ClubRunner

District Guide

For All Members
And Club Executives

2014

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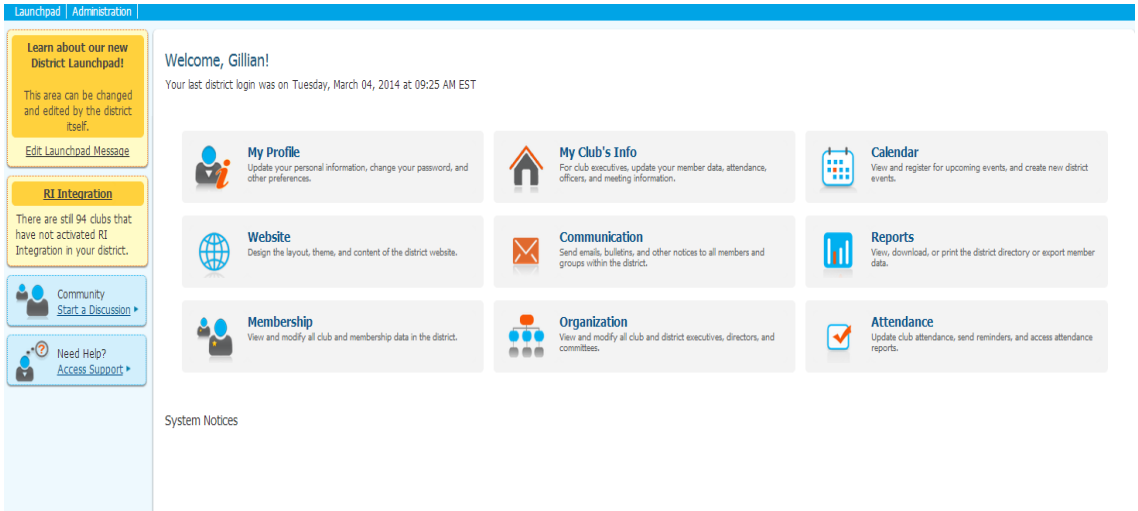
Introduction

Welcome to the District Version of ClubRunner, an interactive website and membership management service that will facilitate easier information sharing and communication with every member in the district. All Rotarians already have a login name and password defined, and depending upon your role in the club or district, various features will become available to you once you enter the members only section.

How to Log In

The public can visit and view the District website. However, in order to access private functions intended for members and club executives, you need to log in first.

- Click on the "**Login**" link at the top right of the home page
- Enter your assigned Login name and Password and click the Login button



You are now at the Launchpad. Here you can easily access commonly used features and functions. You can also access the Administration page by clicking on the link in the top left.

Trouble Logging In

If you receive a red "The user name or password you provided does not match our records." message, then either your username or password is incorrect. Try entering the information again.

If you are still not able to log in, you can retrieve and or rest your information by clicking the "**New and existing users: retrieve login and/or reset password**" link.

For Club Executives

If you are a club executive, you can update your club and membership information, report monthly attendance, and register your members for district events.

Your club's membership information can be found in the "For Club Executives" section, at the lower right of the Administration page.

How to Update Your Club Member Information

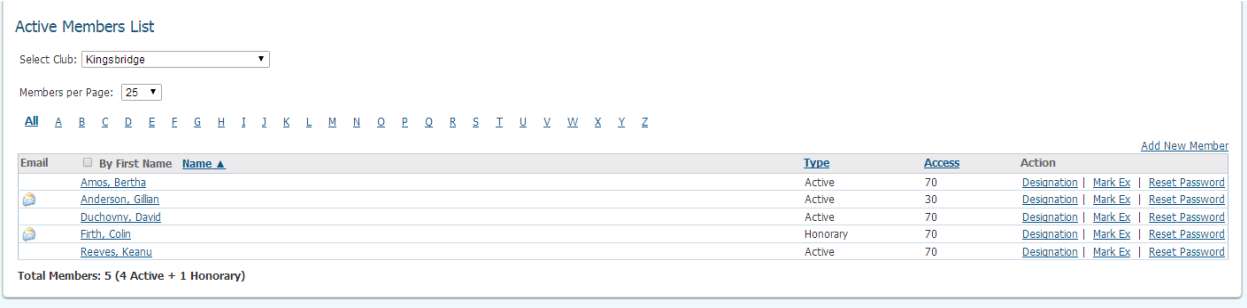
Using the "For Club Executives" section, click on **Active Members List**. This list contains your Active and Honorary members.

Tip: To view and edit your inactive members (such as terminated, or ex-members), click on **Inactive Members List**. To manage other membership types such as prospective, staff or other users, please click on **Other Users List**.

On this page, you will see your club's membership list. You can tell at a glance which members have email addresses defined in their profiles by seeing an envelope icon in front of their name. It is very important that members' email addresses be current in order for the District to properly communicate.

As a club executive, you have the ability to reset members' passwords and change their contact information. You can also add and remove members, covered next.

Note: You can enable RI Integration, a feature that will automatically synchronize any updates you make to your club, membership and officer information directly with Rotary International. See the section further down this guide for more details.



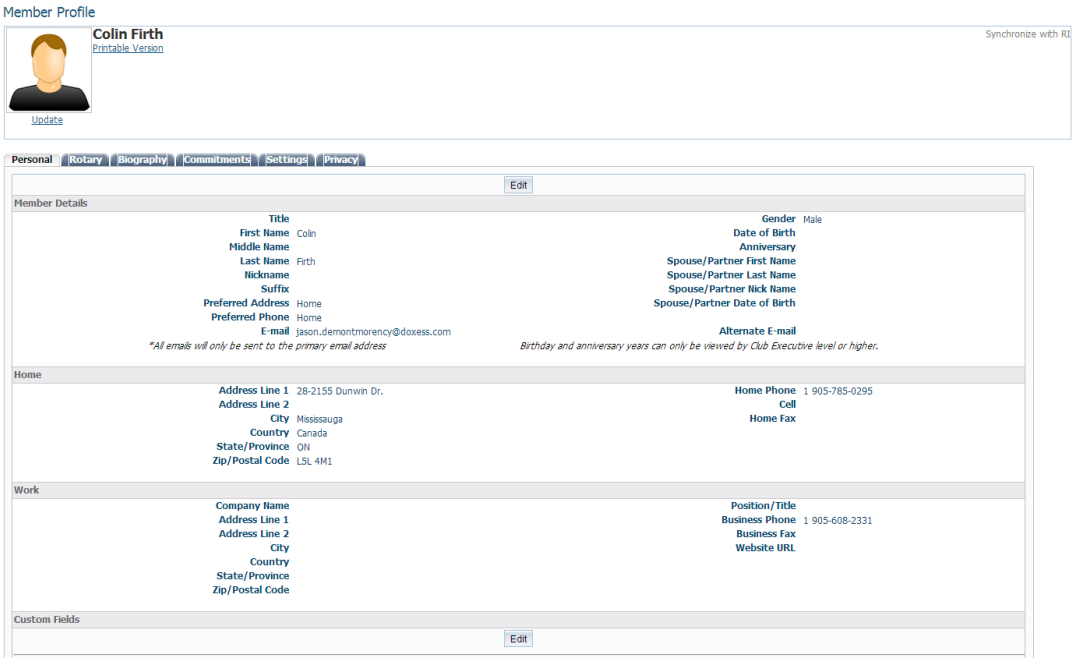
Tip: To jump to members by last name, click on the relevant letter across the top of this page. Additionally, you can change how many members to view per page. Click on Type to sort by type, or click on the checkbox to sort by first name.

Update Member Profiles

Updating a member's profile is vital if you want that member to be listed accurately in the directory, and to be listed on any organization charts on the website. This is even more relevant if that member is a district or club officer.

To change a specific member's profile:

- Click on **Active Members List**
- Click on **the member's name** to view their profile
- Select the appropriate tab and click the **Edit** button
- Fill in or change as many details as you need
- Click the **Save** button

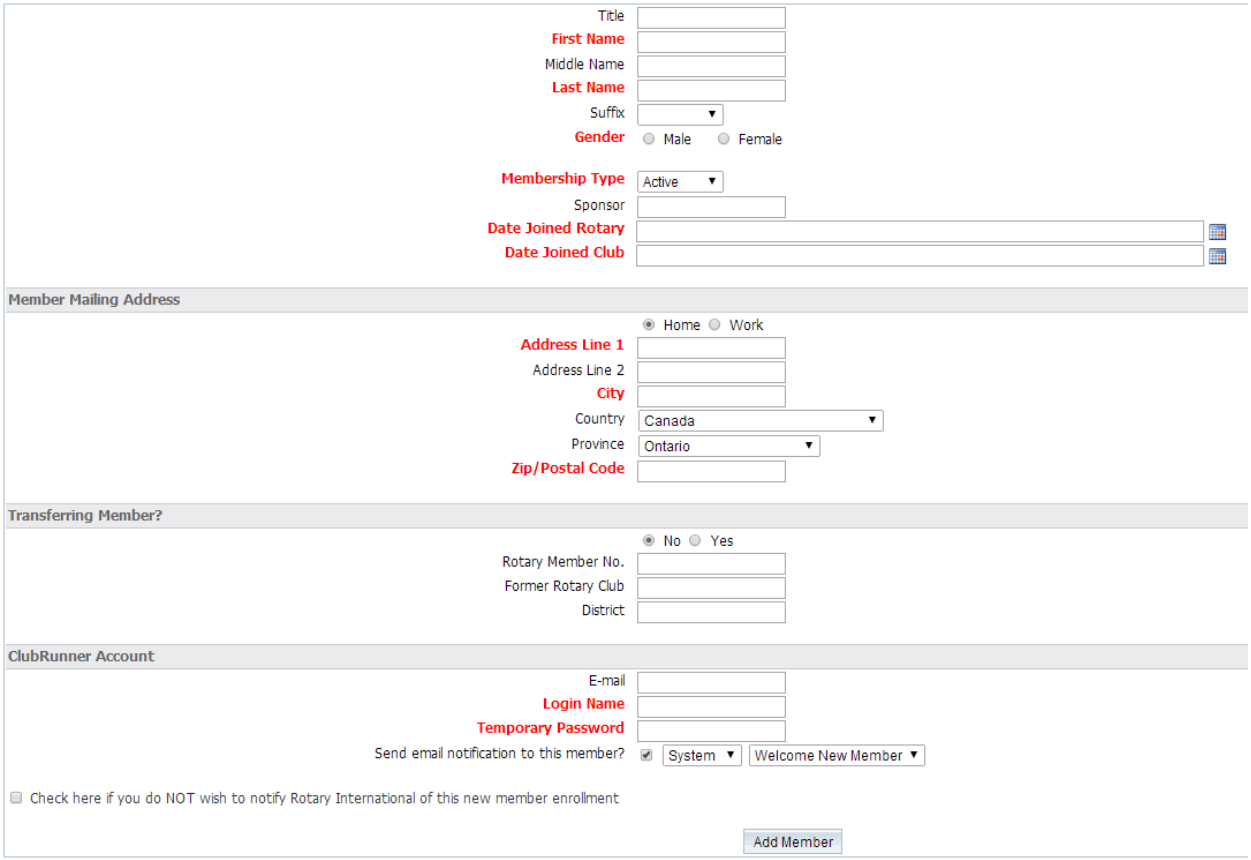


Add a New Member

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

To add a member:

- Click on **Active Members List**
- Click on **Add New Member**, located at the top right
- Fill in that member's information, including their login name and password at the bottom. This is what the member will use to log in to the District website
- Click the **Add Member** button

