## 1. General Overview

Welcome to Assistant/Area Governors Module, this well structured section of the District Organization Chart will assist you in organizing the club lists for all your Assistant/Area Governors

## 2. Getting Started – Adding Areas and Assistant/Area Governors

**Please Note – This feature is part of the District Organization Chart found within the District Version of ClubRunner.**

To begin first you must navigate to the District website admin page. Under the Communication Services heading, click on **District Organization Chart**



Once the District Organization page has loaded up, it is now time to begin adding your Areas and the Assistant/Area Governors that have been assigned to that area. On the top-right of the Assistant/Area Governors section, click the **Add** link. You will notice that a text field for Area and a dropdown for Club and Member are showing on screen.

Type in the name of the Area to be governed and Select the Club the person in question is part of. Click on the name of the individual you are assigning as the Assistant/Area Governor and click **Save**.



**Edit:** Use the edit link to modify the name of the area or to select a different member as Assistant/Area Governor.

**Clear:** Use the Clear link to clear the select member from the position. This will keep the position list but, the name will be empty.

**Delete:** Use the delete link to completely remove the listing.

## 3. Assigning Clubs

Once the Area and Assistant/Area Governor has been assigned, it is now time to assign the Clubs for that Area. The first step is to click on the **Clubs** link to the right of the assigned Assistant/Area Governor. The club assignment page will open up, to assign a club click on the **Assign Club to this Area** link on the top-right of the box.



Under the Club Name dropdown, select the club and click **Save**. Repeat this step to add additional clubs to the list.

## 4. Unassigning Clubs

If you have noticed that a mistake has been made with the club list for a Assistant/Area Governor. You have the ability to unassign clubs off the Assistant/Area Governors list. This function can be accessed by clicking on the **Clubs** link next to the Assistant/Area Governor.



Simply click on the **Unassign Club** link next to the wrongfully added club and the listing will be removed from the list. Repeat this step if more than one club needs to be removed

**View Executives & Directors:** The View Executives and Directors link will take you directly to the Executives and Directors list for the assigned club.

## 5. View AG Details

When **View AG Details** is clicked from the Assistant/Area Governors list, you will be taken to a page with a complete listing/functions for assigning clubs and committees.



**To assign clubs** click on the **Assign Club to this Area** link on the top-right of the box just above Clubs. Under the Club Name dropdown, select the Club and Click **Save**. Repeat this step to add additional clubs to the list.

**To Unassign clubs** click on the **Unassign Club** link next to the wrongfully added club and the listing will be removed from the list. Repeat this step if more than one club needs to be removed

**View Executives & Directors:** The View Executives and Directors link will take you directly to the Executives and Directors list for the assigned club.

## Adding a New Committee's

**To create a committee** click on **"Add New Committee"** link at the top-right of the committee's section. 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.

Click the `Save` button to save the new committee.

## How to add a member to a Committee

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

Click Add Member, 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



## 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.

## Post Documents

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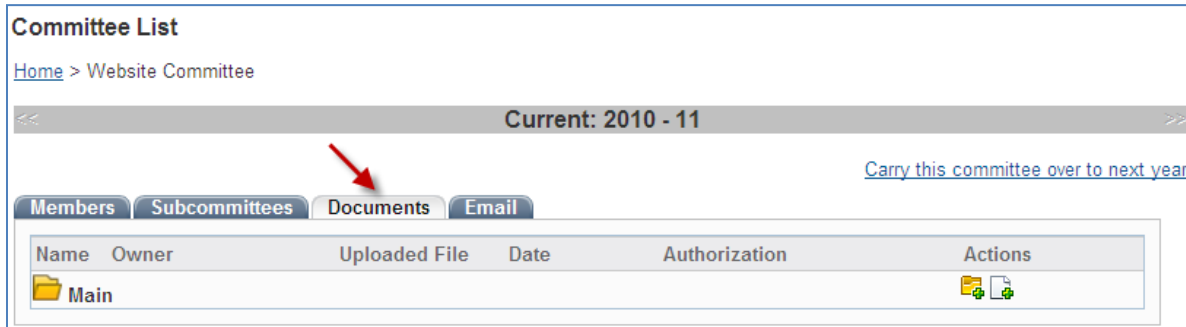


3. Click on the "Add New Document" icon under the actions column. Once the popup appears, you will be prompted to:

   o Enter the document name
   o Enter the description (optional)
   o Select access level from the drop down menu (see below for definitions)
   o Click on the Browse button and locate the file from your computer



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**

## 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.
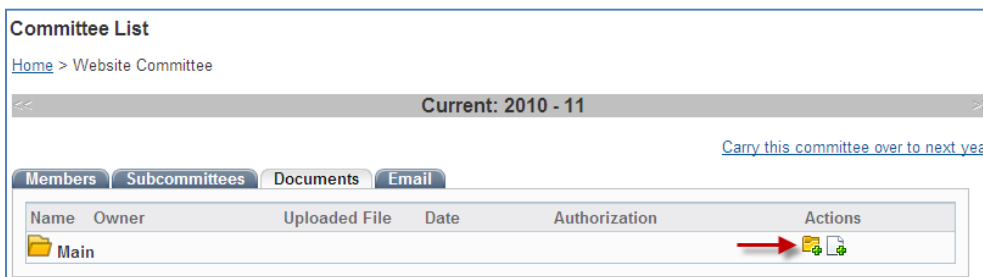


Once the popup appears, you will be prompted to:

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

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.

### Send email to my committee members

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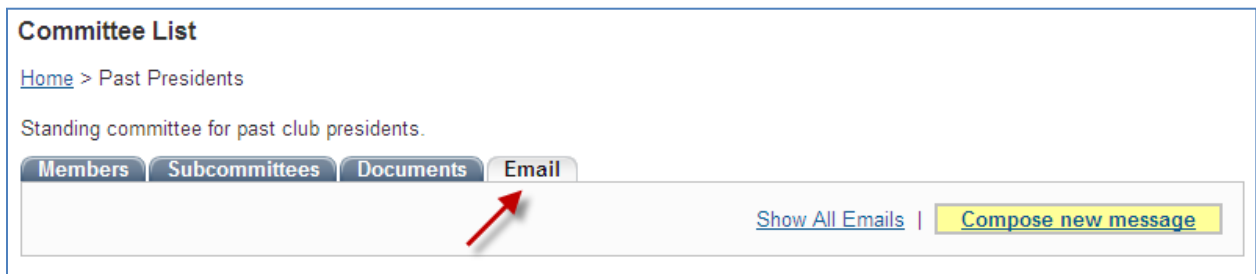


3. Click on the [Compose new message] icon.
4. Select your recipients from your distribution list, located on the left hand side of the screen. You may need to click on the plus (+) sign to expand the group.



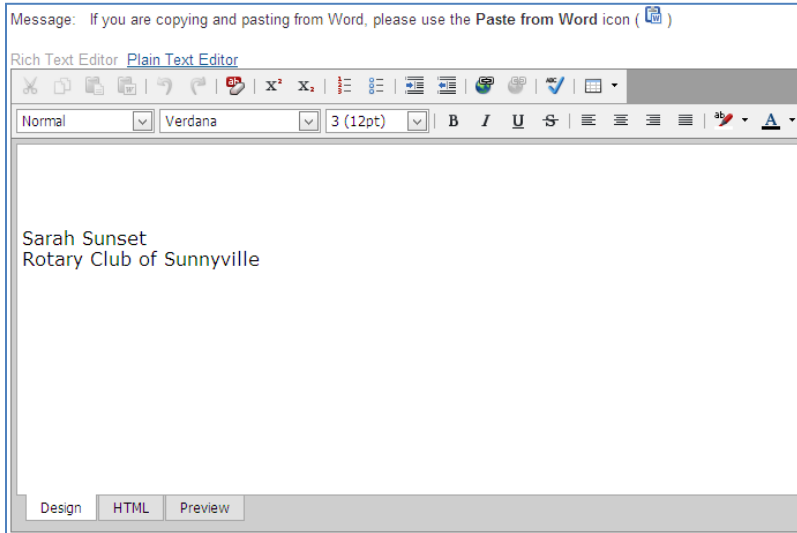5. Enter the subject of your email. *NOTE: You cannot send an email without a subject line.*
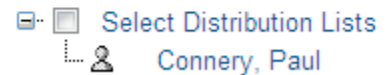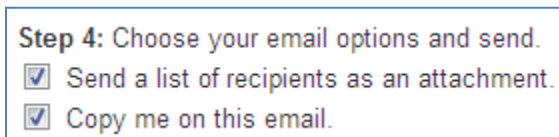


6. Enter the body of your message.

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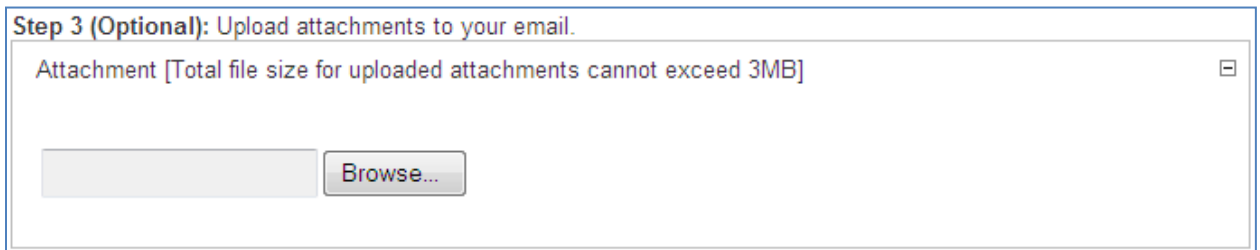


8. Select your email options



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

## 6. View AG Details – Email Message Service

The Email Message Service is intended to be used by the Assistant/Area Governor to keep in touch with their assigned clubs or other Executives within the District. Within this section you have two options':

| Email Message Service |
|---|
| Email All Members of My clubs |
| Email District Officers and AGs |

**Email All Members of My Clubs:** This link will provide with the email message center and a distribution list of that consist of Active and Honorary members for the clubs assigned to the Area Governor.

**Email District Officer and AGs:** This link will provide with the email message center and a distribution list of that consist of The District Governor, Committee Chairs, Assistant/Area Governors and Club Executives/Directors.

## 7. View AG Details – AG Reports

Within the AG Reports area, we currently have the only have the Club Size and Growth Report. Clicking on the **Club Size and Growth Report** will provide you with a report based upon the assigned clubs for the Assistant/Area Governor's list

**Club Size Reports**

Club Size Report ▾   Generate Report

**Club Size Report [Guelph]**

| Azure Club (Attendance) | 5 |
| Kingsbridge (Rotaract) | 5 |
| ClubRunner | 1 |
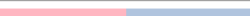
Total: 3 clubs

**Club Size Reports**

Club Growth Report ▾   Generate Report

**District Growth Report [Guelph] (7/2011 - 3/2012)**

Change report date: From: 7 ▾ 2011 ▾   To: 3 ▾ 2012 ▾   Refresh

| Azure Club (Attendance)* | ? | ? | ? |
| ClubRunner* | ? | ? | ? |
| Kingsbridge (Rotaract)* | ? | ? | ? |
| 3 Clubs. TOTAL: | 0 | 0 | 0 |

District Total: 0 new members

\* Indicates that the club does not have up-to-date member data
? Indicates that the club does not have any members' data

## 8. 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.

| Knowledgebase | Downloads |
|---|---|
| **This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.** | **This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.** |
| On-Demand Videos | Webinar Training |
| **For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.** | 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. |
| Submit a Ticket | Community |
| **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.** | 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. |

For the latest ClubRunner updates, follow us on: