# HOW TO DELEGATE YOUR ONLINE ACCESS

**CONTENTS**

## WHAT IS DELEGATION?

As a club, district, or regional officer you can delegate temporary permission to conduct online Rotary business on your behalf to an individual in the same organizational level who has an active My Rotary account. You control the start and end date, and can schedule delegates in advance. However, you will only be able to share your access with one person at a time. Your role cannot be further delegated.

Delegation is designed only to share your online access, and it is not intended to relieve you of your duties as an officer. Your delegate will not have access anything of a personal nature such as your profile, personal contribution history, or Rotary Community Discussions. You will continue to have the same online experience for your role.
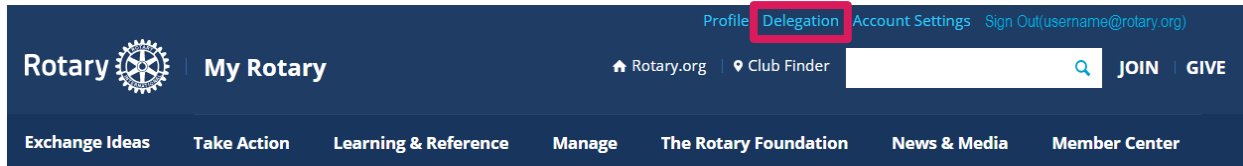
As a delegator, it is very important to begin this process only after having a thorough conversation with your delegate. Make certain that you both understand the significance and risks of this relationship because, ultimately, the responsibility of all activity lies with the delegator. You will not receive a notification stating that a change was made on your behalf.

For certain roles, a delegate will have access to sensitive information and functions. You will not be able to turn off any features. Specific areas that may be effected include,

| Grants Application Tool | Rate Clubs (Rotary Club Central) |
|---|---|
| • Club Presidents<br>• District Governors<br>• District Rotary Foundation Chairs<br>• District Grant Subcommittee Chairs<br>• District Scholarship Chairs<br>• District Stewardship Chairs<br>• RRFCs (view only access to one member within their zone) | • Assistant Governors<br>• District Governors |

## STARTING DELEGATION

To begin, log on to [www.rotary.org/myrotary](http://www.rotary.org/myrotary) and hover over your name. Then, select "Delegation":



The delegation screen features 4 sections: (1) **Your Roles**; (2) the **Roles You Have Delegated**; (3) the **Roles** that have been **Delegated To You**; and (4) your **Delegation History**:

Under each role, the organization (club name, district number, or region) and respective term dates are listed.

**YOUR ROLES** ⑦

**CLUB TREASURER**
→ Rotary Club
→ Start 01-Jul-2015 - End 30-Jun-2016
**Delegate role**

> Select "Delegate Role" to continue

In the pop-up, start typing the name or email address of your delegate. **Please Note**, the search will only return the names of those who are (1) in the same organizational level as you *and* (2) if they have created a My Rotary account that is associated with their membership. **Tip:** enter the email address they use to log in to My Rotary.

If the search is unsuccessful, it may mean that the delegate has yet to create their account, or has created a secondary account that must be merged by Rotary Staff. If you require assistance, please email RotarySupportCenter@rotary.org.

If both criteria are met, the search will populate results:

**DELEGATE ROLE** ✖

**CLUB TREASURER**
Rotary Club
Start 01-Jul-2015 - End 30-Jun-2016

**DELEGATE ROLE TO** ⑦
NAME *

My Deleg|                                                    ○ ✖

**My Delegate**
My Organization, 0000
theirusername@rotary.org

1 result was found.

Select Day        Select Month        Select Year

END DATE *
Select Day     ▼    Select Month     ▼    Select Year     ▼

> Select your delegate's name to continue

**Rotary**

After making your selection, the remaining fields will activate: (1) **Duration of Delegation**, and (2) **Terms of Delegation**. Both areas must be completed to continue.

Select the start and end date for their online access. Again, you control the duration of delegation; a delegate may have as little as 24 hours of access and as long as an entire Rotary Year.



If you are satisfied with your selections, click "Save". The assignment will now appear in the second column, "Roles You Have Delegated":



You will be copied on an automated email that informs the delegate of the Terms of Agreement, and the Duration of Delegation. The next time they log on to My Rotary, they will have the same role-based access that you experience.

## EDITING OR REMOVING DELEGATION

As a delegator, you have the ability to either edit or remove the delegated access to My Rotary.

(1) **Edit** allows you to update the duration of the delegation. The delegation history will reflect the completed delegation.

(2) **Remove:** allows you to either put an end date to an ongoing delegation, or cancel a future delegation altogether. **Please Note,** your delegate may have their access for up to 24 hours from the time you select "Remove". If the time period of the delegation never occurs, it will not appear in the Delegation History.

**ROLES YOU HAVE DELEGATED** ⑦

**CLUB TREASURER**
Rotary Club

Delegated to My Delegate
Sta... 6-Jul-2015 - End 1...Jul-2015
**①**  **②**
**Edit | Remove delegation**

## QUESTIONS?
Contact RotarySupportCenter@rotary.org