'Active Member List', 'Inactive Member List', 'Friends of My Club', 'Bulletin Subscribers', 'New Member Program', 'Tools & Editing', 'RI Integration', 'Update Member Updates', 'Full Database and Directors', 'Download Member Lists', 'Members Designations', 'Input Attendance', and 'Attendance Report'.

Rotary Club of Arlington Heights

Welcome, Linda | Logout | Admin | Home Page

Admin | My ClubRunner | Communications | Bulletin | New Bulletin (Beta) | Contacts | **Membership** | Organisation | RI Integration | Attendance | Website | New Website (Beta) | Reports | Events | Volunteers | Help

Member Lists | Dashboard | Member Designations | Friends | Bulletin Subscribers | Request Member Update | New Member Program | Download Member Data | Search Member Information

Members

- Active Member List
- Other User List
- Download Member List

Download the Mobile App

Access your member directory on the go!

Help

- Support Center
- On Demand Online
- Webinars
- Submit a Ticket

Help Articles

- How to add a new member
- How to set up a member's access rights
- How to delete a member
- How to upload member photos
- Change inactive member to an active member?

Administration

How to ClubRunner or need a refresher? Register for free ClubRunner webinar here. Read up on our latest updates! Release Notes are available on our Service Updates page.

My ClubRunner

- Edit My Profile
- Change My Password
- Upload My Photo
- My Connections
- My New Member Activities **new**
- My Friends
- View Club Directory
- View Club Photo Directory
- Refinery Reports 2.0
- View Printable Meeting Labels **new**
- Email Message Centre **new**
- View Club Documents **new**
- My Attendance
- My Connections
- My Billing Account Balance

Membership Manager

- Active Member List
- Inactive Member List
- Friends of My Club
- Bulletin Subscribers
- New Member Program
- Tools & Editing
- RI Integration
- Update Member Updates
- Full Database and Directors
- Download Member Lists
- Members Designations
- Input Attendance
- Attendance Report

Membership Management
(Add, Terminate, Change of Status)

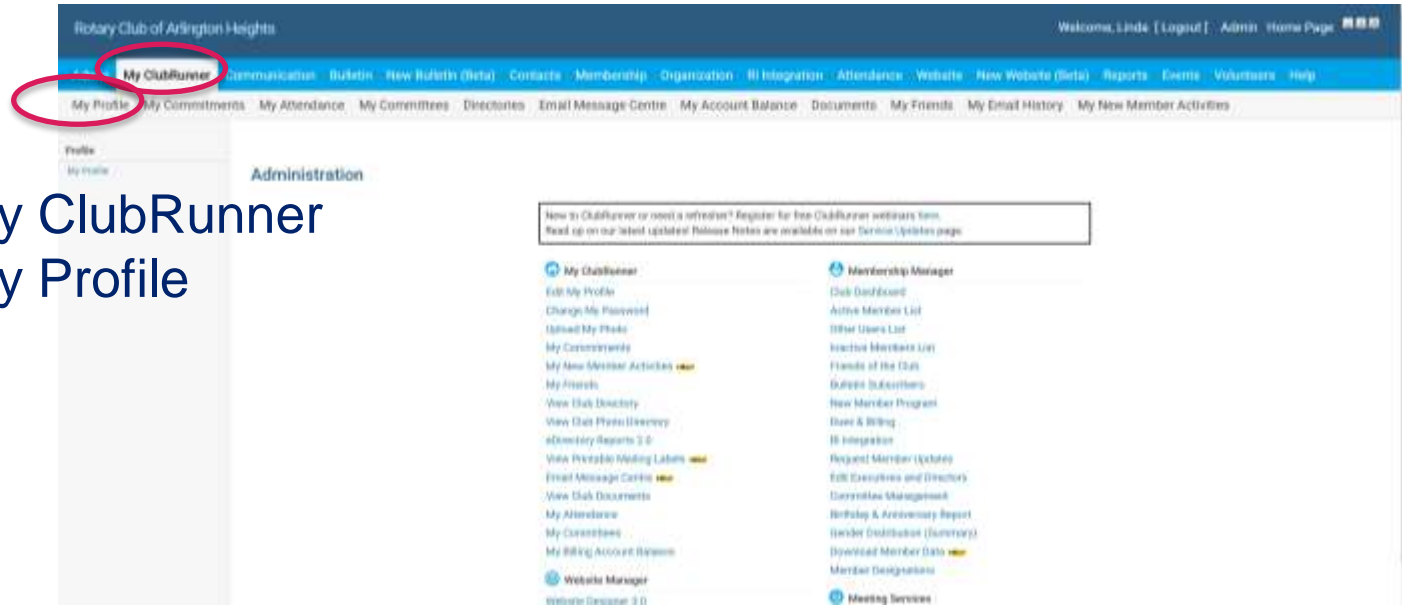
Manage RI Integration

Update Executives and officers

Input Attendance

Tasks can also be started from the Navigation Bar

Updating personal information



The screenshot shows the website for the Rotary Club of Arlington Heights. The navigation bar at the top includes links such as My ClubRunner, Communication, Bulletin, New Bulletin (Beta), Contacts, Membership, Organization, RI Integration, Attendance, Website, New Website (Beta), Reports, Events, Volunteers, and Help. Below the navigation bar, there is a section for My Profile, My Commitments, My Attendance, My Committees, Directories, Email Message Centre, My Account Balance, Documents, My Friends, My Email History, and My New Member Activities. The My ClubRunner menu is highlighted with a red circle, and the My Profile link is also highlighted with a red circle. The My ClubRunner menu includes options like Edit My Profile, Change My Password, Upload My Photo, My Commitments, My New Member Activities, My Friends, View Club Directory, View Club Photo Gallery, eDirectory Reports 3.0, View Printable Meeting Labels, Email Message Centre, View Club Documents, My Attendance, My Committees, My Billing Account Request, Website Manager, Membership Manager, Club Dashboard, Active Member List, Other Users List, Inactive Member List, Hands of the Club, Bulletin Subscribers, New Member Program, Dues & Billing, RI Integration, Request Member Updates, Edit Executives and Directors, Committee Management, Birthday & Anniversary Report, Member Subscription (Summary), Download Member Data, Member Designations, and Meeting Services.

1. Select My ClubRunner

2. Select My Profile

ClubRunner Access

Functions that all members can access:

- Viewing and updating member information
- Sending e-mail through ClubRunner
- Setting up an event

Functions for Officers & Directors:

- Membership management (add, terminate, or change status of members)
- Updating club executives and officers
- Recording attendance
- Adding speakers



ClubRunner Access Levels

- 30 [Site Administrator](#) - This is for the member or members who changes the website and administrates the club. This access gives them the access to do everything in ClubRunner
- 40 [Club President](#) - This is reserved for the current year president. This gives access to everything except for changing the website.
- 50 [Club Executive](#) - This is for Club Executives and Directors. This gives access to everything except for changing the website.
- 60 [Editor](#) - This is for members who would like to write stories, create the bulletin, and events.
- 70 [Member](#) - This is the default access. This lets members edit their own profiles, send email, pay invoices, and view the club directory.



This is how different levels of access look

Tasks with access have clickable links

Tasks without access are grayed out

Access Level 70

Member

The screenshot shows the Member interface with four panels. The 'My ClubHome' panel has a red circle around it, and a red arrow points from the text 'Tasks with access have clickable links' to it. The 'Meeting Services' panel has a red circle around it, and a red arrow points from the text 'Tasks without access are grayed out' to it. In both circles, tasks with access are blue and clickable, while tasks without access are grayed out.

Access Level 50

Club Executive

The screenshot shows the Club Executive interface with four panels. The 'My ClubHome' panel has a red circle around it, and a red arrow points from the text 'Tasks with access have clickable links' to it. The 'Meeting Services' panel has a red circle around it, and a red arrow points from the text 'Tasks without access are grayed out' to it. In both circles, tasks with access are blue and clickable, while tasks without access are grayed out.

How To's

How to update your profile information

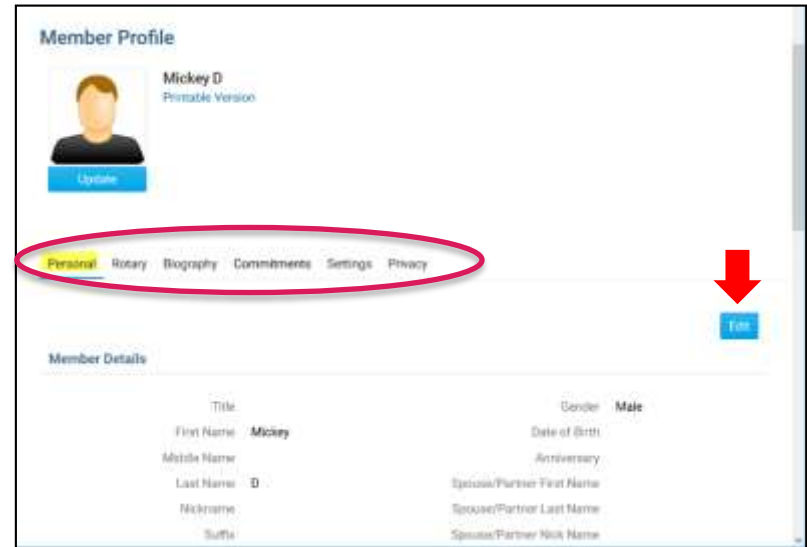
1

From the Navigation Bar click
MyClubRunner - My Profile:



2

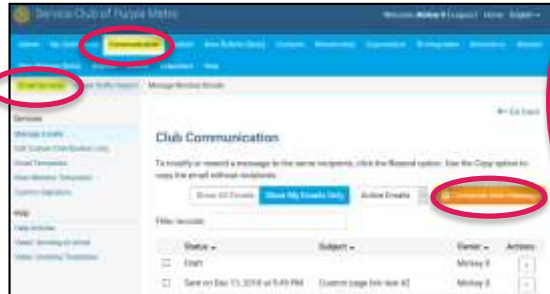
Inside your profile, below your photo, there are several tabs such as: **Personal | Rotary | Biography | etc.** Select any of these tabs. These tabs contain all the different sections of your profile you can edit. Click the Edit button to edit your information. Click the Save button to save your changes.



How to Send an E-mail

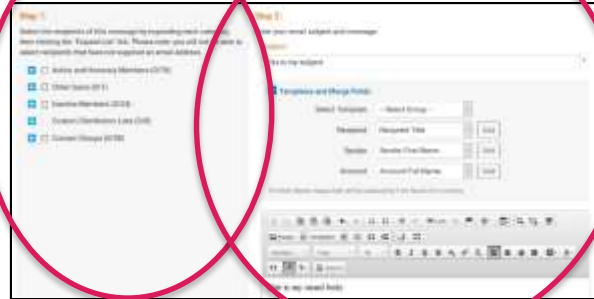
1

Along the top tabs click:
Communication – Email Services, then
Compose new message.



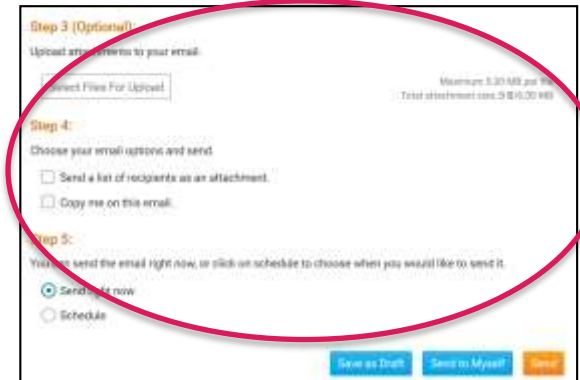
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Step 1 = select your recipients
Step 2 = compose the subject and body of email



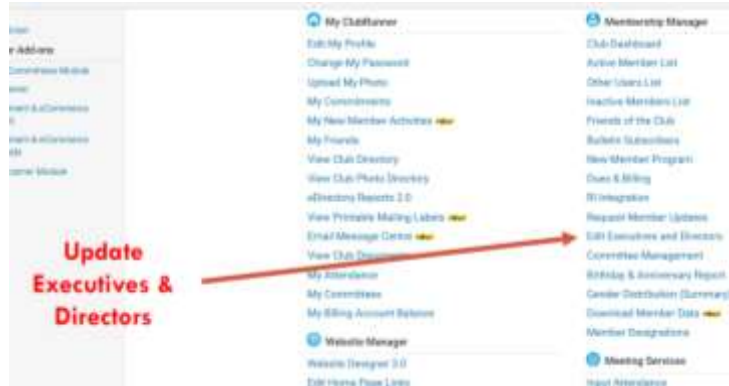
3

Step 3 = add attachment
Step 4 = send a list of recipients; cc yourself
Step 5 = send now, or schedule email for later

