

ClubRunner

Attendance Module 3.0 Guide

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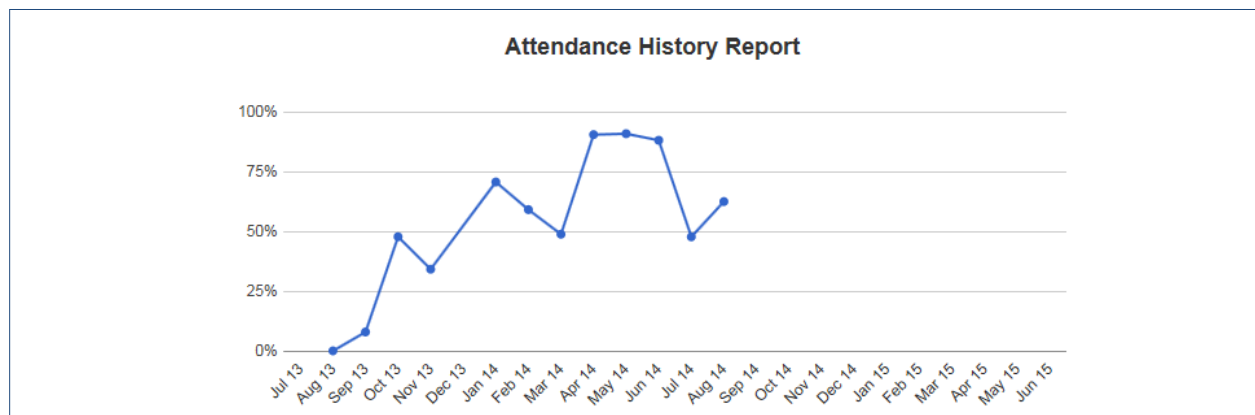
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Overview

The Attendance module is a far more intuitive and revamped version of what you are currently used to. Taking all the feedback we have received over the years into account, this new module was designed to cater to the custom attendance needs of each club.

Besides more advanced attendance tracking functions, Attendance 3.0 will give you the ability to:

- Bank and track make-ups for members
- Auto assign a makeup from the members' pool for any meetings they miss
- Track attendance for honorary members
- Record guests and other visitors
- Customize attendance rules based on member type (excused vs. exempted)
- View attendance history and performance in a dashboard view
- Open up your own past meeting records to recalculate attendance
- Migrate data from previous Attendance module versions
- and much more!



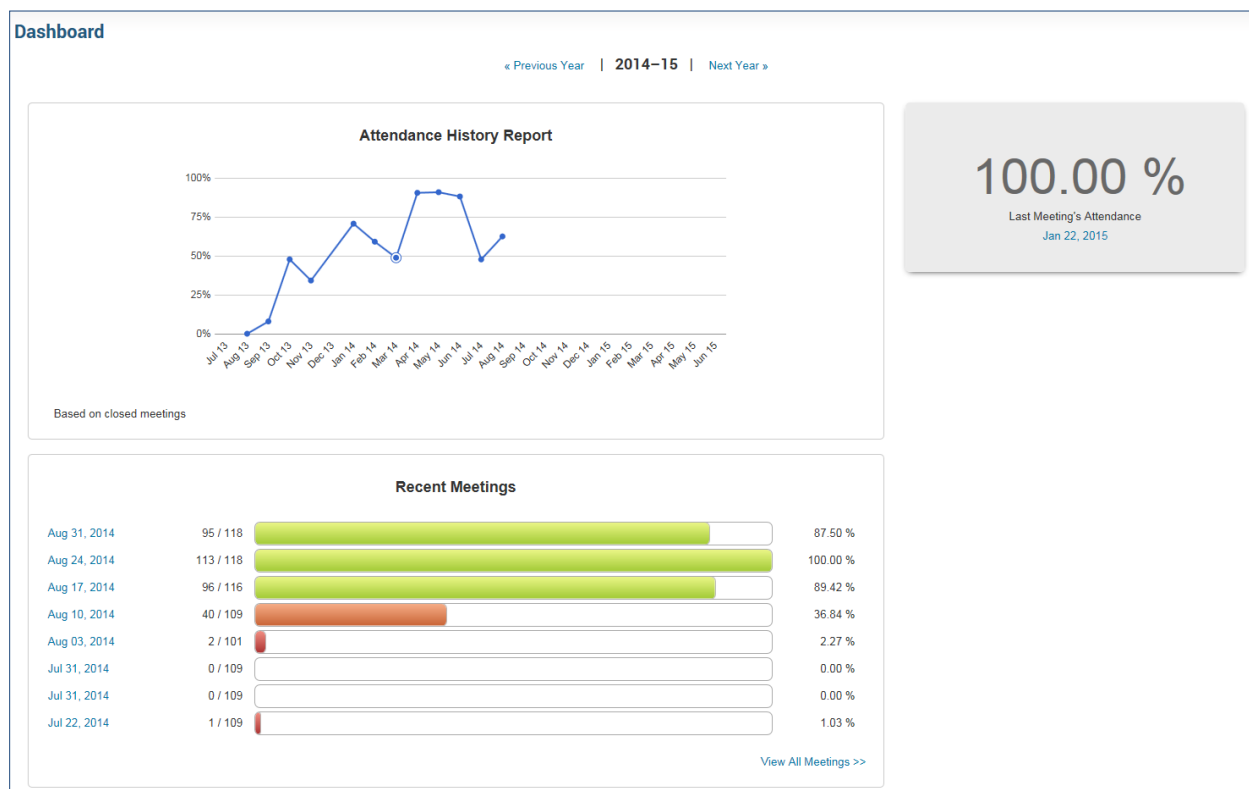
Access Levels Required for Attendance Module

Below are the access level(s) required to access the attendance module:

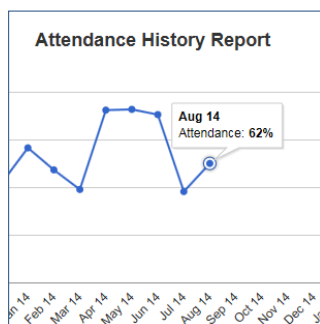
- **50** (Club Executive)
- **40** (President)
- **30** (Site Administrator)

Dashboard

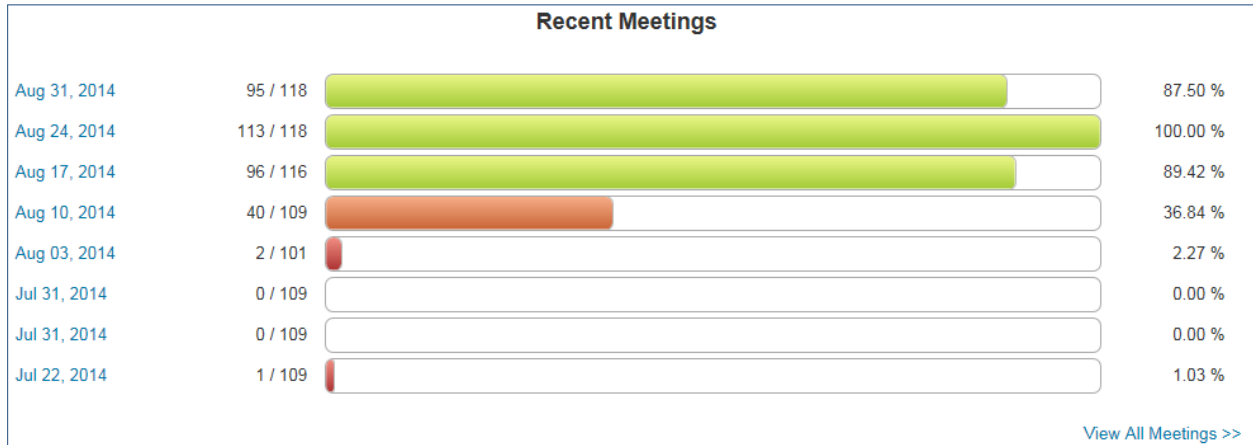
The Attendance Dashboard gives you a quick snapshot of your clubs attendance history for the current year.



The **Attendance History report** displays the final attendee percentages per month for the current year. Each of the **points** can be clicked on to see the specific value for that given month.



The **Recent Meetings** section displays the last eight meetings and their attendance percentages. Here you can quickly click on a Meeting Date to see more information about that particular meeting.



The **View All Meetings >>** (link) will take you to the see all of the meetings for the current year.

Meetings												
« Previous Year 2014-15 Next Year »												
Add Meeting												
Meetings	Member Count				Member Present				Actual Attended	Makeups	Reported	
	Regular	Excused	Exempt	Total	Regular	Excused	Exempt	Total				
Sep 07, 2014	100	5	13	118	0	0	0	0	0.00 %	0	0.00 %	Close Delete
Aug 31, 2014	100	5	13	118	85	4	6	95	85.58 %	2	87.50 %	Close Delete
Aug 24, 2014	101	4	13	118	101	4	8	113	100.00 %	0	100.00 %	Re-open Delete
Aug 17, 2014	101	4	11	116	88	3	5	96	87.50 %	2	89.42 %	Re-open Delete
Aug 10, 2014	94	4	11	109	34	1	5	40	36.84 %	0	36.84 %	Re-open Delete
Aug 03, 2014	88	3	10	101	2	0	0	2	2.27 %	0	2.27 %	Re-open Delete
Jul 31, 2014	96	2	11	109	0	0	0	0	0.00 %	0	0.00 %	Re-open Delete
Jul 31, 2014	96	2	11	109	0	0	0	0	0.00 %	0	0.00 %	Re-open Delete
Jul 22, 2014	96	2	11	109	0	1	0	1	1.03 %	0	1.03 %	Re-open Delete
Jul 08, 2014	89	4	6	99	87	4	5	96	97.85 %	0	97.85 %	Re-open Delete
Jul 07, 2014	87	4	5	96	81	0	2	83	93.10 %	0	93.10 %	Re-open Delete
Jul 06, 2014	93	4	9	106	0	1	3	4	1.06 %	1	2.13 %	Re-open Delete
Jul 05, 2014	93	4	9	106	85	4	8	97	91.75 %	0	91.75 %	Re-open Delete
Jul 03, 2014	90	3	6	99	87	0	6	93	96.67 %	0	96.67 %	Re-open Delete
YTD									60.99 %	5	61.19 %	

When you initially open the Attendance 3.0 dashboard, you are given the option to **Migrate your Data** from V1.0 of the Attendance module. Click on the relevant boxes to migrate all meetings and makeups, all leaves of absence, and all member attendance exemptions. Then, press the **Migrate Data and Switch to New Version** button.

