

I. Introduction



1. General Overview

The Committees Module is designed to organize and manage all your club committees in a centralized location. You now have a place to exclusively store your committee lists, list all members, chairs and secretaries associated with each committee, and create its own directory listing, complete with links to member profiles, email and phone numbers.

On the Committee Management home page, you will find a complete listing of all yearly and standing committees along with their corresponding chairs.

This page is organized by services and their directors, followed by all committees under that particular service.

NOTE: All listed services are imported to this module from the data that you have in your club directory.

 Membership Manager
Active Member List
Other Users List
Inactive Members List
Friends of the Club
Online Newsletter Signups
New Member Orientation
Dues & Billing
Switch on Data Integration with RI (Automatic)
Report Data Changes to RI (Manual Emails)
Active Members Update Request
Edit Current Executives & Directors
Edit Next Year Executives & Directors
Committee Management 
Birthday & Anniversary Report
Download Member Data
Custom Reports (Optional)
Member Designations

2. Basic vs. Enhanced Version

Below is a comparison listing of what each version of the Committees Module allows you to do:

	Basic	Enhanced
Add Yearly & Standing Committees	X	X
View All Yearly & Standing Committees & Corresponding Chairs	X	X
View Committee Chair, Secretary & Members and their contact info for each committee	X	X
Email Committee Members		X
Upload Documents		X
Create sub-committees		X

3. Yearly vs. Standing

Yearly Committees

These are committees formed for your club for only the current Year. If you need to carry the information from a specific committee over to another year, click on the link **“Carry this committee over to next year”**. This will result in all members and their contact information duplicated for the following Rotary year.

NOTE: Any documents posted or emails sent in the previous year will not be carried over.

Standing Committees

These are committees that are always in existence in your club, and do not have an associated year. This information will carry over from year to year.

Committees

[View Yearly Committee](#)

[View Standing Committees](#)

[Committee Listing](#)

[Member Committees](#)

4. Who can create and Manage Committees?

You must have access rights of Club Executive (level 50) or higher. This will allow you to:

- Add, edit and delete committees and their members
- Arrange the listing sequence
- Create subcommittees (Enhanced Version Only)
- Add documents (Enhanced Version Only)
- Email committee members (Enhanced Version Only)

NOTE: Once you are a member of a committee, regardless of your access rights level, you will have access to your committee page.

II. Basic Version

1. How to create a committee and add members

To create a committee, start by going to the **“Committees Management”** link from within your Administration page. Then, click on **“Add a Committee”** either in the yearly or standing committee’s section of the web page.

Committee List

Current: 2010 - 11			
Name	Chair	Type	Actions
Website Manager (Director: Geoff Iles)			Add New Committee
Website Committee	Paul Connery		Add Delete Down Up
Public Relations Chair (Director: Judy Beasley)			
Public Relations Committee	Mark Davis		Add Delete Down Up
Membership Director (Director: Adam Casson)			
Membership Committee	Brian Burch		Add Delete Down Up

Total: 3 committee(s)

Once the popup box appears, you will be prompted to enter in the following:

- Committee Name
- Director (to be selected from drop down menu)
- Option to make this committee Private (which will not appear on the public home page, but remain available in the members only area)
- Description (optional)
- Option to Associate to a previous year's committee. If you choose this option, you can select from the dropdown list which committee this relates to from last year.

NOTE: You must have access rights of Club Executive (level 50) or higher.

Add New Committee

Current: 2010 - 11

Name (at most 250 characters)

Director

Private

Description (at most 1000 characters)

Associate to a previous year's committee

Communications

To add a new member to a committee, click the Committee Name. This will open up the committee. Click Add Member.

Committee List

[Home](#) > Website Committee

<< Current: 2010 - 11 >>

[Carry this committee over to next year](#)

Members | Subcommittees | Documents | Email

Sort using first name [Add Member](#)

Name	Club	Position	Access Level	Home Phone	Work Phone	Actions
Connerly, Paul	Sunnyville Rotary	Chair	Chair			

Total: 1 member(s)

Once the popup box appears, you will be prompted to enter in the following:

- Select Name from the Members field
- Enter Committee Position name
- Select Committee Access Level
- Click Save to finish your changes

Add a member to Website Committee

1) Please locate the member either by selecting their club and name, or by searching their name:

Clubs OR Last Name

Members

2) What is the position or title of that member in this committee?

3) What is the access level of that member in this committee?

Member

Secretary or Administrator (can edit this committee)

Chair (can edit this committee)

III. Enhanced Version

1. Enhanced Version Features

The Enhanced version allows for further functionality once your committees have been added. You can **post documents** and folders for download exclusively by committee members, **send secured emails** to committee members, and **create subcommittees** that each has their own set of functions.

2. What are Subcommittees?

These are committees that are part of a larger committee. Subcommittees are visible within the larger committee, and are a nice way to create a structured hierarchy. Subcommittees can be private or public and each have access to their own area to define members, documents, emails and subcommittees. Members of a parent committee have access to information within the subcommittees, but members of a subcommittee do not get access to the parent committee information.

Committee List

[Home](#) > Past Presidents

Standing committee for past club presidents.