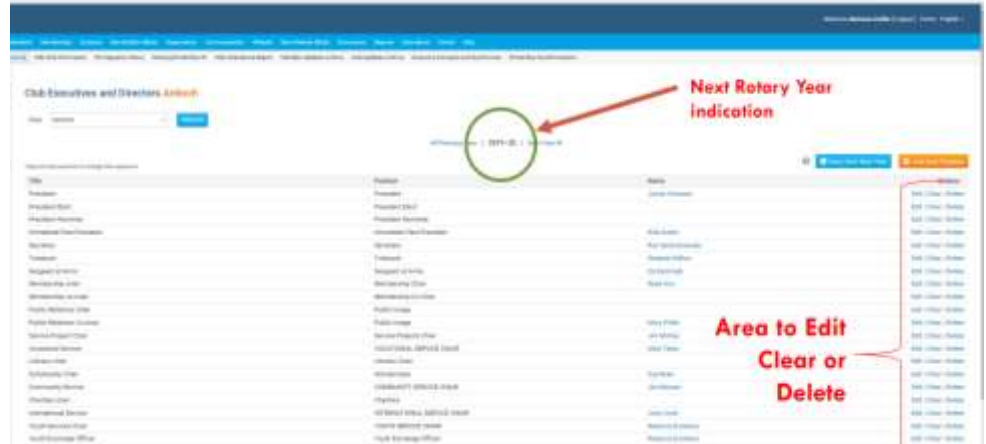


How to Update Executives and Directors

1. Click on Update Executives and Directors



2. Select the Rotary Year



Updating Executives and Directors cont'd

The screenshot displays the 'Club Executives and Directors' management page. A modal window titled 'Edit Position' is open, allowing for the editing of a position. The modal contains the following fields:

- Position:** A dropdown menu currently set to 'Club Administrator'.
- Title:** A dropdown menu currently set to 'Administration Chair'.
- Name:** A dropdown menu currently set to '- Select Member -'.

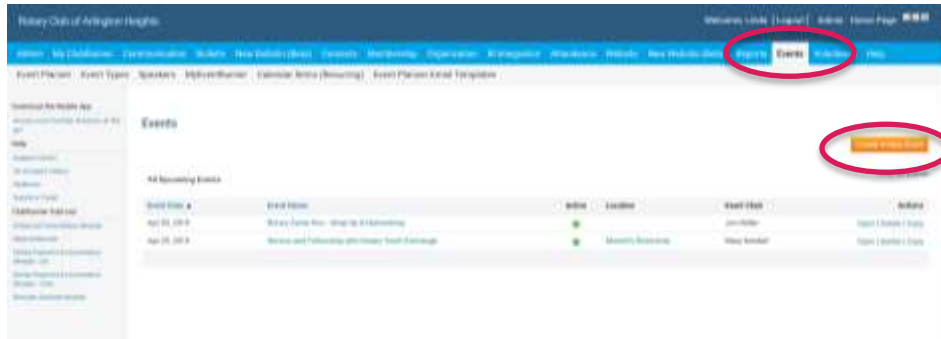
Buttons for 'Cancel' and 'Save' are located at the bottom right of the modal. The background interface shows a table of positions and members, with a 'Go back' button at the top right.

You can add a new position or edit an existing position

How to Add an Event

1. Click on Events in Navigation bar, then click on create a new event.

2. Enter Event Name and details



The screenshot shows the 'Create New Event' form. The fields are as follows:

- Event Name:** A text input field.
- Event Code:** A text input field.
- Status:** Radio buttons for ☒ Active and ☐ Draft.
- Event Type:** A dropdown menu currently set to 'General'.
- Start Date & Time:** A date and time picker with a tip: 'Tip: Type 'A' or 'P' to switch AM/PM.'
- End Date & Time:** A date and time picker with a tip: 'Tip: Type 'A' or 'P' to switch AM/PM. Leave blank if not applicable.'
- Description:** A text area with a tip: 'To add a single line break, hold down Shift and press Enter.'

Below the form fields is a rich text editor toolbar with various formatting options like bold, italic, underline, link, and a 'Source' button.

Adding an Event cont'd

3. If you want participants to register, then click yes to enable registration
4. Select Event chair
5. Add details on location
6. Determine where you want the event to be displayed
7. When everything is completed click Save

Would you like to enable registration now? ☐ Yes ☒ No

Image: Browse...

Event Chair: ▼

Email:

Phone:

Location:

Address 1:

Address 2:

City:

Zip/Postal Code:

Country: ▼

State: ▼

Show Event in home page? ☒ Yes ☐ No

Show Event in Calendar? ☒ Yes ☐ No

Show In Events List? ☒ Yes ☐ No

Show Event in Bulletin? ☒ Yes ☐ No

Display Social Media Share Bar? ☒ Yes ☐ No

Show Event in District Calendar? ☐ Yes ☒ No

Show Map? ☒ Yes ☐ No



After you have created your event, you will be directed to the Event Services screen. Here you can edit the details of the event, setup your registration, payment settings and configure invitation emails.