Migrating Data from Version 1

You can now transfer data from the previous version of the Attendance module into this newer version, but before you do please make note of these points:

- Migration can only **occur once**: any updates made to the previous version after migrating your data already will not re-transfer here.
- The transfer will simply **copy over** the selected data and **will not** overwrite or replace similar data (e.g. two meetings with the same date). You will be able to delete data you don't want to keep records of.
- Once you have migrated data, reporting to District will now take effect from this version, **so continue posting updates to this Attendance module only.**

Click on the checkboxes below to select data that you want to transfer to this new version. (*Tip: We recommend only migrating each data set once only.*)

- Migrate all meetings and makeups
- Migrate all Leaves of Absence
- Migrate Member Attendance Exemptions (into Exempted Members)

If you do not wish to migrate any data from Version 1 Attendance but would like to switch to the new attendance version, leave all checkboxes unchecked and press the button below.

Migrate Data and Switch to New Version

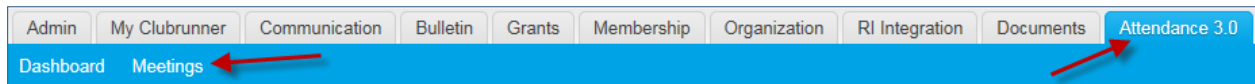
If you do not wish to migrate any data from Version 1 Attendance but would like to switch to the new attendance version, leave all checkboxes unchecked and press the **Migrate Data and Switch to New Version** button.

NOTE: Until you **Migrate your Data**, attendance information you enter for your club with **Attendance 3.0**, as well as information entered with the **My Attendance** feature will not be forwarded to the district or switched to V3.0. If you wish to familiarize yourself with the features of the attendance module, you can delay data migration until you are comfortable using the **Attendance 3.0** module.

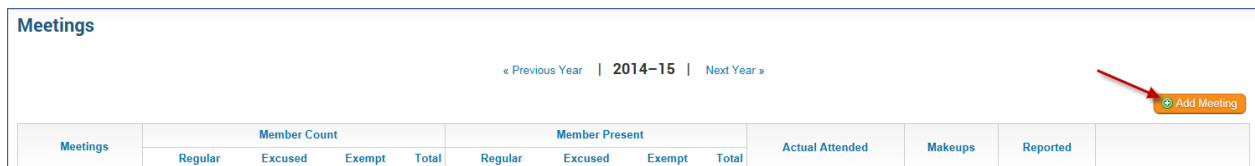
How to Add Attendance Meetings

Below are the steps to add a new Meeting for Attendance:

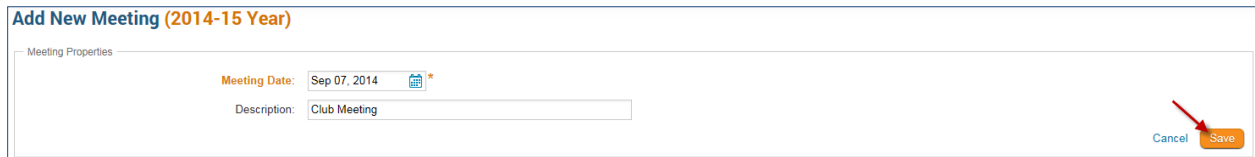
1. Click on the **Attendance 3.0 (tab)...**Meetings (link)



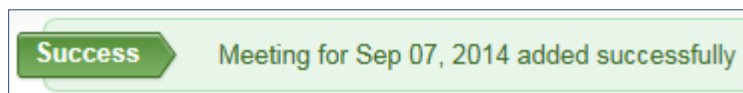
2. Next click on the **Add Meeting** (button) found in the top right corner of the screen.



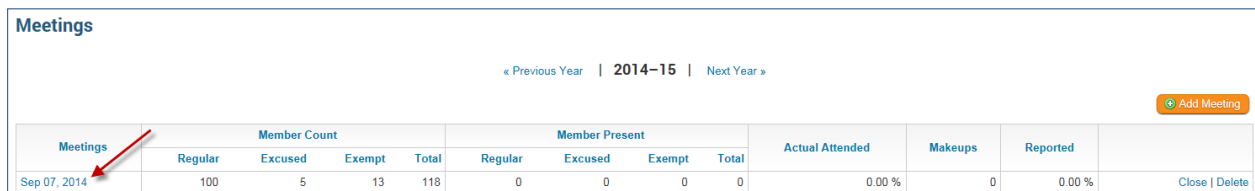
3. Now you will be taken to the Add New Meeting screen. Enter a **Meeting Date** (required field) and optionally add a Description of the Meeting. Then click on the **Save** (button).



4. You should see a **message** at the top of the screen indicating that the Meeting was **successfully** added.



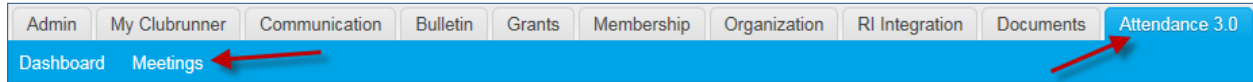
5. That should be it; the meeting should now be added to the list of current year attendance meetings.



How to Report Attendance for Active and Honorary Members

Below are the steps to report attendance for **Active and Honorary Members**:

1. Click on the **Attendance 3.0 (tab)...**Meetings (link)



2. You should now see all of your current year meetings. Click on the **Meeting Date** for the meeting you would like to populate.

Meetings	Member Count				Members Present				Actual Attended	Makeups	Reported	
	Always Count	Count If Attended	Never Count	Total	Always Count	Count If Attended	Never Count	Total				
Jan 08, 2015	12	0	0	12	0	0	0	0	0.00 %	0	0.00 %	Close Delete
Nov 10, 2014	3	0	0	3	3	0	0	3	100.00 %	0	100.00 %	Close Delete

3. The meeting details page should now open. To indicate that **Active Member(s)** participated in the meeting scroll down and under the Active Members section select the checkboxes of all the members that attended.

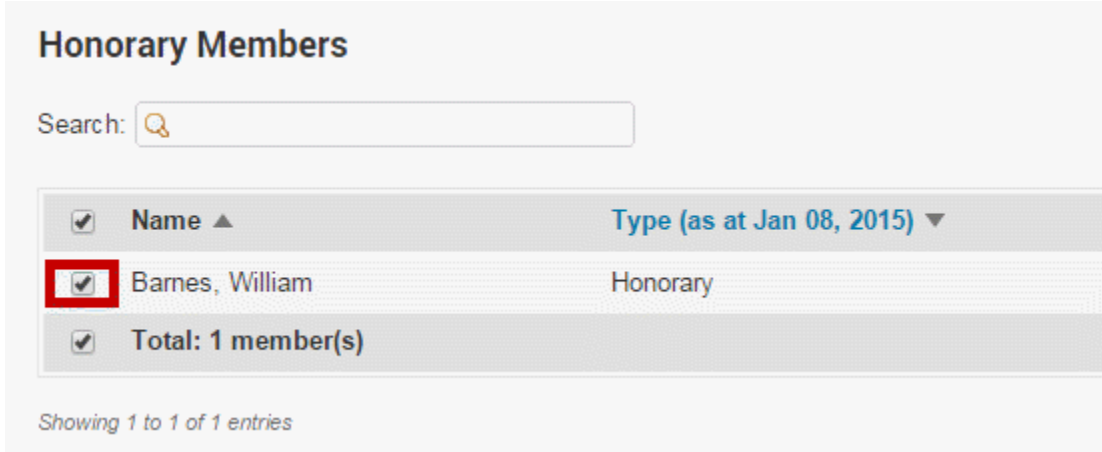
Active Members

Search: Show entries

<input type="checkbox"/>	Name ▲	Type (as of Jan 08, 2015) ▼
<input checked="" type="checkbox"/>	Baker, Sue	Regular - Active
<input type="checkbox"/>	Barnes, Bill	Regular - Active
<input checked="" type="checkbox"/>	Jackson, Eva	Regular - Active
<input checked="" type="checkbox"/>	Kombluth, Cyril	Regular - Active
<input checked="" type="checkbox"/>	Merril, Judith	Regular - Active
<input checked="" type="checkbox"/>	Osimov, Isaak	Regular - Active
<input type="checkbox"/>	Pevensie, Susan	Regular - Active
<input type="checkbox"/>	Salvador, Carlos	Regular - Active
<input type="checkbox"/>	Tang, Simon	Regular - Active
<input checked="" type="checkbox"/>	Trout, Kilgore	Regular - Active
<input checked="" type="checkbox"/>	van Voght, Alfred	Regular - Active
<input type="checkbox"/>	Total: 11 member(s)	

Showing 1 to 11 of 11 entries

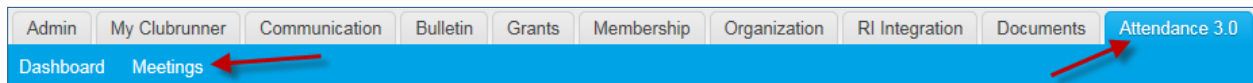
- To indicate that **Honorary Member(s)** participated in the meeting scroll all the way down the page and under the Honorary Members section select the checkboxes of all honorary members that attended.



How to Report Attendance for Guests

Below are the steps to report attendance for **Guests**:

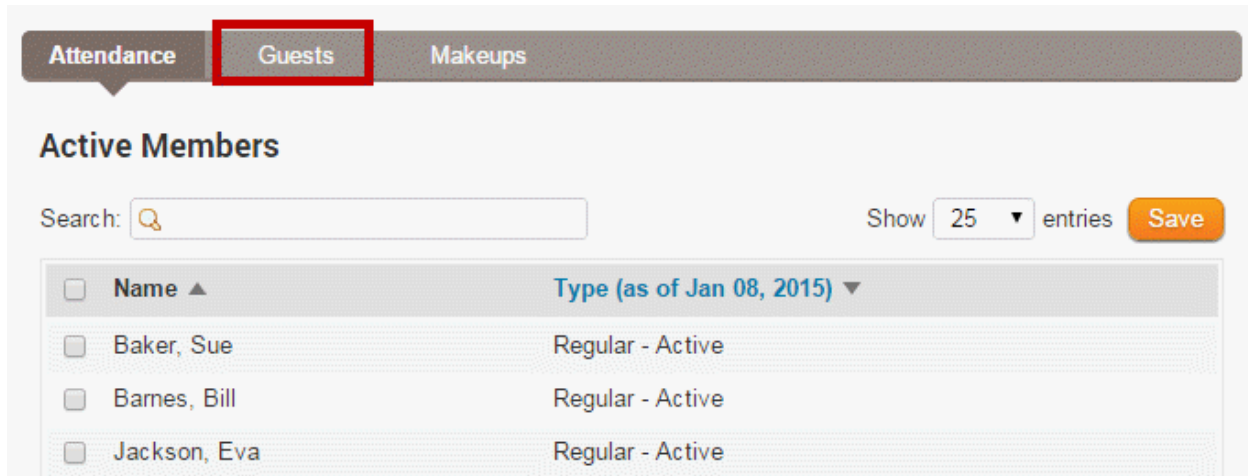
- Click on the **Attendance 3.0 (tab)...Meetings (link)**



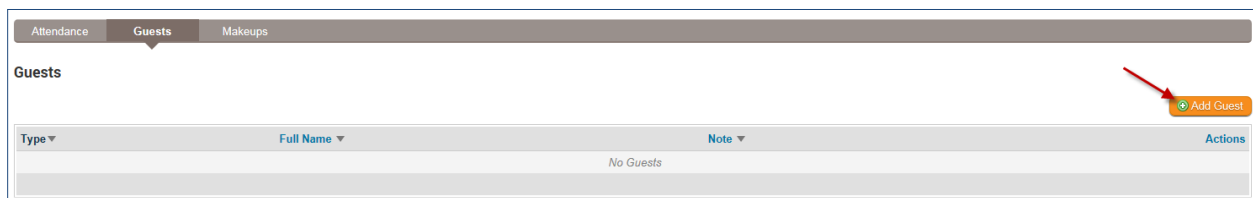
- You should now see all of your current year meetings. Click on the **Meeting Date** for the meeting you would like to populate.

Meetings	Member Count				Members Present				Actual Attended	Makeups	Reported	
	Always Count	Count If Attended	Never Count	Total	Always Count	Count If Attended	Never Count	Total				
Jan 08, 2015	12	0	0	12	0	0	0	0	0.00 %	0	0.00 %	Close Delete
Nov 10, 2014	3	0	0	3	3	0	0	3	100.00 %	0	100.00 %	Close Delete

3. To indicate that a Guest participated in the meeting first click on the **Guests** (tab)



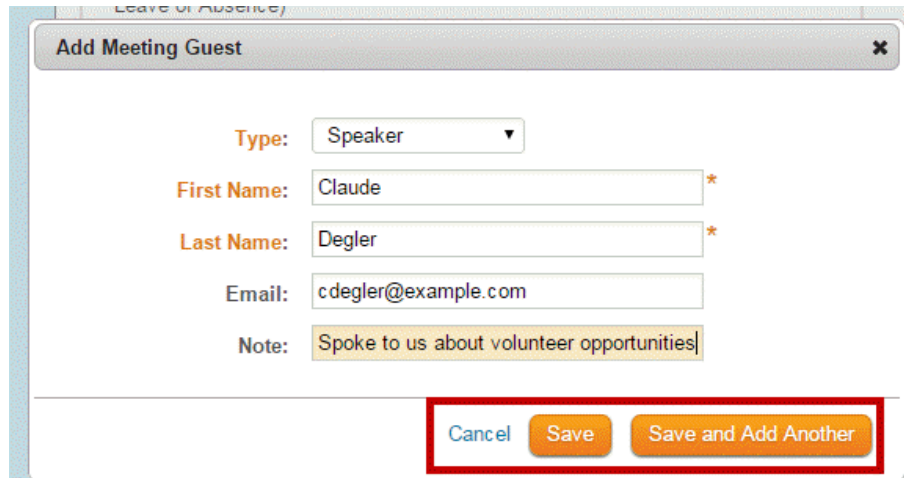
4. Next click on the **Add Guest** (button).



5. An Add Meeting Guest window will appear. First indicate the type of guest. Your options are: **Rotarian, Speaker, Guest of Member, & Other.**



- Next populate the First Name and Last Name fields as they are required fields. **Optional -Then fill in the Email Address and Note fields.* Once the fields have been populated click on the **Save** (button).

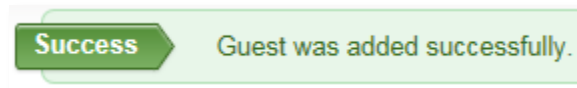


The screenshot shows a dialog box titled "Add Meeting Guest" with a close button (X) in the top right corner. The form contains the following fields:

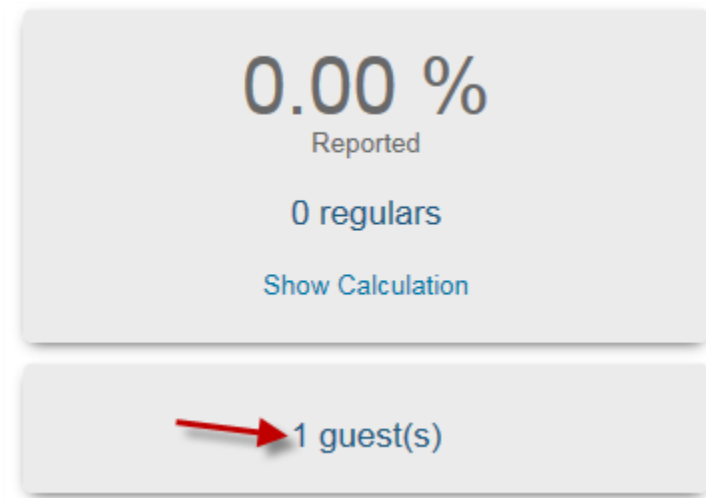
- Type:** A dropdown menu with "Speaker" selected.
- First Name:** A text input field containing "Claude".
- Last Name:** A text input field containing "Degler".
- Email:** A text input field containing "cdegler@example.com".
- Note:** A text area containing "Spoke to us about volunteer opportunities".

At the bottom right of the dialog box, three buttons are visible: "Cancel", "Save", and "Save and Add Another". These buttons are enclosed in a red rectangular box.

- You should see a **message** indicating that the Guest was added successfully.

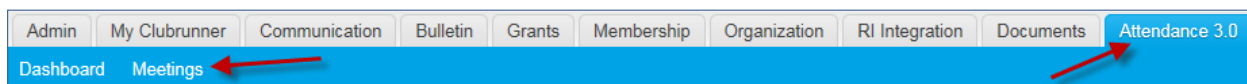


- You will see a summary number indicating how many guests have been added to the meeting.



How to Report Attendance for Make-ups

1. Click on the **Attendance 3.0 (tab)...**Meetings (link)



2. You should now see all of your current year meetings. Click on the **Meeting Date** for the meeting you would like to populate.

Meetings	Member Count				Members Present				Actual Attended	Makeups	Reported	
	Always Count	Count If Attended	Never Count	Total	Always Count	Count If Attended	Never Count	Total				
Jan 08, 2015	12	0	0	12	0	0	0	0	0.00 %	0	0.00 %	Close Delete
Nov 10, 2014	3	0	0	3	3	0	0	3	100.00 %	0	100.00 %	Close Delete

3. To indicate that a member has made-up the meeting elsewhere click on the **Makeups** (tab).

Attendance Guests **Makeups**

Active Members

Search: Show entries

<input type="checkbox"/> Name ▲	Type (as of Jan 08, 2015) ▼
<input type="checkbox"/> Baker, Sue	Regular - Active
<input type="checkbox"/> Barnes, Bill	Regular - Active

4. Next click on the **Add Makeup** (button).

Attendance Guests **Makeups**

Makeups

Name	Makeup Date	Makeup Description	Actions
No makeups for this meeting.			

5. You should now be taken to the **Add Member Makeup** screen. First select an existing member from the dropdown field. **Note please click on the 'Show Inactive Members' checkbox if you need to indicate that an ex-member (terminated) did a makeup!*

Select Member: *

Show Inactive Members

Makeup Date: *

Description:

Makeup Type: Banked Auto-Assign Apply to a Meeting

x ▼ *

Only open meetings available.

- By default the Meeting Date will populate with the Attendance Meetings date however you can change this by clicking on the Calendar icon and changing the date. This date indicates which date the member performed the makeup. **Please note to check the Attendance Sub Types (link) to see if the 'Enforce 2-week makeups rule' is enabled or not. If not then there is no restriction on when the member did the makeup for it to apply to a meeting.*

The screenshot shows a form field labeled "Makeup Date:" with the value "Sep 07, 2014" and a calendar icon. A red arrow points to the calendar icon. Below the date field is a "Description:" field. Below the description field is a "Makeup Type:" field. A calendar dropdown menu is open, showing the month of September 2014. The calendar grid shows days from 1 to 30. The date "Sep 07, 2014" is highlighted in the calendar.

- *Optional* – You can enter a **description** of the make-up. Perhaps indicate where the member did the makeup.

The screenshot shows a form field labeled "Description:" with the text "Attended district planning meeting." Below the description field is a "Makeup Type:" field with three radio button options: "Banked", "Auto-Assign", and "Apply to a Meeting". The "Apply to a Meeting" option is selected. Below the radio buttons is a date field with the value "Jan 08, 2015" and a calendar icon. Below the date field is the text "Only open meetings available." At the bottom of the form are three buttons: "Cancel", "Save", and "Save & Add Another".

- Next is the **Makeup Type** field. Here you have three options to choose from: Banked, Auto-Assign, & Apply to a Meeting. Select an option.

Banked: Banking a makeup will save a makeup to the member then they can apply it later to a meeting.

Makeup Type: Banked Auto-Assign Apply to a Meeting
This makeup will be saved until you apply it to a meeting.

Auto-Assign: Will automatically assign a banked makeup (if any exist) to a meeting based on the 'Enforce 2-week makeups rule' (found in **Settings...Attendance Sub Types**).

Makeup Type: Banked Auto-Assign Apply to a Meeting
Meeting Date will be selected based on the account settings.

If *Enforce 2-week makeup Rule* is:

Enabled: Then the Auto-Assign will look for the closest Makeup to the meeting date and automatically apply it.

Not Enabled: It will use the first makeup date it can find.

Apply to a Meeting: Gives you the option to select the meeting that you want the makeup to apply for.

Please note you can only apply this option to **Open meetings!*

Makeup Type: Banked Auto-Assign Apply to a Meeting

Select Meeting *

2015

- Oct 14, 2015
- Aug 12, 2015
- Jul 01, 2015

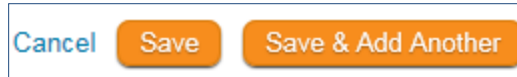
2014

- Sep 07, 2014
- Aug 31, 2014

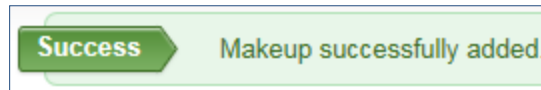
9. Once an option has been selected you have **two** options to save:

Save: Will save the makeup and take you back to the previous screen.

Save & Add Another: Will save the makeup and take you back to the Add Member Makeup screen to add another makeup for a member.



10. You should now see the **message** indicating that the Makeup was **successfully** added.



11. When you click Save you should be taken back to the Meeting and you should now see the makeup added for that meeting.

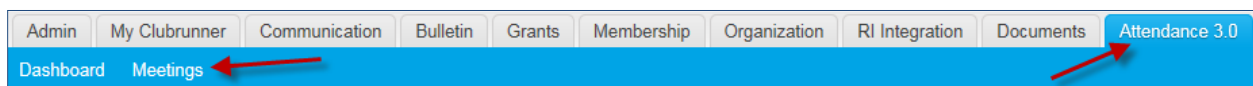
+ Add Multiple Makeups
+ Add Makeup

Name	Makeup Date	Makeup Description	Actions
Brackett, Leigh	Jan 08, 2015	Attended district planning meeting.	Unassign Delete

How to Un-assign Make-ups for a Meeting

Below are the steps to unassign makeups for a specific meeting:

1. Click on the **Attendance 3.0 (tab)...**Meetings (link)



2. You should now see all of your current year meetings. Click on the **Meeting Date** for the meeting you would like to edit.

Meetings	Member Count				Members Present				Actual Attended	Makeups	Reported	
	Always Count	Count If Attended	Never Count	Total	Always Count	Count If Attended	Never Count	Total				
Jan 08, 2015	12	0	0	12	0	0	0	0	0.00 %	0	0.00 %	Close Delete
Nov 10, 2014	3	0	0	3	3	0	0	3	100.00 %	0	100.00 %	Close Delete

- Next click on the **Makeups** (tab) to see a list of makeups for that meeting.

Attendance Guests **Makeups**

Active Members

Search: Show entries [Save](#)

<input type="checkbox"/> Name ▲	Type (as of Jan 08, 2015) ▼
<input type="checkbox"/> Baker, Sue	Regular - Active
<input type="checkbox"/> Barnes, Bill	Regular - Active

- To unassign a member makeup click on the **UnAssign** (link) found under the **Actions** column.

Makeups

Search: Show entries [Add Multiple Makeups](#) [Add Makeup](#)

Name ▲	Makeup Date ▼	Makeup Description ▼	Actions
Baker, Sue	Jan 08, 2015	Attended district planning meeting.	Unassign Delete

Showing 1 to 1 of 1 entries

How to Report Leaves of Absence

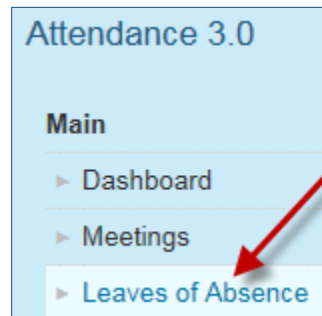
Below are the steps on how to report Leaves of Absence for members:

- Click on the **Attendance 3.0 (tab)...**Meetings (link)

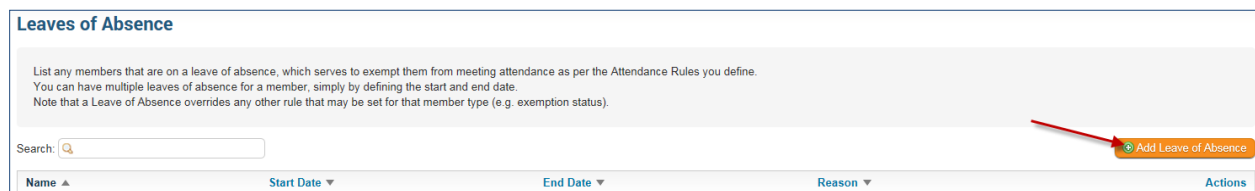
Admin **My Clubrunner** Communication Bulletin Grants Membership Organization RI Integration Documents **Attendance 3.0**

Dashboard **Meetings**

- Now on the left side under the **Main** section click on the **Leaves of Absence** (link).



- You should now see a historical list of all LOA (Leave of Absence) records. Click on the **Add Leave of Absence** (button)



- You should now be on the **Add Member Leave of Absence** screen. First select a member for the leave of absence (this is a required field). **Please note to find a terminated (or ex-member) select the checkbox 'Show Inactive Members', then click on the Select Members dropdown field.*

Select Member: *

Show Inactive Members

Reason:

Start Date: *

End Date:

Cancel

5. **Optional* – Next indicate the reason for the absence.

Select Member: *

Show Inactive Members

Reason:

Start Date: *

End Date:

Cancel

6. Next is the **Start Date** Field (a require field). Indicate the start date of when the member went on the leave of absence. The **End Date** field is not required but if you know when the member will be off of the absence then feel free to enter that information as well.

Select Member: *

Show Inactive Members

Reason:

Start Date: *

End Date:

Cancel

7. Once the fields have been populated click on the **Add** (button).

Cancel

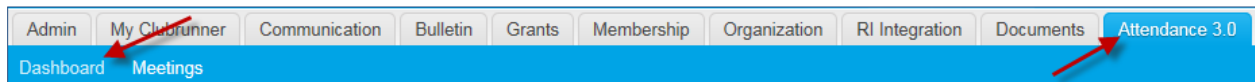
8. You should now see the Leave of Absence record added to the list of leave records.

