ROTARY CLUB SECRETARY TASKS:

NAVIGATING THE CLUBRUNNER ADMIN AREA ON THE CLUB 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 with ClubRunner Websites — [SEE: "How do I add a new member using the club website?" PDF file]

- **Add Member** — Login on Club Website and Select Member Area link --> Membership (tab) --> Member Lists --> Add New Member (upper right corner)
- **Edit Member Info** — Login on Club Website and Select Member Area link --> Membership (tab) --> Member Lists --> Select Member Name --> click on Edit. If you do make changes, remember to press the Save button at the bottom of the page.
- **Terminate a Member** — Login on Club Website and Select Member Area link --> Membership (tab) --> Member Lists --> Select Change Status Link of Member --> Select Terminate Membership --> Fill out remaining fields.

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Knowledgebase: Support and Help > Knowledgebase Articles > Club Version > Club and Membership > Membership Management > Active Members List

How do I add a new member?

Posted by David H. (Support) on 06 December 2016 11:18 AM

When you recruit a new member, or discover an active member is missing from your database, you can use ClubRunner to add a new member to your **Member List.**

1. To access the **Member List** feature, you must go to your Club homepage and log in. Then, click on **Member Area** on the top right, under your Club banner.
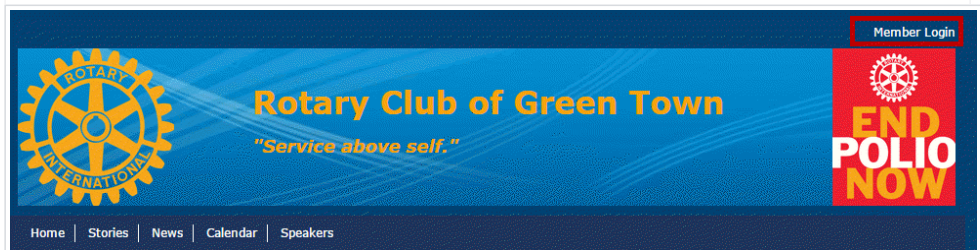
2. Along the top of the screen you will see several tabs. Click on the **Membership** tab.
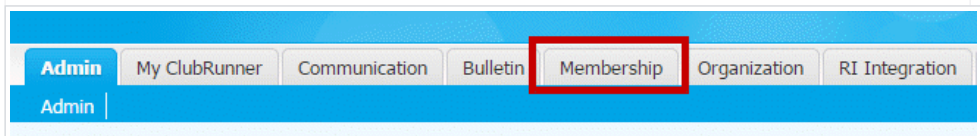
3. Now, click on **Member Lists**.
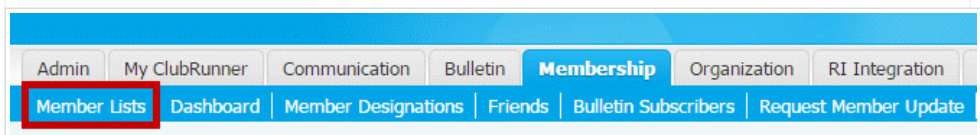
4. You are now on the Active Members List page, where you can browse a list of all currently active members.

Tweets by @ClubRunner

Active Members List

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 ☐ By First Name	Name ▲	Type	Access	Action	
	Baker, Sue	Active	40	Mark Ex	Reset Password
	Barnes, Bill	Honorary	70	Mark Ex	Reset Password
	Barnes Jr., Bill	Active	70	Mark Ex	Reset Password
	Jackson, Eva	Active	70	Mark Ex	Reset Password
	Salvador, Carlos	Active	30	Mark Ex	Reset Password
	Tang, Simon	Active	70	Mark Ex	Reset Password

Total Members: 6 (5 Active + 1 Honorary)

5. To add a new member, simply click the **Add New Member** link at the the top right side of your active member list.

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 ☐ By First Name	Name ▼	Type	Access	Action	
	Baker, Sue	Active	40	Mark Ex	Reset Password
	Barnes Jr., Bill	Active	70	Mark Ex	Reset Password
	Jackson, Eva	Active	70	Mark Ex	Reset Password
	Salvador, Carlos	Active	30	Mark Ex	Reset Password
	Tang, Simon	Active	70	Mark Ex	Reset Password

Total Members: 5 (5 Active)

6. You are now on the **New Member** page, where you can enter contact details for your new member.

New Member

	Rotary Club of	Green Town
		Green Town, WI, United States

Title	
First Name	
Middle Name	
Last Name	
Suffix	▼
Gender	○ Male ○ Female

7. First, enter the new member's name in the fields provided. **First Name**, **Last Name** and **Gender** are required fields.

8. Now, set the membership type. This can be an active member, honorary or a custom type. Next indicate whether the member has a sponsor. If the member has a sponsor, please enter the sponsor's full name. Lastly enter the member's date for joining Rotary and joining your Club.

Note: Rotary International requires that the Date Joined Club must be within 30 days from today. If you chose a date over this you will receive an error.

Note: The Date Joined Rotary and Date Joined Club field will be different if your new member has transferred from another Club, or is a former Rotarian.

9. Now, enter the mailing address details for your new member in the fields provided.

10. If your new member is transferring from another Club, click on **Yes** under the **Transferring Member?** header. Then, fill in their former Club and district details, if known.

Transferring Member?

	○ No ● Yes
Rotary Member No.	128746
Former Rotary Club	Superior Sunrise
District	6270

11. Next, film in the member's email address and set a user name and temporary password. You may also choose to send a pregenerated email welcome to the new member.

E-mail	spevensie@example.com
Login Name	Susan.Pevensie.9723
Temporary Password	9723
Send email notification to this member?	☑ System ▾ Welcome New Member ▾

☐ Check here if you do NOT wish to notify Rotary International of this new member enrollment

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]

12. Click the box if you do NOT wish to notify Rotary International of this new enrollment.

E-mail	spevensie@example.com
Login Name	Susan.Pevensie.9723
Temporary Password	9723
Send email notification to this member?	☑ System ▾ Welcome New Member ▾

☐ Check here if you do NOT wish to notify Rotary International of this new member enrollment

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]

13. Finally, click **Add Member** to save the new member to your Club's Active Members List.

E-mail	spevensie@example.com
Login Name	Susan.Pevensie.9723
Temporary Password	9723
Send email notification to this member?	☑ System ▾ Welcome New Member ▾

☐ Check here if you do NOT wish to notify Rotary International of this new member enrollment

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]

★★⯪☆☆ (530 vote(s))   👍 Helpful   👎 Not helpful

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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 with ClubRunner Websites — [SEE: "How do I update club officers from the club website?" PDF file]

- **Edit Executive/Director** — Login on Club Website and Select Member Area link --> Organization (tab) --> Club Executives and Directors --> Select Edit | Clear | Delete depending on your task.
- **Carry over to next year** — Login on Club Website and Select Member Area link --> Organization (tab) --> Club Executives and Directors --> Select Next Year (top of page to right of current year) and edit if necessary.

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CR **ClubRunner**
January 26 at 10:01am

Did you know you can now view and contact your club executives on the #ClubRunner mobile app?

Download it from the Google Play Store or Apple App store today!

ClubRunner ™ mobile

~~Mobile | ClubRu~~

Follow @clubrunner

Knowledgebase: Support and Help > Knowledgebase Articles > Club Version > Club and Membership > Rotary International Integration

How to update Club Officers

Posted by David H. (Support) on 22 August 2016 02:34 PM

Clubs can now update their club officer information on ClubRunner and have this information automatically synch to Rotary International.

1. Login to your club's administration page.

2. Under the heading **Membership Manager**, click on **Edit Executives and Directors**.

3. Next, click on the **Carry Over Executive and Director Positions to the Next Year** link at the bottom of the left of the list.

Club Executives and Directors

Previous Year | **Current Year: 2014-15** | Next Year

Publish Changes to Home Page | Add New Position

Sequence	Title	Position	Name	Action
20	President	President	Baker, Sue	Edit	Clear	Delete
220	Public Relations	Public Relations	Barnes, Bill	Edit	Clear	Delete

Carry over Executive and Director Positions to the Next Year

4. This will take you to the next year, where you can select your club executives and directors using the drop down menus provided.

Club Executives and Directors

Previous Year | **Year: 2015-16** | Next Year

Add New Position

Sequence	Title	Position	Name	Action
20	President	President	Select Member -- Select Member --	Save	Cancel
			Baker, Sue	
			Barnes, Jr., Bill	
			Barnes, Bill	
			Jackson, Eva	
			Kornbluth, Cyril	
			Merril, Judith	
			Osimov, Isaak	
			Pevensie, Susan	
			Salvador, Carlos	
			Tang, Simon	
			Trout, Kilgore	
			van Voght, Alfred	
220	Public Relations	Public Relations		Edit	Clear	Delete

Carry over Executive and Director Positions to the Next Year

Go Back

5. When you click **Save**, the executive positions will be synchronized with Rotary International.

Add New Position

Sequence	Title	Position	Name	Action
20	President	President	Select Member Kornbluth, Cyril	Save	Cancel
220	Public Relations	Public Relations		Edit	Clear	Delete

Carry over Executive and Director Positions to the Next Year

⭐☆☆☆☆ (18 vote(s))   👍 Helpful   👎 Not helpful

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Knowledgebase: Support and Help > Knowledgebase Articles > Club Version > Club and Membership > Editing Club Executives

How do I carry current executives over to the next year?

Posted by Pieter van Hiel on 12 November 2014 11:34 AM

Your club executive list only applies to the given calendar year in which it was created. However, you can easily carry your current list of executives over to a future year.

1. To manage your club executives, you must go to your club homepage and log in. Click **Member Login** at the top right, just above your club banner.

2. Then, click on **Member Area** on the top right, under your club banner.

3. Along the top of the screen you will see several tabs. Click on the **Organization** tab.

4. The **Organization** tab contains several features which allow you to organize your club membership. Now, click on **Executives and Directors** under the **Organizaton** tab.
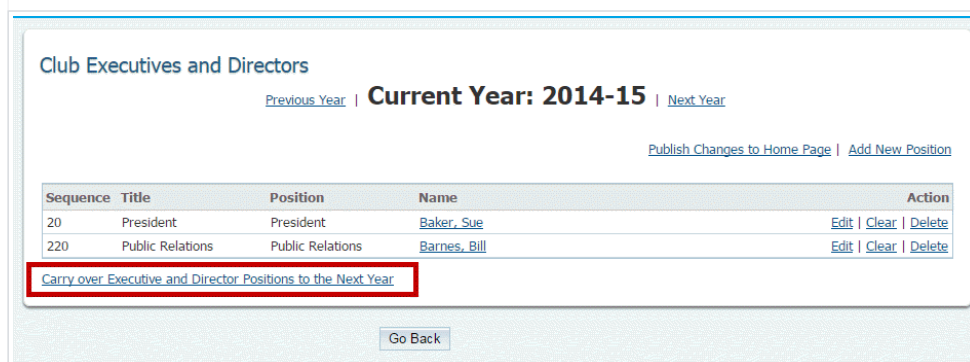
5. You are now on the **Club Executives and Directors** page. Here, you can identify club directors
and executives, remove past directors and executives, edit their contact details, and more.

6. To carry over the existing positions with their current members, click **Carry over Executive
and Director Positions** to the Next Year, as highlighted below.

7. Your currently assigned members are automatically carried over in their position until next
year. To view this, click **Next Year** at the top right of the field.
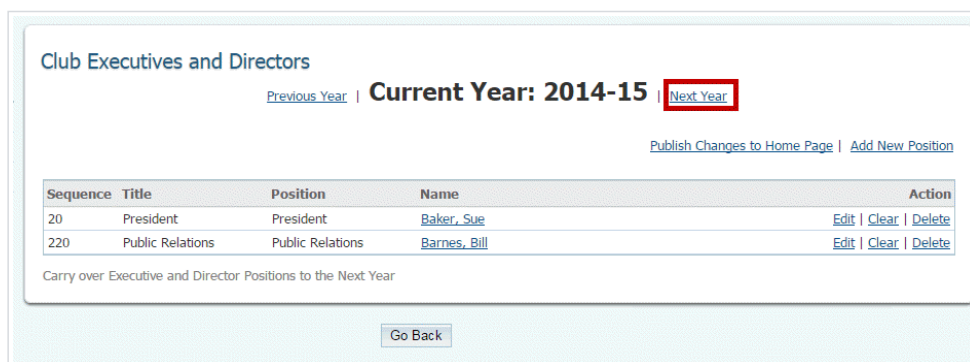
8. Here, you can confirm the executive positions are correctly assigned for the next calendar
year.

Club Executives and Directors

Previous Year | **Year: 2015-16** | Next Year

Add New Position

Sequence	Title	Position	Name	Action
20	President	President		Edit | Clear | Delete
220	Public Relations	Public Relations		Edit | Clear | Delete

Carry over Executive and Director Positions to the Next Year

Go Back

☆☆☆☆☆ (0 vote(s))   👍 Helpful   👎 Not helpful

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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 with ClubRunner Websites — [SEE: "How do I add a club executive position on the club website?" PDF file]

- **Add a new Club Executive Position** — Login on Club Website and Select Member Area link --> Organization (tab) --> Executives & Directors --> Select "Add New Position" on the right side of the screen under the Current Year heading
    - You can now select a new executive and define their position. Under the heading Title, you must enter the title used by your club for this position. This field is required.
    - Then, select the equivalent position from the drop down menu under the Position heading. In most cases, this will be the same as Title, though some clubs may have a different title for an equvialent role.
    - Note: The heading Sequence, at the far left, refers to the order in which executives appear on the homepage. This value is pre-determined by the position you select for a club member. To find out how to edit the Sequence, read the article Edit Your Club Executives [step # 7]. This link opens in a new window.
    - Next, use the drop down menu under the Select Member heading to assign one of your members to the position.
    - Finally, hit Save if you want to finalize your selection. Click Cancel if you wish to discard the information you've entered.

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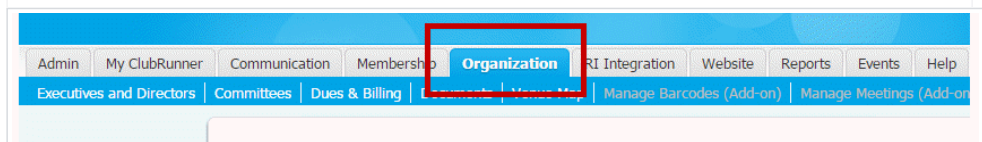| Support and Help | (1186) |
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Knowledgebase: Support and Help > Knowledgebase Articles > Club Version > Club and Membership > Editing Club Executives

How do I add a Club Executive?

Posted by Mickey D. (Support) on 18 October 2016 04:34 PM

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.

1. To manage your club executives, you must go to your club homepage and log in. Click **Member Login** at the top right, just above your club banner.

2. Then, click on **Member Area** on the top right, under your club banner.

3. Along the top of the screen you will see several tabs. Click on the **Organization** tab.

4. The **Organization** tab contains several features which allow you to organize your club membership. Now, click on **Executives and Directors** under the **Organizaton** tab.
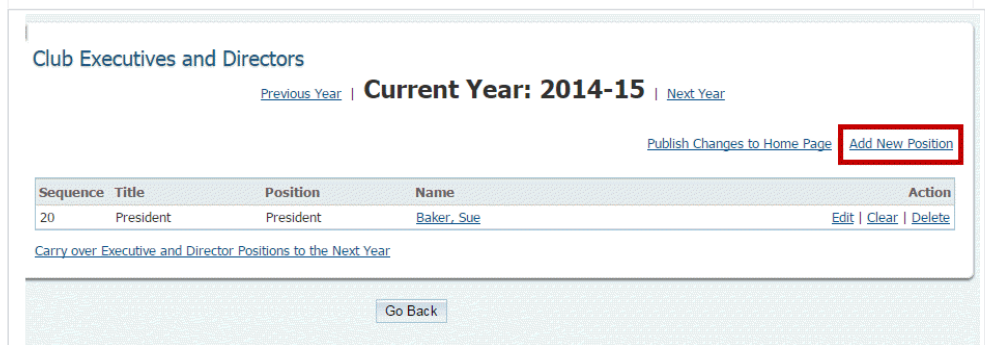
5. You are now on the **Club Executives and Directors** page. Here, you can identify club directors and executives, remove past directors and executives, edit their contact details, and more.

6. To add a new executive position, click **Add New Position**, which is located at the right side of the screen under the **Current Year** heading.

7. You can now select a new executive and define their position. Under the heading **Title**, you must enter the title used by your club for this position. This field is required. Then, select the equivalent position from the drop down menu under the **Position** heading. In most cases, this will be the same as **Title**, though some clubs may have a different title for an equvialent role.

*Note: The heading **Sequence**, at the far left, refers to the order in which executives appear on the homepage. This value is pre-determined by the position you select for a club member. To find out how to edit the Sequence, read the article Edit Your Club Executives [step # 7]. This link opens in a new window.*

8. Next, use the drop down menu under the Select Member heading to assign one of your members to the position.

9. Finally, hit **Save** if you want to finalize your selection. Click **Cancel** if you wish to discard the information you've entered.

10. You'll now see your newly added executive listed on the **Club Executives and Directors** page.

Club Executives and Directors

| **Current Year: 2014-15** |

Publish Changes to Home Page | Add New Position

Sequence	Title	Position	Name	Action
20	President	President	Baker, Sue	Edit | Clear | Delete
220	Public Relations	Public Relations	Barnes, Bill	Edit | Clear | Delete

Carry over Executive and Director Positions to the Next Year

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