Name	Chair	Type	Actions
subcommittee			

Total: 1 committee(s)

3. How do I post Documents?

1. Once in the committee module, select the committee that you need to upload a document to.
2. Select the "Documents" tab

Committee List

[Home](#) > Website Committee

Current: 2010 - 11

[Carry this committee over to next year](#)

Name	Owner	Uploaded File	Date	Authorization	Actions
Main					

3. Click on the “Add New Document” icon under the actions column. Once the popup appears, you will be prompted to:
 - Enter the document name
 - Enter the description (optional)
 - Select access level from the drop down menu (see below for definitions)
 - Click on the Browse button and locate the file from your computer

Name (at most 250 characters)

Description (at most 1000 characters)

Access Level:

Committee Members

Select file to upload:
 (bmp, doc, docx, eps, gif, html, htm, jpeg, jpg, pdf, png, ppt, pptx, swf,tif, txt, vsd, xls, xlsx) Note: File size should not be more than 4M.

4. Click Save to document changes

Repeat this process for each document you wish to upload. Note that you can change the order sequence that these documents appear in by clicking on the corresponding up and down arrows located under the Actions column.

NOTE: Definitions for access levels

Committee Members – Only available to members of the committee where the document is posted.

Public – Is available to anyone (acts as a download file).

Private – Only available to club members, upon login.

Can upload the following file formats:

PDF, HTML, HTM, DOC, DOCX, XLS, PPT, TIF, JPEG, JPG, GIF or EPS

4. How do I create folders to organize documents?

1. Once in the Committee’s module, select the committee that you need to upload a document to.
2. Select the “Documents” tab
3. Click on the “Add New Folder” icon under the actions column.

Committee List[Home](#) > Website Committee

<< **Current: 2010 - 11** >>

[Carry this committee over to next year](#)

Members | **Subcommittees** | **Documents** | **Email**

Name	Owner	Uploaded File	Date	Authorization	Actions
 Main					 

Once the popup appears, you will be prompted to:

- Enter the document name
- Enter the description (optional)
- Click Save

Name (at most 250 characters)

Description (at most 1000 characters)

Repeat this process for each folder you wish to create. To add documents within folders, be sure to click on the Add New Document icon located on the folder row rather than the Root row.

5. How do I send email to my committee members?

1. Once in the module, select the committee.
2. Select the "Email" tab

Committee List[Home](#) > Past Presidents

Standing committee for past club presidents.

Members | **Subcommittees** | **Documents** | **Email**

[Show All Emails](#) | [Compose new message](#)

3. Click on the [Compose new message](#) icon.

- Select your recipients from your distribution list, located on the left hand side of the screen. You may need to click on the plus (+) sign to expand the group.

Step 1: Select the recipients of this message by clicking on the group name to expand, then select from the list of people.




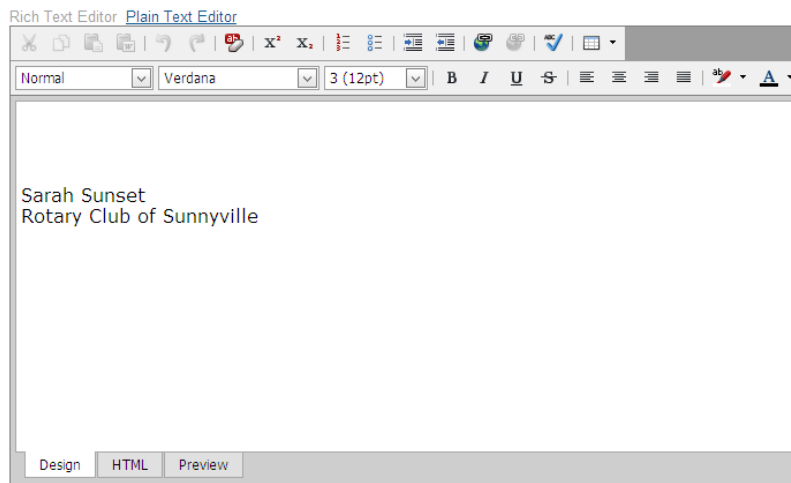
- Enter the subject of your email. **NOTE: You cannot send an email without a subject line.**

Step 2: Enter your email subject and message.

Subject:

- Enter the body of your message.

Message: If you are copying and pasting from Word, please use the **Paste from Word** icon ()



- If you have any attachments to include, expand step 3 and click on "**Browse**" to locate the file on your computer.

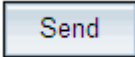
Step 3 (Optional): Upload attachments to your email.

Attachment [Total file size for uploaded attachments cannot exceed 3MB] ✖

8. Select your email options

Step 4: Choose your email options and send.

- Send a list of recipients as an attachment.
- Copy me on this email.

9. Press  to immediately distribute your email to your recipients. Otherwise, press "**Save as Draft**" to keep the message for later.

IV. Support & Training

Visit our **Support Center** at <http://clubrunner.helpserve.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. The following is a list of all the various resource guides available to you.

<p style="text-align: center;"><u>Knowledgebase</u></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;"><u>Downloads</u></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;"><u>On-Demand Videos</u></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;"><u>Webinar Training</u></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;"><u>Submit a Ticket</u></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to support@clubrunner.ca. Our turnaround time for email tickets is 2 business days.</p>	<p style="text-align: center;"><u>Community</u></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:

