

# **District – For Club Executives**

## For Club Executives – Non ClubRunner Subscribers

### Access Rights:

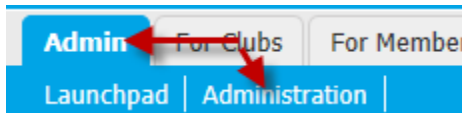
- By Default; only the Club Executives (President, President-Elect, Secretary, and Treasurer) have access rights to change information about the Club.
- If you are NOT identified as a Club Executive and should be, contact your District Secretary to set you up as an executive
- Access Levels do NOT apply with the District website, they are only used for Club version
- A District Administrator is the only one that can grant access for non-club executives.

### Navigation:

1. Login to your District site



2. Click on the **Admin (tab)...**Administration link



3. Now scroll to the bottom of the Administration page and on the right hand side find the **For Club Executives** section.

<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="#">Club Attendance Report</a>
<a href="#">Define Club Attendance Manager</a>
<a href="#">Switch on Data Integration with RI (Automatic) <b>NEW!</b></a>
<a href="#">Report Data Changes to RI (Manual Emails)</a>
<a href="#">Missing RI Member ID Report</a>
<a href="#">RI Updates Archive</a>

### Add or Remove members:

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 **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Active Members List** link
- Click on **Add New Member**, located at the top right.
- Fill in that member's information, including their login name and password.
- Click on **Add Member** to add the member to your club.

To mark a member as an Ex-member (inactive member):

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Active Members List** link
- Click on **Mark EX** next to the member. This is how we terminate members
- Enter the members **termination date** as the Ex-Member as of date.
- Next please indicate a **reason** for terminating the member.
- Once the Termination date and reason have been populated the Terminate Member button should become enabled.
- Press the **Terminate Member** button to make the member inactive.

If you want to remove the member information from your website, you can delete them from the Inactive Member List.

To delete a member:

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Inactive Member List** link
- Click on **Delete** next to the member that you want to completely remove.
- A final message box will appear asking "Are you sure?". Click **OK** to delete.

### **Edit Members Information:**

If you need to update a member's profile follow the below instructions:

To edit a member:

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Active Members List** link
- Now click on the **members name** to get into their membership profile
- You can click on the different tabs to get to the different areas within the Member Profile.
- Click on the **Edit** button to be able to make changes. Click the **Save** button when complete.

## Changing the Clubs Meeting Information:

It is important to update your club's meeting time and place on the district website. This information is posted for all clubs in the Club Directory and "Where Clubs Meet" pages.

To edit your club's meeting information:

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Club Information Page** link
- Under the Meeting Information section; Verify the meeting day and time, and address.

**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.

- Click on the **Save Changes** button.

To check the map:

- Click on the **Home** link located at the top of the page.
- Click on the **When/Where Clubs Meet** link, typically on the left hand side of the page, under the widget called "District Info".
- Locate your club from the list of all district clubs (they are ordered by meeting day & time), and click on the **Map** link. A new window will appear that leads to Google Maps.

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 province. Also make sure you didn't input the actual address under "Meeting Place", which should really be the name of the venue.

## Specify your Clubs Website:

Your District site has a listing of clubs and their website links. To change your club's website link, follow these steps:

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Club Information Page** link
- Fill in your website address next to **Website**.

**TIP:** Don't forget the HTTP:// before your website address. The link will not work if you omit this part.

- Press **Save Changes**.

### Define Club Executives:

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

- The District organization chart
- The District's auto-generated group mailing lists
- Your club's website (if you are on ClubRunner)

**NOTE:** Although your executives' names appear on a web page, their email addresses do not.

It is also important to state who your executives are so that any one of them will be granted access when they try to login to the District site. To specify your executives and directors:

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Define Club Executives** link
- This will take you to a page with many different positions listed. You do not need to fill each one in! Whatever you don't specify will simply not be listed on the site.
- To assign a person to an existing position, click on **Edit**.
- Choose the member's name from the drop down list.
- Press **Save**.

To Define a New Position:

- Click on the **Add New Position** link found in the top right corner
- Enter a **Title** for the position being used. For Example if position Other was selected you could enter Website Administrator as the Title. The title will be displayed on the website.
- Next select a Position from the dropdown list. Only a District Administrator can create new positions to be added to this list.
- Now select an active member from the **Select Member** list
- Once done click on the **Save** link to save the changes.

**NOTE:** If you do not see the member's name in the listing, you will need to add this member to your club directory.

### Assign my Club's Attendance Manager:

Each club has an attendance contact (called the Attendance Manager) who is the person that will be reached 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.

To change the Attendance Manager for your club:

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Define Club Attendance Manager** link
- Choose the new contact person from the drop down list of your members.
- Press **Select**.

To change the Attendance Manager back to the club secretary:

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Define Club Attendance Manager** link
- Check off the box next to "Assign back to club secretary?"
- Press **Select**.