Integration with Rotary.org

RI database integration is a 2-step process

Step 1 is completed through My Rotary at Rotary.org

Step 2 is completed through ClubRunner

The screenshot shows the Rotary.org website with the 'RI Integration' link in the top navigation bar circled in red. Below it, the 'RI Integration Settings' link is also circled in red. The main content area is titled 'RI Database Integration for Arlington Heights' and 'Rotary Integration Settings'. It explains that member data changes will be automatically updated. It states that two steps are needed to set this up. Step 1 is 'Opt in at Rotary International's Member Portal', which involves signing in to a My Rotary account and following a list of instructions: 1. Hover over 'Member Center' and click 'Club & District Administration'. 2. Below Club Administration, click 'MANAGE MY CLUB'. 3. Under Update Club Data, click 'Designate a club management vendor'. 4. Under Club Management Systems, click 'Tell us which vendor you're allowing to update club data.' 5. Click on the drop down box and select ClubRunner from the list of vendors. 6. Click on the check box then the I Agree button, to authorize Rotary to complete the data integration process. Step 2 is 'After 24 hours, opt in by selecting the checkbox below'. Note that this checkbox will only become available once you complete the above step and wait for the RI database to refresh which may take up to 24 hours. A green box on the right indicates 'RI Integration Status: Read & Update: ClubRunner can read and update Rotary International's database for your club.' A yellow box contains a checkbox labeled 'Switch on Data Integration between ClubRunner and RI for all active member records within my club.' Below this, it notes that all members will now be set to opt into the fields the club has selected below, and any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile. At the bottom, there is an 'I agree to the Terms and Conditions of this integration.' checkbox, a timestamp 'Integration confirmed on 2017-12-07 8:39:41 AM', and the text 'by this domain:'.

Address My ClubRunner Communication Bulletin New Bulletin (Beta) Contacts Membership Sign Out **RI Integration** Attendance Website New Website (Beta) Reports Events Volunteers Help

RI Integration Settings Missing Member ID Report Member Updates Archive Club Updates Archive Updates Queue Compare & Synchronize Executive Compare and Synchronize Help

← Go back

RI Database Integration for Arlington Heights

Rotary Integration Settings

Using this feature, member data changes you make on ClubRunner will be automatically updated at Rotary International Headquarters within minutes. For more information on this feature, [click here](#).

In order to set this up, there are **two steps** that need to be completed by your club:

Step 1: Opt in at Rotary International's Member Portal.
As a Club President, Secretary, or Executive Secretary/Director, you will need to sign in to your My Rotary account. To access the sign in page use this link: <https://www.rotary.org/en/myrotary/en/user/login?destination=/>

1. Hover over top of "Member Center" on the top menu, and then click on "Club & District Administration".
2. Below Club Administration click the button called MANAGE MY CLUB.
3. Under Update Club Data, click "Designate a club management vendor."
4. Under Club Management Systems, click "Tell us which vendor you're allowing to update club data."
5. Click on the drop down box and select ClubRunner from the list of vendors.
6. Click on the check box then the I Agree button, to authorize Rotary to complete the data integration process.

Step 2: After 24 hours, opt in by selecting the checkbox below. Note that this checkbox will only become available once you complete the above step and wait for the RI database to refresh which may take up to 24 hours.

☒ Switch on Data Integration between ClubRunner and RI for all active member records within my club.

Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.

I agree to the Terms and Conditions of this integration.

Integration confirmed on 2017-12-07 8:39:41 AM
by this domain:

RI Integration Status: Read & Update:
ClubRunner can read and update Rotary International's database for your club.



Resources

ClubRunner Resources

Function specific help on left menu bar

Rotary Club of Arlington Heights

Admin My Clubrunner Communication Bulletin New Bulletin (Beta) Contacts Membership Organization RI Integration Attendance Website New Website (Beta)

Email Services Email Traffic Report Manage Blocked Emails

Services

- Manage Emails
- Edit Custom Distribution Lists
- Email Templates
- New Member Templates
- Custom Signature
- Help
 - Help Articles
 - Video: Sending an email
 - Video: Creating Templates

Club Communication

To modify or resend a message to the same recipients, click the Resend option. Use the Copy option to copy the email without recipients.

