

## For Club Executives (Non ClubRunner Subscribers)

This guide is designed to help Club Executives with the District Version of ClubRunner. This contains step by step instructions on how to perform your club duties in ClubRunner on the District.

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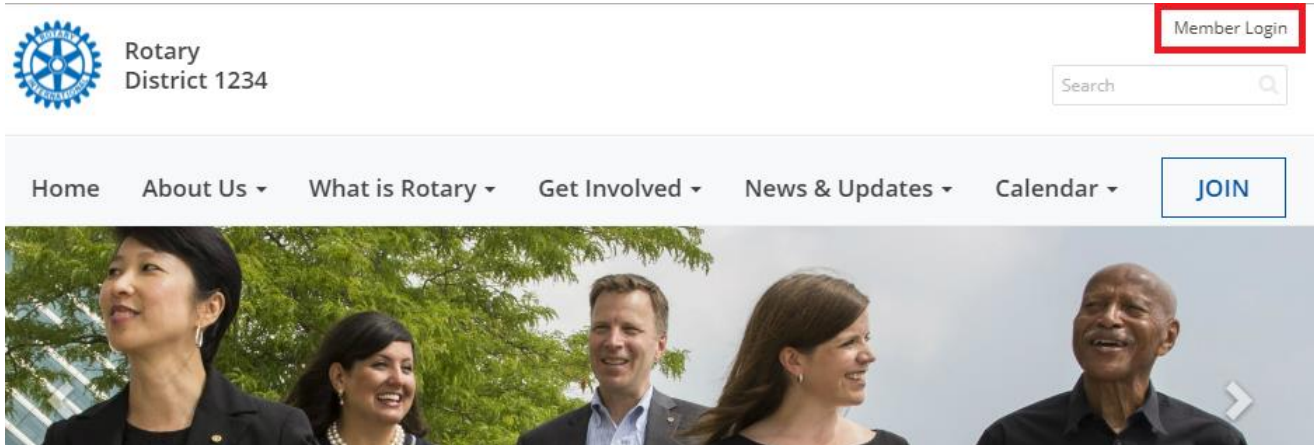
### Access Rights:

- By Default; only the Club Executives (President, President-Elect, Past President, Secretary, Treasurer, and Executive Secretary) have access rights to change information about the Club.
- If you are NOT identified as a Club Executive and should be, then contact your District Secretary and have then set you up as the Executive
- A District Administrator is the only one that can grant members access to the District that are not Club Executives.

**Note:** Club Access Levels do NOT apply to the District website, they are only used for Club websites.

### Navigation:

1. To login you're the District's site please click **Member Login** near the top right.



2. Now enter your login information. If you do not know what your login information is please click on the following link to retrieve it.

<http://clubrunner.helpserve.com/Knowledgebase/Article/View/1331/390/i-cannot-login-to-clubrunner>

After you login it will take you back to the District's home page. Click **Member Area** near the top right to go to the Administration page.

3. On the grey menu bar near the top, click the **For Club** tab.
4. This opens the blue menu bar below it. In this area you can access different areas of ClubRunner to preform your duties.

### Add or Remove Members:

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

#### To add a member:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Membership Lists** on the blue menu bar.
4. On the right, click the **Add New Member** link.
5. Fill in as much of the member's information as you can.
6. Click on the **Add Member** button to add the member to your club.

#### To mark a member as an Ex-member (inactive member):

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Membership Lists** on the blue menu bar.
4. Find the member and click **Change Status** on the right.
5. Click the button called **Terminate Membership**.
6. Enter the member's termination date as the *Ex-Member as of*.
7. Next, please indicate a **reason** for terminating the member.
8. Once the termination date and reason have been populated the **Terminate Member** button should become enabled.
9. Press the **Terminate Member** button to make the member inactive.

### Edit Members Information:

If you need to update a member's profile follow the below instructions:

#### To edit a member:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Membership Lists** on the blue menu bar.
4. Now click on the **member's name** to get into their profile.
5. You can click on the different tabs to get to the different areas within the profile.
6. Click on the **Edit** button to be able to make changes.
7. Click the **Save** button when complete.

### Changing the Clubs Meeting 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 meeting information:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Edit Club Information** on the blue menu bar.
4. This will now show the Club's details.
5. Click **Edit Club Info** near the right to edit the Club's information.

6. Each area has club information. If you need to update one of the areas, click on the **Edit** button.

**Note:** 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.

The map is located near the right side of the screen while on the **Club Information** page. 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 state/province. Also make sure you didn't input the actual address under "Meeting Place", which should really be the name of the venue.

**Note:** You can manually add the Latitude or Longitude to correct the map. You can get this data from Google maps.

### Specify your Clubs Website:

Your District site has a listing of clubs and their website links. To change your Club's website link, please follow the same steps as **Changing the Clubs Meeting Information**. The website is listed in the **Contact Info** area.

### Define Club Executives:

Your Club's listing of executives and directors appear in several places:

- The District organization chart
- The District's auto-generated group mailing lists.
- Your Club's website (if your Club has ClubRunner).

**Note:** Although the Clubs' Executive's names appear on a web page, their email addresses do not.

It is also important to state who your executives are so they can access ClubRunner to do their duties for the Club.

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Define Club Executives** on the blue menu bar.
4. On this page you can edit, add, or remove club officers.

#### To Define a New Position:

1. Click on the **Add New Position** button found in the top right corner.
2. Select the **Position** of the officer being added. (Only a District Administrator can create new positions to be added to this list)
3. By default, the system enters a **title** for you. This title will appear on the website. You can change it if needed. For example, if you selected the position as **Other**, the title could be changed to **Website Administrator**.
4. Select the **member's name** from the dropdown list.

5. Once done, click on the **Save** button to save the changes.

**Note:** If you do not see the member's name in the listing, you will need to add this member to your Club.

### Assign my Club's Attendance Manager:

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:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Assign Attendance Manager** on the blue menu bar.
4. Select a new contact person from the drop down list of your members.
5. Press **Select** to save the changes.

#### To change the Attendance Manager back to the default (Club Secretary):

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Assign Attendance Manager** on the blue menu bar.
4. Check off the box next to "Assign back to club secretary?"
5. Press **Select** to save the changes.

### Reporting Attendance for your Club:

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.

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Club Attendance Report** on the blue menu bar.
4. Fill in the fields on this page, including the attendance percentage for that month.
5. Press **Save**.

**Note:** If your club is using ClubRunner, attendance gets reported automatically to the District if your club is using the attendance module. For help reporting through your club site, please refer to the help section on your site.

### Switch on Data RI Integration:

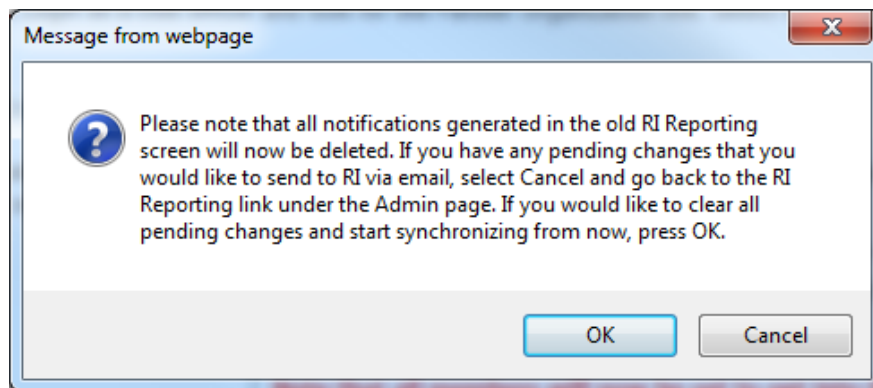
Before you can turn on RI integration for your Club from the District site you need the Club President, Secretary or Club Executive to log onto the RI website (<http://www.rotary.org>) and set ClubRunner as the club management vendor. This will allow changes to flow from ClubRunner to RI.

For more help on this see the RI Integration Guide:

<http://clubrunner.helpserve.com/Knowledgebase/Article/View/438/408/set-up-automatic-integration-with-rotary-international>

1. Login to the District Version of ClubRunner.  
**Note:** You must be a Club Executive: President, President Elect, or Secretary to have access.
2. In the grey menu bar click **For Clubs**.
3. On the blue menu bar click **RI Integration**.
4. Check the checkbox to switch on Data Integration between ClubRunner and RI, then click **OK**

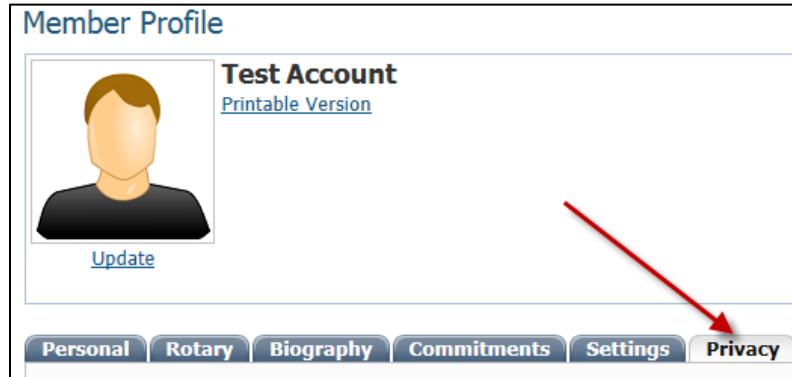
Switch on Data Integration between ClubRunner and RI for all active member records within my club.  
  
**Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.**  
  
I agree to the [Terms and Conditions](#) of this integration.



5. Lower on the page you can customize the privacy options by selecting the appropriate fields to synchronize to RI. This will set the RI integration privacy defaults for all members. Members will still have the option to decline sharing information if they choose. Once done press the **Update Privacy** button.

**How do I set a member's own privacy options?**

1. For Club members who prefer not to send data updates: Go to their ClubRunner member profile and select the **Privacy Tab**.



2. Click the **Edit** button and uncheck the fields that the member does not wish to share with RI. Then click the **Save** button.

**RI Privacy**

This section allows you to specify which fields you would like to update at Rotary International's database. If your club has opted out of certain fields, those will not be updated, even if you opt in. For a field that your club has opted into, you can choose to opt out by unchecking it from the list below.

<b>Name</b> <input checked="" type="checkbox"/> (Club Opted In)	<b>Home Phone</b> <input checked="" type="checkbox"/> (Club Opted In)
<b>Home Address</b> <input checked="" type="checkbox"/> (Club Opted In)	<b>Cell</b> <input checked="" type="checkbox"/> (Club Opted In)
<b>Business Address</b> <input checked="" type="checkbox"/> (Club Opted In)	<b>Business Phone</b> <input checked="" type="checkbox"/> (Club Opted In)
<b>Birthday</b> <input checked="" type="checkbox"/> (Club Opted In)	<b>Home Fax</b> <input checked="" type="checkbox"/> (Club Opted In)
	<b>Business Fax</b> <input checked="" type="checkbox"/> (Club Opted In)
	<b>Primary Email</b> <input checked="" type="checkbox"/> (Club Opted In)

**Note:** Name (highlighted in red) is required and is not uncheck able.

## Support & Training

Visit our **Support Center** at [www.ClubRunnerSupport.com](http://www.ClubRunnerSupport.com) to access all resources available, including submitting a support ticket, searching the knowledgebase, downloading helpful “how-to” documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

<p><b><u><a href="#">Knowledgebase</a></u></b></p> <p>This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.</p>	<p><b><u><a href="#">Downloads</a></u></b></p> <p>This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.</p>
<p><b><u><a href="#">On-Demand Videos</a></u></b></p> <p>For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.</p>	<p><b><u><a href="#">Webinar Training</a></u></b></p> <p>We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend.</p>
<p><b><u><a href="#">Submit a Ticket</a></u></b></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to <a href="mailto:support@clubrunner.ca">support@clubrunner.ca</a>. Our turnaround time for email tickets is 2 business days.</p>	<p><b><u><a href="#">Community</a></u></b></p> <p>Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.</p>

For the latest ClubRunner updates, follow us on:

