

HOW TO DELEGATE YOUR ONLINE ACCESS



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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.

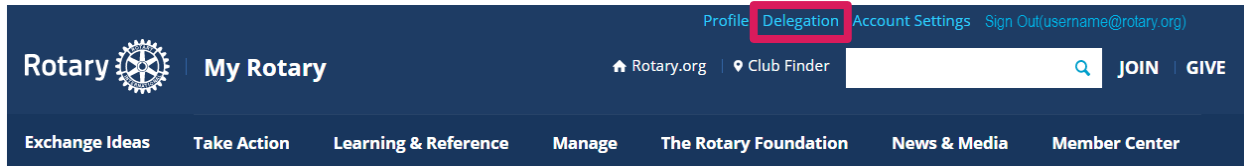
As a delegator, it is very important to begin this process only after having a thorough conversation with your delegate. Make certain that you both understand the significance and risks of this relationship because, ultimately, the responsibility of all activity lies with the delegator. You will not 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)
<ul style="list-style-type: none">• Club Presidents• District Governors• District Rotary Foundation Chairs• District Grant Subcommittee Chairs• District Scholarship Chairs• District Stewardship Chairs• RRFCs (view only access to one member within their zone)	<ul style="list-style-type: none">• Assistant Governors• District Governors

STARTING DELEGATION

To begin, log on to 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**:

YOUR NAME

PROFILE **DELEGATION** CONNECTIONS (1) MESSAGES (0) ACCOUNT SETTINGS

DELEGATION

You can delegate temporary permission to conduct online Rotary business on your behalf to any individual in your club or district who has an active My Rotary account. You control the start and end date and can schedule multiple delegations at one time.

[View the delegation quickstart](#)

YOUR ROLES

CLUB TREASURER
Rotary Club
Start 01-Jul-2015 - End 30-Jun-2016
[Delegate role](#)

CLUB EXECUTIVE SECRETARY/DIRECTOR
Rotary Club
Start 01-Jul-2016 - End 30-Jun-2017
[Delegate role](#)

ROLES YOU HAVE DELEGATED

CLUB TREASURER
Rotary Club
Delegated to My Delegate
Start 17-Jul-2015 - End 17-Jul-2015
[Edit](#) | [Remove delegation](#)

ROLES DELEGATED TO YOU

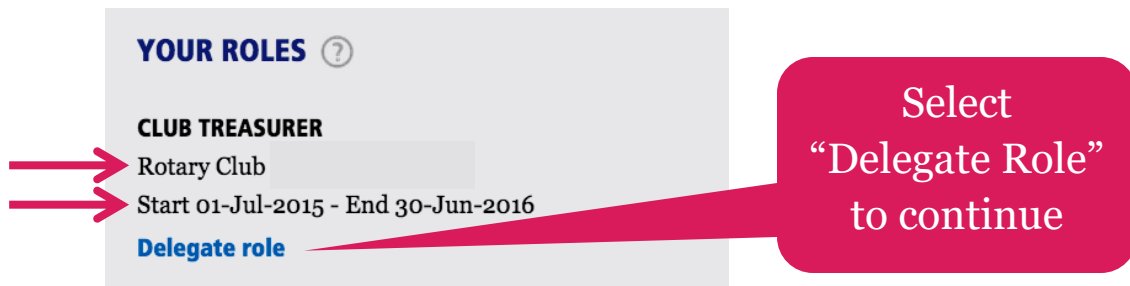
You have no roles currently delegated to you.

DELEGATION HISTORY

CLUB TREASURER
Rotary Club
Delegated to My Delegate
Start 09-Jul-2015 - End 09-Jul-2015

CLUB MEMBERSHIP CHAIR
Rotary Club
Delegated to My Delegate
Start 17-Jun-2015 - End 30-Jun-2015

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



YOUR ROLES ?

CLUB TREASURER

Rotary Club

Start 01-Jul-2015 - End 30-Jun-2016

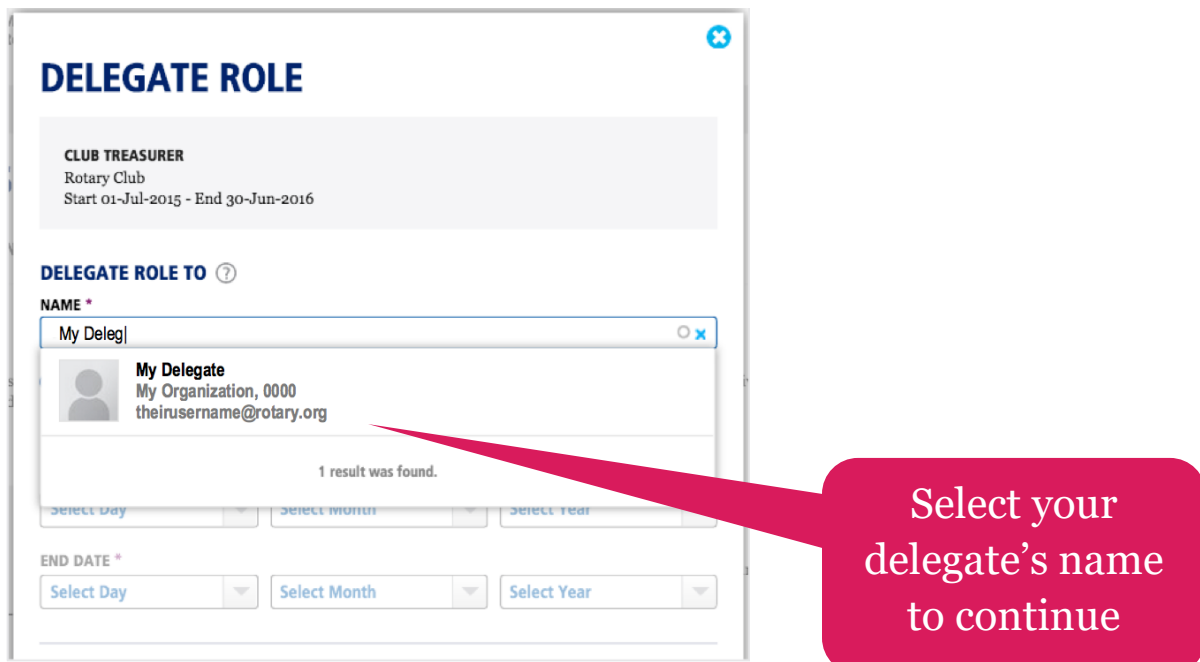
[Delegate role](#)

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 ?

NAME *

My Dele|

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

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.

The screenshot shows a form titled "DURATION OF DELEGATION" with a help icon. It contains two date pickers: "START DATE" and "END DATE". The start date is set to July 18, 2015, and the end date is set to June 30, 2016. A red circle with the number "1" points to the start date field. Below the date pickers is a section titled "TERMS OF DELEGATION" with a checked checkbox and a red circle with the number "2" pointing to it. A pink callout box on the right contains the text: "The Start Date cannot be in the past and the End Date cannot exceed the final date of your term." At the bottom of the form are "SAVE" and "Cancel" buttons.

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

The screenshot shows a dashboard with three columns: "YOUR ROLES", "ROLES YOU HAVE DELEGATED", and "ROLES DELEGATED TO YOU". The "YOUR ROLES" column lists "CLUB TREASURER" and "CLUB EXECUTIVE SECRETARY/DIRECTOR" for a Rotary Club. The "ROLES YOU HAVE DELEGATED" column lists two delegations: one for "CLUB TREASURER" from July 16, 2015, to July 17, 2015, and another for "CLUB TREASURER" from July 18, 2015, to June 30, 2016. The second delegation is highlighted with a red box. The "ROLES DELEGATED TO YOU" column is empty, stating "You have no roles currently delegated to you."

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

CLUB TREASURER

Rotary Club

Delegated to My Delegate
Start 06-Jul-2015 - End 15 Jul-2015

1 [Edit](#) | [Remove delegation](#) **2**

QUESTIONS?

Contact RotarySupportCenter@rotary.org