

SECRETARIES CLUBRUNNER CHEAT SHEET

To Obtain Help Regarding ClubRunner:

- ❖ After logging-in as indicated below Click on “Help.”
 - Normally select “Support Center from tabs.”
 - Type in question or use other options.
- ❖ Or go directly to <http://clubrunner.helpserve.com/> or search YouTube for “ClubRunner” or “ClubRunnerGuru.”

To Log In:

- ❖ Club ClubRunner home page or District ClubRunner home page.
 - Click on “Log-In.”
 - If need password Click on “New and existing users—Retrieve your password.”
 - When get email follow directions to set (reset) your password.
 - Fill in data and Click “Sign-In.”
 - This takes you to Admin Tab which may include the Launchpad Page and the Administration Page.

THE BALANCE OF THE CHEAT SHEET WILL ASSUME YOU RETURN TO THE ADMINISTRATION PAGE UNDER THE ADMIN TAB. IN MANY INSTANCES YOU CAN GO DIRECTLY VIA TABS BUT THIS IS DONE FOR CLARITY.

To Change Member Data:

- ❖ From Administration Page Click on “Active Member List.”
 - Select Name of person and Click on it.
 - Click on "Edit.”
 - Change data; be sure to complete any red item.
 - Look out for State being reset to AK.
 - Click “Save” on Bottom.

To Add a New Member:

- ❖ From Administration Page Click on “Active Member List.”
 - Click on “Add New Member” on far right side just below letter “Z.”
 - Fill in all required data.
 - If this is a former Rotarian obtain RI Member Number from RI Member Access and insert.
 - Create a Login Name and Temporary Password for the Member.
 - Check “Check here if you do NOT wish to notify Rotary International of this new member enrollment” ONLY if you are correcting an error on ClubRunner.
 - Click “Add Member.”

To Terminate a Member:

- ❖ From Administration Page Click on “Active Member List.”
 - On the line for the Member being terminated click on “Mark Ex.”
 - Completed requested information.
 - Check “Check here if you do NOT wish to notify Rotary International of this new member enrollment” ONLY if you are correcting an error on ClubRunner.
 - Click “Terminate Member.”

To Record Attendance (ClubRunner Subscriber Clubs):

- ❖ From Administration Page Click on “Input Attendance Current Year.”
 - Click on “Add New Meeting.”
 - Add date and click “Save.”
 - Click “Attendance.”
 - Record Members who were present (including Exempt Members) or “Check All” and uncheck those who were not present.
 - When complete, including make-ups, click “Save.”
 - If this is the last week of the month and all data for the month is complete click “Report Attendance to District” and your attendance report is complete.

To Report Make-ups (ClubRunner Subscriber Clubs):

- ❖ From Administration Page Click on “Report Make-ups.”

- Select Member.
 - Click “Report Make-Up” for appropriate week.
 - Fill in date of make-up and description. Note permitted range of dates for the week being made up.
 - Click “Save.”

To Report Monthly Attendance to District (Non-ClubRunner Subscribers):

- ❖ From Administration Page Click on “Club Attendance Report.”
 - Record all requested data.
 - Click on “Save.”

To Request Members Review and Update ClubRunner Records (ClubRunner Subscriber Clubs Only)

- ❖ From Administration Page Click on “Request Member Updates”
 - Review when last updated and by whom.
 - Click on those members to whom you wish to send a request for an update.
 - Click on “Send Update Request to Selected Members” or “Send Update Request to All Members”.
 - Wait while email is being generated.

To Send an Email to Some or All Members (ClubRunner Subscriber Clubs Only):

- ❖ From Administration Page Click on “Communication.”
 - Click on left drop-down tab “Email Services.”

- Click on “Compose New Message” on right hand side.
 - If you want to send an email to all Active Members, Inactive Members (terminated members) or Friends of the Club click on the appropriate box or boxes.
 - If you want to send the email only to some of the individuals in a group click on the title and a full list will appear.
 - Click on those individuals to receive the email.
 - Type in a Subject.
 - Type the content.
 - If you want to add an attachment follow “Step 3.”
 - Select from the listed options.
 - Click “Send.”

To Edit Club Information (ClubRunner Subscriber Clubs Only):

- ❖ From Club Administration Page Click on “Edit Club Info & Settings) in Administrator Box.
 - Make change and click “Save.”

To Edit Club Information (Non-ClubRunner Subscribers):

- ❖ From District Administration Page Click on “Club Information Page.”
 - Click on “Edit Club Info.”

- Make changes and click “Save.”

To Edit Club Officers (ClubRunner Subscribers only):

- ❖ From Club Administration Page click on “Organization” tab.
 - Click on “Officers and Directors” sub-tab.
 - If on correct year make change as noted below or click on “Next Year” to go to a new year.
 - To add new position click on “Add New Position.”
 - Type position name in blank box, select position title from drop-down (may be the same) and select member from drop-down.
 - If changing information on listed officer click on “Edit” and make change.
 - Click “Save”.

To edit Club Officers (Non-ClubRunner Subscribers):

- ❖ From District Administration Page click on “Define Club Executives” in the “For Club Executives” section.
 - If on correct year make change as noted below or click on “Next Year” to go to a new year.
 - To add new position click on “Add New Position.”
 - Type position name in blank box, select position title from drop-down (May be the same) and select member from drop-down.
 - If changing information on listed officer click on “Edit” and make change.
 - Click “Save.”

To change a Member's Access Level (ClubRunner Subscribers only):

- ❖ From Club Administration Page click on “Active Member List.”
 - From Active Member List select member.
 - From Member Profile click on “Settings”
 - From Settings click on “Edit.”
 - From drop-down menu select appropriate Access Level.
 - Click on “Save.”

To place a Member on Leave or Absence (ClubRunner Subscribers only):

- ❖ From Club Administration Page click on “Member Leave of Absence.”
 - Select Member from drop-down menu.
 - Click “Next.”
 - Click “Add New Leave.”
 - Specify starting and ending dates and “Save.”

To classify a Member as Exempt under Rule of 85 (ClubRunner Subscribers only):

- ❖ From Club Administration Page click on “Member Attendance Exemption.”
 - To add a new Exempt Member click on “Mark New Exempted Member.”
 - Select Member from drop-down list and specify date exemption approved.

- Click on “Save.”

To compare and synchronize ClubRunner records with RI Records (ClubRunner Subscribers only):

- ❖ From Club’s Administration Page click on “RI Integration Tab.”
 - From “RI Integration Tab” click on “Compare and Synchronize” sub-tab.
 - Click on “Connect to RI Database and Start Compare.”
 - List of Members opens up.
 - Look at bottom for “ClubRunner Members Missing on RI Database” and “Members Listed on RI but Missing in ClubRunner.”
 - Discrepancies can be then corrected from this screen.
 - To check additional information by member, click “Show” adjacent to Member’s name.
 - Colored arrows show differences between databases, click on arrow to update database.

Corrections and suggestions should be submitted to John Sullivan, jaslawyer@volcano.net