ROTARY CLUB SECRETARY TASKS:

NAVIGATING THE CLUBRUNNER ADMIN AREA ON THE DISTRICT WEBSITE

PETS/SETS

Training Session

March 4 & 5, 2017

Introduction

In this presentation we will provide instructions, time permitting, on the following tasks:

- Determining where to update your club information
- How to Login
- Add New Members and/or Update Existing Members
- Terminate a Member
- Update Club Officers
- Carry Current/New Executives Over to the Next Year
- Create New Club Executive Position(s)
- Monthly Update of Club Membership Numbers and Monthly Attendance Percentage (only for clubs without a ClubRunner subscription)

ClubRunner and a Rotary Club Secretary's duties are closely linked, even when the club is not a subscriber to ClubRunner. Reports that every club needs to send to District 7040 are almost all submitted using the the District's ClubRunner website. For clubs with a ClubRunner subscription and website, these reports are automatically "pushed" to the district website after the information is entered into the club ClubRunner Administration Area. But the secretaries of clubs that do not subscribe to ClubRunner will need to manually upload the information into the district website.

This presentation will provide "how to" information for secretaries of clubs that do subscribe to ClubRunner and clubs that don't. There are significant differences. We will also provide access to PDF files for ClubRunner Guides explaining the two different methods of entering the data.

Throughout this document there are references to PDF files with written instructions to complete certain tasks. These documents are listed in the left-side column of all pages of the "Club Tools" section on the District 7040 website [https://portal.clubrunner.ca/50214/Page/club-tools]

Login

Accessing (logging into) a club CR website Admin Area is done exactly the same way as logging into the District website Admin Area. The only difference is the website itself.

In order to receive your password for your website, go to the "Login" link on the website (District or local club — upper right corner of the page) and click on "New and existing users - Retrieve your password". This will direct you to the "Get Password" screen.

On the District website you will be asked to select the name of your local club. On the local club website (if your club subscribes) you will not be asked. Next, you will be asked to enter your last name and your email address. Once you click on "Get Login Info", you will receive an email to retrieve your credentials. Please note, that the last name and email address you provide must match what is on the record for security purposes. If you are unable to get your password, please email support@clubrunner.ca with your name and club.

With your login credentials, you can now access your website or the District website, from where you can navigate to the Admin page. This is a member's only page. You should see your name at the top right hand corner of the webpage. If you have trouble logging in, please email support@clubrunner.ca.

Suggestion: Download the "Member Cheat Sheet" from the Club Tools section of the District website (no login required), print out a copy and fill in your User Name and Password. Keep a copy handy. We also suggest you recommend each of your club members do the same. If you're in a generous mood, maybe print out copies, fill in the User Name for each member and ask them to Login, retreive their own Password and write that on their copy of the Cheat Sheet.



Welcome to ClubRunner!

Introduction

Thank you for choosing ClubRunner! ClubRunner is a powerful **online communication** and **administration** tool that will facilitate your club's activities and correspondence. This guide will show you how to retrieve your password, login, and manage your profile.

1) Logging In

In order to receive your password for your website, go to the "Login" tab on the website and click on "New and existing users - Retrieve your password". This will direct you to the "Get Password" screen.

You will be asked to enter your *last name* and your *email address*. Once you click on "Get Login Info", you will receive an email to retrieve your credentials. Please note, that the last name and email address you provide must match what is on the record for security purposes. If you are unable to get your password, please email support@clubrunner.ca with your name and club. To watch an On-Demand Demo on how to login, click here.

With your login credentials, you can now access your website from where you can navigate to the Admin page. This is a member's only page where you will be able to edit your profile, email other members and contribute content to your site. You should see your name at the top right hand corner of the webpage. If you have trouble logging in, please email support@clubrunner.ca.



For future reference, record your login information below.

Login name:	
Password:	

2) Editing Your Profile

Once you are logged in to your website, you have the opportunity to edit and manage your profile. This is important as you will need to edit your profile in order to receive all email correspondence.

To do so, click on Admin > Edit My Profile. Fill in the data fields and save your data when you are done.



3) Updating Content on Site

If you have the appropriate access level, you can add some personalized content to your site, through the Stories, News, Links, Downloads, Speakers and Site Pages modules. To access these content areas, either click on the links within the "Website Manager" section of the Admin page, or simply click on the Website tab, then select the "Website Content" menu option. For more detailed instruction on adding content to your site, see this help-page.

This guide is an excerpt of the extensive online help available on your website. To access the online help, visit http://www.ClubRunnerSupport.com

Add New Members, Update existing Members, Terminate Members

Clubs without ClubRunner Websites — [SEE: "How do I add/update club members on the district website?" PDF file]

- Add Member Login on District Website and Select Member Area link --> Membership (tab) --> Clubs & Membership --> Select Members Link from appropriate club --> Add New Member (upper right corner) --> Fill out fields --> Remember to press Save button.
- Edit Member Login on District Website and Select Member Area link --> Membership (tab) --> Clubs & Membership --> Select Members Link from appropriate club --> Select member name. To view or update the profile for that member, click on Edit. If you do make changes, remember to press the Save button at the bottom of the page.
- **Terminate a Member** If you want to remove a member from your club's active rolls, you are essentially changing their status from Active (or Honorary) to inactive. They will then reside in the Inactive Members List, so you will always have access to their profile information. If you want to permanently remove them, you must delete them from the Inactive Members List.
 - Login on District Website and Select Member Area link --> Membership (tab) --> Clubs & Membership
 --> Select Change Status Link of Member --> Select Terminate Membership --> Fill out remaining fields.

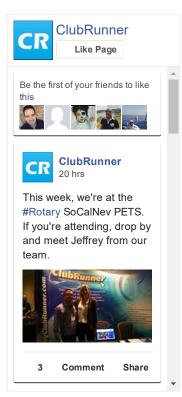
Customer Support & Knowledgebase

Home Submit a Ticket Knowledgebase Downloads On Demand Videos Webinars Service Updates English (U.S.) ▼

Bulletin Manual

KNOWLEDGEBASE





Follow @clubrunner



Knowledgebase: Support and Help > Knowledgebase Articles > District Version > Clubs and Membership > Membership Management

View and update all club members



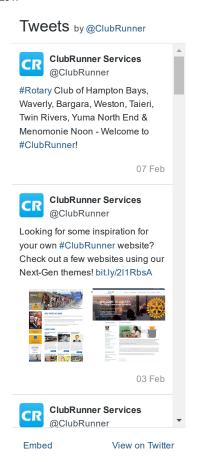
Posted by Pieter van Hiel on 23 December 2014 12:42 PM

To view the membership list for a club:

- Login and go to the Admin page.
- Click on Clubs & Membership Details under the "District, Clubs & Membership" section.
- Click on **Members** next to the club. This will show you the club members for that club.
- To view or update the profile for that member, click on **Edit**. If you do make changes, remember to press the **Save** button at the bottom of the page.

NOTE: Only active members are displayed in the Members link. To view all members/users for a club (e.g. honorary, ex, staff, exchange students, etc), click on **Other Users** from the main club listing page.





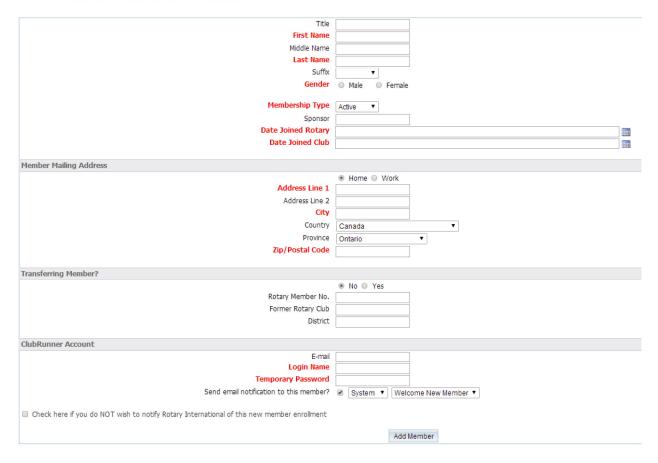
Help Desk Software by Kayako

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:

- Click on Active Members List
- 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 the Add Member button

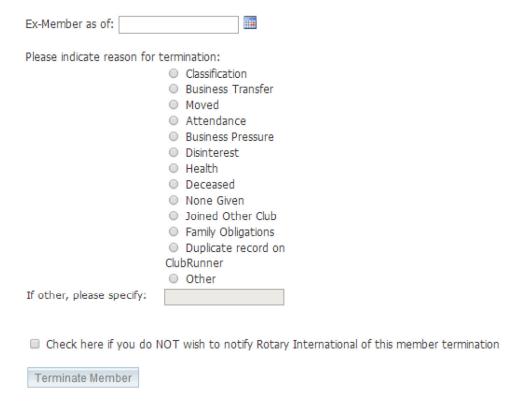


Tip: You may notice that the Add New Member screen is more limited than the regular profile. This has been designed for convenience, as you are only presented with the required fields necessary to add that member. Once added, you can then click on their name to view their profile.

Terminate a Member

If you want to delete a member, you are essentially changing their status from Active (or Honorary) to Exmember. They will then reside in the Inactive Members List, so you will always have access to their profile information. If you want to permanently remove them, you must delete them from the Inactive Members List.

- Click on Active Members List
- Click on the Mark Ex link
- You will be asked to specify their date of termination, as well as a reason for termination (see screenshot below).
- Press the **Terminate Member** button. You should now see this member listed under the Inactive Members List, as an "Ex-Member" type



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:

- Exchange Students
- Rotaract

- Staff
- Interact

Update Club Officers

NOTE: Updating next year's club officers is very important and should be completed by the end of January. If circumstances prevent you from completing this task by the end of January, please inform your AG and the Website Administrator by the end of January.

Clubs without ClubRunner Websites — [SEE: "How do I add/update club executives from the district website?" PDF file]

- Edit Executive/Director Login on District Website and Select Member Area link --> Membership (tab) --> Define Club Executives (tab)--> Select Define Current Year Executive OR Define Next Year Executive from the appropriate club --> Select Edit | Clear | Delete depending on your task.
- Carry over to next year Login on District Website and Select Member Area link --> Membership (tab) --> Define Club Executives (tab)--> Select Define Current Year Executive from the appropriate club --> Select "Carry over Executive and Director Positions to the Next Year" link located at the bottom of list of names.

Customer Support & Knowledgebase

Home Submit a Ticket Knowledgebase Downloads On Demand Videos Webinars Service Updates English (U.S.) ▼

Bulletin Manual

KNOWLEDGEBASE





Follow @clubrunner



Knowledgebase: Support and Help > Knowledgebase Articles > District Version > For Club Executives > Edit my Club Executives

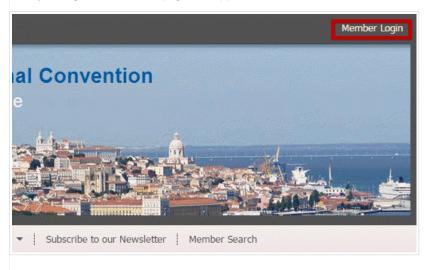
Add a Club Executive or Director on District Page



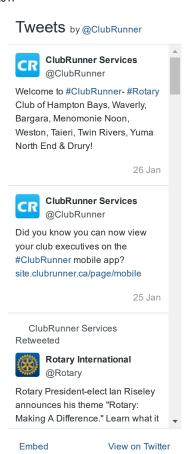
Posted by Zach W. (Support) on 07 March 2016 02:33 PM

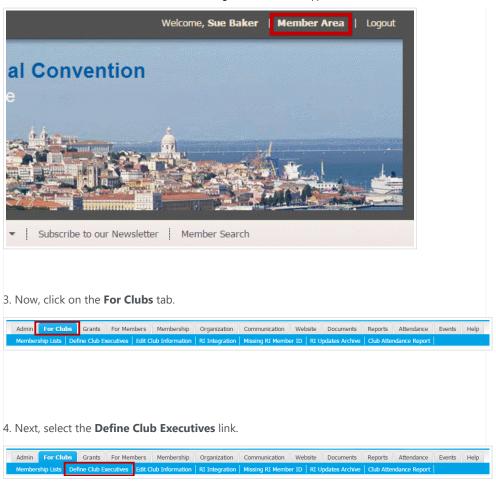
You have the ability to add club executives and officers via your district page, provided you have appropriate access levels.

1. Go to your district webpage and click on the **Login** link at the top right of the page. Then, enter your login details on the page that appears.



2. You are now logged in. To access the District Administration page, click on **Member Area** on the top right.





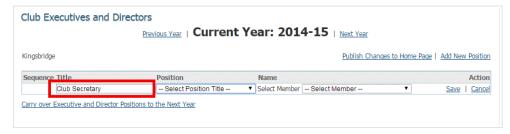
5. This brings you to a page listing the current club executives and directors. Use the **Next Year**, or **Previous Year** links if required to navigate to the year you want to update.



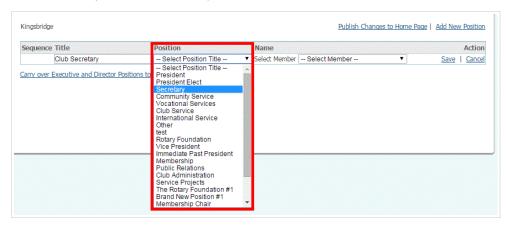
6. Once you have the correct year selected, add a new executive by clicking **Add New Position** at the right side of the screen.



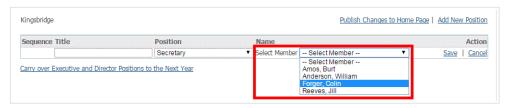
7. To add a new executive, first you must enter the title of the new position in the **Sequence Title** field. This field is mandatory.



8. Next, select the appropriate position from the **Position** drop down menu. This may be the same as the title you entered in the **Sequence Title** field.



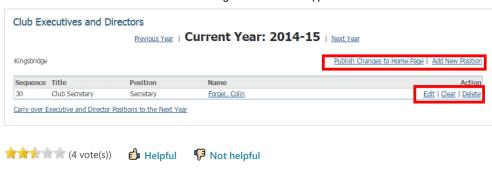
9. Now, choose a member to assign to this role, using the **Select Member** drop down menu.



10. Finally, click **Save** to keep your changes. Click **Cancel** to discard them.



- 11. You now have the following options:
- Publish Changes to Home Page: This makes the executive change appear on the home page.
- Add New Position: You can add an additional position for this year.
- Edit: Click Edit under the Action heading, if you wish to make changes to this position.
- Clear: Click Clear to remove the currently assigned member from this position, while retaining the position.
- **Delete:** Delete removes the position entirely.



Help Desk Software by Kayako

Create New Club Executive Position(s)

NOTE: Executives and normal club members have different access rights to ClubRunner at the club and district level. If you have site administrator access, you can add or edit your club's executives and directors. Their names will appear on the club website, as well as on the district organization chart and automatically generated mailing lists. It's important for you to define club executives, as this allows them to access the district site.

Clubs without ClubRunner Websites — [SEE: "How do I add or update Club Executives or Directors on the district website" PDF file]

- Add a new Club Executive Position Login on District Website and Select Member Area link --> For Clubs
 (tab) --> Define Club Executives
 - o Use the "Next Year", or "Previous Year" links if required to navigate to the year you want to update.
 - o Add a new executive by clicking Add New Position at the right side of the screen.
 - To add a new executive, first you must enter the title of the new position in the Sequence Title field.
 This field is mandatory.
 - Next, select the appropriate position from the Position drop down menu. This may be the same as the title you entered in the Sequence Title field.
 - o Now, choose a member to assign to this role, using the Select Member drop down menu.
 - o Finally, click Save to keep your changes. Click Cancel to discard them.

You now have the following options:

- o Publish Changes to Home Page: This makes the executive change appear on the home page.
- o Add New Position: You can add an additional position for this year.
- o Edit: Click Edit under the Action heading, if you wish to make changes to this position.
- Clear: Click Clear to remove the currently assigned member from this position, while retaining the position.
- o Delete: Delete removes the position entirely.

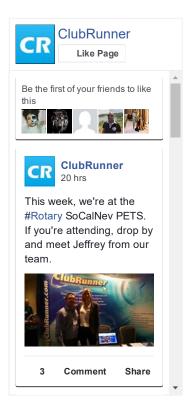
Customer Support & Knowledgebase

Home Submit a Ticket Knowledgebase Downloads On Demand Videos Webinars Service Updates English (U.S.) ▼

Bulletin Manual

KNOWLEDGEBASE





Follow @clubrunner



Knowledgebase: Support and Help > Knowledgebase Articles > District Version > Clubs and Membership > Membership Management

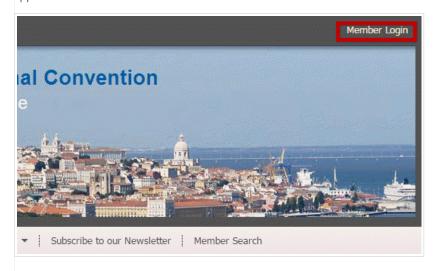
How to Define Positions for Clubs



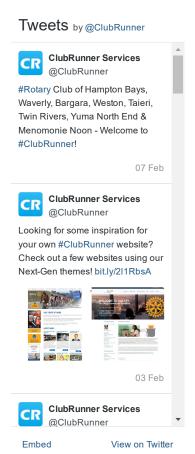
Posted by David H. (Support) on 15 December 2016 09:42 AM

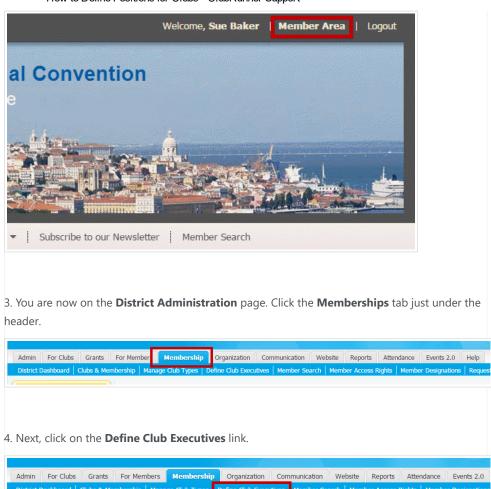
You may use your District website to view and define executives and directors positions held by Club members in your District. You may also create new Club positions as needed.

1. To create a new Club position for your District, go to your District webpage and click on the **Login** link at the top right of the page. Then, enter your login details on the page that appears.



2. You are now logged in. To access the District Administration page, click on **Member Area** on the top right.

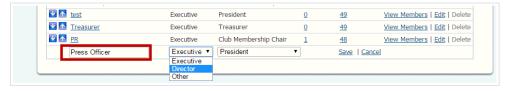




5. You are taken to the **Define Club Position Types** page, where all current position titles defined by your constituent Clubs are listed. To define a new position, click the **Add New Position** link at the top right above the position list.

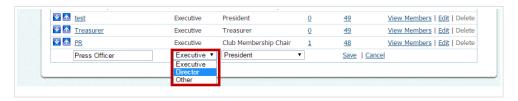


6. Use the fields provided to define the details of the new position. First, enter a title for the position.

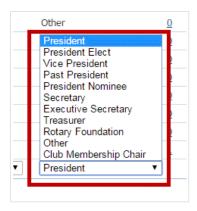


7. Next, to determine the access levels granted to the position, use the drop-down menu to determine whether it is an **Executive** position, a **Director** position, or **Other**.

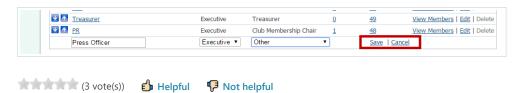
Note: Executive positions have executive access on the District website.



8. Now, define the **Code** that best reflects the position type.



9. Finally, hit Save to add the position, or Cancel to discard it.



Help Desk Software by Kayako

Attendance

Monthly Update of Club Membership Numbers and Monthly Attendance Percentage (only for clubs without a ClubRunner subscription) [SEE: "Report Your Monthly Attendance at District Website" PDF file]

NOTE #1: Clubs with a ClubRunner subscription can use their Attendance module to setup their "Rule of 85 members, record their weekly meeting attendance, record and "bank" makeups, print out attendance reports and automatically submit their monthy attendance reports to District 7040. But clubs without ClubRunner subscriptions need to track their attendance using whatever system works best for them and manually report their Attendance numbers to the district by entering the data into the district's ClubRunner Attendance module.

NOTE #2: When taking attendance at club meetings, include active club members present at the weekly club meeting, members credited with make-ups, and members excused by the board for a reason that it considers to be sufficient. Do not count as absent members whose combined age and years of membership (in one or more clubs) is 85 years or more and who have notified the club secretary in writing of their desire to be excused from attendance; the board must approve the request before the absences of the member is excluded from attendance figures.

NOTE #3: The monthly Attendance Report required by District 7040, in addition to a count of new members added during the month and a count of members lost during the month, also includes the average weekly "Attendance Percentage." This is calculated as:

Rule of 85 Members if they attended + Non-Rule of 85 Members if they attended (divided by)

Rule of 85 Members if they attended + Total club Non-Rule of 85 Members

NOTE #4: Under Club Resources in the left column of the Club Tools section pages, there is an Excel Work Sheet template you can modify with your club's member names to record weekly attendance and, more importantly, to calculate your Weekly Attendance Percentage. To determine your club's Monthly Attendance Percentage, calculate the average Weekly Attendance Percentage for all the meetings in a given month.

To Report Monthly Club Attendance on the District Website [SEE "How to Report Your Monthly Attendance at District Website" PDF file]

- Login on District Website and Select Member Area link --> For Clubs (tab) --> Club Attendance Report
 - First, enter the number of members who attended meetings by the end of a given month in the field provided.
 - o Then, enter New Members this Month
 - o Enter terminated Members this Month,
 - o Enter the Number of Meetings this Month
 - o Then enter Attendance Percentage.
 - When you are finished entering your attendance data, click Save. Your report is filed with the district.

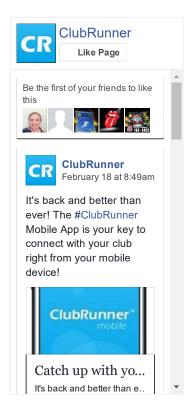
Customer Support & Knowledgebase

Home Submit a Ticket Knowledgebase Downloads On Demand Videos Webinars Service Updates English (U.S.) ▼

Bulletin Manual

KNOWLEDGEBASE





Follow @clubrunner



Knowledgebase: Support and Help > Knowledgebase Articles > District Version > For Club Executives > Report Attendance

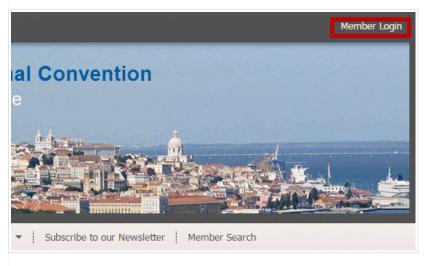
Report Your Monthly Attendance at District Site



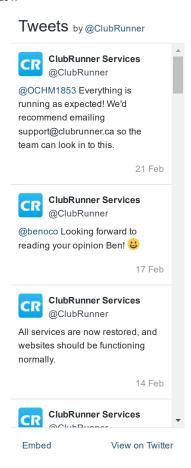
Posted by David H. (Support) on 03 May 2016 01:55 PM

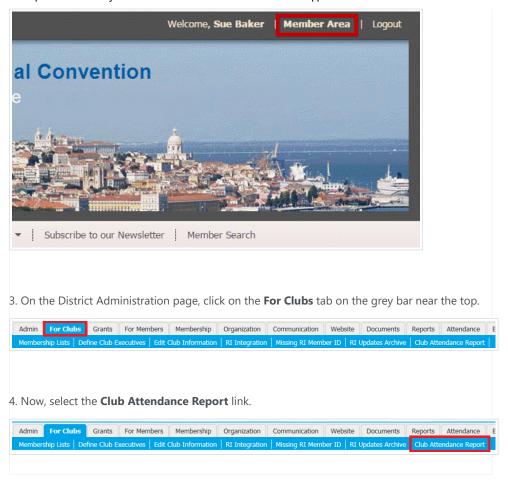
If you are a club executive, you have the ability to report your club's monthly attendance through the district site as well as through your club site.

1. To report club attendance, you must first log in to your district website. Click **Member Login** at the top right and enter your details.

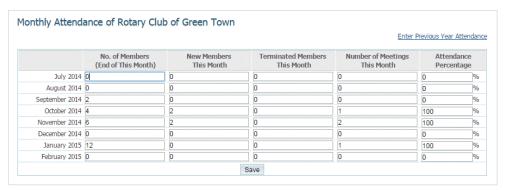


2. You are now logged in. To access the District Administration page, click on **Member Area** on the top right.

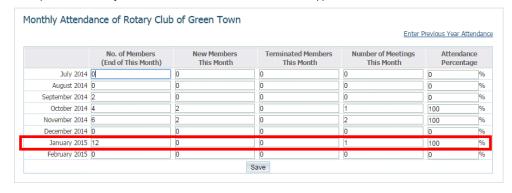




5. You are now on the **Monthly Attendance** page for your Rotary Club. Here, you can make your attendance report.



6. First, enter the number of members who attended meetings by the end of a given month in the field provided. Then, enter **New Members this Month**, **Terminated Members this Month**, the **Number of Meetings this Month** and the **Attendance Percentage**.



7. When you are finished entering your attendance data, click **Save.** Your report is filed with the district.





Help Desk Software by Kayako