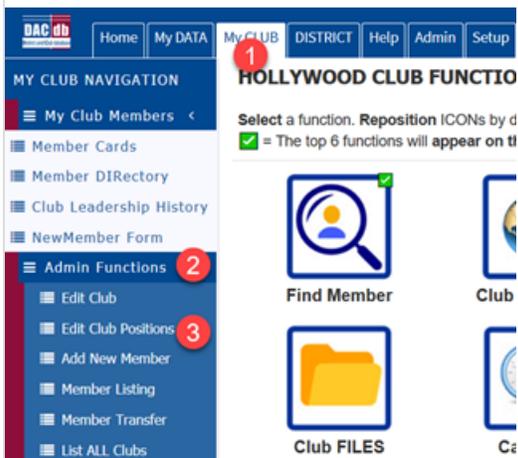


Use the "Search" field at the top right to search for a help topic.

HOW TO EDIT CLUB POSITIONS USING THE NEW USER INTERFACE

It is highly recommended that you go to the Help tab and on the left navigation column, scroll down and click on Club. There is an 11 minute video to watch that is very helpful. The way to edit positions is covered very nicely in this video.

Getting to the Edit Club Positions is slightly different in the New Use Interface. Once in the New Interface, you scroll down on the left navigation column to Admin Functions and select Edit Club Positions.



A new screen opens where you will see is an edit pencil in front of each member. Click on the pencil of the first individual you need to edit, and it will open to their information.

Edit	Club Member Name	MemberType	Sec-Lvl	2018-19 Positions
- A -	 Aniston, Jennifer	Active	4	iPast President (IPP)
- B -	 Baba, Ali	Active-Satellite	4	
	 Brosnan, Pierce	Active-R85	1	
- C -	 Cage, Nicolas	Active	5	
	 Craig, Daniel	Active	1	
	 CRMlast, CRMfirst	Active	1	
	 Cruise, Tom	Active	4	President-Elect (PE)
- D -	 Damon, Matt	Active	4	Secretary (S)
	 Diaz, Cameron	Active	2	
	 Dobra, Jed	Active	4	Club Executive Secretary (CES) <small>(05/26/19 - 06/30/19)</small>

When you click on the pencil, the Club Position Admin page opens for that individual:

Club Position Admin

Manage your Club position here. Click **[Edit]** to change or add new roles to position(s) that are already defined for a given time period. Click **[Add]** to add a new position in a different time period (in most situations this would be in a new OrgYear period).

Aniston, Jennifer

ID=800218032

Close Clone Last Position Delete **Edit** Add

Active	Start Date	End Date	Club Position Name	Leader	S-Lvl	Sort	Updated
<input checked="" type="checkbox"/>	07/01/18	06/30/19	iPast President	<input checked="" type="checkbox"/>	4	32	Kelly, Lin 06/05/17
	07/01/17	06/30/18	President	<input checked="" type="checkbox"/>	4	1	Kelly, Lin 06/05/17

Active position -- Current member position in use

LP (Leader Position) - Check this if you want the position shown at the top of the #SESSION.ClubLabel# listing.

S-Lvl (Security Level) - Security level for this position (e.g., 4 is #SESSION.ClubLabel# officer). You cannot grant a security level higher than your own.

Sort (Sort Position). - Affects the leader position sorting sequence, lower numbers sort first.

Now very important, you can only have one org year on a line, but you can have multiple positions in the same org year. If an individual is going to repeat their position from the year before, you can simply clone the last position. If they are going to have a new position, then you will click on the Add button.

Check the start date and end dates are correct; then select the grey "Add" button next to the position field:

Aniston, Jennifer ID={new} Cancel Add

You are about to ADD a new Club position. There must be only one (1) row per OrgYear and the Start and End dates should generally be the first and last days of the OrgYear -- unless you are adding a new position mid-year or terminating an existing position. To add club positions, click the [Add] button next to the Club position field. To ADD an additional Club "role" to an existing position, use the EDIT vs. ADD.

Active	Start Date	End Date	Club Position Name	Leader	S-Lvl	Sort
new	07/01/2019	06/30/2020	<input type="text" value="Club Director,Treasurer,Membership Chair"/> Add	<input type="checkbox"/>	1	0
✓	07/01/18	06/30/19	IPast President	✓	4	32
	07/01/17	06/30/18	President	✓	4	1

In this example, this individual will hold three positions; put a check mark in all three and click on save on the bottom of the box.

Select Club Roles

District Default Key: Position (Primary) [S-Lvl / Sort]

Check one or more roles from the list below for the SAME time period:

<input type="checkbox"/> Attendance Secretary (AS) [3/6]	<input type="checkbox"/> President-Nominee (PN) [4/6]
<input type="checkbox"/> Bulletin Editor (BE) [3/6]	<input type="checkbox"/> Public Relations Chair (PR) [2/6]
<input type="checkbox"/> CCO-Club Comm. Offic (CCO) [4/7]	<input type="checkbox"/> Recording Secretary
<input type="checkbox"/> Club Admin Chair (CAC) [2/7]	<input type="checkbox"/> Rotary Foundation Chair (RFC) [2/7]
<input checked="" type="checkbox"/> Club Director (CD) [4/6]	<input type="checkbox"/> Secretary (S) [4/7]
<input type="checkbox"/> Club Executive Secretary (CES) [4/3]	<input type="checkbox"/> Secretary-Elect (SE) [4/3]
<input type="checkbox"/> Club Programs Chair (CPC) [2/6]	<input type="checkbox"/> Sergeant-at-Arms (SAA) [2/7]
<input type="checkbox"/> Club Service Chair (CSC) [3/6]	<input type="checkbox"/> Service Projects Chair (SPC) [2/7]
<input type="checkbox"/> Community Service Chair (COC) [2/6]	<input type="checkbox"/> Test (TST) [2/6]
<input type="checkbox"/> Disaster Relief Chair (DRC) [2/7]	<input type="checkbox"/> Training Officer (TO) [3/6]
<input type="checkbox"/> District Events Coord (DEC) [2/6]	<input checked="" type="checkbox"/> Treasurer (T) [4/4]
<input type="checkbox"/> Interact Club Sponsor (ICS) [1/3]	<input type="checkbox"/> Treasurer-Elect (TE) [4/4]
<input type="checkbox"/> International Service Chair (ISC) [2/6]	<input type="checkbox"/> Vice President (VP) [4/3]
<input type="checkbox"/> IPast President (IPP) [4/3]	<input type="checkbox"/> Vocational Service Chair (VSC) [2/6]
<input checked="" type="checkbox"/> Membership Chair (MC) [2/7]	<input type="checkbox"/> Webmaster (WB) [3/6]
<input type="checkbox"/> IPast President (IPP) [4/3]	<input type="checkbox"/> Youth Services Chair (YSC) [2/3]
<input type="checkbox"/> President (P) [4/3]	<input type="checkbox"/> Youth Services Project Chair (YSP) [2/6]
<input type="checkbox"/> President-Elect (PE) [4/3]	

Cancel Save

Now click on Add:

Aniston, Jennifer ID={new} Cancel Add

You are about to ADD a new Club position. There must be only one (1) row per OrgYear and the Start and End dates should generally be the first and last days of the OrgYear -- unless you are adding a new position mid-year or terminating an existing position. To add club positions, click the [Add] button next to the Club position field. To ADD an additional Club "role" to an existing position, use the EDIT vs. ADD.

Active	Start Date	End Date	Club Position Name	Leader	S-Lvl	Sort
new	07/01/2019	06/30/2020	<input type="text" value="Club Director,Treasurer,Membership Chair"/> Add	<input checked="" type="checkbox"/>	4	4
✓	07/01/18	06/30/19	IPast President	✓	4	32
	07/01/17	06/30/18	President	✓	4	1

You can then close the pop-up box and move on to the next individual. Once you have added all your positions and if you have RI Integration turned on, it is good to check your Club Officer Compare to make sure the positions of President, Secretary, Treasurer, Membership Chair, Foundation Chair and Club Executive Secretary (if applicable) rolled up to RI.

Click on My Club, then the RI Compare Icon:

My CLUB DISTRICT Help Adm

HOLLYWOOD CLUB FI

Select a function. Reposition I

= The top 6 functions will a



RI Compare

On the left-hand menu click on Club Officer Compare:

RI NAVIGATION

- Member Compare
- Club Officer Compare
- Club Info Compare
- RI Transaction Log

Now you can review the results.

The left and right sides should match. (For privacy reasons, the names are scrambled in the example below):

OrgYear: 2019-20							
Club President	augz, v QV		07/01/2019	06/30/2020	Vawqjly, Dadsm		07/01/2019 06/30/2020
Club Secretary	UWITWykr, Vlj OjcmDbdm		07/01/2019	06/30/2020	Idod, Satrikje		07/01/2019 06/30/2020
Club Treasurer	KQZn, nRWEGFHZ ZUNB		07/01/2019	06/30/2020	Okjt, Gabh		07/01/2019 06/30/2020
Club Membership Chair	PKALWTok, Dlj J		07/01/2019	06/30/2020	Pokdy, Evmo		07/01/2019 06/30/2020
Club Foundation Chair	dhl, Dnu UyalOulow III		07/01/2019	06/30/2020	Wylth, Wirfmm J. Sr.		07/01/2019 06/30/2020
Club Executive Secretary/Director							
OrgYear: 2020-21							
Club President	oUJNURk, Usk EbcCnrbj		07/01/2020	06/30/2021	Besjp, Cldog Jaeger		07/01/2020 06/30/2021
Club Secretary							
Club Treasurer							
Club Membership Chair							
Club Foundation Chair							
Club Executive Secretary/Director							
OrgYear: 2021-22							
Club President	avXpDRNvS, HNgS EcCD		07/01/2021	06/30/2022	Mamqfcks, Kadbovhv		07/01/2021 06/30/2022
Club Secretary							
Club Treasurer							

However, if there are errors, pink arrows will show up in between the Rotary and DACdb listings, and then you can move information from the left to right or right to left, depending on the error.

Leader, Security or Sort Order Wrong

If when you return to the Club Members page the club leadership is either not in the right order or includes the wrong people, you can override the default settings. In the District Default Role popup, the default security level and sort order numeric values display in brackets to the right of the role.

Select Club Roles

District Default Key: Po

Check one or **more roles** from the list below **for the SAME ti**

Attendance Secretary (AS) [3/6]

Bulletin Editor (BE) [3/6]

CCO-Club Comm. Offcr (CCO) [4/7]

Return to Edit Club Positions and select to Edit the appropriate individual:

Witherspoon, Reese ID=800218049 Close Clone Last Position Delete Edit Add

Active	Start Date	End Date	Club Position Name	Leader	S-Lvl	Sort	Updated
✓	01-Jul-20	30-Jun-21	Bulletin Editor	✓	3	6	Brauer, Jeff 06/30/2020
	01-Jul-19	30-Jun-20	Bulletin Editor	✓	3	6	Lowery, Jamie 06/30/2019

Change the values in the Leader, S-Lvl and/or Sort columns accordingly and Update to apply the change.

Witherspoon, Reese ID=800218049 Cancel Update

You are about to Edit the Club position. To change the name (make an alias) for a Club position name, click in the Club Position field to edit the name. To change or add additional roles, click **[Edit]** next to the Club Position, and select one or more roles from the pop-up that appears.

Active	Start Date	End Date	Club Position Name	Leader	S-Lvl	Sort
✓	07/01/2020	06/30/2021	Bulletin Editor Edit	✓	3	6
	07/01/2019	06/30/2020	Bulletin Editor Edit	✓	3	6

Return to the Club Members page and check to be sure the new values have the desired results. Repeat, if needed.