

# **ClubRunner**

## **District Guide**

For All Members  
And Club Executives

2011

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## Introduction

Welcome to the District Version of ClubRunner, an interactive website and membership management service that will facilitate easier information sharing and communication with every member in the district. All Rotarians already have a login name and password defined, and depending upon your role in the club or district, various features will become available to you once you enter the members only section.

This guide will show you how to modify your personal and club information on the District website. In addition, club executives can update their membership list, the club meeting place, day and time, and website URL, as well as report monthly attendance, register for events, download and search the district directories, and more.

ClubRunner already has some key information regarding your club and members, and uses this data to create the District Directory. Therefore, it is vital that you check this information. This guide will show you how to accomplish this.

**Note:** If your club has the club version of ClubRunner set up, you have access to much more functionality in addition to those discussed in this guide, including having your own personalized web site. If you require help with your club website, please refer to the Help section on your club website.

## The District Administration Page

<b>Home Page Editing</b> <a href="#">Home Page Stories</a> <a href="#">Story Management</a> <a href="#">Edit Home Page Links</a> <a href="#">Download Files</a> <a href="#">News Management</a> <b><a href="#">Events Management</a></b> <a href="#">Site Pages Management</a> <a href="#">Photo Albums Management</a> <a href="#">Documents Download</a> <a href="#">Website Sponsoring Area</a> <a href="#">Website Sponsoring Guide</a> <a href="#">Website Designer 2.0</a>	<b>District, Clubs &amp; Membership</b> <a href="#">Club &amp; Membership Detail</a> <a href="#">Member Detail</a> <a href="#">Member Access Rights</a> <a href="#">Clubs Attendance Management</a> <a href="#">Define Current and Next Year Executives</a> <a href="#">Download Member Data</a> <a href="#">Member Data Changes</a> <a href="#">RI Reporting</a> <a href="#">Member Designation</a>
<b>Communication Services</b> <a href="#">Email Message Services</a> <a href="#">Send District Bulletin</a> <a href="#">District Organization Chart</a> <a href="#">Committee Management</a> <a href="#">Members Email Status report</a> <a href="#">Email Traffic Report</a> <a href="#">MyEventRunner Registration</a>	<b>For Members</b> <a href="#">Edit My Profile</a> <a href="#">Change My Password</a> <b><a href="#">District Directories</a></b> <a href="#">Search Member eDirectory</a> <a href="#">My Committees</a>
<b>For Event Registrations, visit the</b> <a href="#">Event Calendar</a>	<b>For Club Executives</b> <a href="#">Active Members List</a> <a href="#">Other Users List</a> <a href="#">Inactive Member List</a> <a href="#">Club Information Page</a> <a href="#">Define Club Executives</a> <a href="#">Define Next Year's Executives</a> <a href="#">Club Attendance Report</a> <a href="#">Define Club Attendance Manager</a> <a href="#">Club RI Reporting</a>

 District Administration Page

## Getting Started

Although there are many public pages on the District website that allow you to access valuable information, you can see much more information if you are a Rotarian in the District when you login. In addition, logging in gives you access to the members only administration area, which contains many interactive features including detailed directory searches.



Logging in allows you to update your profile, register online for district events, book yourself and others for volunteer positions, use the discussion forum, access the password-protected documents, and download PDF and Word directories. If you are a club executive, you would also be able to update your club roster, report attendance, and update your listing of directors.

## How to find Out Your Login name and Password

There is an easy automatic way to get your login name and password emailed to you as a member of the District.

- Click on the Login tab or the Login button from the home page.
- In the **Member Login** page, click on the link **"I forgot my password"**.

**Enter your login information below:**


**User Name:**

**Password:**

[I forgot my password](#)

[Online Help](#)

☒ Remember me on this computer

 *Member Login*

- In the **Forgot Your Password?** Page, choose your club name from the drop down list, type in your last name and email address.

Forgot Your Password?

All members in the District have login accounts in the system. If you cannot retrieve your login information through this page, please contact your Club President, or email to [clubrunner@dcoxess.com](mailto:clubrunner@dcoxess.com). Select your club and enter the information required to receive your login name and password immediately by email.

\* Denotes a required field.

Select Club: Guelph ▼

Last Name:

Email Address:  \*

Get Login Info
Return

 *Forgot Your Password?*

- Click on **Get Login Info** to immediately receive your login and password via email.
- Check your email for your login information; it should arrive in a few minutes.

**Note:** Be sure to change your password when you login to keep your account secure!

**Why this might not work:**

Please note that the last name and email address you provide must match what is on record for security purposes.

If you are unable to get your password, please email [logins@clubrunner.ca](mailto:logins@clubrunner.ca) with your request and it will be emailed to you. Make sure to include your District number, club name and full name.

## How to Log In to the District Website

Anybody can visit and view the District website. However, in order to access private functions intended for members and club executives, you need to log in first.

- Click on the “**Login**” link on the top of the home page, or the Login button on the top left.

**Rotary District 9999**

Home Stories News Calendar Contact US Speakers Bureau District Facebook Page Login

**Links of Interest**

- » [Latest news from 7020](#)
- » [RYLA](#)
- » [Ronkonkoma Rotary](#)
- » [Pacific Northwest PETS](#)
- » [Foundation Update Page](#)
- » [Rochester Rotary](#)
- » [RC Tumon Bay](#)

**District Info**

- » [Organization Chart](#)
- » [Photo Organization Chart](#)
- » [When/Where Clubs Meet](#)
- » [Club Directory & Contact](#)

**Mini Calendar**

<< Aug Sep 2010 Oct >>						
S	M	T	W	T	F	S
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02

**District Conference Coming Soon!**

**RYLA**

Welcome to our District!

**EVERY ROTARIAN EVERY YEAR**

**Stories**

**Bolded Story Title**

Test Brief  
More...

**Rotary Unveils New Theme for Next Year**  
Apr 12, 2010

Home Page

- In the Members Login page, enter your assigned login name and password.
- Click on the **Login** button. You will be taken to the District **Admin** page. You can always jump back to this page by clicking on the “Admin” link at the top.

## Trouble Logging In

If you receive a red “*I didn’t recognize your login and password combination*” message, then either your username or password is incorrect. Please retrieve your login information outlined in “Get your username and password”. If this does not work, please send an email to [logins@clubrunner.ca](mailto:logins@clubrunner.ca).

However, if after you click on Login and the fields blank out and you remain on the same page, you may have cookies disabled on your browser. To fix this problem on Internet Explorer, follow these steps (*this will only enable cookies to be accepted from ClubRunner*):

1. Go to Tools -> Internet Options
2. Click on the **Privacy** tab
3. Click on the **Edit** button under Web Sites
4. Type in **clubrunner.ca** (**DO NOT HIT ENTER!**)
5. Press the **Allow** button. You should now see it under the list of managed web sites.
6. Press **OK**, then **OK** again.

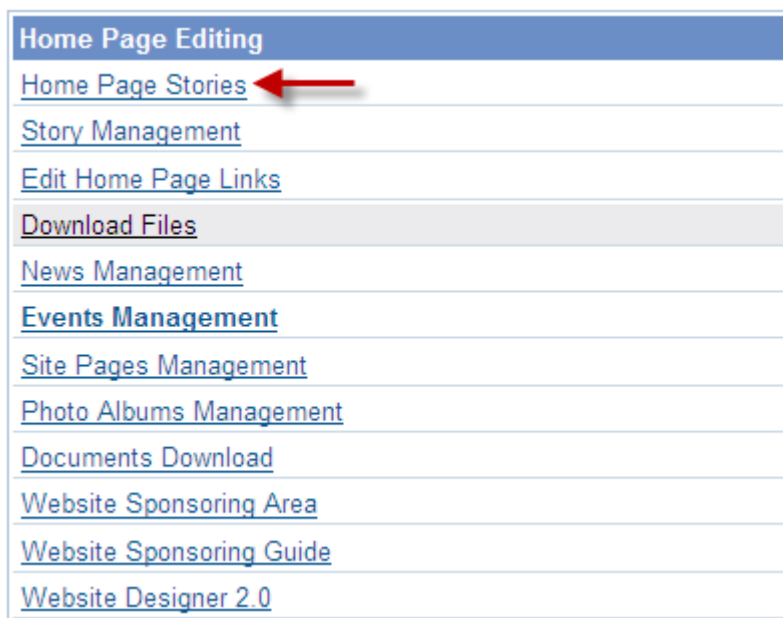
Restart your browser and try to log in again. If you are still experiencing problems, contact [support@clubrunner.ca](mailto:support@clubrunner.ca). To enable cookies on other browsers, or for additional troubleshooting tips, visit the ClubRunner eSupport Center at <http://clubrunner.helpserve.com>.

## Home Page Editing

### Homepage Stories

To add a story to the home page, follow these steps:

- Login to the district website and go to the Admin page.
- Click on Home Page Stories, located under the "Home Page Editing" section.



- Click on Add New Story at the top right

Manage Home Page Stories					
			Publish Changes to Home Page		Add New Story
	Title	Editor	Source	Date	Action
⬆ ⬇ ⬆	Rotaract Club of Mississauga	Scheerer, Dale	District		
⬆ ⬇ ⬆	The Club Of The Month for September	Dinnert, Bernd	District		
⬆ ⬇ ⬆	December Zone Foundation Newsletter	Chris Offer	Zone	Nov 30, 2010	
⬆ ⬇ ⬆	New Major Gift Officer in Zone 24	Chris Offer	Zone	Sep 26, 2010	
⬆ ⬇ ⬆	World Peace Fellow Report - Report 4	Maia, Paulo	District	Nov 03, 2010	
⬆ ⬇ ⬆	'Club of the Month' winner for the month of August	Dinnert, Bernd	District	Sep 09, 2010	
⬆ ⬇ ⬆	Far Horizons - Group Study Exchange Newsletter		District	Aug 17, 2010	
⬆ ⬇ ⬆	Congratulations Peggy !	Bernd Dinnert	District	Aug 05, 2010	
⬆ ⬇ ⬆	July News letter from DG Bernd	Bernd Dinnert	District	Jul 20, 2010	
⬆ ⬇ ⬆	2010 COL Summary Report by PDG Doug Vincent		District	May 04, 2010	
⬆ ⬇ ⬆	Rotary Programs for Youth and Young Adults		District	Apr 04, 2010	
⬆ ⬇ ⬆	You are visitor number:	Frank Strauss	District	Jul 13, 2006	

- Type in the headline of the story under Story Title

**Edit Story**

Title:

- Type in the brief description of the story under Story Brief. This is the part that will appear on the home page

Brief:

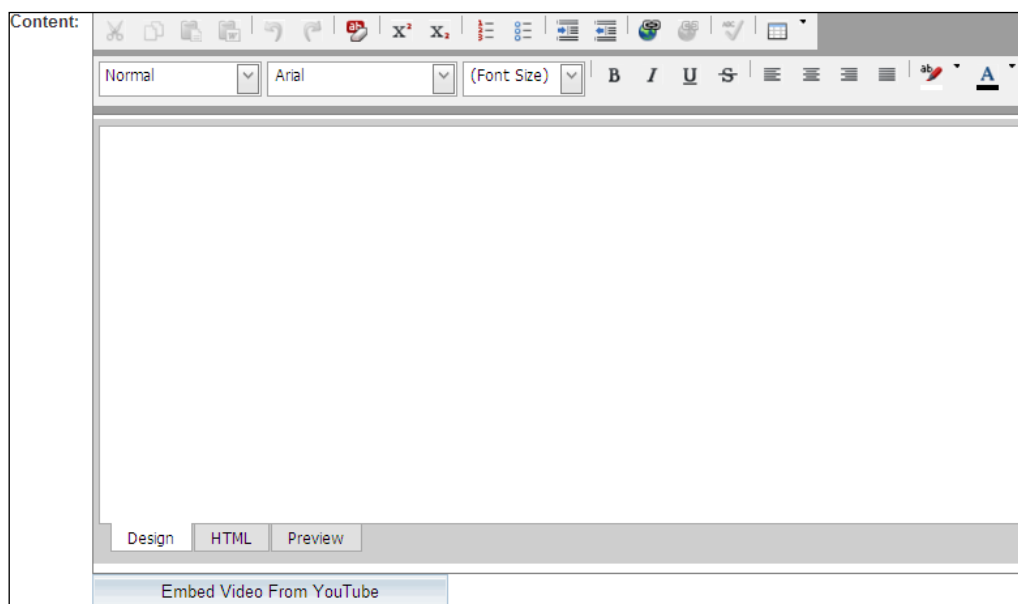
Normal | Arial | (Font Size) | **B** | *I* | U | | | | | | |

Design | HTML | Preview

Embed Video From YouTube



- Type in the rest of the story under Story Content. This will appear on its own page when the reader clicks on “More”



- If you have an image you'd like to show alongside the story, click on the Browse button, and choose the image from your computer.





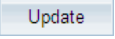
- Select the Editor of the story from the drop down list of members.
- If you want the story not to appear on the **home page**, change the selection under **Show In Home Page** to **No**. This is useful for when you want to save a story halfway through working on it.
- If you want the story to appear in the **Stories Archive** (by selecting the Stories tab from the top of the home page), select **Yes** from **Show In Story Tab Page**.
- If you want this story to appear among the **top headline stories** of the home page, select **Yes** from **Is Headline?**
- Enter a date for the story.
- Click on Save.

## Story Management

To edit an existing story:

- Login to the district website and go to the Admin page
- Click on Stories Management under Website Manager

Home Page Editing
<a href="#">Home Page Stories</a>
<a href="#">Story Management</a> 
<a href="#">Edit Home Page Links</a>
<a href="#">Download Files</a>
<a href="#">News Management</a>
<a href="#">Events Management</a>
<a href="#">Site Pages Management</a>
<a href="#">Photo Albums Management</a>
<a href="#">Documents Download</a>
<a href="#">Website Sponsoring Area</a>
<a href="#">Website Sponsoring Guide</a>
<a href="#">Website Designer 2.0</a>

- Look for the story you want to edit, and click on the  (Edit link) beside it
- Modify the brief or content part of the story in the text boxes, or anything else required.
- If you need to update the picture, select the new one by clicking on the Browse button.
- Click  to finish your changes.

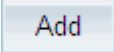
## Edit Home Page Links


### Add a link

To add a link under **District Links**:

- Login to your district website and go to the **Admin** page.
- Click on **Edit Home Page Links**



- Click on 
- Next to **Link Text**, type in the name of the link as you want it to appear on the home page
- Next to **Link URL**, type in the address of the site or webpage you want to link to.
- Click on **Save**.


<b>Text</b>	<b>URL</b>	 <a href="#">Save</a>   <a href="#">Cancel</a>
-------------	------------	---

**Note:** Don't forget the **http://** before the address. It's best to copy and paste the URL directly from your browser.

Check that the link is working by going back to the homepage and clicking on it. If you get a "Page Not Found" screen, you may have mistyped the URL.

### Edit a link

To edit an existing link:

- Login to your district website and go to the **Admin** page.
- Click on **Homepage Links**
- Locate the link you wish to change, and click on  **Edit** next to it.
- Edit the link information as needed.
- Click on **Update**.




**Note: Don't forget the <http://> before the address.** It's best to copy and paste the URL directly from your browser.

*Check that the link is working by going back to the homepage and clicking on it. If you get a "Page Not Found" screen, you may have mistyped the URL.*

## Change the order of the links


You can change the order of the links by changing the **Sequence** field for each link.

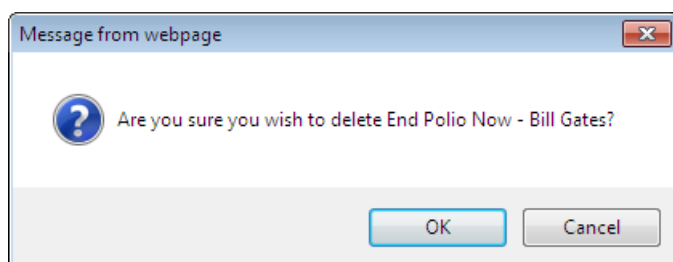
To move a link:

- Login to your district website and go to the **Admin** page.
- Click on **Homepage Links**
- Locate the link you want to move, click  and drag it to your desired location
- You can also click   adjust the link's sequence

## Remove a link

To remove a link:






- Login to your district website and go to the **Admin** page.
- Click on **Homepage Links**
- Locate the link you wish to change, and click on  **Delete** next to it.
- The link information will appear as a confirmation



- Click **OK** to delete

## Download Files

### Action Icons

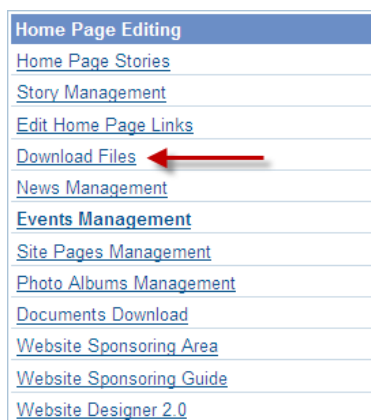
-  The View icon will allow you to open your uploaded file
-  The File icon
-  The Edit icon allows you to edit the uploaded file. This is where you can upload a different file replacing the one that was originally uploaded
-  The Delete icon will delete the uploaded file
-  The Clipboard icon will copy the URL of the uploaded file. You can then use the URL anywhere in the site to link to your file

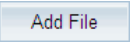
## How to add a Download File

Download Files appear on the home page to the right. Once uploaded, you can link to them from any other page by copying and pasting the URL on the browser when they are displayed.

To add a Download File:

- Login to the Admin page.
- Under the Home Page Editing section, click on Download Files



- Click 
- Type in the Title as you would like it to appear on the home page
- Click on the Browse button and choose the file you wish to upload
- Choose the Editor from the list of members in the drop down list
- You also have the option to show the download on the Home Page and on all Club Sites

Title	Editor	Date Created	Uploaded	Home Page	Club Page	Actions
Main HTML/PDF/MS Office File	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Save</a>   <a href="#">Cancel</a>

- Click on Save

Tip: Please note that dots (.) and any special characters except for an underscore cannot be contained in the filename. Supported file types to be uploaded: HTML, HTM, PDF, DOC, XLS, VSD, JPG, GIF, WMA, WAV, WMV, AVI, MPG, MP3, SWF, MIDI, DOCX, XLSX, PPT, PPSX, MID.

## How to replace a download file

To replace a Download File:

- Login to your district website and go to the Admin page.
- Under the Home Page Editing section, click on Download Files.
- Locate the link you wish to update, and click the Edit icon

Title	Editor	Date Created	Uploaded	Home Page	Club Page	Actions
 Download File		Jan 13, 2011	No	No	No	   

- Click on the Browse button and choose the new file you wish to upload.




Title	Editor	Date Created	Uploaded	Home Page	Club Page	Actions
Download File		Jan 13, 2011	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Update</a> <a href="#">Cancel</a>
Main HTML/PDF/MS Office File		Browse...				

- Edit any other fields necessary such as the Date or Editor.
- Click on Update

Supported file types to be uploaded: HTML, HTM, PDF, DOC, XLS, VSD, JPG, GIF, WMA, WAV, WMV, AVI, MPG, MP3, SWF, MIDI, DOCX, XLSX, PPT, PPSX, MID.


### ***How to change the order of a download file***

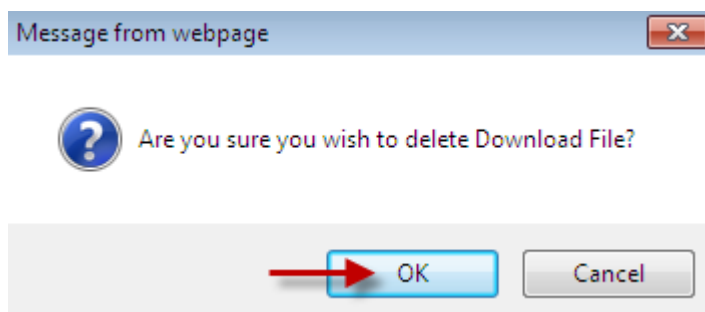
To move a Download File:

- Login to the Admin page.
- Under the Home Page Editing section, click on Download Files.
- Locate the download you want to move, click  and drag it to your desired location
- You can also click   to adjust the Download sequence as well

### ***How to delete a download file***

To delete a Download File:

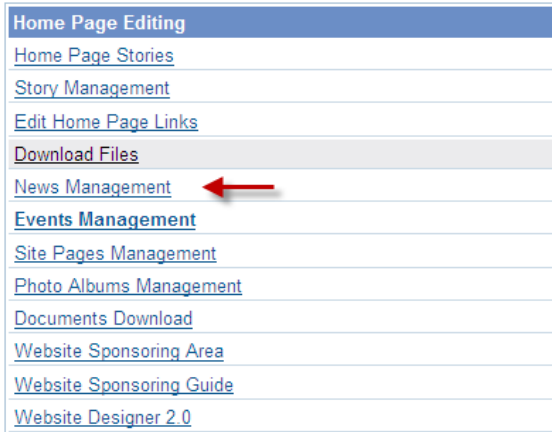
- Login to the Admin page.
- Under the Home Page Editing section, click on Download Files.
- Locate the link you wish to delete, and click  to delete the file.
- Click on the OK to confirm

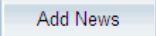


## News Management

### Add a news item to the home page

- Login to your district website and go to the **Admin** page.
- Click on **News Management** from the "Home Page Editing" section.



- Click .
- Type in the headline of the news under **News Title**.
- Type in the brief description of the news under **News Brief**.
- Type in the rest of the news article under **News Content**.
- Select the **Editor** of the news from the drop down list of members.
- If you want the news not to appear on the home page, change the selection under **Show In** to **No**
- If you want the news not to appear on the club home pages, change the selection under **Show to** **No**

Show In	Home Page:	<input type="radio"/> Yes	<input checked="" type="radio"/> No
	Club:	<input type="radio"/> Yes	<input checked="" type="radio"/> No

- Press **Save**.

### Edit an existing news item

To edit an existing news item:




- **Login** to your district website and go to the **Admin** page.
- Click on **News Management** from the "Home Page Editing" section.
- Look for the news item you want to edit, and click on the **Edit** link beside it.

Title	Editor	Home	Club	Date	Actions
Club Event	Support, ClubRunner	Yes	No	Jul 27, 2004	

- Modify any part of the news item in the text boxes.
- Click on **Save**, or **Cancel** to abandon changes.

## Change the order of the news

To move a news item:

- Login to your district website and go to the **Admin** page.
- Click on **News Management** in the "Home Page Editing" section.
- Locate the news item you want to move, click  and drag it to your desired location
- You can also click   adjust the story's sequence

## Remove a news item

If you want to remove a news item from the home page, you can do one of two things: Delete the news entirely from ClubRunner, or just hide it from the home page but keep it in the system.

### To delete the news item entirely:

- Login to your district website and go to the **Admin** page.
- Click on **News Management** in the "Home Page Editing" section.
- Locate the news item you want to delete, and click **Delete**.

	Title	Editor	Home	Club	Date	Actions
	 Club Event	Support, ClubRunner	Yes	No	Jul 27, 2004	

- The contents of the news item will appear as a confirmation. Scroll down and click the **Delete** button.

### To hide the news item from the home page:

- Login to your district website and go to the **Admin** page.
- Click on **News Management** in the "Home Page Editing" section.
- Locate the news item you want to hide, and click **Edit**.
- Select **No** from **Show In Home Page**

Show In

Home Page:  Yes  No

- Click on **Save**.

**Note:** Although the news item will not appear on the homepage, it will still appear in the listing of news under the News tab.



## Site Page Management

### What is a Site Page?

A Site Page is a page that appears within the structure of your normal website, complete with the top tabs section and its own navigation column. A Site Page can have its own links, HTML pages, and journals, all of which appear within its own structure. It is essentially its own internal website.

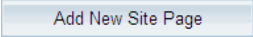
Site Pages have the capability of being owned by a particular member, allowing him or her to modify its contents without necessarily being given access to the entire website.

Useful applications include: Committee and project pages, director bios, history of the district, background information, etc.

### Add a site page

Only members with Home Page Editing rights can create a Site Page. However any member can be designated as the owner and can edit its contents.


#### To create a new Site Page:

- Login and go to the **Admin** page.
- Click on **Site Pages Management** from the "Home Page Editing" section.
- Click on 
- Type in a **Title** for the Site Page. This is what will appear as the link on the home page.
- Select your club from the **Club** field
- Select your name as the owner from the **Member** field
- Click on **Save**.

### Edit the contents of a site page

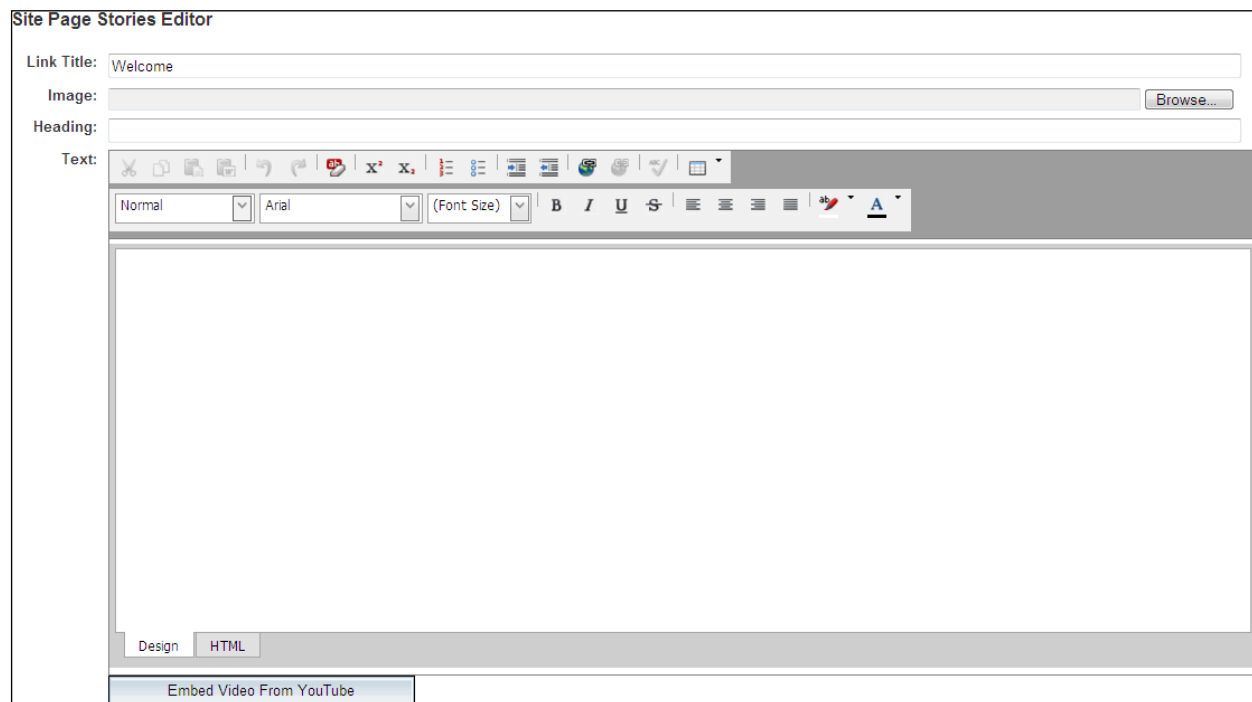
Only the Site Page Owner and Site Administrators can edit a Site Page.

To edit Site Page contents:

- Login and go to the **Home** page.
- Click Site Pages Management
- Click the  View icon located to the right of the site page you would like to edit.
- Click **here** to open the Site page to edit.



- You can then create your Site page within the Editor



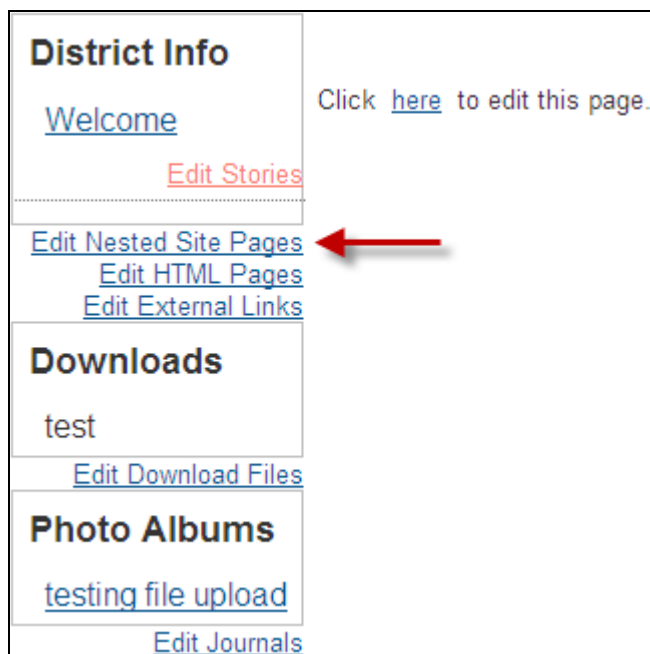
- Click [Update](#) to finish your changes.

## What is a Nested Site Page?

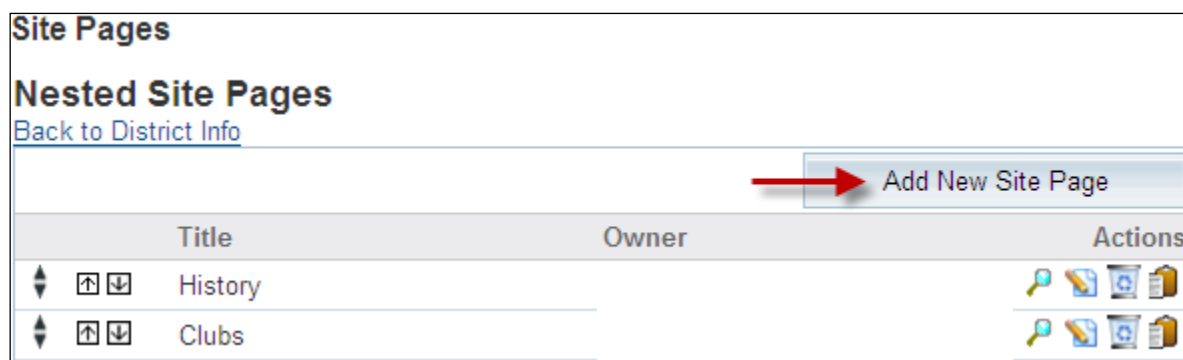
A nested Site Page is basically a Site Page that is accessible through another Site Page. For instance, if you have a committee site, you may choose to include links for sub-committees, and each of those would have its own site.

To add a nested site page:

- Login and go to the **Site Page** to which you want to add the nested site page.
- Click on the link that says **Edit Nested Site Pages**. Here you will be able to view all the nested site pages.



- Click on **Add New Nested Site Page**.
- Type in the title for this new site page.
- Click on **Save**.




To

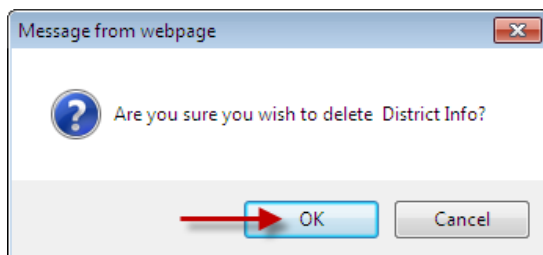
modify the contents of the Nested Site Page

- To create/edit the Nested Site Page, click the  View Icon.

## Delete a Site Page

Only Site Administrators can delete a Site Page.

- **Login** and go to the **Admin** page.
- Click on **Site Pages Management**
- Locate the Site Page you wish to delete, and click  **Delete** next to it.
- The title of the page will appear as a confirmation. Click on **OK**



## Photo Albums Management

### What is a Photo Album?

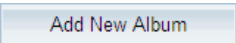
A Photo Album is an easy way to create a series of photos and entries on one page. Useful applications include: exchange student reports, committee reports, event photo album, etc.

Photo Albums can be shown on the home page using the Photo Album widget or by setting them up within the navigation menu (Please see Menu Management – Website Designer 2.0).

### Add a Photo Album

Only members with administrative rights can create a Photo Album. However any member can be designated as the owner and can edit the journal.

To create a new Photo Album:

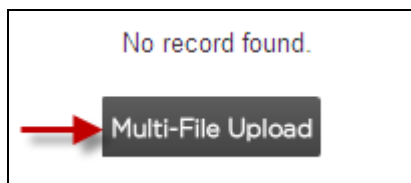
- Login and go to the **Admin** page.
- Click on **Photo Albums Management**
- Click 
- Enter the Album Title
- Select your Club and Name to define yourself as the owner

- You have the option to add 1 picture as an Album Title Page Logo by clicking Browse. This will allow you to upload a 1 photo
- You can also add a brief album description with the Description field
- At the bottom, select the checkbox if you would like the Album to show in the home page
- Click Save to finish

## Adding Photos to the Photo Album

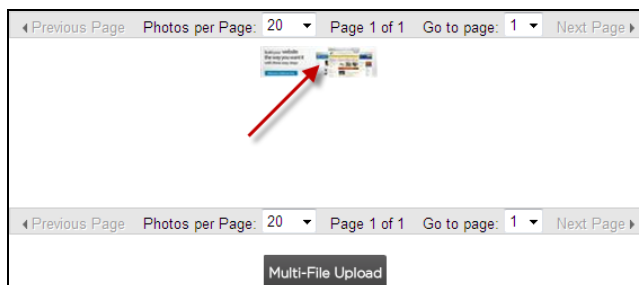
To add photos to a photo album

- Login to the Administration Page
- Click Photo Album Management
- Click the View Icon to the right of the Photo Album. This will open up the album
- Click the **Multi-File Upload** button to add your photos

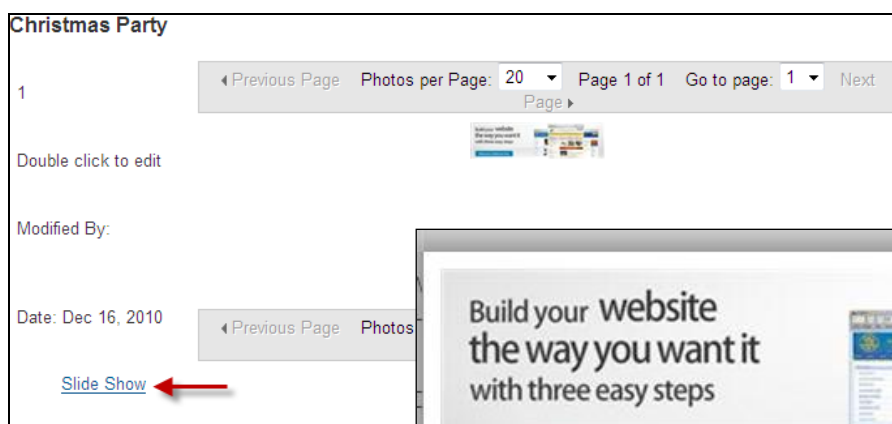


- A new window will open. This is where you'll navigate and select the pictures you would like to add from your computer
- Click **Open** to finish
- The photos will automatically upload to your Photo Album

To view a photo, simply click on it.




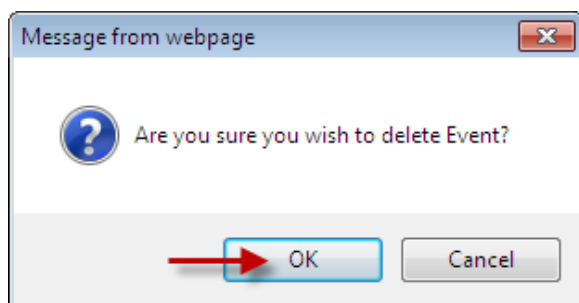
You can also view your albums using the **Slideshow** link. Once opened, you can hover over either the left or right side of the photo, an arrow will appear allowing you to view the next or previous picture.



## Delete a Photo Album

To delete an entire journal:

- Login and go to the **Admin** page.
- Click on **Photo Albums Management**
- Locate the Album you wish to delete, and click on  **Delete** next to it.
- A confirmation window will appear. Click on **OK** to finish deleting the Photo Album

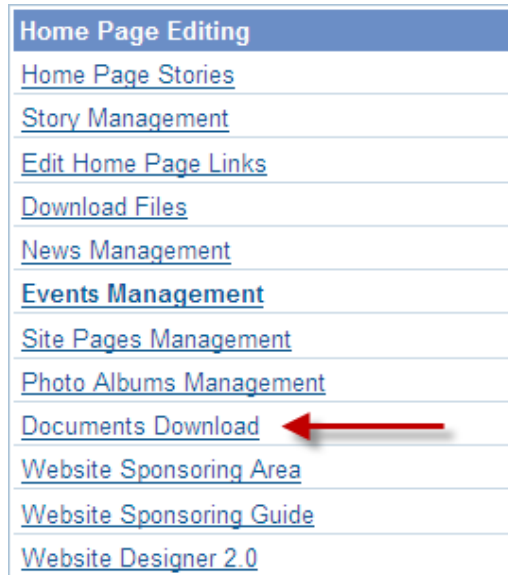



## Documents Download

Documents download is used to organize and maintain the all documentation. Within this section members can access and important information related to the District.

### Adding a Document

- Login to the Admin page
- Click District Documents



- Click the New Document icon 
- Enter Document Info (Name, Description, Access Level)

Name (at most 250 characters)

Description (at most 1000 characters)

Access Level:

Members


Select file to upload:



(bmp, doc, docx, eps, gif, html, htm, jpeg, jpg, pdf, png, ppt, pptx, swf,tif, txt, vsd, xls, xlsx) Note: File size should not be more than 4M.

- Click

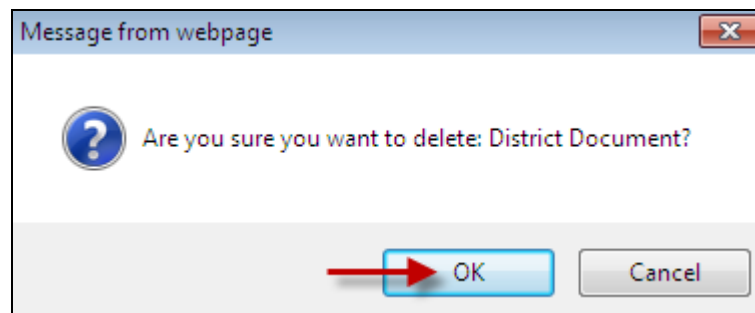
- Browse to Add Document
- Click Save to finish

## Deleting a Document

- Login to the Admin
- Click District Documents
- Locate the file you would like to delete
- Click  to delete the Document

Name	Owner	Uploaded File	Date	Authorization	Actions
 Main					
<a href="#">District Document</a>			01-13-2011	Members	

- Click Ok to finish



## Communications Services

### Create a new email

To use the Message Centre, you will need the District Communication access right.

To create a new email:

- Login to the Admin page.
- Click on Email Message Services in the Communication Services section. This will take you to a page listing all the past emails you've sent. If this is the first time you're doing this, the list will be blank.



- Click [Compose new message](#) on the top right of the page.
- Type in your Subject and the body of the message.



## Send District Bulletin

- Login to the Admin page
- Click Send District Bulletin

### Communication Services

[Email Message Services](#)

[Send District Bulletin](#) 

[District Organization Chart](#)

[Committee Management](#)

[Members Email Status report](#)

[Email Traffic Report](#)


[MyEventRunner Registration](#)

- Click [Add New Bulletin](#)

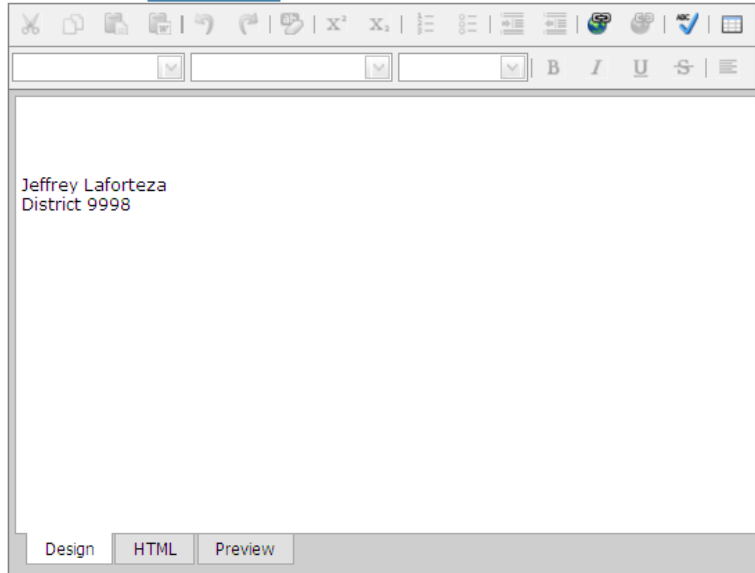
### Step 1: Enter your Email Subject and Message within the Editor

**Step 1:** Enter your email subject and message.

Subject:

Message: If you are copying and pasting from Word, please use the **Paste from Word** icon (  )

Rich Text Editor [Plain Text Editor](#)




Jeffrey Laforteza  
District 9998

### Step 2: Upload your bulletin

- Click Here to Expand
- Click Browse
- Find and select the file on your computer, click Open

**Step 2:** Upload your bulletin by clicking the "Attach a File" button and selecting the document from your computer.

Attachment [Total file size for uploaded attachments cannot exceed 3MB] 

**Step 3:** Select the recipients groups

**Step 3:** Select the recipient groups.


- ☐ Active
 ☐ Other Users  
☒ Honorary

**Step 4:** Press Send to send this email immediately. You may also save your work if you don't want to send it now. Use the Send Test Email to Myself Only button to check your message and attachment before sending the message to everyone

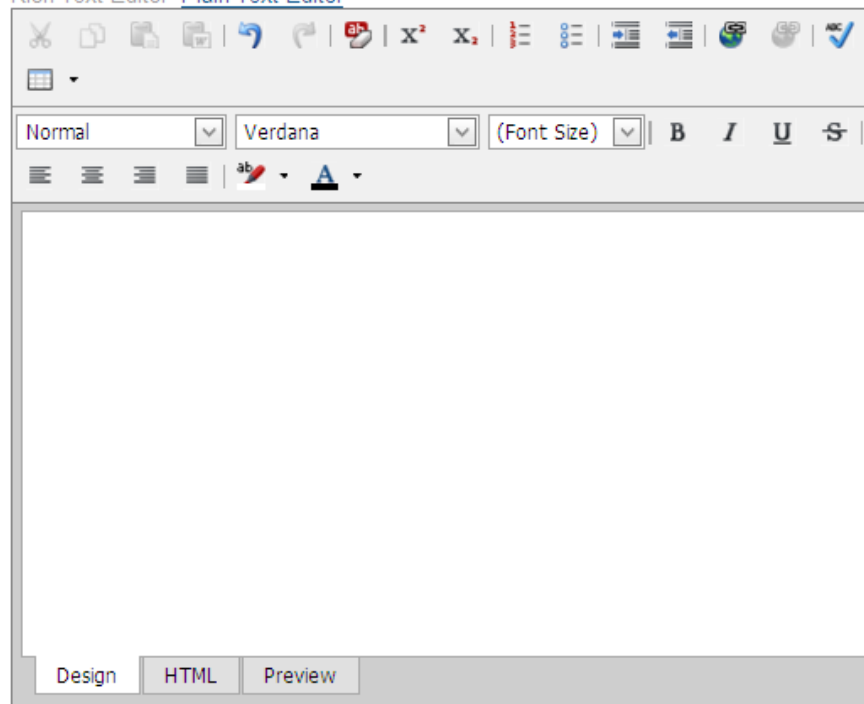
**Step 4:** Press **Send** to send this email immediately. You may also **Save** your work if you don't want to send it now. Use the **Send Test Email To Myself Only** button to check your message and attachment before sending the message to everyone.

**Step 2:** Enter your email subject and message.

Subject:

Message: If you are copying and pasting from Word, please use the **Paste from Word** icon (  )

Rich Text Editor [Plain Text Editor](#)




## Insert attachments

Once you've created the body of the email, you can upload any attachments to send with the email.

- Under the email you've created, within Step 3 (Optional): Upload attachments to your email, click on Here to expand.
- Click on the Browse button to upload your file
- Navigate to where your attachment is located, then select it, and click Open

**Step 3 (Optional):** Upload attachments to your email.

Attachment [Total file size for uploaded attachments cannot exceed 3MB] 

## Select the recipients and send

Now that you've composed your email, you are ready to define your recipients and send it

- The Distribution list is located on the left. Check of the box next to the distribution list you'd like to send the email to

- If you would like to send to only certain individuals within that list,
  - Click Expand List. The list will populate with check boxes next to the names
  - You can then select the members you'd like to send the email to
- Check the Send a list of all recipients option if you want everyone to know who else got the message (although this does not list their email addresses)

### Edit District Email Window

**Step 1:** Select the recipients of this message by clicking on the plus sign to expand each category, then clicking the "Expand Group" link to select the recipients.

☐ District Executives (Current Year) [Expand list](#) (0)  
☐ District Governor [Expand list](#) (0)  
☐ District Executives [Expand list](#) (0)  
☐ District Officers and Directors [Expand list](#) (0)  
☐ Assistant/Area Governors [Expand list](#) (0)  
☐ Committee Chairs [Expand list](#) (0)

---

☐ District Executives (Next Year)

---

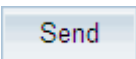
☐ Club Executives & Directors (Current Year)

---

☐ Club Executives & Directors (Next Year)

---

☐ Custom Distribution Lists

- Uncheck the Send a copy to myself option if you don't want to receive a copy of this message in your inbox
- When you are ready to send the message, click 

**TIP:** Clicking on Send Test Email to Myself only allows you to see what everyone would get before you actually send it.

## Position Management

### Add a Position

(District Executives, District Officers and Directors, Assistant/Area Governors)

- Login to the Admin as usual
- Click District Organization Chart
- Click [Add](#) to the section you'd like to edit
- Enter Title, Club, and Name then click Save

Secretary Adel Asterbadi (Mississauga) Committees Edit | Clear | Delete

Title  Save | Cancel

Select Club  Member

## Edit a Position

- Click [Edit](#) located to the right of the position
- Enter Title, Club and Name then click Save

**District Executives** Add


Title	Name
Title <input type="text"/>	
Select Club <input type="text"/>	Member <input type="text"/>


[Save](#) | [Cancel](#)

## Clearing a Position

- Click [Clear](#) to the right of the position
- Click OK to confirm

Message from webpage ✕


 Are you sure you wish to clear that position?


 [OK](#) [Cancel](#)

## Deleting a Position

- Click [Delete](#) to the right of the position
- Click OK to confirm

Message from webpage ✕

 Are you sure you wish to delete the "DG Elect" title?

 [OK](#) [Cancel](#)

## Assistant/Area Governors

### Clubs

#### Adding a Club

- Click Clubs

## Assistant/Area Governors

Area	Name						
area number one	<a href="#">John Beaty</a> ( <a href="#">Sunnyville Rotary</a> )	<a href="#">Clubs</a>	<a href="#">View AG Details</a>	<a href="#">Edit</a>	<a href="#">Clear</a>	<a href="#">Delete</a>	
area number two		<a href="#">Clubs</a>	<a href="#">View AG Details</a>	<a href="#">Edit</a>	<a href="#">Clear</a>	<a href="#">Delete</a>	

Carry over this organization chart to the next year

- Click Assign Club to this Area
- Select Club from the drop down menu
- Select Member from the drop down menu
- Click Save

### Assistant/Area Governors

Area	Name								
1	John Beaty (Sunnyville Rotary)								
2	Club Sunnyville Rotary	-- Select Member --							

Carry over this organization chart to the next year









## Adjusting the Sequence

- Click the   to adjust the sequence of the Areas' Club list

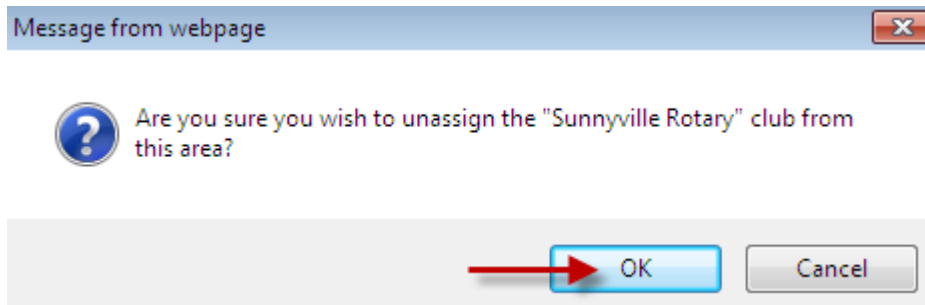
## To Unassign a Club

- To the right of the club name, click Unassign Club

## Clubs

Club Name	President	
  <a href="#">Sunnyville Rotary</a>		<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>
  <a href="#">RC Guam</a>		<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>
  <a href="#">RC Northern Guam</a>		<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>
  <a href="#">RC Palau</a>		<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>

- Click OK to confirm

[View AG Details](#)

This feature will allow you to view the profile of the Area along with brief detail of the AG

Assistant/Area Governors							<a href="#">Add</a>
	Area	Name					
1	1	John Beaty (Sunnyville Rotary)	<a href="#">Clubs</a>	<a href="#">View AG Details</a>	<a href="#">Edit</a>	<a href="#">Clear</a>	<a href="#">Delete</a>

You'll be able to assign clubs to this area, manage area committees, view reports and send Area Emails.

## Area Governor's Sub-module

[Print This Page](#)

1



**John Beaty**

[Rotary Club of Sunnyville](#)

### Clubs

[Assign Club to this Area](#)

Club Name	President	
<a href="#">Sunnyville Rotary</a>	<a href="#">Ken Faulkner</a>	<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>
<a href="#">RC Guam</a>	<a href="#">Victoria Borja</a>	<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>
<a href="#">RC Northern Guam</a>	<a href="#">Yoko Hattori</a>	<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>
<a href="#">RC Palau</a>	<a href="#">Don Brown</a>	<a href="#">View Executives &amp; Directors</a> <a href="#">Unassign Club</a>

### Committees

[Add New Committee](#)

Name	Chair	Type	Actions
------	-------	------	---------

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](#)




## Committee Management


Committee Management is a designated space for all members of the district committee to store information regarding the committee, within this section multiple committees can be created and organized.

### Adding a new Committee

- To add a new committee, click the "Add new Committee" link located on the top right of the committee list.

Communication Services
<a href="#">Email Message Services</a>
<a href="#">Send District Bulletin</a>
<a href="#">District Organization Chart</a>
<a href="#">Committee Management</a>
<a href="#">Members Email Status report</a>
<a href="#">Email Traffic Report</a>
<a href="#">MyEventRunner Registration</a>

Committee List			
Current: 2010 - 11			
Name	Chair	Type	Actions
Club Extension ( Director: Adel Asterbadi )			
Committee with Subcommittees	Felix Yang		
Secretary ( Director: Adel Asterbadi )			
Committee with Subcommittees	Felix Yang		
Committee With Documents			
test ( Director: Unknown )			
Test	Максим Рыбков		
Total: 4 committee(s)			

- Fill in the following information
  - Name
  - Director
  - Description
- Check **"Private"** if the committee is private towards internal committee members
- Check **"Associate to a previous year's committee"** this will enable a dropdown box with a list of previous committees.
- When Completed Click 

Add New Committee

Current: 2010 - 11

Name (at most 250 characters)

Director

☐ Private

Description (at most 1000 characters)


☐ Associate to a previous year's committee

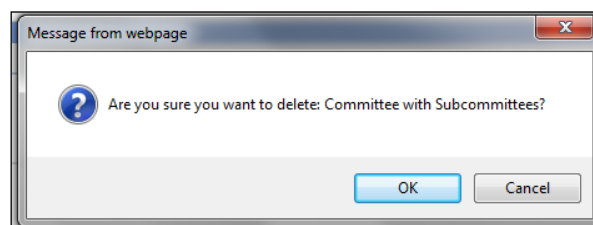
Youth Exchange

Save

Cancel

## Deleting a Committee

When you are in the committee list and your committee is listed, you have the ability to delete the committee. To delete the committee Click  button, you will be asked to confirm you deletion request. Click the **Ok** button to confirm your selection or Click cancel to avoid deleting the committee listed.



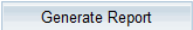
## Members Email Status report

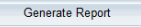
The Members Email Status Report displays the percentage of users that have email addresses within the district. This report shows total active users other users and friends with the district.

User Email Status Report								
Club Name ▲	Member			Other User			Friends	
	Total	With Email	%	Total	With Email	%	Total	With Email
ClubFrench	1			3	1	33%		
ClubMixedAsp	2	1	50%	5	1	20%	2	
ClubRunner	1							
ComDocSer Test				1				
ComDocSer Test				1	1	100%		
Fusenet	2	1	50%					
Guelph	1							



## Email Traffic Report

The Email Traffic Report displays the number of emails that have been sent from the district with the month. To use the report select the month you would like to generate a report for with the year. Once the information has been entered, Click the .

Email Traffic Report				
Select Month: <span>January</span>	Year: <span>2011</span>			
<b>District Summary</b>				
District	Service Count	No. of Emails	Total Size (MB)	Action
9998	2	56	0.2414	<a href="#">Detail</a>
<b>Club Summary</b>				
Club Name	Service Count	No. of Emails	Total Size (MB)	Action
Mississauga	4	21	2.9393	<a href="#">Detail</a>

## For Members Section

### Edit My Profile

- Login to the District site
- In the **For Members** section, Click on **Edit My Profile**.
- This will take you to the **Edit Member Profile** page
- Make any changes in the fields displayed.
- Click on the **Save** button at the bottom to save your changes.

For Members
<a href="#">Edit My Profile</a>
<a href="#">Change My Password</a>
<a href="#">District Directories</a>
<a href="#">Search Member eDirectory</a>
<a href="#">My Committees</a>

### How private is my personal information?

- Club executives in your club only will be able to view and edit the information in your profile.
- The District's Site Administrator can reset your password.
- Your District executives can view and edit your profile.

ClubRunner, the District website provider, is committed to protecting your privacy. Please read ClubRunner's Privacy Policy which can be found at: <http://web.clubrunner.ca/Privacy-Policy>

### Change Your Password

To change your password:

- Login to your Club or District site.
- In the **For Members** section, click on **Change My Password**.

<b>Old Password</b>	<input type="password"/>	
<b>Enter New Password</b>	<input type="password"/>	<b>Begin Typing</b>
<b>Confirm New Password</b>	<input type="password"/>	
<b>Password should contain at least 8 characters and 1 number</b>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

- Click on “**Reset Password**”
- Type in your old password for verification purposes.
- Type in the new password **twice**.
- Click on the **Save** button to save your changes.

## District Directories

### Download Word or Excel Reports

- Login to the District website using your username and password.
- Click on **District Directories**, The Older version of the Login Screen will appear. Login Once more and **District Directory**, under the **For Members** heading.
- Select which directory you wish to view, and click on the type of file in which you would like to view it.

You will also notice a new eDirectory link under the **For Members** section. As more directory templates or features relevant to members are added, you will find them listed under this section.

### Search Member eDirectory

- Login to the District website using your username and password.
- Click on **Search Member eDirectory**, under the “For Members” section.
- Type in any number of search fields, such as name, club, classification. You can use partial words for most of these fields, such as last name.
- Press the **Search** button. Your results will appear in a listing, limited to 10 per page. Note that you can go to the next pages by selecting the page number below the listing.

**Tip:** To sort your results by a particular column, click on that column name.

- To expand an entry, click on the name of the person. This will allow you to view further contact information such as home and business address, fax, cell and home numbers.

ClubRunner is committed to protecting your privacy. Please read ClubRunner's Privacy Policy which can found at <http://web.clubrunner.ca/Privacy-Policy>

### How to create a committee and add members

To create a committee, start by going to the “**Committees Management**” link from within your Administration page. Then, click on “**Add a Committee**” either in the yearly or standing committee’s section of the web page. Once the popup box appears, you will be prompted to enter in the following:

- Committee Name
- Director (to be selected from drop down menu)
- Option to make this committee Private (which will not appear on the public home page, but remain available in the members only area)
- Description (optional)
- Option to Associate to a previous year's committee. If you choose this option, you can select from the dropdown list which committee this relates to from last year.

**NOTE:** You must have access rights of Club Executive (level 50) or better.

**Alternatively** you can also watch our [training video](#).

## My Committees

### Viewing committees your account is associated

- Login to the District website using your username and password.
- Click on **My Committees**, under the “For Members” section.

The purpose of the page is an overview of the committee your account is associated with, by clicking or **Committee with Subcommittees** or **View Committee** link. This will bring up the Committee List.

#### Committee List















Committee List

[Home](#) > Committee with Subcommittees

Current: 2010 - 11

Members Subcommittees Documents Email

Sort using first name

Name	Club	Position	Access Level	Home Phone	Work Phone	Actions
<a href="#">Production_30 Test</a>	Mississauga		Member			 
<a href="#">Production_40 Test</a>	Mississauga		Member			 
<a href="#">Toste, Elias</a>	Mississauga	Chair	Secretary	905-555-5525		 
<a href="#">Yang, Felix</a>	Mississauga		Chair			 
<a href="#">Zhang, Lana</a>	Mississauga		Secretary			 
<a href="#">Zhang, Lana</a>	ComDocSer Test		Member			 
<a href="#">Рыбков, Максим</a>	Mississauga		Member	(905) 905-8290	709 738 0422	 


Total: 7 member(s)


**Members:** Within this section is the list of individuals added to the committee.

**Subcommittees:** These are committees that are part of a larger committee. Subcommittees are visible within the larger committee, and are a nice way to create a structured hierarchy. Subcommittees can be private or public, each have access to their own area to define members, documents, emails and subcommittees. Members of a parent committee have access to information within the subcommittees, but members of a subcommittee do not get access to the parent committee information.

**Documents:** The purpose of the Committee Document is a storage area for any documentation related directly to the Committee or Subcommittee.

### Adding a Document to the Committee

- Click on  to begin adding your document
- Provide a name, description of the document being added
- The access level is will determine who can access the document within this section (i.e. Committee Member, Member, Public)
- Use the browse button to navigate to the file to be added from your computer. Click open when selected.
- Click Save when completed

The Folder icon : The icon is used to create a grouping of documents, Click this icon to create a section for documents to be added.

**Email:** The purpose of the Email section is to communicate with your Committee members only. Messages can be composed by Clicking “**Compose New Messages**”.

## For Club Executives



If you are a club executive, you can update your club and membership information, report monthly attendance, and register your members for district events and volunteer positions.

For help logging in and updating your own information, please see this guide's **For All Members** section.

For Club Executives
<a href="#">Active Members List</a>
<a href="#">Other Users List</a>
<a href="#">Inactive Member List</a>
<a href="#">Club Information Page</a>
<a href="#">Define Club Executives</a>
<a href="#">Define Next Year's Executives</a>
<a href="#">Club Attendance Report</a>
<a href="#">Define Club Attendance Manager</a>
<a href="#">Switch on Data Integration with RI (Automatic)</a>
<a href="#">Report Data Changes to RI (Manual Emails)</a>

Your club's membership information can be found in the "For Club Executives" section, at the lower right corner of the Admin page.

Each of the links contained in this section allow you to modify your own club's information as it appears on the district site and directories.

### How to Update Your Club Member Information

- Login to the District website using your username and password.
- From the "For Club Executives" section, click on **Active Members List**. This list contains your Active and Honorary members.

**Tip:** To view and edit your inactive members (such as terminated, or ex-members), click on **Inactive Members List**. To manage other membership types such as prospective, staff or other users, please click on **Other Users List**.

On this page, you will see your club's membership list. You can tell at a glance which members have email addresses defined in their profiles by seeing an envelope icon in front of their name. It is very important that members' email addresses be current in order for the District to properly communicate.
















As a club executive, you have the ability to reset members' passwords and change their contact information. You can also add and remove members, covered next.

Members List

Active Members List

Select Club: Mississauga City Centre Members per Page: 25

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 Add New Member

Email <input type="checkbox"/>	By First Name	Name ▲	Type	Action
	Asterbadi, Adel		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Asterbadi, Sarah		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Bandhu, Desh		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Batiuk, Eugene		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Berlettano, Joe		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Bonde, Umesh		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Fyfe, Andrew Alan		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Fyfe, Sheila		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Gunby, Lloyd C.		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Hyles, Patricia C.		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Kempf, Rolf		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Molloy-Measures, Brenda		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Perry, Dave		Honorary	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	Ridha, Mowaffaq		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>
	von Twickel, Christian		Active	<a href="#">Designation</a>   <a href="#">Mark Ex</a>   <a href="#">Reset Password</a>

Total Members: 15 (14 Active + 1 Honorary)

#### Active Members List Page

**Tip:** To jump to members by last name, click on the relevant letter across the top of this page. Additionally, you can change how many members to view per page. Click on Type to sort by type, or click on the checkbox to sort by first name.

## Update Member Profiles


Updating a member's profile is vital if you want that member to be listed accurately in the directory, and to be listed on any organization charts on the website. This is more relevant if that member is a district or club officer.

To change a specific member's profile:

- Login, and go to the **Admin** page.
- Click on **Active Members List**, located under the "For Club Executives" section.
- Click on the **member's name** to view their profile.
- Select the appropriate tab and click the **Edit** button.
- Fill in or change as many details as you need
- Click **Save**, located at the top and bottom of the page.

Member Profile

Member Profile



Christine Lee

[Printable Version](#)

Update

Personal

Rotary

Biography

Commitments

Settings

Edit

Member Details

Title	Ms.	Gender	Female
First Name	Christine	Birthday	Apr 08 2009
Middle Name	A.	Anniversary	Jun 17 1997
Last Name	Lee	Spouse/Partner First Name	James
Nickname	Chris	Spouse/Partner Last Name	Lee
Suffix		Spouse/Partner Nick Name	Jim
Preferred Address	Home	Spouse/Partner Birthday	Oct 02 2009
E-mail	christine@clubrunner.ca	Alternate E-mail	christine@hotmail.com

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

Home

Address Line 1	300 Main St. W	Home Phone	905-555-1234
Address Line 2	Suite 1	Cell	905-555-9876
City	Mississauga	Home Fax	905-555-5837
State/Province	ON		
Zip/Postal Code	L5H 1E3		
Country	Canada		

Work

Company Name	Doxess	Position/Title	Support Specialist
Address Line 1	2155 Dunwin Dr	Business Phone	905-608-2321
Address Line 2	Suite 28	Business Fax	905-608-2338
City	Mississauga	Website URL	http://www.doxess.com
State/Province	ON		
Zip/Postal Code	L5L4M1		
Country	Canada		

 Member Profile Page

## Add a New Member

If you have a new member or find that one is missing from ClubRunner, you can add that member easily.

To add a member:

- Login and go to the **Admin** page.
- Click on **Active Members List**, located in the "For Club Executives" section.
- Click on **Add New Member**, located at the top right.
- Fill in that member's information, including their login name and password at the bottom. This is what the member will use to log in to the District website.
- Click on **Save**, or Cancel if you do not wish to add this member at this time.

The form is titled "Add New Member" and contains the following sections and fields:

- Personal Information:**
  - First Name (text input)
  - Middle Name (text input)
  - Last Name (text input)
  - Gender: ☐ Male ☐ Female
  - Membership Type: Active (dropdown menu)
  - Date of Admission (calendar icon)
- Member Mailing Address:**
  - Home ☒ Work ☐
  - Address Line 1 (text input)
  - Address Line 2 (text input)
  - City (text input)
  - State/Province: Ontario (text input)
  - Zip/Postal Code (text input)
  - Country: Canada (text input)
- Transferring Member?:**
  - No ☒ Yes ☐
  - Rotary Member No. (text input)
  - Former Rotary Club (text input)
  - District (text input)
- ClubRunner Account:**
  - E-mail (text input)
  - Login Name (text input)
  - Temporary Password (text input)

At the bottom of the form is a button labeled "Add Member".

Add New Member Page

**Tip:** You may notice that the Add New Member screen is more limited than the regular profile. This has been designed for convenience, as you are only presented with the required fields necessary to add that member. Once added, you can then click on their name to view their full profile.

## Terminate a Member

If you want to delete a member, you are essentially changing their status from Active (or Honorary) to Ex-member. They will then reside in the **Inactive Members List**, so you will always have access to their profile information. However, they will no longer be listed in any directories or email lists. If you want to indefinitely remove them from the database, you must delete them from the Inactive Members List.

- Login and go to the **Admin** page.
- Click on **Active Members List**, located in the "For Club Executives" section.
- Click on **Mark Ex** next to the member. You will be asked to specify their date of termination, as well as a reason for termination (see screenshot below). This is required for various reports such as the RI Notifications (covered later in this document).
- Press the **Terminate Member** button. You should now see this member listed under the Inactive Members List, as an "Ex-Member" type.

Mark As Ex-Member

Eugene Batiuk

Ex-Member as of:

Oct 28 2009

Please indicate reason for termination:

☐ Classification

☐ Business Transfer

☐ Moved

☐ Attendance

☒ Business Pressure

☐ Disinterest

☐ Health

☐ Deceased

☐ None Given

☐ Joined Other Club

☐ Other

If other, please specify:

Terminate Member

 Terminating an Active Member



## Add or Remove Other Users

Other Users is the term used for anyone who might login and participate in your club or district, but is not an official, active member.

Some examples of other users are:

- Ex Members
- Exchange Students
- Spouse
- Staff
- Others

Adding users is done in the same way as Members, except you would go through the **Other Users List**.

## Update Your Club's Information

For Club Executives
<a href="#">Active Members List</a>
<a href="#">Other Users List</a>
<a href="#">Inactive Member List</a>
<a href="#">Club Information Page</a>
<a href="#">Define Club Executives</a>
<a href="#">Define Next Year's Executives</a>
<a href="#">Club Attendance Report</a>
<a href="#">Define Club Attendance Manager</a>
<a href="#">Club RI Reporting</a>

It is important to update your club information such as:


- club name
- meeting time and place
- website address

This information is posted on both the public and private pages of the District website, such as the "Where Clubs Meet" listing. Many members consult this list to do make-ups, so verify that your club's meeting information is up to date!

To change your club's information, follow these steps:

- Login, and go to the **Admin** page.
- Click on **Club Information Page**, in the "For Club Executives" section. This will take you to a page with your entire club's settings and information, see below.

Club Information Page



Meeting Date/Time: Every day  
 Meeting Venue: 2155 Dunwin Drive Unit 28  
 Mississauga City 905-608-2321 L5L 4M1  
 Canada

Websites <http://www.clubrunner.ca>  
[ClubRunner Website](#)

[Edit Club Info \(Online\)](#) [Edit Executives & Directors](#)

President		
Name	Preferred Phone Number	
<a href="#">Jeffrey Laforteza</a>	H: 555-555-5555	

Club Executives		
Title	Name	Preferred Phone Number
President test	<a href="#">Lana Zhang</a>	
Secretary	<a href="#">first Anders</a>	
President-Elect	<a href="#">Halle Asterbadi</a>	W: 905-608-2331
President	<a href="#">Jeffrey Laforteza</a>	H: 555-555-5555

Club Directors		
Title	Name	Preferred Phone Number
Secretary of the DevClub	<a href="#">Максим Рыбков</a>	W: 709 738 0422
Vocational Services	<a href="#">Honorary Member</a>	
test	<a href="#">asdfsadfsadfsa asdfsadfsadfsa</a>	
asdfsadfsa	<a href="#">Adel Asterbadi</a>	
UOA 600a	<a href="#">À 00a 0 U Q À 00a 0 U Q</a>	H:

### Club Information Page

- If your club does not have a ClubRunner website, make sure you provide your **website address** on this page so that visitors to the District site can find your site.
- Click on **Save**.

#### Note:

Don't forget the <http://> before your website address. The link will not work if you omit this part. It's best to copy and paste your entire website address from your Internet browser.

## Edit the Meeting Time and Venue

To edit your club's information:

- Login and go to the **Admin** page.
- Click on **Club Information Page**, located under the "For Club Executives" section. This will bring you to the Update Club Information page.
- Verify your *club name, meeting day and time, and address*.
- Click on **Save**.

**TIP:** Make sure your meeting address is an actual street address, not just a location. This data will be used to display your meeting place on a map. We will check this in the next step.

To check the map:

- Click on the **Home** tab located at the top of the page.
- Click on **Where Clubs Meet**, on the left hand side of the page, under the section called "District Info".
- Locate your club from the list of all district clubs (they are ordered by meeting time), and click on **Map**. A new window will appear that leads to Yahoo! Maps. Check that the location is correct.

### If the map is incorrect

There may be a spelling mistake in the address, or a part of the address missing, such as the city or state. Also make sure you didn't input the actual address under "Meeting Place", which should really be the name of the venue. If you still encounter problems with your map, email ClubRunner Support at [support@clubrunner.ca](mailto:support@clubrunner.ca) with your club name and address for support.

## Define Your Club's Executives and Directors

For Club Executives
<a href="#">Active Members List</a>
<a href="#">Other Users List</a>
<a href="#">Inactive Member List</a>
<a href="#">Club Information Page</a>
<a href="#">Define Club Executives</a>
<a href="#">Define Next Year's Executives</a>
<a href="#">Club Attendance Report</a>
<a href="#">Define Club Attendance Manager</a>
<a href="#">Switch on Data Integration with RI (Automatic)</a>
<a href="#">Report Data Changes to RI (Manual Emails)</a>

Your club's listing of executives and directors appears in several places:

- The District organization chart
- The District's auto-generated group emailing lists
- Various online directories
- Your club's website (if your club is using the ClubRunner club version)

It is also important to define your club executives so that they receive access to the **For Club Executives** section automatically.

ClubRunner lists both **Current Year** and **Next Year** executives. This makes the transition easier from year to year by allowing up to a full year to enter the new positions, and transfers the listing automatically on July 1<sup>st</sup>.

It is important to state who your executives are so that they get granted access when they try to login to the District site.

### To define your current executives and directors:

- Login, and go to the **Admin** page.
- Click on **Define Club Executives**, in the "For Club Executives" section. This will take you to a new screen. This may or may not have existing titles.
- If the position title does not appear on this list, you will need to add a new position. Do this by clicking on **Add New Position** at the upper right.
- Specify the position name, and then select the **Position Title**. This would be the district related position, and the intention is that this should match as closely as possible to the title you entered. The reason for this is so that your member will be selected if the District needs to send out a communication to all members of that Position Title.

- Click on the **Save** link.

Club Executives & Directors

[View Next Year's Executives & Directors](#) [Publish Changes to Home Page](#) [Add New Position](#)

Page 1

Sequence	Title	Position	Name	Action
1	President test	Immediate Past President	Zhang, Lana	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
40	Secretary	Community Service	Anders, first	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
40	Secreatry of the DevClub	Secretary	PyGkos, Максим	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
50	Test	Community Service		<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
60	Vocational Services	Vocational Services	Member, Honoran2	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
60	u0a U0A8	Other	Å u0a 8 U 0, Å u0a 8 U 0	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
70	test	Club Service	asdfsadfsa, asdfsadfsa	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
70	asdfsadfsa	Club Service	Asterbadi, Adel	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
70	Club Service	Club Service		<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
80	U0A 8u0a	International Service	Å u0a 8 U 0, Å u0a 8 U 0	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
90	Community Service Co-Chair	Other	Johns, Mark	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
100	President-Elect	President Elect	Asterbadi, Halle	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
100	Website Administrator	Other	Alba, Jessica	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
150	President	President	Laforteza, Jeffrey	<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
9999	Jian's Position	Other		<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
9999	test	Other		<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
9999	Test Position	Other		<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>
99999	Me , Pres	Vice President		<a href="#">Edit</a>   <a href="#">Clear</a>   <a href="#">Delete</a>

### Add a New Executive Position

Tip: You can also edit the **Sequence** number of the position after it was added, to rearrange the order in which all your positions are listed.

NOTE: If you do not see the member's name in the listing, you will need to add this member to your club directory. See the **Add a New Member** section earlier in this guide.

Sequence	Title	Position	Name	Action
150	President	President ▼	Select Member Alba, Jessica ▼	<a href="#">Save</a>   <a href="#">Cancel</a>

### Edit an Executive Position

### Don't Forget!

Don't forget to keep next year's list up-to-date for an easy transition! Click on Define Next Year's Executives if you know who will occupy that role next year.

### To define your Next Year executives and directors:

Follow the same steps as above, after clicking on "Define Club Next Year Executives" from the Admin page.

## Report Club Attendance

For Club Executives
<a href="#">Active Members List</a>
<a href="#">Other Users List</a>
<a href="#">Inactive Member List</a>
<a href="#">Club Information Page</a>
<a href="#">Define Club Executives</a>
<a href="#">Define Next Year's Executives</a>
<a href="#">Club Attendance Report</a>
<a href="#">Define Club Attendance Manager</a>
<a href="#">Switch on Data Integration with RI (Automatic)</a>
<a href="#">Report Data Changes to RI (Manual Emails)</a>

The District website has an easy attendance reporting section that will make reporting your club's monthly attendance easier than ever.

*You must be a club executive to be able to report attendance for your club, or you must be defined as the Club Attendance Manager. Your executives can do this for you.*

To report your club's monthly attendance, follow these steps:

- Login to your District site.
- Click on **Club Attendance Report** under the "For Club Executives" section.
- Enter the number of **active members** in your club as of the end of the month. E.g. if you are filling in the month of January, enter the member count as of January 31<sup>st</sup>.
- Enter the number of new members you **added** during this month.
- Enter the number of members that were **terminated** during this month
- Enter the overall **attendance percentage** for that month.
- Click on **Save**.

Monthly Attendance of [Enter Previous Year Attendance](#)

	Number of Members	New Members	Terminated Members	Number of Meetings	Attendance Percentage
July 2010	68	0	1	2	3.17 %
August 2010	68	0	0	3	2.13 %
September 2010	0	0	0	0	0 %
October 2010	0	0	0	0	0 %
November 2010	0	0	0	0	0 %

[Save](#)

 *Club Attendance Report*

### If your clubs uses ClubRunner as your website

You can report attendance either through the District site or your club site. For help reporting through your club site, please refer to the attendance section of your club site's Online Help. The club site will allow you to enter each individual meeting and specify the members that attended, including makeups, excused leaves of absence, and exempted members. It will then automatically calculate all the numbers for you.

### Define Your Club's Attendance Manager

Each club has an **Attendance Manager** who is the person that will be contacted by the district for information regarding the club's attendance.

By default this is the **Club Secretary**, but you can change this to be any member of your club. If the person handling attendance is the club secretary, you don't need to define the attendance manager.

**Assign Attendance Manager**

Denise Balkissoon is the current person responsible for attendance.

The club secretary usually is the person responsible for reporting attendance.

Should this responsibility have been delegated to a different person - Please select the person so that all correspondence will be forwarded to him/her.

Club Name: Rotary Club of Mississauga

Select From: Denise Balkissoon

Assign back to Club Secretary? ☐

[Select](#)

 *Assign Attendance Manager*

To change the Attendance Manager for your club:

- Login to your District site.
- Choose the **Define Club Attendance Manager** option from the For Club Executives section.
- Choose the new contact person from the drop down list of your members.
- Click on **Select**.

To change the Attendance Manager back to the club secretary:

- Login to your District site.
- Choose the **Define Club Attendance Manager** option from the For Club Executives section.
- Check off the box next to "Assign back to club secretary?"
- Click on **Select**.

## ***RI Reporting and Integration***

The manual RI Reporting feature that was introduced in August 2008, comprised of email notifications that you have to manually send to RI's Data Services division. Note that there is a new automated synchronization feature that was introduced on November 1, 2010 which will post updates to RI's databases within two hours, and is intended to replace this manual feature. For more information and to get started on the new module please [click here](#).

Note that this listing of updates only includes clubs who have not opted into the new automated synchronization feature introduced on November 1 2010.

**Note:** Once the automated integration has been enabled, the Manual RI service will be disabled.

As member data changes are made on the district website, a log is generated of these changes along with their details. Note that the log tracks changes made by District and Club executives via the District website, as well as changes made via the clubs' ClubRunner websites. These changes include:

- New Members
- Member Terminations along with Reason for Termination
- Member Change of Home Address
- Member Name Changes

Every month or so, someone in the club or district must send these notifications to RI. Each notification can be opened, viewed and edited prior to being sent. You may also decide to delete a notification if the change is irrelevant or a result of data cleanup.

## **How to Report Changes to RI Manually**

- From the District Administration page, click on **Club RI Reporting**, located in the "For Club Executives" section.
- Click on **Open** next to a notification. Make any modifications if required to the email.
- Press the **Send** button.
- If you don't wish to send the notification, instead of clicking Open, click on **Delete**.

## Membership Change Reporting

This is the manual RI Reporting feature that was introduced in August 2008, comprised of email notifications that you have to manually send to RI's Data Services division. Note that there is a new automated synchronization feature that was introduced on November 1, 2010 which will post updates to RI's databases within two hours, and is intended to replace this manual feature. For more information and to get started on the new module please [click here](#).

Note that this listing of updates only includes clubs who have not opted into the new automated synchronization feature introduced on November 1 2010.

Date	Name	Subject	Actions
Dec 15 2010	Margaret Nixon (Guelph South)	Member Change of Address	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 15 2010	Nancy Penney (Burlington Central)	Member Change of Address	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 15 2010	Tom Dolson (Caledon West)	Member Change of Address	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 14 2010	Derek Williams (Shelburne)	New Member	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 14 2010	Jacobson Hodoh (Brampton)	New Member	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 13 2010	David MacKenzie (Woodstock)	Member's Termination	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 13 2010	Ehsan Khandaker (Mississauga Airport)	New Member	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 13 2010	David MacKenzie (Woodstock)	New Member	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 12 2010	Marco Maseelall (Rotaract (Mississauga))	New Member	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 12 2010	Bill Agnew (Bolton)	New Member	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 06 2010	Cheryl Blake (Oakville West)	Member's Name Change	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 06 2010	Cheryl Blake (Oakville West)	Member Change of Address	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 06 2010	John English (Kitchener)	Member Change of Address	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 05 2010	Barb Saxby (Milton)	Member's Termination	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 03 2010	James Rae (Mississauga Lakeshore)	New Member	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 02 2010	Bill Blackman (Milton)	Member's Termination	<a href="#">Open</a>   <a href="#">Delete</a>
Dec 01 2010	Kenneth Marland (Mississauga Lakeshore)	Member Change of Address	<a href="#">Open</a>   <a href="#">Delete</a>

**Notes:** All changes will be reflected in the Rotary International database however this process is not instantaneous and may require a few weeks. In all cases, there should not be any further action required, with the exception of the New Member notification. You should log in to the RI Member Access area to ensure this member has been created and fill in any extra information required by RI.

## Automated RI integration

ClubRunner enabled automatic database integration with Rotary International on November 1, 2010. This means that all member data updates (which your club chooses to share) will be automatically updated on Member Access at RI's Headquarter databases within 2 hours, without the need to send any email notifications or enter the data via [rotary.org](http://rotary.org).

Prior to November 1, 2010, the database integration consisted of email notifications which were automatically generated by ClubRunner, but had to be sent by a club executive through the "Send Data Changes to RI" feature on ClubRunner. Note that the automatic integration replaces this feature.

## RI Database Integration

We are pleased to announce that RI Database Integration is now available on ClubRunner! This new feature will automatically update member records at Rotary International Headquarters within 2 hours of being 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 link. Select ClubRunner as your authorized partner and follow the steps outlined within that 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 updates to Rotary International as soon as any changes are made to your active members' profiles, whether the change was made by the member or a club executive.

☒ Switch on Data Integration between ClubRunner and RI for all active member records within my club.  
I agree to the [Terms and Conditions](#) of this integration.

Integration confirmed on 10/11/2010 11:41:21 AM EST  
by Halle Asterbadi

## Choose Club RI Integration Privacy

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

Update Privacy

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 at [www.rotary.org](http://www.rotary.org). Login as either Club President or Secretary and look for the Partner Organization section. Select ClubRunner as your authorized partner then click on the I Agree button to indicate acceptance of the terms and conditions. Here is a direct link to the Partner Organization page:

<http://www.rotary.org/en/secureselfservice/Pages/AddVendorOrganization.aspx>

2. Opt in within your ClubRunner Site. Login to your ClubRunner site and click on the "Switch On" RI Integration link on the Admin page. If you are logging into your District site, you will find this link under the "For Clubs" section. **Note**

**that you have to be on ClubRunner Version 2.0 in order to use the RI Integration feature.** Select the checkbox to switch on integration and agree to the ClubRunner terms and conditions. At that time, you will see your club privacy options. This allows you to choose which fields you wish to share with Rotary. Note that the name and at least one address is the minimum that has to be shared. Note that once you do this, ClubRunner will begin to transmit your member information updates to Rotary International as soon as any changes are made to your active members' profiles, whether the change was made by the member or a club executive.

## Privacy options by member

This new integration feature also allows your individual members to customize their own privacy options by allowing them to select which fields they wish to share with Rotary International. The club privacy options override the member in terms of opting out of certain fields, so if the club chooses not to share cell phone numbers, all members will not share cell phones. However, if the club chooses to share home phones, certain members can decide to opt out of sharing home phones.

Personal Rotary Biography Commitments Settings **Privacy**

Edit

Communication Preferences

District Emails ☒

District Bulletin ☒

RI Integration Privacy

This section allows you to specify which fields you would like to update at Rotary International's database. If your club has opted out of certain fields, those will not be updated, even if you opt in. For a field that your club has opted into, you can choose to opt out by unchecking it from the list below.

Allow Name <input checked="" type="checkbox"/> (Club Opted In)	Allow Home Phone <input checked="" type="checkbox"/> (Club Opted In)
Allow Home Address <input checked="" type="checkbox"/> (Club Opted In)	Allow Cell <input checked="" type="checkbox"/> (Club Opted In)
Allow Business Address <input checked="" type="checkbox"/> (Club Opted In)	Allow Business Phone <input checked="" type="checkbox"/> (Club Opted In)
	Allow Home Fax <input checked="" type="checkbox"/> (Club Opted In)
	Allow Business Fax <input checked="" type="checkbox"/> (Club Opted In)
	Allow Primary Email <input checked="" type="checkbox"/> (Club Opted In)

Edit

Last updated on Dec 09 2010 by Halle Asterbadi

## Importance of RI Member ID

It's important to note that the RI Member Number must be populated for all members in your club that you wish to integrate changes for. Effective November 11th, a service was implemented on ClubRunner to automatically populate the RI Member Numbers for all your members' ClubRunner profiles. You can access a list of any members that were not successfully matched for an RI Member ID by clicking on Missing RI Member ID Report under the Membership tab (For the District site, this would be found under the For Clubs section). To update these profiles manually, click on the View Profile link on the right to access their Rotary tab, and there you can update their RI Member ID. This information can be found on the Rotary Member Access site.

## Future Enhancements

At this time, existing member updates are integrated with Rotary International, however new member additions and member terminations will go to RI via email notifications. You will not have to do anything for these emails to go to RI as they will happen automatically. More functionality is planned for this integration initiative in the future, including updates to club meeting information and club officer assignments. Contact ClubRunner Support if you have any questions regarding this initiative.

ClubRunner enabled automatic database integration with Rotary International on November 1, 2010. This means that all member data updates (which your club chooses to share) will be automatically updated on Member Access at RI's Headquarter databases within 2 hours, without the need to send any email notifications or enter the data via rotary.org.



Prior to November 1, 2010, the database integration consisted of email notifications which were automatically generated by ClubRunner, but had to be sent by a club executive through the "Send Data Changes to RI" feature on ClubRunner. Note that the automatic integration replaces this feature.

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** at [www.rotary.org](http://www.rotary.org). Login as either Club President or Secretary and look for the Partner Organization section. Select ClubRunner as your authorized partner then click on the I Agree button to indicate acceptance of the terms and conditions. Here is a direct link to the Partner Organization page:

<http://www.rotary.org/en/secureselfservice/Pages/AddVendorOrganization.aspx>

**2. Opt in within your ClubRunner Site.** Login to your ClubRunner site and click on the "Switch On" RI Integration link on the Admin page. If you are logging into your District site, you will find this link under the "For Clubs" section. **Note that you have to be on ClubRunner Version 2.0 in order to use the RI Integration feature.** Select the checkbox to switch on integration and agree to the ClubRunner terms and conditions. At that time, you will see your club privacy options. This allows you to choose which fields you wish to share with Rotary. Note that the name and at least one address is the minimum that has to be shared. Note that once you do this, ClubRunner will begin to transmit your member information updates to Rotary International as soon as any changes are made to your active members' profiles, whether the change was made by the member or a club executive.

### Privacy options by member

This new integration feature also allows your individual members to customize their own privacy options by allowing them to select which fields they wish to share with Rotary International. The club privacy options override the member in terms of opting out of certain fields, so if the club chooses not to share cell phone numbers, all members will not share cell phones. However, if the club chooses to share home phones, certain members can decide to opt out of sharing home phones.

### Importance of RI Member ID

It's important to note that the RI Member Number must be populated for all members in your club that you wish to integrate changes for. Effective November 11th, a service was implemented on ClubRunner to automatically populate the RI Member Numbers for all your members' ClubRunner profiles. You can access a list of any members that were not successfully matched for an RI Member ID by clicking on Missing RI Member ID Report under the Membership tab (For the District site, this would be found under the For Clubs section). To update these profiles manually, click on the View Profile link on the right to access their Rotary tab, and there you can update their RI Member ID. This information can be found on the Rotary Member Access site.

### Future Enhancements

At this time, existing member updates are integrated with Rotary International, however new member additions and member terminations will go to RI via email notifications. You will not have to do anything for these emails to go to RI as they will happen automatically. More functionality is planned for this integration initiative in the future, including updates to club meeting information and club officer assignments. Contact ClubRunner Support if you have any questions regarding this initiative.

## Support & Training

Visit our **Support Center** at <http://clubrunner.helpserve.com> to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful “how-to” documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

<p><b><u>Knowledgebase</u></b></p> <p>This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.</p>	<p><b><u>Downloads</u></b></p> <p>This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.</p>
<p><b><u>On-Demand Videos</u></b></p> <p>For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.</p>	<p><b><u>Webinar Training</u></b></p> <p>We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend.</p>
<p><b><u>Submit a Ticket</u></b></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to <a href="mailto:support@clubrunner.ca">support@clubrunner.ca</a>. Our turnaround time for email tickets is 2 business days.</p>	<p><b><u>Community</u></b></p> <p>Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.</p>

For the latest ClubRunner updates, follow us on:

