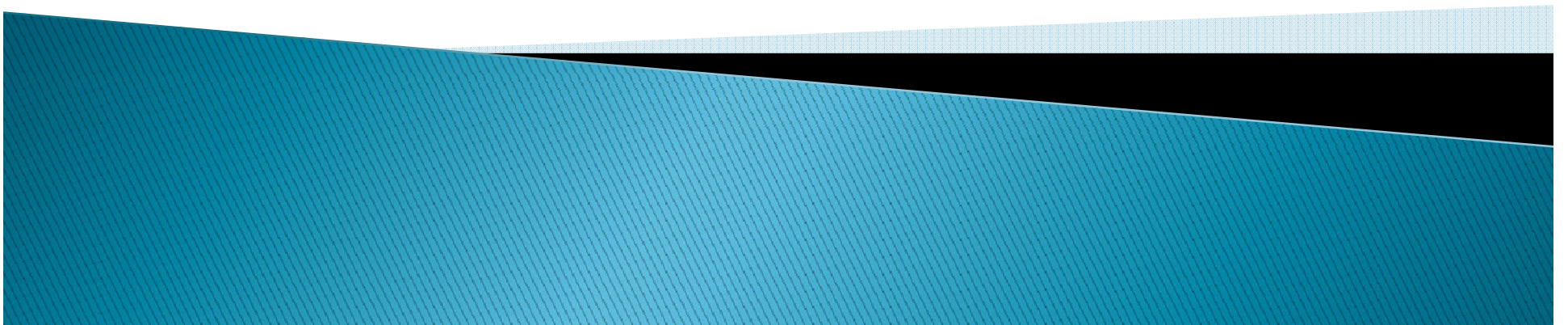


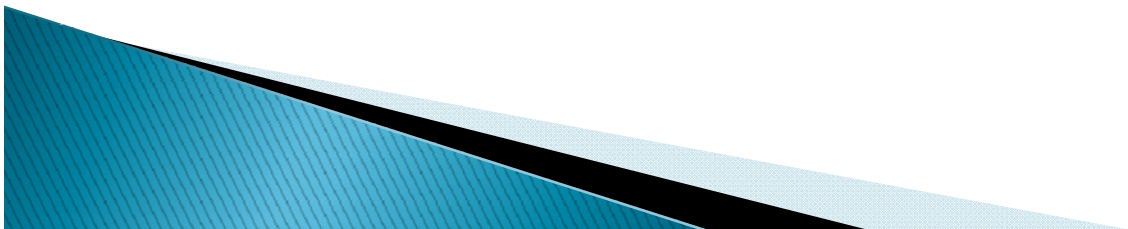
District Website

6 Feb 2012



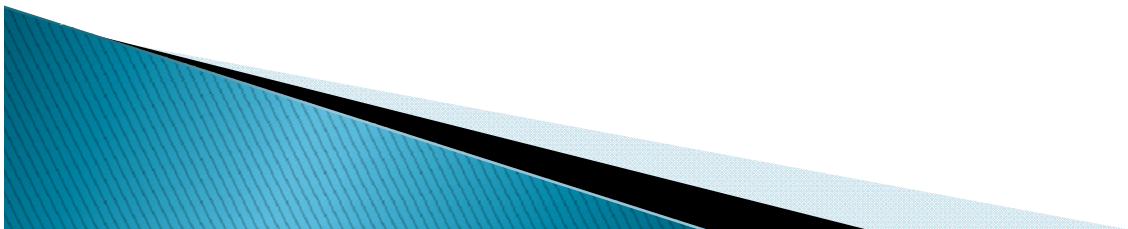
Webinar

- ▶ My apologies on the announcement error.
- ▶ Please connect using the online audio if possible.
- ▶ I've not used Go-to Meeting before, it'll be an adventure for all of us.
- ▶ I'm going to try the recording feature as well.



