

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.

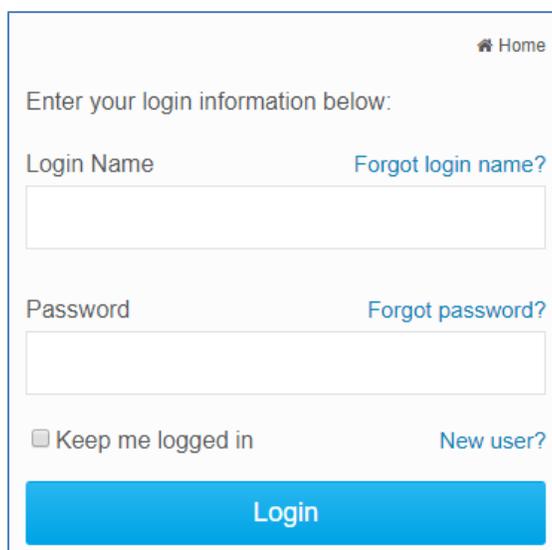
Note that only members who have been assigned **District Administrator** access rights (i.e. full access rights) are able to click on all the links on the Administration page. Unless you have District Administrator rights many commands you see will be ‘grayed out’.

Administration	
<p>Home Page Editing</p> <ul style="list-style-type: none"> 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! 	<p>District, Clubs & Membership</p> <ul style="list-style-type: none"> 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
<p>Communication Services</p> <ul style="list-style-type: none"> Email Message Services Email All Members District Organization Chart Committee Management Members Email Status report Email Traffic Report Edit Bulletins Archived Bulletins NEW! 	<p>For Members</p> <ul style="list-style-type: none"> Edit My Profile Change My Password District Directories Search Member eDirectory My Committees
<p>Events</p> <ul style="list-style-type: none"> Event Calendar Event Planner (Version 2) Old Version MyEventRunner (new window) 	<p>For Club Executives</p> <ul style="list-style-type: none"> 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.



The screenshot shows a login form with the following elements:

- A "Home" link with a house icon in the top right corner.
- The instruction "Enter your login information below:".
- A "Login Name" label and a "Forgot login name?" link.
- A text input field for the login name.
- A "Password" label and a "Forgot password?" link.
- A text input field for the password.
- A checkbox labeled "Keep me logged in" and a "New user?" link.
- A large blue "Login" button at the bottom.

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.

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

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.

Active Members List

Select Club: Green Town ▾

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	<input type="checkbox"/> By First Name	Name ▲	Type	Access	Action
Applegate, John			Active	70	Designation Change Status Reset Password
Baker, Sue			Active	70	Designation Change Status Reset Password
Brackett, Leigh			Active	40	Designation Change Status Reset Password
Chu, Edward			Active	30	Designation Change Status Reset Password
D, Mickey			Active	30	Designation Change Status Reset Password

Total Members: 5 (5 Active + 0 Honorary)

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

Member Profile



Sue Baker
[Printable Version](#)

Update

Personal Rotary Biography Commitments Settings Privacy

Edit

Member Details

Title	Ms.	Gender	Female
First Name	Sue	Date of Birth	Dec 28 1980
Middle Name		Anniversary	
Last Name	Baker	Spouse/Partner First Name	
Nickname		Spouse/Partner Last Name	
Suffix		Spouse/Partner Nick Name	
Preferred Address	Home	Spouse/Partner Date of Birth	
Preferred Phone	Home	Dues & Billing Preferred Email	Primary Email
Email	suebaker@example.com	Alternate Email	

*All emails will only be sent to the primary email address Birthday and anniversary years can only be viewed by Club Executive level or higher.

Home

Address Line 1	123 LaPlace Road	Home Phone	1 202-555-1234
Address Line 2		Cell	
City	Green Town	Home Fax	
Country	United States		
State/Province	WI		
Zip/Postal Code	12345		

Work

Company Name	Sue Holdings	Position/Title	Owner
Address Line 1	2060 Winston Park Dr	Business Phone	1 416-555-5511
Address Line 2	S 102	Business Fax	
City	Oakville	Website URL	
Country	Canada		
State/Province	ON		
Zip/Postal Code	L6H5R7		

Custom Fields

Edit

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).

Ex-Member as of: 

Please indicate reason for termination:

- Classification
- Business Transfer
- Moved
- Attendance
- Business Pressure
- Disinterest
- Health
- Deceased
- None Given
- Joined Other Club
- Family Obligations
- Duplicate record on ClubRunner
- Non-payment of club dues
- By club for cause
- Lack of participation
- Other

If other, please specify:

Ex-Member Confirmation

Please note that once you confirm this member to be marked as an ex-member, the following actions will take place. These cannot be undone if the member is reinstated.

The member's access rights will be changed to access level 70 (Member) and this member will no longer be able to login.

- Report this termination to Rotary International
- Do NOT report this termination to Rotary International

[Terminate Member](#)

- 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:

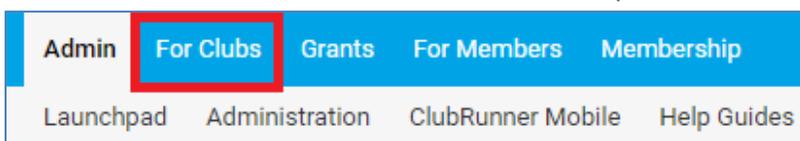
- Exchange Students
- Rotaract
- Staff
- Interact

Update Your Club’s Information

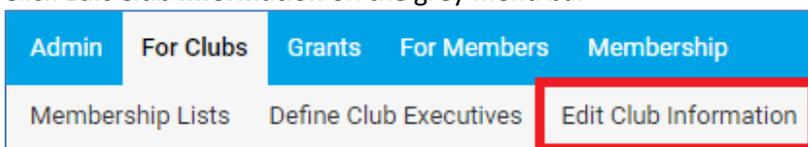
It is important to update your club information. This information is posted on both the public and private pages of the District Website. Many members consult this list to do meeting make-ups, so verify the club’s meeting information is up to date.

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**.

« Previous Year 2017-18 Next Year »				
<i>Drag and drop positions to change their sequence</i>			Carry Over Next Year	Add New Position
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	<input type="text" value="83"/>	<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="4"/>	<input type="text" value="89.6"/> %
April 2018	<input type="text" value="84"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="4"/>	<input type="text" value="86.3"/> %

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 correspondence 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.

Personal
Rotary
Biography
Commitments
Settings
Privacy

[Edit](#)

Communication Preferences

Club Emails ✔	ClubRunner Connect ✔
Club Bulletin ✔	ClubRunner Service Updates ✔
District Emails ✔	ClubRunner Product Announcements/News ✔
District Bulletin ✔	
Zone Emails ✔	
Zone Bulletin ✔	
Inter Club Email ✔	
Register Guest Confirmation Email ✔	

RI Integration 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.

Allow Name ✔ (Club Opted In)	Allow Home Phone ✔ (Club Opted In)
Allow Home Address ✔ (Club Opted In)	Allow Cell Phone ✔ (Club Opted In)
Allow Business Address ✔ (Club Opted In)	Allow Business Phone ✔ (Club Opted In)
Allow Birthday ✔ (Club Opted In)	Allow Home Fax ✔ (Club Opted In)
	Allow Business Fax ✔ (Club Opted In)
	Allow Primary Email ✔ (Club Opted In)

[Edit](#)

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.

Filter records: Display records

Name	ID	CR Member Type	RI Member Type	Last Updated	Actions
Amin, Shohreh	9162163	Active	Member	Jul 31, 2014	Compare
Brackett, Leigh	9165504	Active	Member	Jun 30, 2016	Compare
Harris, Clare	4621049	Active	Member	Jun 04, 2016	Compare
Baker, Sue *	6839830	Active	Member	Nov 11, 2009	Compare

Showing all 4 records

ClubRunner Members Type Mismatched at RI

These members are listed in both ClubRunner and Rotary International, but with different membership types. Click on Edit Profile if you would like to change the ClubRunner type. Note that this will not update RI but this feature is coming soon. Note that any RI Duplicates will also appear here, which can be ignored provided they have their original record already matched.

Filter records:

Name	ID	CR Member Type	RI Member Type	Last Updated	Actions
Doe, Jane	5898050	Honorary	Member	Nov 11, 2009	Edit Profile

ClubRunner Members Missing in RI

These members are active and honorary members in ClubRunner, but do not appear on the RI membership list. To add to RI, click on the link to the right.

Filter records:

Name	ID	CR Member Type	RI Member Type	Date Added	Actions
Kornbluth, Cyril	2000000	Active	-	Apr 22, 2016	Add Member To RI
Merril, Judy		Active	-	Apr 04, 2016	Add Member To RI

RI Members Missing in ClubRunner

These members are active and honorary members currently listed on the RI database, but do not appear in your ClubRunner list. To add to ClubRunner, click on the link to the right.

Name	ID	CR Member Type	RI Member Type	Date Joined	Actions
Merril, Judith	8800000	-	Member	Apr 07, 2016	Add Member To ClubRunner
Kuang, Ni	2200000	-	Member	Apr 07, 2016	Add Member To 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.

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