### Reporting Attendance for your Club:

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

Note: You must be a club executive to be able to report attendance for your club.

- **Login** and go to **Admin (tab)...Administration** link.
- Find the **For Club Executives** section and click on the **Club Attendance Report** link
- Enter the number of members as of the end of the month shown.
- Enter the attendance percentage for that month.
- Press **Save**.

Note: For clubs using ClubRunner, you can report attendance either through the District site or through your club site. For help reporting through your club site, please refer to the Help section on your site.

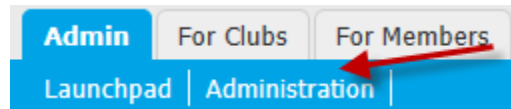
### Switch on Data Integration with RI (Automatic):

Before you can turn on RI integration for your Club from the District site you need the Club President, Secretary or Club Executive to log onto the RI website (<http://www.rotary.org>) and click on the **My Rotary...Sign in/Register** link and specify us as the vendor of choice.

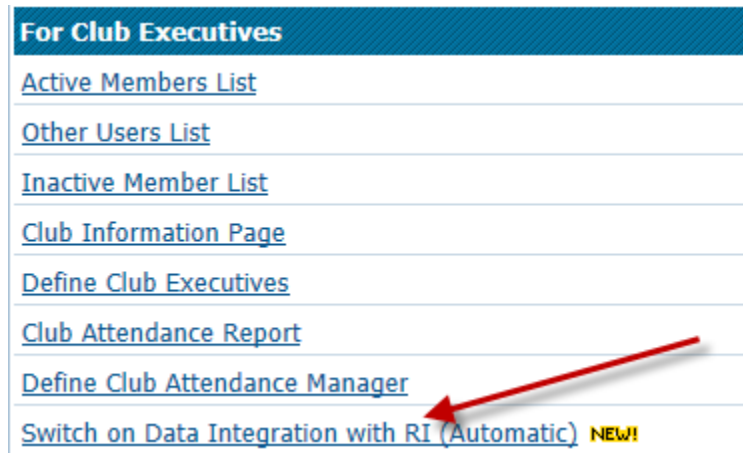
For more help on this see the RI Integration Guide:

<http://clubrunner.helpserve.com/Knowledgebase/Article/View/464/0/ri-integration-guide>

1. Login to the District Version of ClubRunner. Note: You must be a Club Executive: President, President Elect, or Secretary to have access.
2. In the menu bar click **Admin (tab)...**Administration.



3. Under the For club Executives section click on **the Switch on Data Integration with RI (Automatic)** link.

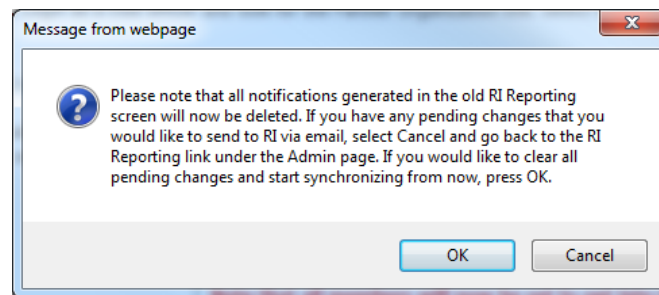


4. Check the checkbox to switch on Data Integration between ClubRunner and RI.

Switch on Data Integration between ClubRunner and RI for all active member records within my club.

**Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.**

I agree to the [Terms and Conditions](#) of this integration.

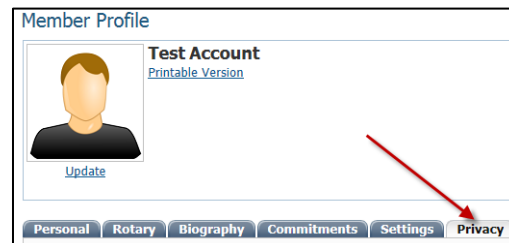


5. Customize any privacy options by selecting the appropriate fields to synchronize. This will set the RI Integration Privacy defaults for all members. Members will still have the option to decline sharing information if they choose. Now Press the **Update Privacy** button.

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

6. For Club members who prefer not to send data updates: Go to their ClubRunner member profile and select the **Privacy Tab**.



7. Uncheck the fields that the member does not wish to share with RI. Then click the **Save** button.



Communication Preferences

**District Emails**   
**District Bulletin**

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RI 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.

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

*Note: Name (highlighted in red) is required and cannot be unchecked.*

## Support & Training

Visit our **Support Center** at [www.ClubRunnerSupport.com](http://www.ClubRunnerSupport.com) to access all resources available, including submitting a support ticket, searching the knowledgebase, 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 style="text-align: center;"><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 style="text-align: center;"><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 style="text-align: center;"><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 style="text-align: center;"><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 style="text-align: center;"><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 style="text-align: center;"><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:

