

Updating Executives and Directors

All clubs are required to ensure their Executives and Directors list for the incoming year is correct and also ensure that as soon as possible after their Annual General Meeting that they confirm the following year roles as well. Instructions for updating these details are shown below -

(Step 1)

Presidents, Treasurers or Secretaries should login to their club website (for Clubs using ClubRunner) OR the District Website (for non-ClubRunner Clubs) by selecting the member login link (top right) –



Enter your login information below:

Login Name

Password

Keep me logged in

[Login »](#)

[New and existing users: retrieve login and/or reset password](#)

(Step 2)

Enter your username and password in the box provided above. Click on the link underneath the login box if you can't remember your details and need to retrieve them, or check with your club President or District webmaster Teresa Dawson.

(Step 3)

Once you have successfully logged in you will be returned to the home page, click on 'Member Area' at the top right –



(Step 4)

Once you have clicked on the 'Member Area' link you will see the Admin screen.

For ClubRunner Clubs editing via their own website

Click on 'Edit Executives and Directors' from the 'Membership Manager' section –

 Membership Manager
Club Dashboard
Active Member List
Other Users List
Inactive Members List
Friends of the Club
Bulletin Subscribers
New Member Program
Dues & Billing
Switch on Data Integration with RI (Automatic)
Report Data Changes to RI (Manual Emails)
Request Member Updates
Edit Executives and Directors
Committee Management
Birthday & Anniversary Report
Gender Distribution (Summary)
Download Member Data NEW!
Member Designations

For Non-ClubRunner Clubs editing via the District website there are two ways to do this either via the Admin/**Launchpad** or Admin/**Administration**

Launchpad

Click on 'My Clubs Info' link to edit these details. Or click on the Blue tool bar click 'Administration' which will give you a list format

My Clubs Info -

Active Members List

Select Club:

Members per Page:

[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	Access	Action
	<input type="checkbox"/>	Avuri, Leigh	Active	50	Designation Mark Ex Reset Password
	<input type="checkbox"/>	Bonython, Ken	Active	70	Designation Mark Ex Reset Password
	<input type="checkbox"/>	Bottomley, Mike	Honorary	80	Designation Change Type Reset Password
	<input type="checkbox"/>	Cummins, Nerine	Honorary	90	Designation Change Type Reset Password
	<input type="checkbox"/>	Davidson, Peter	Active	70	Designation Mark Ex Reset Password
	<input type="checkbox"/>	Dawson, Teresa	Active	30	Designation Mark Ex Reset Password
	<input type="checkbox"/>	de Fina, Amanda	Active	70	Designation Mark Ex Reset Password
	<input type="checkbox"/>	Dullisear, Kerry	Active	70	Designation Mark Ex Reset Password
	<input type="checkbox"/>	Fruotniet, Deb	Active	50	Designation Mark Ex Reset Password

Administration (List Format)

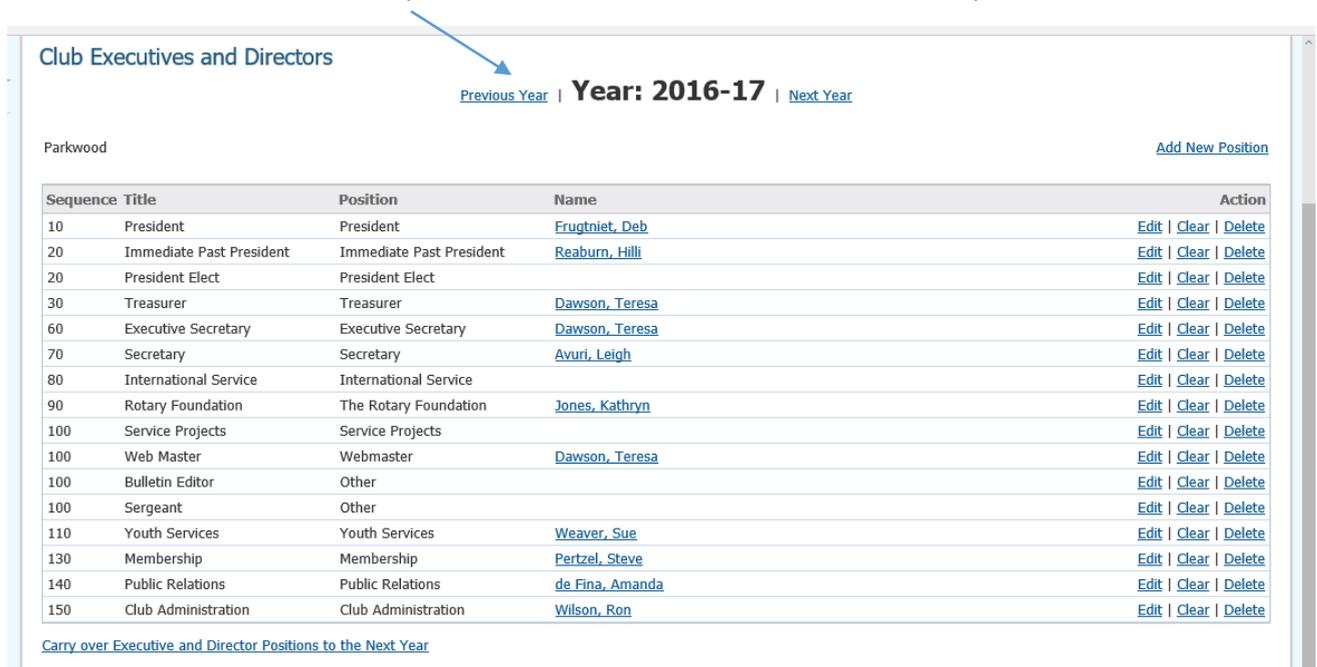
Click on 'Define Club Executives' from the 'For Club Executives' section –



The screenshot shows a vertical menu titled "For Club Executives" with the following items: Active Members List, Other Users List, Inactive Member List, Club Information Page, Define Club Executives, Club Attendance Report, Define Club Attendance Manager, Switch on Data Integration with RI, Missing RI Member ID Report, RI Updates Archive, and RI Member Synchronization. A blue arrow points to the "Define Club Executives" link.

(Step 5)

After you click on this link you will get to the list of current year Executives and Directors click on the relevant year from where you can add edit or delete existing positions by clicking on the respective links or the 'Add New Position' if you need to add a record for a role not currently on the list.



The screenshot shows the "Club Executives and Directors" page for the year 2016-17. It includes a table with columns for Sequence, Title, Position, Name, and Action. The table lists various roles and their holders for the year 2016-17. A blue arrow points to the "Year: 2016-17" link.

Sequence	Title	Position	Name	Action
10	President	President	Frugtniet, Deb	Edit Clear Delete
20	Immediate Past President	Immediate Past President	Reaburn, Hilli	Edit Clear Delete
20	President Elect	President Elect		Edit Clear Delete
30	Treasurer	Treasurer	Dawson, Teresa	Edit Clear Delete
60	Executive Secretary	Executive Secretary	Dawson, Teresa	Edit Clear Delete
70	Secretary	Secretary	Avuri, Leigh	Edit Clear Delete
80	International Service	International Service		Edit Clear Delete
90	Rotary Foundation	The Rotary Foundation	Jones, Kathryn	Edit Clear Delete
100	Service Projects	Service Projects		Edit Clear Delete
100	Web Master	Webmaster	Dawson, Teresa	Edit Clear Delete
100	Bulletin Editor	Other		Edit Clear Delete
100	Sergeant	Other		Edit Clear Delete
110	Youth Services	Youth Services	Weaver, Sue	Edit Clear Delete
130	Membership	Membership	Pertzel, Steve	Edit Clear Delete
140	Public Relations	Public Relations	de Fina, Amanda	Edit Clear Delete
150	Club Administration	Club Administration	Wilson, Ron	Edit Clear Delete

Carry over Executive and Director Positions to the Next Year

At a minimum, the roles you are required to ensure you complete are as follows –

• President • President-Elect • Treasurer • Secretary • Executive Secretary (if your club has this role – usually someone requiring access to RI to update member records) • Youth Services • Webmaster (the person responsible for your website) • YEP Club Protection Officer

If a member performs more than one role in your club make sure you put them down against each role.

When you add a new position you can select both the Position and the Member from a drop down list. The 'Title' column is a discretionary title you may give to a role. Please also make sure you 'Save' your changes as you go.

(Step 6) – CLUBRUNNER CLUBS ONLY

If your club website has the Executives and Directors Widget on one of the pages, then click on 'Publish Changes to Home Page' (next to 'Add New Position') when you have finished.

(Step 7)

To enter details for next year, click on the 'Next Year' link to the right of the current year date and repeat Steps 5 & 6 above.

ONCE YOU HAVE COMPLETED DETAILS FOR BOTH YEARS YOU'RE DONE !!!

Do you need help ?

Contact your Cluster Area's Technical Adviser. Visit our District Website help page for details (<http://rotary9640.org/sitepage/help>)