Instructions:

**District 7255 Web Site Interaction including Attendance Reporting**

For Rotary clubs using and not using ClubRunner/Doxess Technologies services for their club’s homepage.

Part I: Club’s **not** using Club Runner/Doxess Technologies for their club’s homepage

**Access rights are limited to club presidents, presidents-elect, secretaries, treasurers, attendance chairpersons and so forth.**

You are provided with a tremendous resource tool and it does not take a lot of effort to maintain your entire club’s vital information and all that in one place. Updated Rotary Information is thus simplified and tasks like preparing directories are enhanced.

Following steps are necessary to login to the system:

1). – Start your favorite Internet browser such as **Internet Explorer**, or other browsers, however **Mozilla Firefox** is preferred.

2). – When your browser is loaded, enter **District7255.org** as shown below:
3). – You will be rewarded with the Home Page of the District 7255 website:

![Home Page of District 7255](image)

4). – A “Login” pop-up window appears as shown below:

Enter your “Login Name”
Usually your e-mail address

Enter your “Password”

Click here to retrieve or set a Password - it will be emailed

After you entered you password depress “Login”
5). – The District 7255 Homepage appears as follows:

Point and click on “Administration”

6). – The District 7255 “Admin” screen will appear:

You will work with options listed in the highlighted “For Club Executives” (meaning Rotary Club Officers) section. You can always return here by clicking on “Back To” on the bottom of most screens or by logging in as just delineated. Remember to depress “Save” after updated data.
Add member(s) - it is important to add member(s) as soon a new member is inducted into your Rotary club so that not only you have an accurate record but so that District 7255 has an accurate count in the district:

2). – In the “Active Members List” click on “Add New Member”
3). – In the “New Member” panel fill in the new member’s information

<table>
<thead>
<tr>
<th>Title</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Suffix</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>Male</td>
</tr>
<tr>
<td>Membership Type</td>
<td>Active</td>
</tr>
<tr>
<td>Sponsor</td>
<td></td>
</tr>
<tr>
<td>Date of Admission</td>
<td>Aug 30 2013</td>
</tr>
</tbody>
</table>

**Member Mailing Address**

| Address Line 1 |  |
| Address Line 2 |  |
| City |  |
| Country | United States |  |
| State | New York |  |
| Zip/Postal Code |  |

Including the login name (typically the member’s e-mail address) and a password.

If new member transfers from another club it is very important to enter the transferring member’s previous membership number (typically found on the mailing label of the Rotarian Magazine). Thus, all Foundation contributions will be credited to the transferring new member account.

Do not forget to click on “Add Member”

When you are done click on “Go Back”
Delete former member(s) - it is important to delete former member(s) as soon as they are terminated, or leave(s) your club, so that you have an accurate record and District 7255 has an accurate count of members. Please make sure you indicate the reason for termination:

1). - in the “For Club Executives” section

Click on “Active Members List”

2). – In the “Active Members List” click on “Mark Ex” for the desire member line:
3). – In the “Termination” page:

- Enter the Termination Date
- Use the calendar box
- Select a termination reason
- If other is selected, please specify
- Leave unchecked
- Press “Terminate”

4). – Press “Go Back”

To totally remove a terminated member(s) from the District 7255 web site. However, do not be too hasty to do this in case a member might return!

1). - in the “For Club Executives” section

- Click on “Inactive Members List”
2). - In the “Inactive Members List”:

On the line for the inactive member to be permanently deleted, press “Delete”

**Editing Member(s) Information** is of paramount importance by the Rotarian who is responsible (usually the Club Secretary) in order to keep the club’s member information up-to-date on the District 7255 web site. If a club has its own web site, with ClubRunner, then the club web page shall be kept up-to-date. The ClubRunner “club web page” is then automatically synchronized with the “District 7255 web site.” Thus, as soon member information changes it is easier to change the one member’s data right away as opposed to having to do massive updates by a later deadline. Such an example is when District 7255 is in the process of producing a District 7255 Directory. Being diligent about all this data entry/correction/update not only assures respective clubs that their records are accurate but insures that District 7255 has accurate and up-to-date district records. These are a tremendously valuable resource and please take advantage of it.

1). - in the “For Club Executives” section

Click on “Active Members List”
2). – In the “Active Members List” click on the following:

Click on the Rotarians name to get into the respective membership profile

3). – The “Member Profile” Page appears

Click on “Update” to post a photo (process can be repeated)
Follow instructions

Click on “Edit” to enter/change any data element.
Please enter all contact information
More “Member Profile” data entry/update fields:

Notice the six tabs – press one at a time for more data entry/update possibilities

Notice each data element appears in a box to be updated

Date fields have pull-down calendars

Choices are handled by radio-buttons

Press “Edit” to add/change data
The “Rotary” Tab:

<table>
<thead>
<tr>
<th>Personal</th>
<th>Rotary</th>
<th>Biography</th>
<th>Commitments</th>
<th>Settings</th>
<th>Privacy</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

The “Biography” Tabs – please enter your story so we can get to know each other better.

Please assure that all data elements are up-to-date.
Changing your Club’s Meeting Information:

1). - in the “For Club Executives” section

2). _ The “Club Information” page will appear:

- Click on “Club Information Page”
- Click here to enter/edit your Club Info
- Click here to enter/edit your Club Officers and Directors
Update Club Information page:

When finished making all the correct data entries, click on the **Save Changes** button.

**Define Club Officers** i.e., Club President, Secretary, etc (ClubRunner calls them Executives)

Your club’s listing of officers and directors appear in several places:

- The District 7255 Organization Chart
- The District 7255’s auto-generated group mailing lists
- Your club’s website (if you are a ClubRunner club web site user)

Note: Although your club officers’ names appear on a web site, their e-mail addresses do not.
It is of paramount importance to state who your current club officer’s are in order that any one of them will be granted access when they try to login to the District 7255 web site.

To specify your club officers and directors (called Executives by ClubRunner):

1). - in the “For Club Executives” section

![Screenshot of Club Runner interface](image)

Click on “Define Club Executives”

The presented page has many different positions listed. You do not need to fill in each one! Whatever is not specified will simply not be listed on the web site. Presidents and Secretaries are required to be included.

![Screenshot of Club Executives and Directors](image)

To assign a Rotarian to an existing position click on “Edit” on the respective line.
The following page appears:

Then choose the name from the drop down list and press “Save”
Repeat the process of clicking on “Edit” for other officers and directors lines and selecting the respective Rotarian from the drop down list until all desired officers are recorded.

It is of paramount importance to indicate at least the Club President and the Club Secretary.

To define a **New Position**:

Click on the “Add New Position” in the top right corner above and the following appears”

*For example if position “Other” was selected you could enter Web Administrator as the Title. The title will be displayed on the web site.

Then select a Position from the dropdown list. Only a District Administrator can create new positions to be added to the list.

Select an active member from the “Select Member” list, then click “Save”

**Note:** If a member’s name is not listed, then that member needs to be added to the club directory.
Assign a Club’s Attendance Recorder/Manager/Chair

Each club needs an Attendance Recorder (in ClubRunner 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 - you can change this to be any Rotarians in your club.

To change the Attendance Recorder for your club:

1). - in the “For Club Executives” section

2). - In the “Assign Attendance Manager” page:

- If the current listed Rotarian needs to be changed or the position is blank, choose the new person from the drop down list
- “Check” to change back to Club Secretary
- “Select” to change back to Club Secretary
Reporting Attendance for your Club

Note: You must be a club “Club Officer” (Executive) to be able to report attendance for your club.
Clubs that use ClubRunner’s Club Web Site and report their attendance through their club web site can skip this section!

1). - in the “For Club Executives” section

2). – In the Monthly Attendance Page:
Switch on (Automatic) Data Integration with RI:

1). Before a club can turn on the RI integration for your Club from the District 7255 web site, the Club President, Club Secretary or Club Executive to log onto “MY PRIVATE ROTARY INTERNATIONAL” web site at http://rotary.org/myrotary/en/home to link and specify ClubRunner as the vendor of choice.

2). - in the “For Club Executives” section

3). – On the RI Database Integration page:

If integration was not previously done
Read everything and if your club agrees check the box

Choose Club RI Integration Privacy if not previously completed or changes are necessary

If RI Integration Privacy need to updated click here
For Club Rotarians who prefer not to send data updates to RI: Go to their ClubRunner member profile referred to earlier and change the “Privacy” settings.

Part II: **Attendance Reporting** Club’s using Club Runner/Doxess for their club’s homepage

Follow the steps 1 through 4; however, in step 2 sign on to your Club website address. Naturally your Club Website will appear instead of the District 7255 website.

5). – The Club website Admin Page will appear:

Point and click on “Input Attendance (Current Year)”
6) – On the Club Attendance Input screen do the following:

7). – Then depress “Go Back” on as many screens as necessary to get back to the home page, then point and click on “Logout.”

P.S. You may need to contact your Club Web Administrator or Club Secretary to obtain “Attendance Update” privileges.

Questions and comments can be addressed to:

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