9705 ClubRunner Training

Leo Farrelly and Paul Murray

Thank you for registering for the 9705 ClubRunner training.

Please review the Preparations for Zoom Meeting (page 2)

Contents

Web Details:

9700 Website: rotary9700.org.au

Your UserID : "**your Email**" (don't include quotes)

Your Password: "**9705passwØrd**" (note zero in password)

It is important that after the meeting you get logged into the system. If you wish to try some of the editing features, follow along with the instructions provided in the training.

Instructions for the Zoom Training

If you are unfamiliar with Zoom, I suggest you spend a few minutes reviewing this document and clicking on the actual link below.

By clicking on the actual link, It will prepare your computer for the meeting by checking your software for an existing version of Zoom. If it finds one, it opens it and tries to join the linked meeting. If it doesn't find a copy of Zoom, it (1) downloads the software, (2) asks your name, and (3) tries to join the meeting. Since there is no current meeting, you will not be able to join the meeting, however you will be prepared.

The email link is simply an internet site and a meeting ID. The District 9700 meeting ID number is 386 861 1170.

Here is the actual link: https://zoom.us/j/3868611170

So if you have never used Zoom before, click on the above link to load the software. If you have used Zoom before, all you need to do, is click the link at the appointed time for the meeting.

Another option you have… if Zoom is already loaded on your computer, is to open Zoom, and click on **Join a Meeting**, and then enter the meeting ID 386 861 1170.

When you enter the meeting/webinar you will be welcomed into a waiting room. You will be invited to join the session just before the training starts. This training will be conducted as a webinar. There will be 30 or more attendees. That is far too many for everyone to use their microphones and video cameras. The presenters will briefly appear on camera, however most of the presentation will be using PowerPoint or the live website. Questions can be submitted on Chat. They will be answered towards the end of the session.
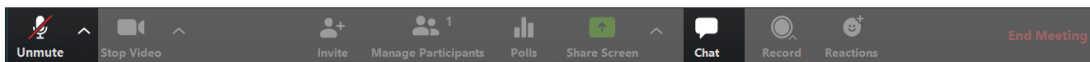
Paul Murray

0408285562

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Welcome to our
District 9710 ClubRunner
Training Session

Presented by Leo Farrelly and Paul Murray

Zoom Meeting Guidelines

- At the start, all attendees will be muted
- To ask a question… click the Chat icon below
- Type your question in the panel   on the bottom right

- Handouts are on the 9700 and 9710 websites and were sent to you.

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Zoom Meeting Schedule

• Introduction	Leo
• ClubRunner overview	Paul
• Key action items	Leo
• Synchronisation	Paul
• Clubs using ClubRunner	Leo
• District 9705 E-directory	Paul
• Questions	Leo & Paul

Training Objectives

- Your clubs basic data is now in ClubRunner
- It is incomplete and possibly incorrect
- We ask you to review, correct and complete the data.
- After July 1 you complete the link of CR and RI
- You run the Synchronisation programs and check for errors
- This training teaches you how to do the above

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Key Contacts District 9705 Action Items Handout

To complete the transfer of 9710 data to the 9705 ClubRunner database, the Club Secretary (or Key Contact) must complete the following Action Items

Item No.	Date	Action Item Description
0	March 28th	On or about the end of March, ClubRunner head office in Canada will transfer 1300 District 9710 members data from the RI database to the new 9705 ClubRunner database. Clubs currently using ClubRunner will not be edited.
1	April - June30	Review each members profile to confirm correctness
2	April - June30	Add new members to both CR and RI for this interim period
3	April - June30	Check members email, phone numbers, partner, address and add data as identified. Add new members to CR and RI
4	April - June30	Check club data for accuracy & completeness
5	April - June30	Load 2020-21 club officers
	April - June30	Do Not Run ANY Synchronisation Programs
6	July 1, 2020	**After July 1…complete RI Integration.** Log in to the district 9705 Members Area. Go to menu Item *For Clubs* >*RI Integration.* Read the document carefully and complete the **"opt in"** process. Read
7	July ?, 2020	Go to Menu item *For Clubs>RI Member Synchronisation.* Run the program to see if there are any non-linked members. If error arise, make corrections.
8	July 1, 2020	Go to Menu item *For Clubs>Executives Compare and Synchronise.* Run the program to see if there are any non-linked executives. If error arise, make corrections.

If you have any problems call Leo Farrelly at 0430 581 672 or Paul Murray at 0408 285 562

How can we help you?   **Start a conversation**

How can we help you?   ◀ GO BACK

Start a conversation

Set up Automatic Integration With Rotary International (District)

You can set your club to automatically integrate the member list with Rotary International, by opting in at their webpage. Follow the directions below to turn on the RI Integration Feature.

At Rotary.org:

1. To turn on the RI Integration feature login to the Rotary Member Access webpage by **clicking here**. The link will open in a new window. Sign in to your existing account using the fields provided, or click the **Create Account** button.

*Note: Only the Club's **President, Secretary**, or **Executive Secretary / Director** may access this page.*

Sign In

Sign-in Email *

Forgot email? ⑦

Password *

Forgot password?

☑ Remember me ⑦

Why Create An Account?

Signing in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Anyone can create an account and sign in. Existing Member Access users can re-register with their current user ID. For tips on registering and using the site, see our website resources. For assistance, contact us.

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2. Hover over top of **Manage** from the menu, then select **Club Administration.**

3. Scroll down and click **Designate a club management vendor**.

4. On the next screen click **Tell us which vendor you're allowing to update club data**:

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more club management vendors to link its own membership records to Rotary International's database. A district or zone may also use a vendor to view club data if the club allows that vendor access to club information. (Note that, though more than one vendor may be authorized to view a club's data, only one may update the data.) First, your club must be a customer of a club management vendor. Find a list of the vendors that provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

Tell us which vendor you're allowing to view club data.
Tell us which vendor you're allowing to update club data

5. Click on the drop down box and select **ClubRunner:**

Identify and authorize a Club Management Vendor
Please review the Agreement below and click on "I Agree" to authorize Rotary International to complete the data integration process and submit your authorization.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

Identify the club management vendor you are authorizing from the dropdown menu below.

Club management vendor

| ClubRunner ▼ |

Start Date
11/22/2017 00:00:00

6. Scroll all the way down and click the **I Agree** button.

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.
☑

| I Agree | I Disagree |

7. The steps for RI are complete!

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Note: There maybe 24 hour delay from the time a club opts in (authorizes the vendor) to the time the authorization takes effect. Authorizations are processed by a database procedure that is scheduled to run once a day.

On the District in ClubRunner:

1. Now, log into your District's home page as usual and go to the member area. Click on the **For Clubs** tab.
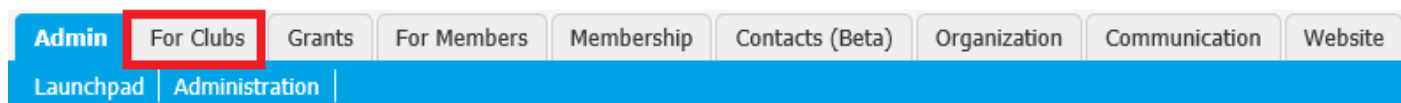
2. Next, click on the **RI Integration** link.
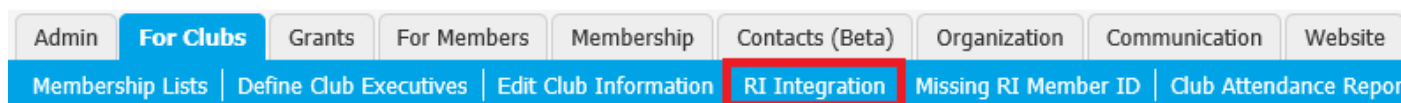
3. You are now on the **RI Database Integration** page. Click the box labelled **Switch On Data Integration**.

*Note: If the box to check mark is not there, please verify that the **Club ID** Number is populated correctly under the **Club & Info Settings** page. Please read the article called Edit Rotary Club ID on the District to learn how to do this.*

Once you click on the check box to enable the RI database integration it performs a check. If the connection fails, a message will appear stating "*The RI integration service is currently experiencing technical difficulties connecting to Rotary's servers. Please try again later.*" If you receive this message please try again after an hour or more.

For further information click here to go to the Club RI Integration section of our Knowledgebase.

DH

David H.

Posted 3 years ago
Updated 2 years ago

Related articles

Set up Automatic Integration With Rotary International

How to use the RI Integration Member Updates Archive on the District

Activating RI Synchronization on the District by a District Administrator

Opting In & Out of RI Integration & RI Integration settings on the District

View and Edit Club Information

How to resolve synchronization failures with RI Integration

How to use the RI Integration Updates Archive (District)

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ClubRunner ™
Connect. Collaborate. Communicate.

Member Cheat Sheet

Welcome to ClubRunner!

Introduction

Thank you for choosing ClubRunner! ClubRunner is a powerful **online communication** and **administration** tool that will facilitate your club's activities and correspondence. This guide will show you how to retrieve your password, login, and manage your profile.

1) Logging In

In order to receive your password for your website, go to the **Login** tab on the website and click on **New user?**. This will direct you to the **Retrieve Login Information** screen.

You will be asked to enter your *last name* and your *email address*, once done click the **Submit** button. You will receive an email which will ask you to click on a link to retrieve your credentials.
Note: the last name and email address you provide must match what is on the record for security purposes. If you are unable to get your password, please email *support@clubrunner.ca* with your name and club. To learn more please **click here** for a step by step article with details.

After you retrieve your login credentials, you can now access your club's website and the Administration page. The Administration page is a member's only page where you will be able to edit your profile, email other members, and contribute content to your site. You should see your name at the top right hand corner of the webpage.

For future reference, record your login information below.

Login name:	
Password:	

2) Editing Your Profile

Once you have logged into your website, you have the opportunity to edit and manage your profile. This is important as you will need to edit your profile in order to receive all email correspondence.

To do so, click on **My ClubRunner** on the grey menu bar near the top left, then click **My Profile** on the blue menu bar.

Admin	**My ClubRunner**	Communication
My Profile	My Commitments	My Attenda
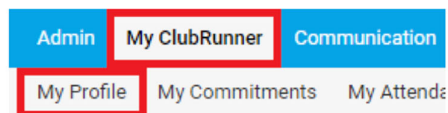
You can click on the blue **Edit** button on the right to edit the data fields. Once done, click the **Save** button near the bottom.

3) Updating Content on Site

If you have the appropriate access level, you can add some personalized content to your site, through the Stories, Links, Downloads, Speakers, Photo Albums, and Site Pages. To access these content areas, either click on the links within the **Website Manager** section of the Admin page, or simply click on the **Website** tab, then select the **Website Content** menu option. For more detailed instruction on adding content to your site, see this **help page.**

This guide is an excerpt of the extensive online help available on your website. To access the online help, Visit: www.ClubRunnerSupport.com