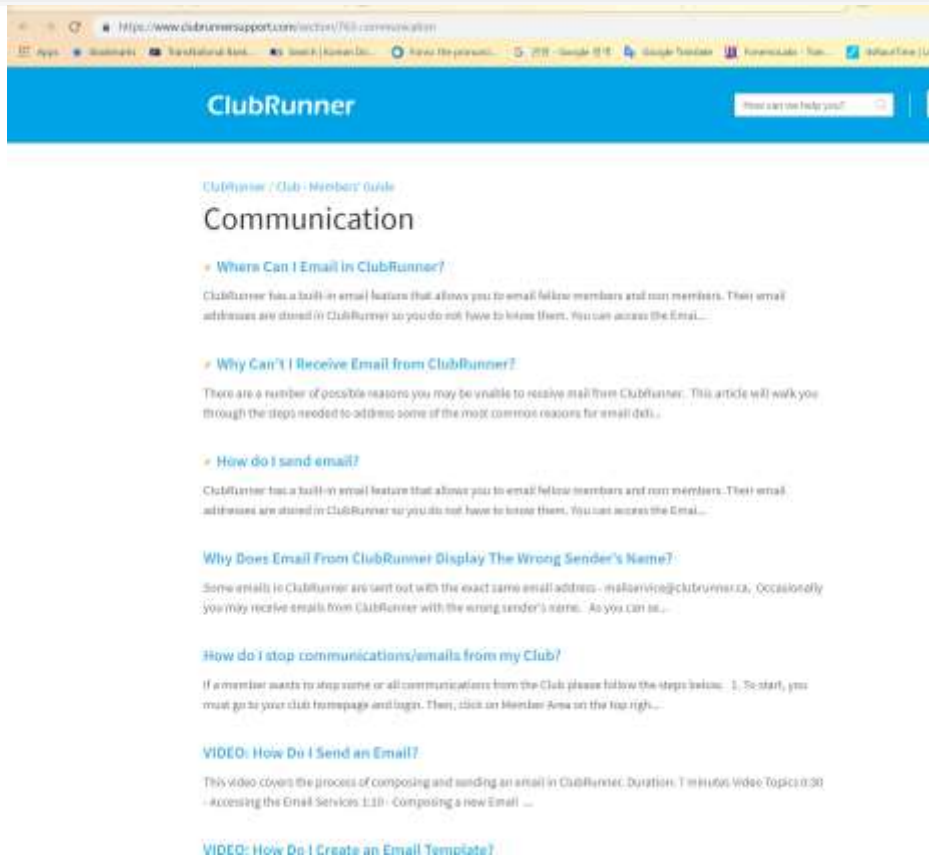
Show All Emails Show My Emails On

Filter records:

Status	Subject
Sent on Mar 22, 2019 at 10:02 AM	Rotary- Important Upcoming Events

ClubRunner Resources

If you click “Help Articles” you will get a list of articles related to the function you are working on.



The screenshot shows a web browser displaying the ClubRunner website. The URL in the address bar is <https://www.clubrunnersupport.com/wc2en/768-communication>. The page has a blue header with the 'ClubRunner' logo and a search bar. Below the header, the main content area is titled 'ClubRunner / Club - Members' Guide' and 'Communication'. There are four article links with orange arrow icons: 'Where Can I Email in ClubRunner?', 'Why Can't I Receive Email from ClubRunner?', 'How do I send email?', and 'Why Does Email From ClubRunner Display The Wrong Sender's Name?'. Each link is followed by a short summary of the article's content. At the bottom, there are two video links: 'VIDEO: How Do I Send an Email?' and 'VIDEO: How Do I Create an Email Template?'. The 'How Do I Send an Email?' video link is highlighted in blue.

[Where Can I Email in ClubRunner?](#)
ClubRunner has a built-in email feature that allows you to email fellow members and non members. Their email addresses are stored in ClubRunner so you do not have to know them. You can access the Email...

[Why Can't I Receive Email from ClubRunner?](#)
There are a number of possible reasons you may be unable to receive mail from ClubRunner. This article will walk you through the steps needed to address some of the most common reasons for email deli...

[How do I send email?](#)
ClubRunner has a built-in email feature that allows you to email fellow members and non members. Their email addresses are stored in ClubRunner so you do not have to know them. You can access the Email...

[Why Does Email From ClubRunner Display The Wrong Sender's Name?](#)
Some emails in ClubRunner are sent out with the exact same email address - helpservice@clubrunner.ca. Occasionally you may receive emails from ClubRunner with the wrong sender's name. As you can see...

[How do I stop communications/emails from my Club?](#)
If a member wants to stop some or all communications from the Club please follow the steps below: 1. To start, you must go to your club homepage and login. Then, click on Member Area on the top right...

[VIDEO: How Do I Send an Email?](#)
This video covers the process of composing and sending an email in ClubRunner. Duration: 1 minutes Video Topics: 030 - Accessing the Email Services 1:10 - Composing a new Email ...

[VIDEO: How Do I Create an Email Template?](#)

ClubRunner Resources

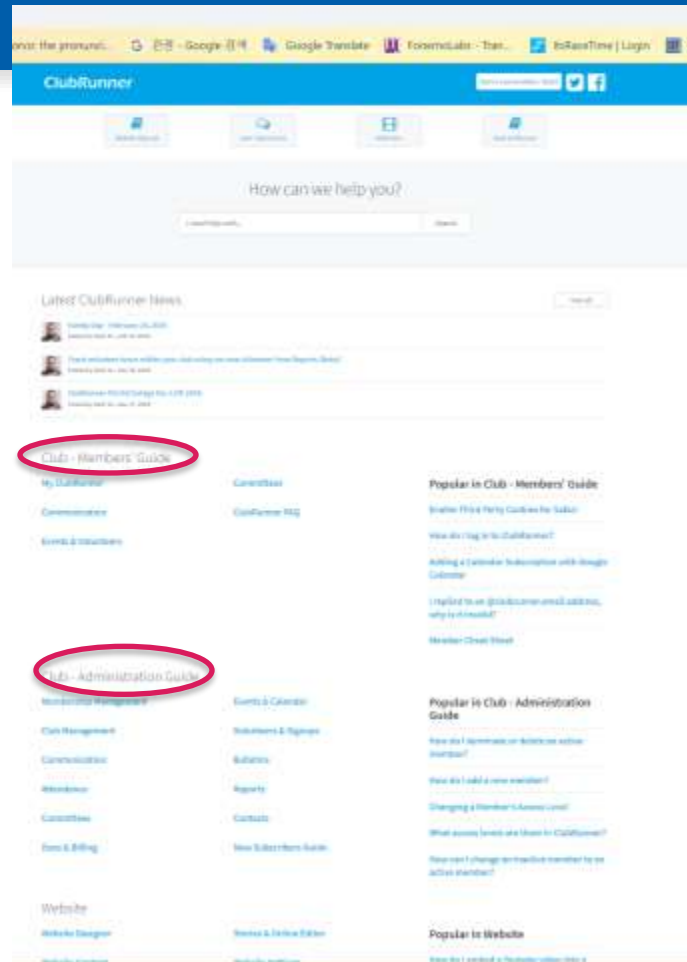


Clicking on Help & Support Center will take you to the Support Center landing page

Help Center Support Page

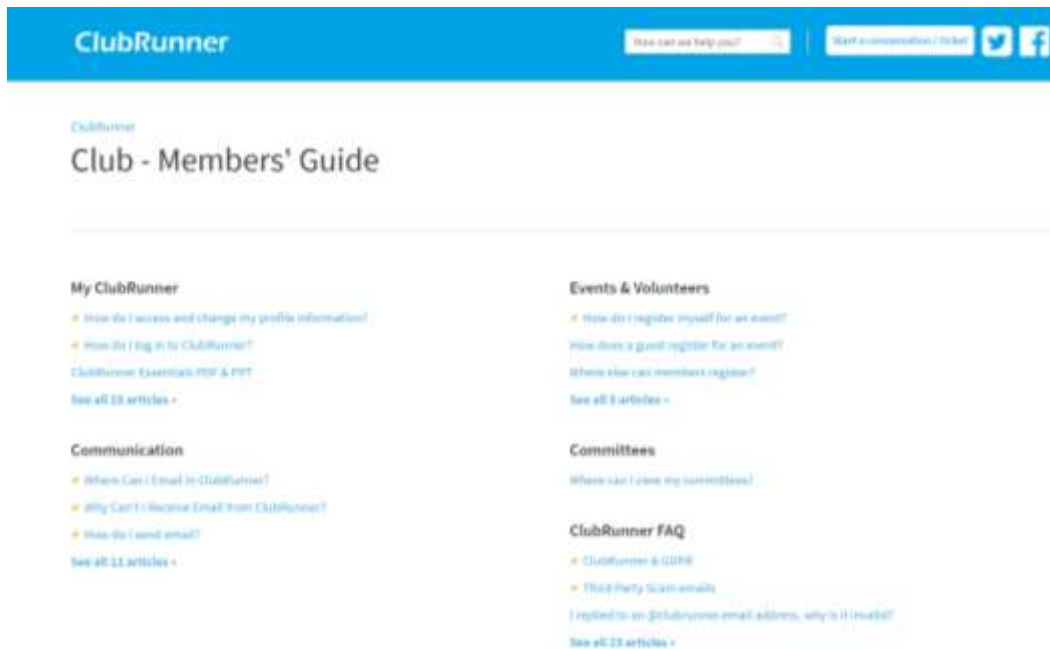
- Club Member's Guide
- Club Administration Guide

Both guides contain
“on demand” How To's



ClubRunner Resources

ClubRunner Members Guide:



The screenshot shows the ClubRunner website interface. At the top is a blue header with the 'ClubRunner' logo on the left. To the right of the logo are two search bars: 'How can we help you?' and 'Start a communication / ticket'. Further right are social media icons for Twitter and Facebook. Below the header, the page title 'Club - Members' Guide' is displayed. The main content area is divided into two columns. The left column contains sections for 'My ClubRunner' and 'Communication'. The right column contains sections for 'Events & Volunteers', 'Committees', and 'ClubRunner FAQ'. Each section lists several articles with a yellow arrow icon and a 'See all 23 articles' link.

ClubRunner

How can we help you? | Start a communication / ticket

ClubRunner

Club - Members' Guide

My ClubRunner

- How do I access and change my profile information?
- How do I log in to ClubRunner?
- ClubRunner Eventbuck PDF & PPT
- [See all 23 articles »](#)

Communication

- Where Can I Email in ClubRunner?
- Why Can't I Receive Email from ClubRunner?
- How do I send email?
- [See all 23 articles »](#)

Events & Volunteers

- How do I register myself for an event?
- How does a guest register for an event?
- Where else can members register?
- [See all 23 articles »](#)

Committees

- Where can I view my committees?

ClubRunner FAQ

- ClubRunner & GDPR
- Third Party Spam emails
- I replied to an @clubrunner email address, why is it invalid?
- [See all 23 articles »](#)





ClubRunner Resources

ClubRunner Administration Guide:

ClubRunner

How can we help you?

Start a conversation with us



ClubRunner

Club - Administration Guide

Membership Management

- What is the Member Profile & how do I edit it?
- Add, Edit, Reinvite & Renewal using the Club website
- Changing a Member's Access Level

[See all 28 articles >](#)

Events & Calendar

- How do I Add a Calendar Item?
- How do I Create an Event in Event Planner?
- How to Add a Speaker

[See all 28 articles >](#)

Club Management

- How do I add a Club Executive?
- How to update your Club's Contact
- How do I edit Club Information?

[See all 14 articles >](#)

Volunteers & Signups

- How do I Create a New Volunteer Signup List?
- What's the Difference Between the Basic and Advanced Version?
- Volunteer Hour Tracking (Beta)

[See all 24 articles >](#)

Communication

- How do I receive emails from the ClubRunner email list?
- Why can't I reply all in ClubRunner?
- How to Avoid Spam Filters

[See all 12 articles >](#)

Bulletins

- 100% New Bulletin Detail - Essential Walk-through
- New Bulletin Method - Now Available!
- Scheduling your Bulletin - How to avoid

[See all 11 articles >](#)

Attendance

- How do I create a meeting?

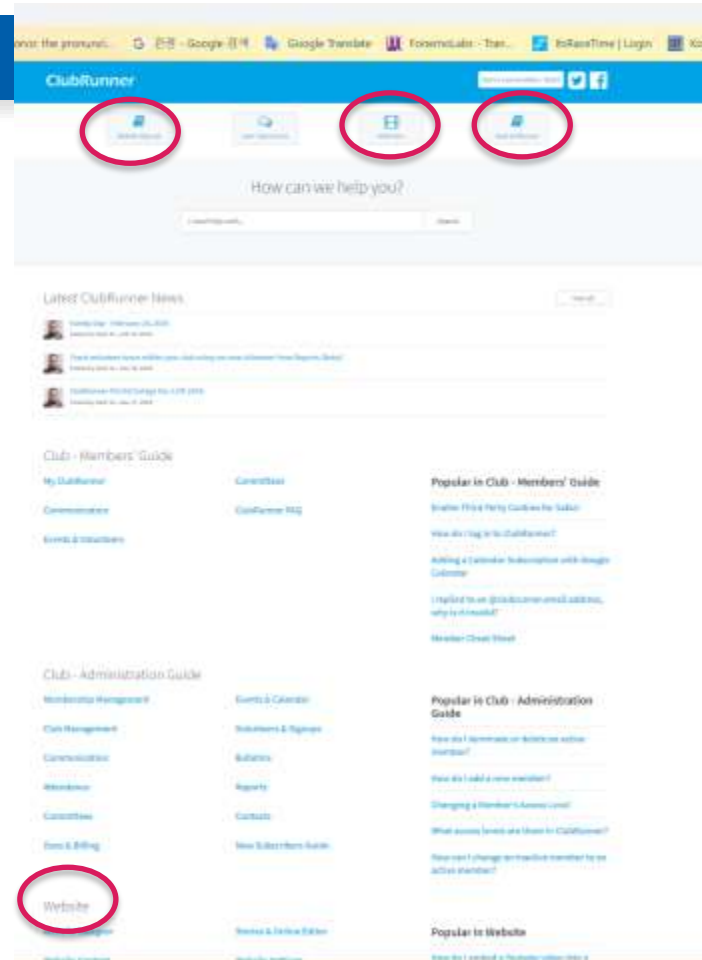
Reports

- How to download Word & PDF reports using advanced queries



Additional ClubRunner Support

- Bulletin Manual
- My EventRunner
- Website Manual
- Webinars
 - ClubRunner 101
 - eBulletin 3.0
 - Attendance 3.0
 - Dues and Billing
 - Website Designer
 - Membership Management & RI Integration
 - Event and volunteer management



Questions?