ClubRunner

District Guide

For All Members
& Club Executives

2018

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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.

Note: This guide is intended for clubs in the district that do not have a ClubRunner subscription. If your club is using ClubRunner, you do not need to update membership information on the district site, as all your changes are automatically integrated from the club to the district site.

How to Login

The public can visit and view the District public homepage. However, in order to access private functions intended for members and club Executives, you will need to log in first.

- Click on the **Member Login** link at the top right of the home page.
- Enter your assigned **Login name** and **Password,** and click the **Login** button.
- After you login it takes you back to the home page. Click on the **Member Area** link found in the top right corner.

You are now at the **Administration** page. Here you can easily access commonly used features and functions.

Note that only members who have been assigned **District Administrator** access rights (i.e. full access rights) are able to click on all the links on the Administration page. Unless you have District Administrator rights many commands you see will be 'grayed out'.

Administration

Home Page Editing
Home Page Stories
Story Management
Edit Home Page Links
Download Files
Site Pages Management
Photo Albums Management
Documents Download
Website Sponsoring Area
Website Sponsoring Guide
Website Designer 3.0
Edit Meta Tags NEW!
Edit Favicon Logo
Image Library
Google Analytics NEW!

Communication Services
Email Message Services
Email All Members
District Organization Chart
Committee Management
Members Email Status report
Email Traffic Report
Edit Bulletins
Archived Bulletins NEW!

Events
Event Calendar
Event Planner (Version 2) | Old Version
MyEventRunner (new window)

District, Clubs & Membership
District Dashboard
Club & Membership Detail
Member Detail
Request Member Updates
Member Access Rights
Clubs Attendance Management
Edit Executives and Directors
Download Member Data
Member Data Changes
RI Integration Archive | Member Synchronization
Reports
Member Designations
District eDirectory Builder 2.0

For Members
Edit My Profile
Change My Password
District Directories
Search Member eDirectory
My Committees

For Club Executives
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
RI Member Synchronization

Trouble Logging In

If you receive a red "The user name or password you provided does not match our records" message, then either your username or password is incorrect. Try entering the information again.

If you are still not able to log in, you can retrieve and or reset your information by clicking the **Forgot login name?, Forgot password?** or **New user?** link.
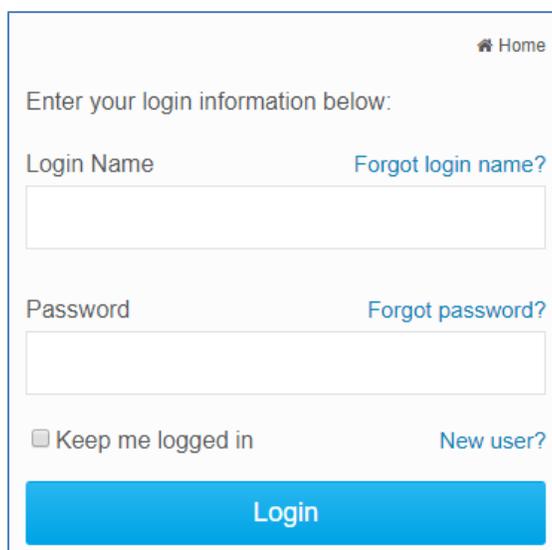
For Club Executives

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

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

How to Update Your Club Member Information

Using the "**For Club Executives**" section, click on **Active Members List**. This list contains the club's 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 with them.

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

Note: You can enable RI Integration, a feature that will automatically synchronize any updates you make to your club, membership and officer information directly with Rotary International. See the section further down in this guide for more details.

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 even more relevant if that member is a district or club officer.

To change a specific member's profile:

- Click on **Active Members List**
- Click on the **member's name** to view their profile
- Select the appropriate tab and click the **Edit** button on the right
- Fill in or change as many details as you need
- Click the **Save** button

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

- See next page for image

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 and add to their profile.

New Member

Rotary Club of Green Town
Oakville, ON, Canada

Title	
First Name	
Middle Name	
Last Name	
Suffix	▼
Gender	○ Male ○ Female
Membership Type	Active ▼
Sponsor	
Date Joined Rotary	May 01 2018 📅
Date Joined Club	May 01 2018 📅

RI requires that Date Joined Club must be within the past 30 days.

Member Mailing Address

◉ Home   ○ Work

Address Line 1	
Address Line 2	
City	
Country	Canada ▼
Province	Ontario ▼
Zip/Postal Code	

Transferring Member?

◉ No   ○ Yes

Rotary Member No.	
Former Rotary Club	
District	

ClubRunner Account

Email	
Login Name	
Temporary Password	

Send email notification to this member? ☑ System ▼ Welcome New Member ▼

◉ Report this new member to Rotary International
○ Do NOT report this new member to Rotary International

Please note that member additions are performed manually by RI Data Services, and could take up to 5 business days to be processed.

Add Member

Terminate a Member

When a member leaves the Club, you have to terminate the member. You are essentially changing the member's status from Active (or Honorary) to Ex-member. Once done, the member will then reside in the Inactive Members List, so you will always have access to their profile information.

- Click on **Active Members List**
- Click on the **Change Status** link
- You will then see three options, click **Terminate Membership**
- 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

Note: *Rotary Clubs cannot set the date of termination more than 30 days into the past, or 30 days into the future, due to Rotary International rules.*

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 or honorary member. The link to the "Other Users" list can be found on the left while on the Active Member List.

Some examples of other users are:

- Exchange Students
- Rotaract

- Staff
- Interact

Update Your Club's Information

It is important to update your club information. This information is posted on both the public and private pages of the District Website. Many members consult this list to do meeting make-ups, so verify the club's meeting information is up to date.

To change your club's information:

- Click on **For Clubs** on the blue menu bar near the top
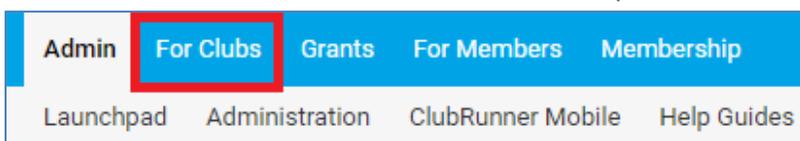
- Click **Edit Club Information** on the grey menu bar
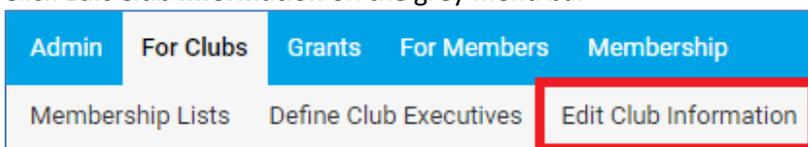
- This will take you to the edit Club Information page

Note: If your club uses ClubRunner for its own administration, you do not need to update the District site with any club or member changes. Any changes at the club website will automatically go to the district, as long as both systems are on ClubRunner.

Define Your Club's Executives and Directors

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)
- Rotary International's official directory (provided you have integrated, see RI Reporting & Integration section for more details)

It is also important to define your club executives so that they receive access to the **For Club Executives** section automatically. ClubRunner lists the executives by Rotary Year. This makes the transition easier from year to year by allowing you to define the positions ahead of time. It is important to state who your executives are so that they get granted access when they try to login to the District site during the start of their term.

- Click on **Define Club Executives**, in the "For Club Executives" section on the Administration page. 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** 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 **Save**.

Title	Position	Name	Actions
President	President	Sue Baker	Edit | Clear Partner Info | Delete
President Elect	President Elect	Fred Pohl	Edit | Clear Partner Info | Delete
Secretary	Secretary	Edward Chu	Edit | Clear Partner Info | Delete
Treasurer	Treasurer	Club Runner	Edit | Clear Partner Info | Delete
Social Media	Social Media	Olaf Stapledon	Edit | Clear Partner Info | Delete

Tip: You can click and drag the position name, up or down to rearrange the order in which they are displayed.

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

Report Club Attendance

The District website has an easy attendance reporting section for recording your club's monthly attendance.

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 (See below).

Note: If your club uses the club version, you will not need to report club attendance through the District site. The club site will allow you to enter each individual weekly 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, and send this information to the district website if both club and district are using ClubRunner. For help using the club version, please visit www.clubrunnersupport.com.

To report your club's monthly attendance using the district site:

- Click on **Club Attendance Report**.
- 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 31st.
- 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**.

	No. of Members (End of This Month)	New Members This Month	Terminated Members This Month	Number of Meetings This Month	Attendance Percentage	
March 2018	83	2	0	4	89.6	%
April 2018	84	1	1	4	86.3	%
						Save

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.

To change the Attendance Manager for your club:

- On the **Administration** page, click **Define Club Attendance Manager** under the **For Club Executives** section.
- Choose the new contact person from the drop down list of your members.
- Click on **Select.**

Assign Attendance Manager

Cyril Kornbluth 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 correspondance will be forwarded to him/her.

Club Name	Rotary Club of Green Town
Select From	Cyril Kornbluth ▾
Assign back to Club Secretary?	☐

Select

Tip: To change the Attendance Manager back to the club secretary, check the box next to "Assign back to club secretary?"

RI Reporting and Integration

ClubRunner has integrated its databases with Rotary International. The RI Integration feature allows automated synchronization of member names, member contact information, club details and club officer changes.

When a club database is updated with, for example, a member's new contact information, that change will automatically be incorporated into RI's database within minutes, eliminating the need for clubs to formally notify RI or make the change again manually through Member Access.

The Compare and Synchronize feature allows you to compare your member data as it appears on ClubRunner with what is available in RI's Member Access. You then have the option to push your member information directly from ClubRunner to RI or pull your information from Member Access to populate your ClubRunner profile allowing you to clean up any inconsistent data between the two databases.

Note: *Each club needs to opt into RI Integration at the RI website, but this only needs to be completed once.*

Opt In to Activate RI Integration

1. Opt in at RI's Member Access Portal (www.rotary.org)
   a. Log in either as President, Secretary, or Executive Secretary
   b. Select ClubRunner as authorized partner from the Partner Organization section
   c. Agree to the Terms & Conditions
   d. It could take up to 24 hours to take effect

2. After 24 hours, opt in within your ClubRunner Site
   a. Switch on RI Integration link on Admin
   b. Select checkbox to switch on integration
   c. Agree to Terms & Conditions
   d. Select the fields you'd like to share as a club. Note that you can further opt out on a per member basis, covered next.

Privacy options by member

This 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.

To access this section for any member, edit to their member profile, then select the **Privacy** tab.

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. ClubRunner will 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.** 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.

Compare & Synchronize

This function allows you to synchronize the data in ClubRunner with what has been added to Rotary International and vice versa. You will see a list of members with a date stamp of when the account was last integrated, a list of ClubRunner Members Missing on RI Database and Members Listed on RI but Missing in ClubRunner.

Compare: This function brings you to the **Member Profile Comparison** page. From here, you will see what information has been entered in RI and ClubRunner as well as your changes.

Add Member to RI: This function will send the member's data to Rotary international and add the member into the Club. This process can take up to 24 hours.

Add Member to ClubRunner: This function will pull the member's data from Rotary Internationals' database and create a new profile on ClubRunner for the member.

Member Profile Comparison

You will see a breakdown of the fields shared between RI and ClubRunner. The items listed under ClubRunner displays the member information as listed on ClubRunner, while the data under Rotary International lists the data as it appears in RI.

Between the information within ClubRunner and RI are arrows and equal signs. Clicking on the option will allow you to make changes from ClubRunner to RI and vice versa.

➡️ - Indicates the information listed in ClubRunner will replace the information in RI

⬅️ - Indicates the information listed in RI will replace the information in ClubRunner

🟰 - Indicates the information matches and is the same in ClubRunner and RI

Once you have made the necessary changes, click the **Synchronized Selected Fields** button to apply the changes. Please note changes can take up to 24 hours to be applied at Rotary International. Please see the next page for a screen shot.

Member Profile Comparison for Baker, Sue

Member:	Baker, Sue	
Rotary Member Number:	000000	
Rotary Club Id:	0	

The following chart displays this member's information as it currently appears on both ClubRunner and RI. For any discrepancies, you can copy over either the ClubRunner value or the RI value by checking the box for the corresponding field, then clicking on the arrow to reflect the direction of the copy. Once you have selected all your values, click on the Synchronize button below.

☑	Field	ClubRunner	← →	Rotary International
☐	Name			
☐	Prefix		=	
☐	First Name	Sue	→	S
☑	Middle Name		←	B
☐	Last Name	Baker	=	Baker
☐	Suffix		=	
☑	Date of Birth		←	Sep 28, 1946
☐	Sponsor		=	
☐	Classification		=	
☐	Date Joined Club	Jan 17, 2008	=	Jan 17, 2008
	Date Joined Rotary	Jan 17, 2008	=	Jan 17, 2008
☑	Address			
☐	Address Type	Home* ▾	=	Home* ▾
☑	Address1	1 Main st	→	
☐	Address2		=	
☑	City	Mississauga	→	
☑	State	Ontario	→	
☑	Zip	A1A 1A1	→	
☑	Country	Canada	→	
☑	Contacts			
☐	Phone Type	Home* ▾ Canada 555-555-5555	→	Home* ▾
☐	Fax Type	Home* ▾	=	Home* ▾
☐	Email Type	Primary* ▾ Sue@example.com	=	Primary* ▾ Sue@example.com
☑	Website URL	Example.com	→	

Synchronize Selected Fields

Training and Support

Visit our **Support Center** at www.ClubRunnerSupport.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.