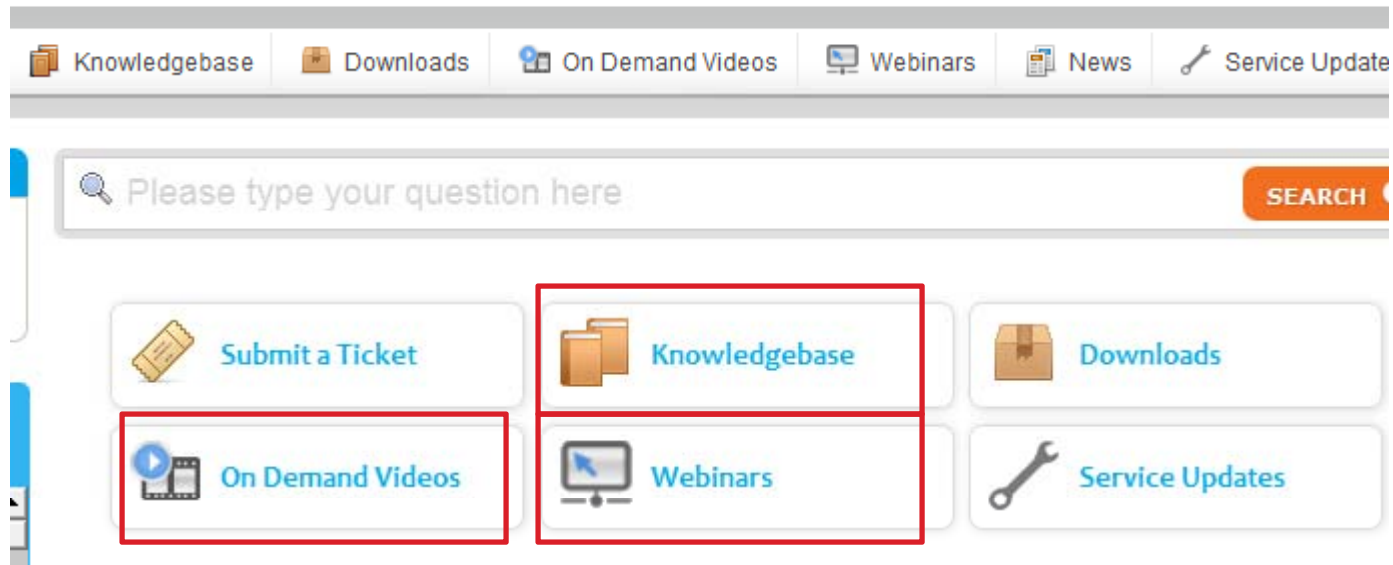
Agenda

- ▶ **Overview**
- ▶ Membership Information
- ▶ Club Executives
- ▶ Club Information
- ▶ Attendance
- ▶ Communication
- ▶ Communication
- ▶ Calendar & Events
- ▶ Committee's, etc.....



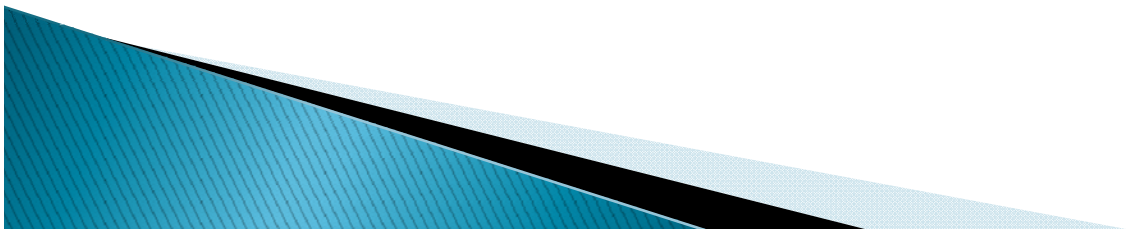
Future Reference

- ▶ <http://clubrunner.helpserve.com/>



Sidebar: rotary.org

- ▶ Lots of good information, but it can be hard to find
- ▶ The rotary.org search engine is not that good
- ▶ Use google.com instead using
Site:rotary.org “your search terms”
- ▶ The first part restricts the search to rotary.org



Let's make it easier

- ▶ For Clubrunner or non-Clubrunner clubs, there is an easy way, and numerous harder ways.
- ▶ #1 improvement for everyone, go to rotary.org, turn on integration.
 - There is no downside to this.
 - The Club President or Secretary can do this.
- ▶ For CC's, turn on integration on your club website.
 - Without it you lose a major benefit of having Clubrunner
 - Note! – There are several items that appear on the district page that must be edited from the club.



Two steps to Integration

RI Database Integration

We are pleased to announce that RI Database Integration is now available on ClubRunner! This new feature will allow your club's member information to be updated on ClubRunner, using API integration. For help information [click here](#).

In order to begin using this feature, there are **two steps** that need to be completed by your club:

1. **Opt in at Rotary International's Member Portal.** Login as a club officer and look for the Partner Organization page to agree to the terms and conditions. Here is a direct link to that page:
<http://www.rotary.org/en/secureselfservice/Pages/AddVendorOrganization.aspx>
2. **Opt in by selecting the checkbox below.** Note that once you do this, ClubRunner will begin to transmit your member information up to your active members' profiles, whether the change was made by the member or a club executive.

For Club Executives

[Active Members List](#)[Other Users List](#)[Inactive Member List](#)[Club Information Page](#)[Define Club Executives](#)[Club Attendance Report](#)[Define Club Attendance Manager](#)[Switch on Data Integration with RI \(Automated\)](#)[Report Data Changes to RI \(Manual Emails\)](#)[Missing RI Member ID Report](#)[RI Updates Archive](#)

☒ 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 10/11/2010 9:07:55 PM EST
by Daniel Mooers

Choose Club RI Integration Privacy

- | | |
|--|--|
| <input checked="" type="checkbox"/> Allow Name | <input type="checkbox"/> Allow Home Phone |
| <input checked="" type="checkbox"/> Allow Home Address | <input type="checkbox"/> Allow Cell Phone |
| <input checked="" type="checkbox"/> Allow Business Address | <input checked="" type="checkbox"/> Allow Business Phone |
| | <input type="checkbox"/> Allow Home Fax |
| | <input checked="" type="checkbox"/> Allow Business Fax |
| | <input checked="" type="checkbox"/> Allow Primary Email |

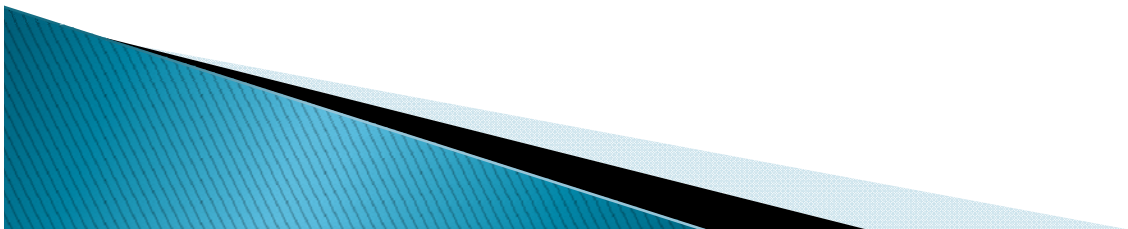
Update Privacy

Our District

- ▶ Mixed set of software

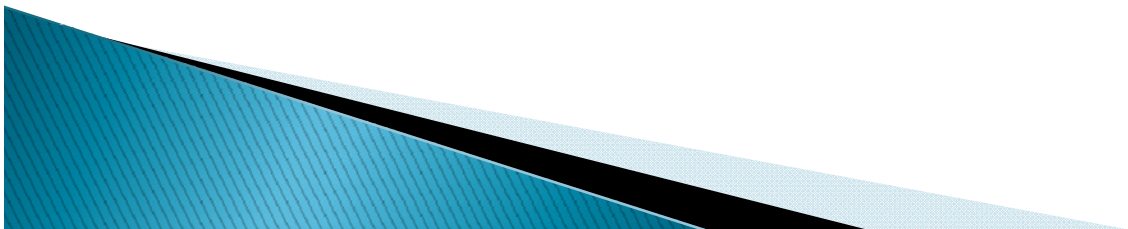
Software	#
Clubrunner	26
Club Wizard	13
Custom	1

- ▶ District Website is Clubrunner
- ▶ Use of District site slightly different for Clubrunner Clubs (CC), vs Non-Clubrunner Clubs (NCC).
- ▶ Will try to cover both



District site

- ▶ www.rotary7780.org
- ▶ Your login
 - CC: Same as club
 - NCC: As set up by your club
 - Easy for anyone to retrieve login information
 - Next page for details
 - If it doesn't work you probably don't have an account
 - Club executives, or webmaster should be first resource
 - If that fails, the district webmaster.



Logging in

Enter your login information below:

User Name:

User name is a required field.

Password:

[I forgot my password](#)

[Online Help](#)

☒ Remember me on this computer

Last Name:

Email Address:

Hello Scott Irving,

This is your login information for the ClubRunner website:

Login Name: [scott@irvings.name](#)

Password:

Club: Rotary Club of South Portland-Cape Elizabeth

If you need assistance, please reply to this email.

President's view

Home Page Editing

Home Page Stories
Story Management
Edit Home Page Links
Download Files
News Management
Events Management
[Site Pages Management](#)
[Photo Albums Management](#)
[Documents Download](#)
Website Sponsoring Area
Website Sponsoring Guide
Website Designer 2.0
Edit Meta Tags **NEW!**

Communication Services

Email Message Services
Send District Bulletin
District Organization Chart
[Committee Management](#)
Members Email Status report
Email Traffic Report
MyEventRunner Registration

For Event Registrations, visit the

[Event Calendar](#)

District, Clubs & Membership

Club & Membership Detail
Member Detail
Member Access Rights
Clubs Attendance Management
Define Current and Next Year Executives
Download Member Data
Member Data Changes
RI Reporting
Reports
Member Designation

For Members

[Edit My Profile](#)
[Change My Password](#)
[District Directories](#)
[Search Member eDirectory](#)
[My Committees](#)

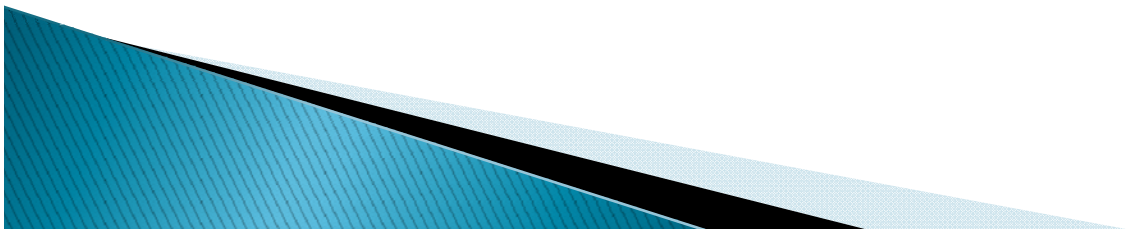
For Club Executives

[Active Members List](#)
[Other Users List](#)
[Inactive Member List](#)
[Club Information Page](#)
[Define Club Executives](#)
[Define Next Year's Executives](#)
[Club Attendance Report](#)
[Define Club Attendance Manager](#)
[Switch on Data Integration with RI \(Automatic\)](#) **NEW!**
[Report Data Changes to RI \(Manual Emails\)](#)

- ▶ Other Club positions vary some regarding what items are grayed out.

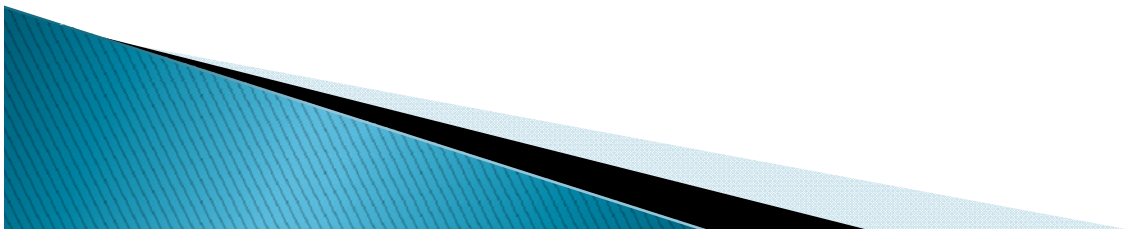
Agenda

- ▶ Overview
- ▶ Membership Information
- ▶ Club Executives
- ▶ Club Information
- ▶ Attendance
- ▶ Communication
- ▶ Communication
- ▶ Calendar & Events
- ▶ Committee's, etc.....



Membership Information

- ▶ This is critical, without this, most other items become more difficult or impossible.
- ▶ CC: Update your club site, no need to update district or RI if integration is on
- ▶ NCC: Update district, RI will update if integration is on
- ▶ There is required and optional information
 - Required is a small subset of what is possible
 - Please enter emails
- ▶ Membership Information enables logins for members



Time

- ▶ You need to update your club, the District, and Rotary International.
 - You don't have to do this 3 times!
- ▶ CC: Update your club, with integration on, your done.
 - Only one update
- ▶ NCC:
 - Update your club
 - Update the district and with Integration on, RI will automatically be updated.
 - Not quite as good as one, but you've been doing at least two already.



Adding a member



For Club Executives
Active Members List
Other Users List
Inactive Member List
Club Information Page
Define Club Executives
Club Attendance Report
Define Club Attendance Manager
Switch on Data Integration with RI (Automat
Report Data Changes to RI (Manual Emails
Missing RI Member ID Report
RI Updates Archive

Active Members List

Select Club:

Members per Page:

[All](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Email	<input type="checkbox"/> By First Name	Name ▼	Type	Access	Action
		Irving, Nancy	Active	60	Designation Mark Ex Reset Password
		Irving, Scott	Active	30	Designation Mark Ex Reset Password

Total Members: 2 (2 Active)

- ▶ To add members select active member list
 - ▶ Then select Add new member
 - ▶ Fill in required fields
 - ▶ Save
 - ▶ Select person & Edit
 - ▶ Add email
-
- ▶ Use Inactive member list to restore an Ex member

[Add New Member](#)

New Member

Title	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
Suffix	<input type="text"/>
Gender	<input type="radio"/> Male <input type="radio"/> Female
Membership Type	<input type="text" value="Active"/>
Date of Admission	<input type="text" value="Feb 06 2012"/>

	<input checked="" type="radio"/> Home <input type="radio"/> Work
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
Country	<input type="text" value="United States"/>
State	<input type="text" value="Maine"/>
Zip/Postal Code	<input type="text"/>

	<input checked="" type="radio"/> No <input type="radio"/> Yes
Rotary Member No.	<input type="text"/>
Former Rotary Club	<input type="text"/>
District	<input type="text"/>

E-mail	<input type="text"/>
Login Name	<input type="text"/>
Temporary Password	<input type="text"/>

- ▶ The Rotary member number will populate automatically from RI
- ▶ Use email for login name to insure it is unique.
- ▶ The password can be anything, including gibberish, if the member will retrieve it as discussed.
- ▶ Member can change login and password to suite if they wish
- ▶ Member can update the data.

Edit Member

Personal	Rotary	Biography	Commitments	Settings	Privacy
----------	--------	-----------	-------------	----------	---------

SaveCancel

Fields marked in red are required.

Member Details

Title		Gender	<input checked="" type="radio"/> Male
First Name	Scott	Birthday	Sep 09
Middle Name	J	Anniversary	Jun 30 1
Last Name	Irving	Spouse/Partner First Name	Nancy
Nickname		Spouse/Partner Last Name	Irving
Suffix		Spouse/Partner Nick Name	Nancy
Preferred Address	<input checked="" type="radio"/> Home <input type="radio"/> Work	Spouse/Partner Birthday	Feb 13
Preferred Phone	<input type="radio"/> Business <input checked="" type="radio"/> Home <input type="radio"/> Cell	Alternate E-mail	
E-mail	scott@irvings.name		

**All emails will only be sent to the primary email address*

Birthday and anniversary years can only be viewed by Clu

Home

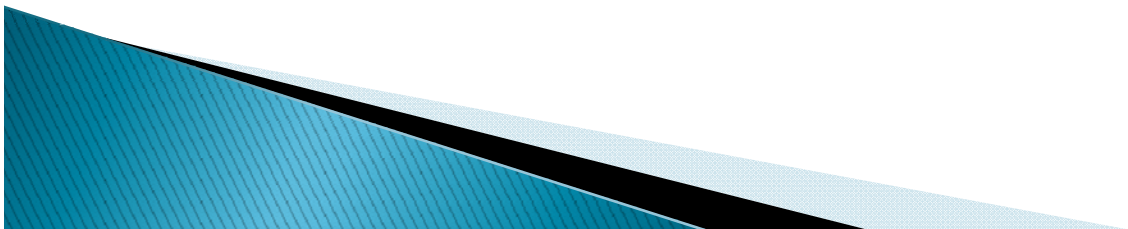
Address Line 1	27 Crescent View Avenue	Home Phone	1
Address Line 2		Cell	1
City	Cape Elizabeth	Home Fax	
Country	United States		
State/Province	Maine		
Zip/Postal Code	04107		

Work

Company Name	Petrus Technology LLC	Position/Title	Principa
Address Line 1	27 Crescent View Ave	Business Phone	1
Address Line 2		Business Fax	
City	Cape Elizabeth	Website URL	http://pe
Country	United States		

Agenda

- ▶ Overview
- ▶ Membership Information
- ▶ **Club Executives**
- ▶ Club Information
- ▶ Attendance
- ▶ Communication
- ▶ Calendar & Events
- ▶ Committee's, etc.....



Executives

- ▶ Critical: controls access to some district tools
- ▶ CC: Update your club website
- ▶ NCC: Same operation using district site
- ▶ Must be done in late Dec. or early January
 - Automatically rolls over on July 1
- ▶ Results propagate to RI
- ▶ Be complete

For Club Executives
Active Members List
Other Users List
Inactive Member List
Club Information Page
Define Club Executives
Club Attendance Report
Define Club Attendance Manager
Switch on Data Integration with RI (Automat
Report Data Changes to RI (Manual Emails
Missing RI Member ID Report
RI Updates Archive

Bath

[Add New Position](#)

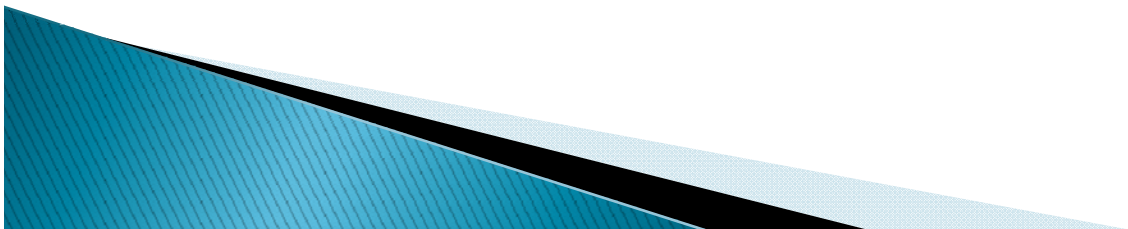
Sequence	Title	Position	Name	Action
10	President	President	Select Member Evans, John	Save Cancel
20	President Elect	President Elect	Wyman, Bernie	Edit Clear Delete
30	Treasurer	Treasurer	MacKinnon, Darlene	Edit Clear Delete
30	Vice-President	Vice President	Neilson, William	Edit Clear Delete
40	Secretary	Secretary	Smith, Caelie	Edit Clear Delete
60	Past President	Immediate Past President	Baribeau, Michael	Edit Clear Delete

Carry over Executive and Director Positions to the Next Year

1. Create undefined position
2. Control presentation order only
3. Defined by the district + Clubrunner
 - Used to feed email distribution lists
 - Go light on usage of "Other"
4. Free-form, whatever you call them
 - e.g. District defines webmaster in 3, you might have multiple:
 - Facebook & Website
 - Technical & content
5. Drop down to pick name already in system
6. Don't forget to save!!!

Agenda

- ▶ Overview
- ▶ Membership Information
- ▶ Club Executives
- ▶ **Club Information**
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- ▶ Communication
- ▶ Calendar & Events
- ▶ Committee's, etc.....



For Club Executives

[Active Members List](#)

[Other Users List](#)

[Inactive Member List](#)

[Club Information Page](#)

[Define Club Executives](#)

[Club Attendance Report](#)

[Define Club Attendance Manager](#)

[Switch on Data Integration with RI \(Automat](#)

[Report Data Changes to RI \(Manual Emails'](#)

[Missing RI Member ID Report](#)

[RI Updates Archive](#)

Club Information Page



Meeting Date/Time: Wednesday at 6:15 PM

Meeting Venue: Purpoodock Club
300 Spurwink Ave
Cape Elizabeth Maine 04107
United States

Websites

[ClubRunner Website](#)

[Edit Club Info \(Online\)](#)

Area Governor

[Daniel Colby](#)

President


Name	Preferred Ph
Marjorie Barker	Home: 207-87

Club Executives

Title	Name	Preferre
President	Marjorie Barker	Home: 2
President Elect	Robert Flynn	Home: 7
Vice President	Charles Redman III	Home: 2
Treasurer	Maggie Haines	Home: 6

Update Club Information

Club Information

Club Name	<input type="text" value="Rotary Club of Bath Sunrise"/>
Short Name	<input type="text" value="Bath Sunrise"/>
Club Motto	<input type="text" value="Service Above Self"/>
Club Greeting	<input type="text" value="Welcome to our Club!"/>
Club Id	<input type="text" value="26157"/>
Charter Date	<input type="text" value="2/4/2010"/> 
Website	<input type="text" value=""/> URL must starts with http://

Meeting Information

Club Meeting	<input checked="" type="radio"/> Every <input type="text" value="Friday"/> at <input type="text" value="7:00"/> <input checked="" type="radio"/> AM <input type="radio"/> PM e.g hh:mm
	<input type="radio"/> Meeting Schedule <input type="text" value=""/>
Meeting Place	<input type="text" value="MAE'S CAFE"/>
Meeting Address	<input type="text" value="160 Centre Street"/>
Unit/Suite	<input type="text" value=""/>
City	<input type="text" value="Bath"/>
Country	<input type="text" value="United States"/>
State/Province	<input type="text" value="Maine"/>
Zip/Postal Code	<input type="text" value="04530"/>
Latitude	<input type="text" value="43.9112700"/>
Longitude	<input type="text" value="-69.8197480"/>













District Info

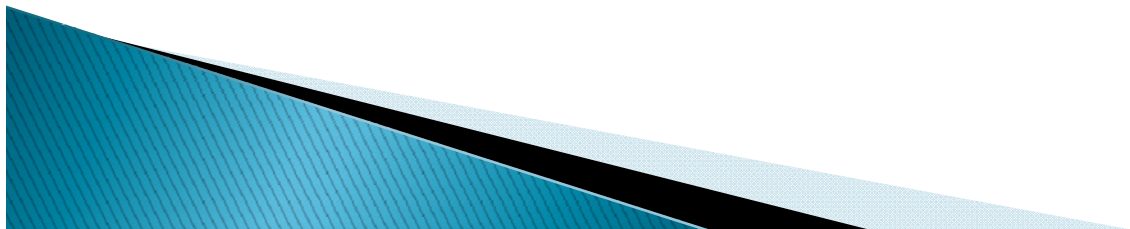
- Organization Chart
- Photo Organization Chart
- When/Where Clubs Meet
- Club Directory & Contact

Note: If you change your meeting address and do not update the latitude/longitude it

This club is a current ClubRunner subscriber, therefore District may not edit the information c

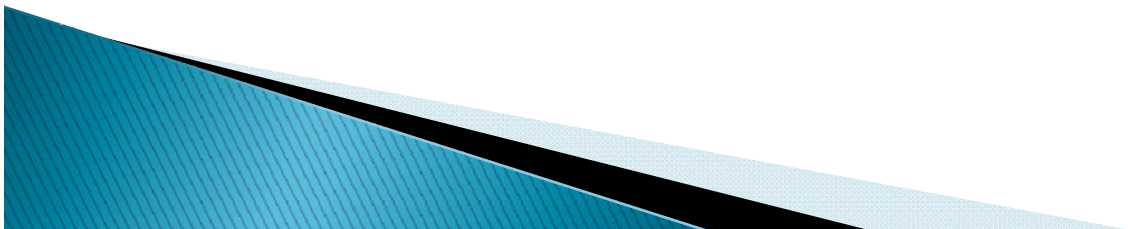
When & Where Clubs Meet

	Club	President	Location	Map	Meeting Day and Time
	Yarmouth	David Kitchen	Location	Map	Monday 7:00 AM
	Topsham Expresso	Russell Andrews	Location	Map	Monday 7:15 AM
	Wells	William Hobbs	Location	Map	Monday 7:30 AM
	Brunswick	Don Kniseley	Location	Map	Monday 12:00 PM
	Exeter	Kenneth Bailey	Location	Map	Monday 12:15 PM
	Rochester	Janet Laatsch	Location	Map	Monday 12:15 PM
	Falmouth Maine	David Jones	Location	Map	Monday 4:15 PM
	Damariscotta-Newcastle	Lorraine Faherty	Location	Map	Tuesday 7:00 AM
	Kennebunk Portside	Karen Schlegel	Location	Map	Tuesday 7:15 AM
	Bethel	Ellie Andrews	Location	Map	Tuesday 7:30 AM
	Fryeburg Area Rotary Club	Wendell Webb	Location	Map	Tuesday 7:30 AM
	Hampton Rotary Club	Debora Marsolais	Location	Map	Thursday 7:30 AM January, February and March 2012



Agenda

- ▶ Overview
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Attendance overview

- ▶ CC: Clubrunner does this really well
 - All from the club's web site
 - Meeting attendance
 - Make ups
 - Exempt members
 - Leaves of absence
 - New and Ex member counts
 - Reporting is automatic with integration turned on.
- ▶ NCC: details will depend on what you use
 - Generally manual or separate software
 - No automatic reporting
 - Report to district using district site



Reporting via the district

- ▶ Define attendance manager
- ▶ You can delegate this

Assign Attendance Manager

Paul Butler (Club Secretary) is the current person responsible for reporting.

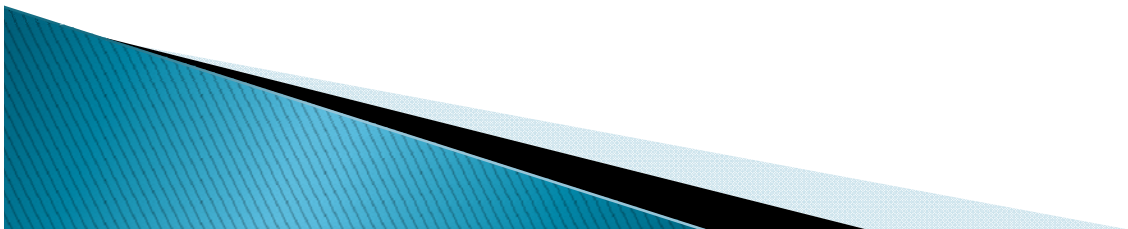
The club secretary usually is the person responsible for reporting.

Should this responsibility have been delegated to a different person?

Club Name Rotary Club of South Portland-Cape Elizabeth

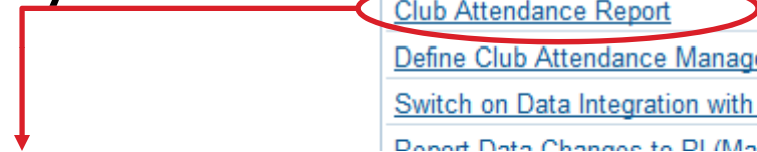
Select From

Select



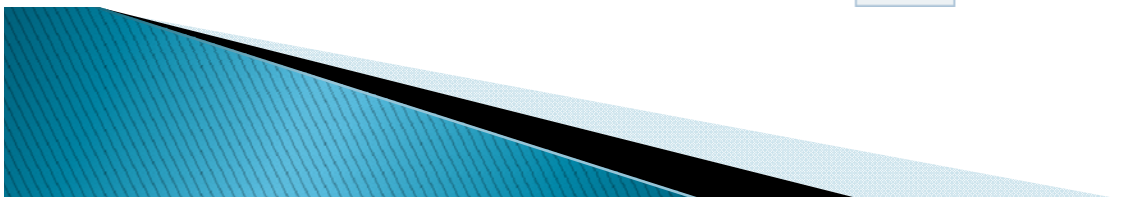
- ▶ CC: Do this on your club page
 - Form is different than below
- ▶ NCC: Monthly summary

For Club Executives
Active Members List
Other Users List
Inactive Member List
Club Information Page
Define Club Executives
Club Attendance Report
Define Club Attendance Manager
Switch on Data Integration with RI (Automat
Report Data Changes to RI (Manual Emails'



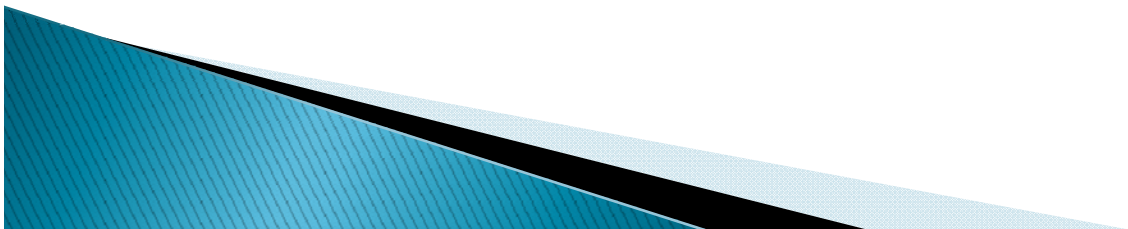
	Number of Members	New Members	Terminated Members	Number of Meetings	Attendance Percentage
July 2011	50	0	0	4	72.19 %
August 2011	51	1	0	5	72.15 %
September 2011	51	0	0	4	81.68 %
October 2011	52	1	0	4	72.25 %
November 2011	52	1	1	4	82.16 %
December 2011	0	0	0	0	0 %
January 2012	0	0	0	0	0 %

Save



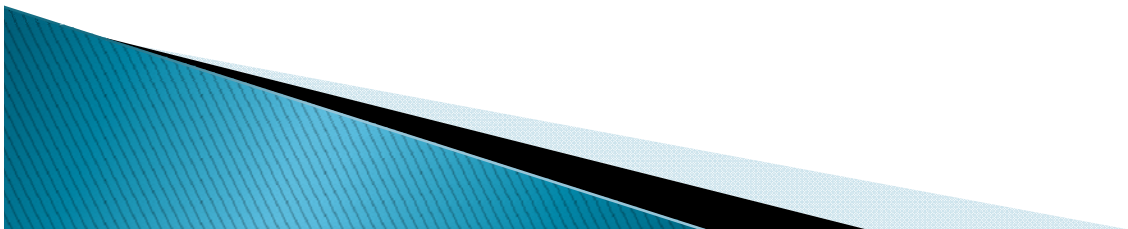
Agenda

- ▶ Overview
- ▶ Membership Information
- ▶ Club Executives
- ▶ Club Information
- ▶ Attendance
- ▶ **Communication**
- ▶ Calendar & Events
- ▶ Committee's, etc.....



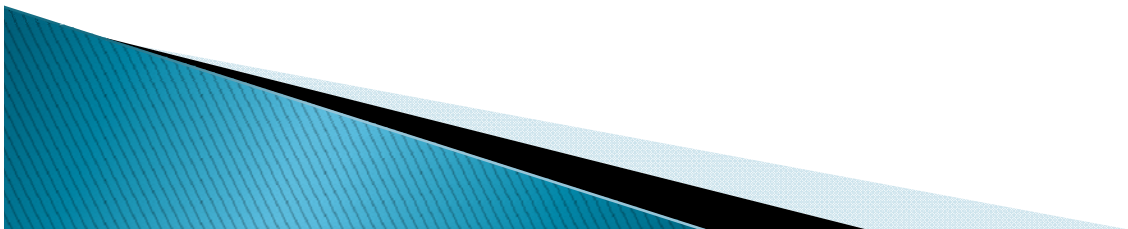
Communications

- ▶ District membership information enables district communications.
- ▶ 2011–2012 year to date volume has been just over 1 email per month.
- ▶ Many members do not get the district newsletter because they are not in the database.
- ▶ CC: You can send emails to other club presidents for events
- ▶ NCC: No email access



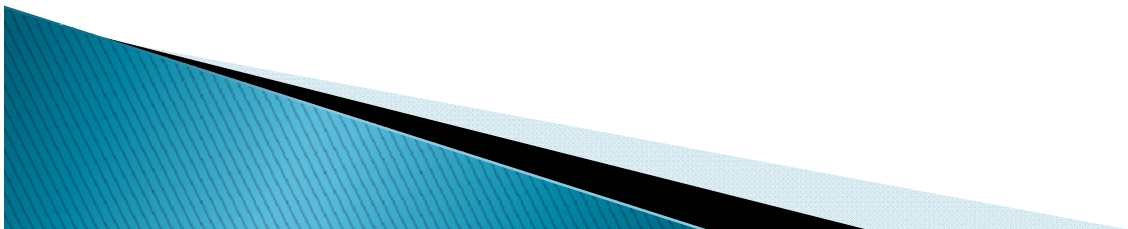
Agenda

- ▶ Overview
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- ▶ Club Information
- ▶ Attendance
- ▶ Communication
- ▶ **Calendar & Events**
- ▶ Committee's, etc.....



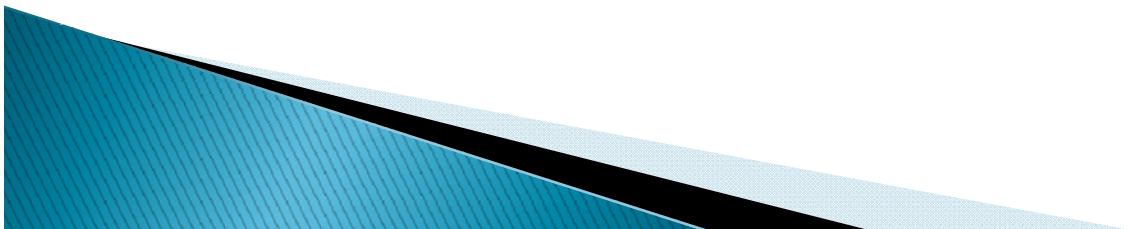
Calendar for Clubrunner clubs

- ▶ Calendar and events are two views of the same information.
- ▶ When you set up an club event, you can optionally display it on the district calendar.
- ▶ You can announce the event to members, and send it to other club presidents via your club site.



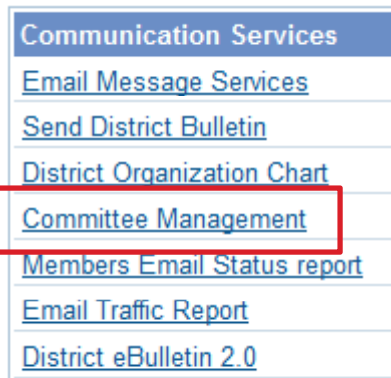
Agenda

- ▶ Overview
- ▶ Membership Information
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- ▶ Club Information
- ▶ Attendance
- ▶ Communications
- ▶ Calendar & Events
- ▶ Committee's, etc.....



Committee's

- ▶ District committee's have
 - Common file area
 - Committee email list for communications
- ▶ Provides committee makeup and contact information to other members
- ▶ These appear under the District Org Chart also



Communication Services
Email Message Services
Send District Bulletin
District Organization Chart
Committee Management
Members Email Status report
Email Traffic Report
District eBulletin 2.0

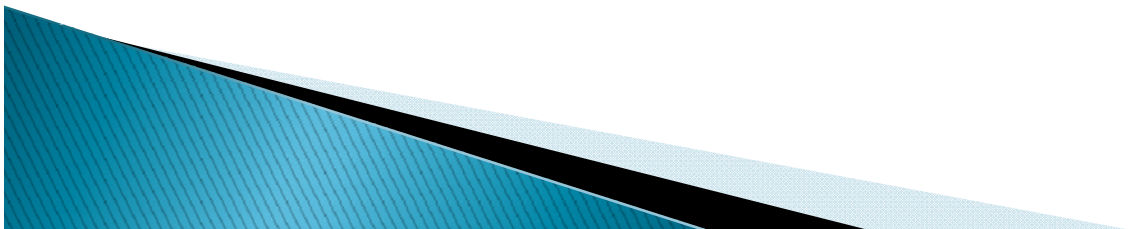
District Organization Chart

- ▶ Access from homepage or admin menu
- ▶ The public is restricted n what they can see
- ▶ A logged in member will see more info.

Communication Services
Email Message Services
Send District Bulletin
District Organization Chart
Committee Management
Members Email Status report
Email Traffic Report
District eBulletin 2.0

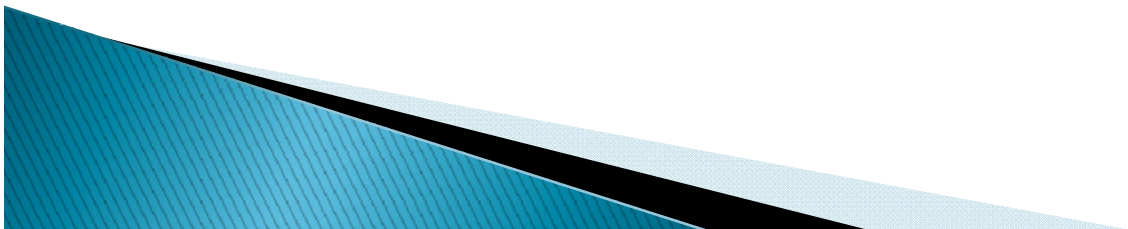
or

District Info
Organization Chart
Photo Organization Chart
When/Where Clubs Meet
Club Directory & Contact



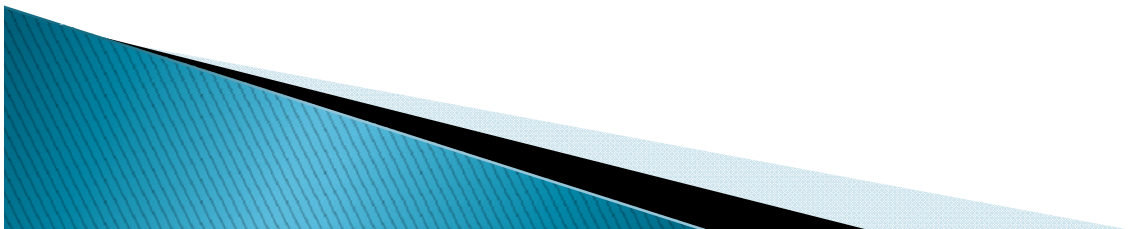
District Organization Chart

- ▶ Potentially this is the best source of who is doing what.
 - BUT it is only as good as what we input for members, executives and committee's.
 - If Clubrunner Clubs turn on integration and if
 - Non-Clubrunners turn on integration and update the district instead of RI.
 - It should be much more useful for all
 - With the same or less work!



District Directory

- ▶ This area is being changed but currently
 - Can generate a current list of club and district officers
 - Can format the list, but it's a work in progress
 - The biggest current drawback is it regenerates at 4AM.



AG Page

login>District Org Chart>View AG details

Area Governor's Module

One









[Print This Page](#)



Mae Bradshaw
[Rotary Club of Exeter](#)

Clubs

[Assign Club to this AG](#)

Club Name	President	
  Hampton Rotary Club	Debora Marsolais	View Executives & Directors Unassign Club
  Newburyport	Susan Christ	View Executives & Directors Unassign Club
  Portsmouth	Anthony Delyani	View Executives & Directors Unassign Club
  Seacoast Portsmouth	Christopher McMahon	View Executives & Directors Unassign Club

Committees

[Add New Committee](#)

Name	Chair	Type	Actions
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Total: 0 committee(s)

AG Reports

[Club Size/Growth Report](#)

Year of Service Report **Coming Soon**

District Membership & Attendance Report **Coming Soon**

Club Attendance **Coming Soon**

Email Message Service

[Email All Members of My clubs](#)

[Email District Officers and AGs](#)

Questions?