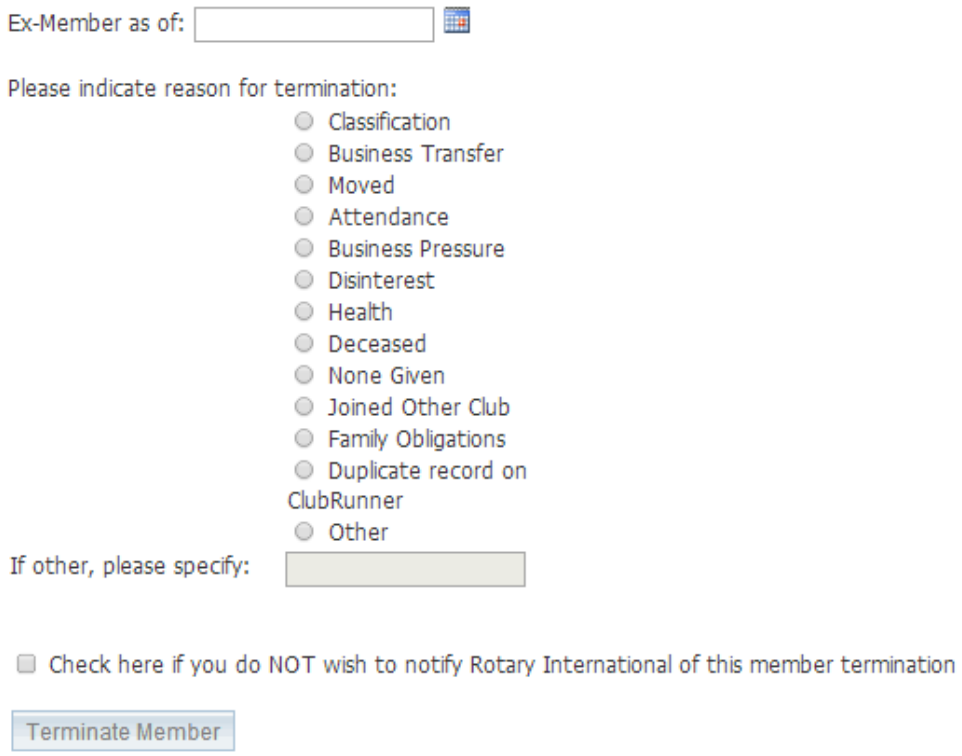


Tip: You may notice that the Add New Member screen is more limited than the regular profile. This has been designed for convenience, as you are only presented with the required fields necessary to add that member. Once added, you can then click on their name to view their profile.

Terminate a Member

If you want to delete a member, you are essentially changing their status from Active (or Honorary) to Ex-member. They will then reside in the Inactive Members List, so you will always have access to their profile information. If you want to permanently remove them, you must delete them from the Inactive Members List.

- Click on **Active Members List**
- Click on the **Mark Ex** link
- You will be asked to specify their date of termination, as well as a reason for termination (see screenshot below).
- Press the **Terminate Member** button. You should now see this member listed under the Inactive Members List, as an "Ex-Member" type



Add or Remove Other Users

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.

Some examples of other users are:

- Exchange Students
- Rotaract
- Staff
- Interact

Update Your Club's Information

It is important to update your club information. This information is posted on both the public and private pages of the District Website. Many members consult this list to do make-ups, so verify that your clubs meeting information is up to date.

To change your club's information:

- Click on **Club Information Page** to go to the details page
- To make changes, click on **Edit Club Info** at the top right

Note: If you club uses ClubRunner for its own administration, you do not need to update the District site with any club or member changes. Note that any information updated on either system will take effect across the board.

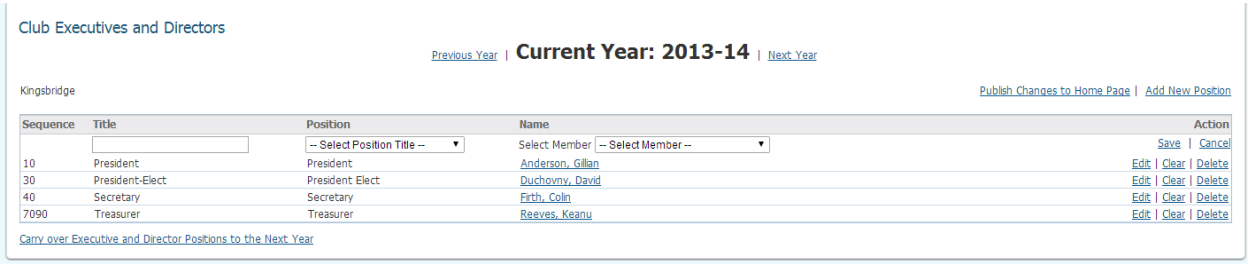
Define Your Club's Executives and Directors

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

- The District organization chart
- The District's auto-generated group emailing lists
- Various online directories
- Your club's website (if your club is using the ClubRunner club version)
- Rotary International's official directory (provided you have integrated, see RI Reporting & Integration section for more details)

It is also important to define your club executives so that they receive access to the **For Club Executives** section automatically. ClubRunner lists the executives by Rotary Year. This makes the transition easier from year to year by allowing you to define the positions ahead of time. It is important to state who your executives are so that they get granted access when they try to login to the District site.

- Click on **Define Club Executives**, in the "For Club Executives" section. This will take you to a new screen. This may or may not have existing titles.
- If the position title does not appear on this list, you will need to add a new position. Do this by clicking on **Add New Position** the upper right
- Specify the position name, and then select the **Position Title**. This would be the district related position, and the intention is that this should match as closely as possible to the title you entered. The reason for this is so that your member will be selected if the District needs to send out a communication to all members of that Position Title.
- Click on **Save**



Tip: You can also edit the **Sequence** number of the position after it was added, to rearrange the order in which all your positions are listed.

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 the **Add a New Member** section earlier in this guide.

Report Club Attendance

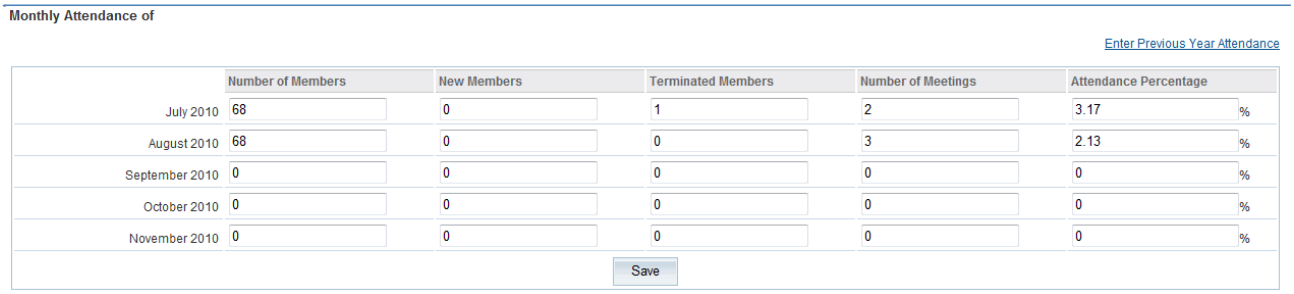
The District website has an easy attendance reporting section that will make reporting your club's monthly attendance easier than ever.

You must be a club executive to be able to report attendance for your club, or you must be defined as the Club Attendance Manager (See below).

Note: If your club uses the club version, you will not need to report club attendance through the District site. The club site will allow you to enter each individual meeting and specify the members that attended, including makeups, excused leaves of absence, and exempted members. It will then automatically calculate all the numbers for you. For help using the club version, please visit www.clubrunnersupport.com.

To report your club's monthly attendance:

- Click on **Club Attendance Report**
- Enter the number of **active members** in your club as of the end of the month. E.g. if you are filling in the month of January, enter the member count as of January 31st
- Enter the number of new members you **added** during this month
- Enter the number of members that were **terminated** during this month
- Enter the overall **attendance percentage** for that month
- Click on **Save**



Monthly Attendance of

Enter Previous Year Attendance

	Number of Members	New Members	Terminated Members	Number of Meetings	Attendance Percentage
July 2010	68	0	1	2	3.17 %
August 2010	68	0	0	3	2.13 %
September 2010	0	0	0	0	0 %
October 2010	0	0	0	0	0 %
November 2010	0	0	0	0	0 %

Save

Define Your Club's Attendance Manager

Each club has an **Attendance Manager** who is the person that will be contacted by the district 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. If the person handling attendance is the club secretary, you don't need to define the attendance manager.

To change the Attendance Manager for your club:

- Click on **Define Club Attendance Manager** option
- Choose the new contact person from the drop down list of your members
- Click on **Select**

Tip: To change the Attendance Manager back to the club secretary, check the box next to "Assign back to club secretary?"

RI Reporting and Integration

ClubRunner has integrated its databases with Rotary International. The RI Integration feature allows automated synchronization of member names, member contact information, club details and club officer changes.

When a club database is updated with, for example, a member's new contact information, that change will automatically be incorporated into RI's database within minutes, eliminating the need for clubs to formally notify RI or make the change again manually through Member Access.

The Compare and Synchronize feature allows you to compare your member data as it appears on ClubRunner with what is available in RI's Member Access. You then have the option to push your member information directly from ClubRunner to RI or pull your information from Member Access to populate your ClubRunner profile allowing you to clean up any inconsistent data between the two databases.

Note: *Each club needs to opt into RI Integration, but this only needs to be completed once.*

Opt In to Activate RI Integration

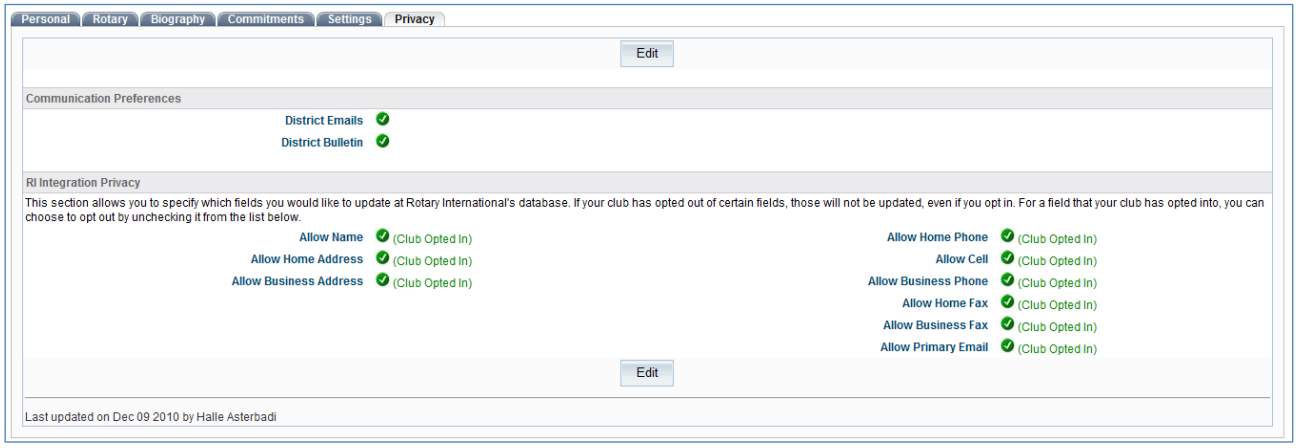
1. Opt in at RI's Member Access Portal (www.rotary.org)
    a. Log in either as President or Secretary
    b. Select ClubRunner as authorized partner from the Partner Organization section
    c. Agree to the Terms & Conditions
    d. Wait 24 hours

2. Opt in within your ClubRunner Site
    a. Switch on RI Integration link on Admin
    b. Select checkbox to switch on integration
    c. Agree to Terms & Conditions
    d. Select the fields you'd like to share as a club. Note that you can further opt out on a per member basis, covered next.

Privacy options by member

This integration feature also allows your individual members to customize their own privacy options by allowing them to select which fields they wish to share with Rotary International. The club privacy options override the member in terms of opting out of certain fields, so if the club chooses not to share cell phone numbers, all members will not share cell phones. However, if the club chooses to share home phones, certain members can decide to opt out of sharing home phones.

To access this section for any member, go to their profile, then select the **Privacy** tab.



Importance of RI Member ID

It's important to note that the RI Member Number must be populated for all members in your club that you wish to integrate changes. ClubRunner will automatically populate the RI Member Numbers for all your members' ClubRunner profiles. You can access a list of any members that were not successfully matched for an RI Member ID by clicking on **Missing RI Member ID Report.** To update these profiles

manually, click on the **View Profile** link on the right to access their Rotary tab, and there you can update their RI Member ID. This information can be found on the Rotary Member Access site.

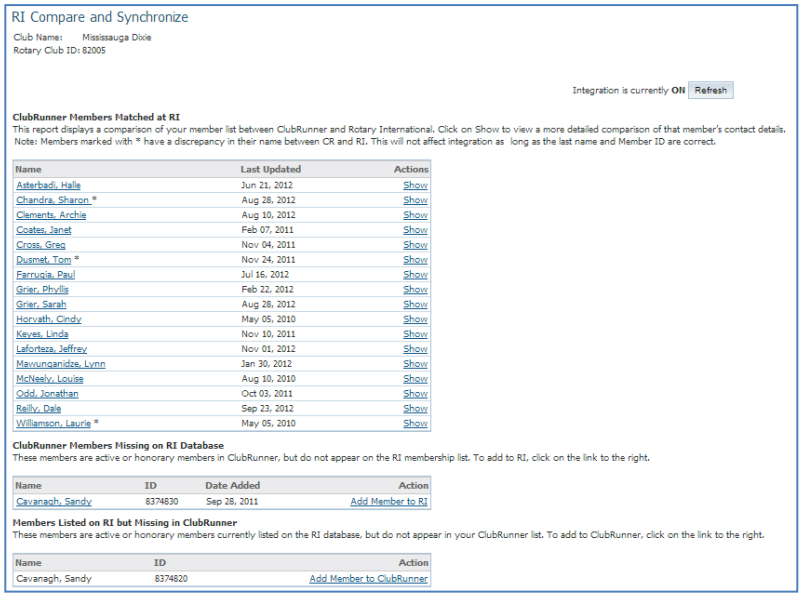
Compare & Synchronize

This function allows you to synchronize the data in ClubRunner with what has been added to Rotary International and vice versa. You will see a list of members with a date stamp of when the account was last integrated, a list of ClubRunner Members Missing on RI Database and Members Listed on RI but Missing in ClubRunner.

Add Member to RI: This function will send an email to data services at Rotary international. Once the email has been received from RI, they will process the request manually. This process can take 7-14 business days (dependant on the amount of Requests RI receives).

Add Member to ClubRunner: This function will create a new profile on ClubRunner, using the data from Rotary Internationals' database.

Show: This function brings you to the Member Profile Comparison page. From here, you will see what information has been entered in RI and ClubRunner as well as your changes.



RI Compare and Synchronize

Club Name: Mississauga Dixie
Rotary Club ID: 82005

Integration is currently **ON** Refresh

ClubRunner Members Matched at RI
This report displays a comparison of your member list between ClubRunner and Rotary International. Click on Show to view a more detailed comparison of that member's contact details.
Note: Members marked with * have a discrepancy in their name between CR and RI. This will not affect integration as long as the last name and Member ID are correct.

Name	Last Updated	Actions
Asterbadi, Halle	Jun 21, 2012	Show
Chandra, Sharon *	Aug 28, 2012	Show
Clements, Archie	Aug 10, 2012	Show
Coates, Janet	Feb 07, 2011	Show
Cross, Greg	Nov 04, 2011	Show
Dusmet, Tom *	Nov 24, 2011	Show
Farrugia, Paul	Jul 16, 2012	Show
Grier, Phyllis	Feb 22, 2012	Show
Grier, Sarah	Aug 28, 2012	Show
Horvath, Cindy	May 05, 2010	Show
Keyes, Linda	Nov 10, 2011	Show
Laforteza, Jeffrey	Nov 01, 2012	Show
Mawunganidze, Lynn	Jan 30, 2012	Show
McNeely, Louise	Aug 10, 2010	Show
Odd, Jonathan	Oct 03, 2011	Show
Reilly, Dale	Sep 23, 2012	Show
Williamson, Laurie *	May 05, 2010	Show

ClubRunner Members Missing on RI Database
These members are active or honorary members in ClubRunner, but do not appear on the RI membership list. To add to RI, click on the link to the right.

Name	ID	Date Added	Action
Cavanagh, Sandy	8374830	Sep 28, 2011	Add Member to RI

Members Listed on RI but Missing in ClubRunner
These members are active or honorary members currently listed on the RI database, but do not appear in your ClubRunner list. To add to ClubRunner, click on the link to the right.

Name	ID	Action
Cavanagh, Sandy	8374820	Add Member to ClubRunner

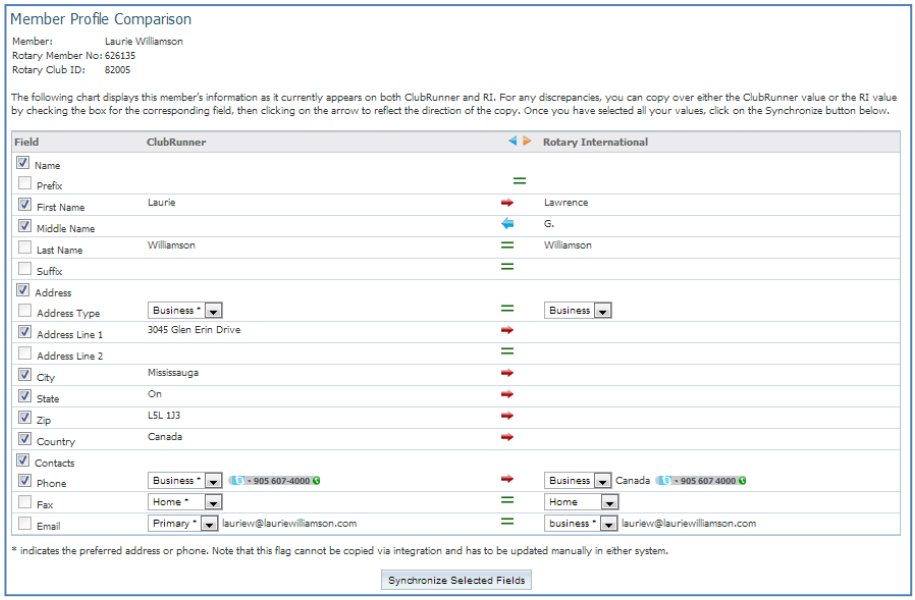
Member Profile Comparison

You will see a breakdown of the fields shared between RI and ClubRunner. The items listed under ClubRunner displays the member information as listed on ClubRunner, while the data under Rotary International lists the data as it appears in RI.

Between the information within ClubRunner and RI are arrows and equal signs. Clicking on the option will allow you to make changes from ClubRunner to RI and vice versa.

- ➡ - Indicates the information listed in RI will be replaced with the information from ClubRunner
- ⬅ - Indicates the information listed in ClubRunner will be replaced with the information from RI
- = - Indicates the information matches and is the same in ClubRunner and RI

Once you have made the necessary changes, click the **Synchronized Selected Fields** button to apply the changes. Please note changes can take up to 24 hours to be applied at Rotary International.



Training and Support

Visit our **Support Center** at www.ClubRunnerSupport.com to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful "how-to" documents and viewing on-demand demos.