How to Customize the Leaves of Absence Rules

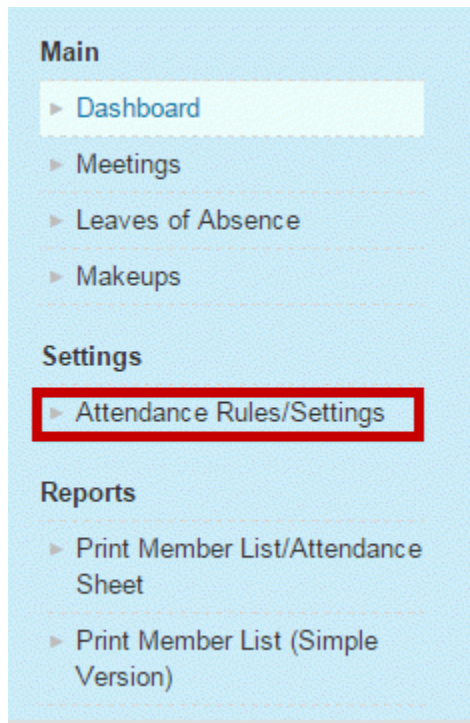
With attendance in ClubRunner 3.0 you now have the ability to edit whether Leave of Absence records should be: Always counted, Counted if attended, or Never Count at all towards to the overall count for a meeting. **Please note any changes here will apply to **Open** meetings only!*

Below are the steps to **edit the Leave of Absence rules**:

1. Click on the **Attendance 3.0 (tab)...Dashboard (link)**



2. On the left side under the **Settings** section click on the **Attendance Rules/Settings** (link).



3. You are now on the Attendance Rules and Settings screen. Scroll down and locate **Leaves of Absence** under the **Membership Types** header. To change these rules, click the **Edit** link.

Membership Types

Name	Always Count	Count If Attended	Never Count	Actions
Active - Regular	✓			Edit Restore Defaults
Honorary		✓		Edit Restore Defaults
Leave of Absence *			✓	Edit Restore Defaults
*Overrides all rule types				

- Now select the rule radio button that works best for your club when it pertains to Leave of Absence. Options are: **Always Count**, **Count if attend ("Excused")**, or **Never Count ("Exempt")**.

Name: *

Rule: Always Count Count if attend ("Excused") Never Count ("Exempt")

- Once you have made the selection click on the **Save** (button) to save the changes.

Edit Sub Type Leave of Absence

Sub Type Properties

Name: *

Rule: Always Count Count if attend ("Excused") Never Count ("Exempt")

[Cancel](#) [Save](#)

- That should be it; Leaves of Absence will now use your rule for counting or not counting towards attendance records.

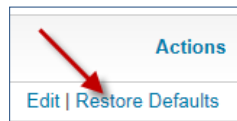
System Types				
Name	Always Count	Count If Attend "Excused"	Never Count "Exempt"	Actions
Active - Regular	✓			Edit Restore Defaults
Leave of Absence	✓			Edit Restore Defaults
Honorary			✓	Edit Restore Defaults

Below are the steps to **restore the Leave of Absence rule to Default**:

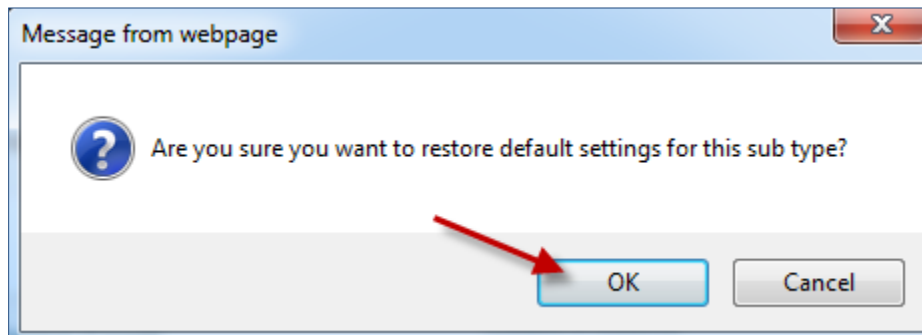
1. Under the System Types section you should see a Leave of Absence item.

System Types			
Name	Always Count	Count If Attend "Excused"	Never Count "Exempt"
Active - Regular	✓		
Leave of Absence	✓		
Honorary			✓

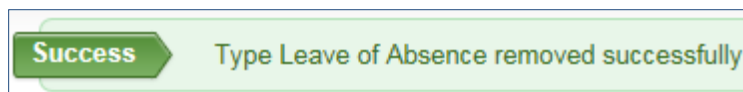
2. On the right side under the Actions column click on the **Restore Defaults** (link).



3. A message box will popup confirming that you want to restore default settings, click the **OK** button.



4. You should see a message indicating that the Leave of Absence removed successfully.



5. The value for the Leave of Absence record should now revert back to the default setting.

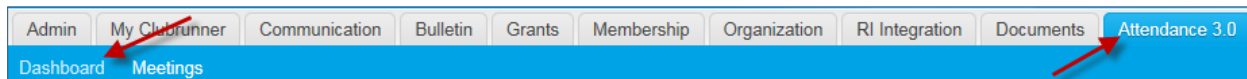
System Types			
Name	Always Count	Count If Attend "Excused"	Never Count "Exempt"
Active - Regular	✓		
Leave of Absence		✓	
Honorary			✓

How to Customize the Active Members Rules

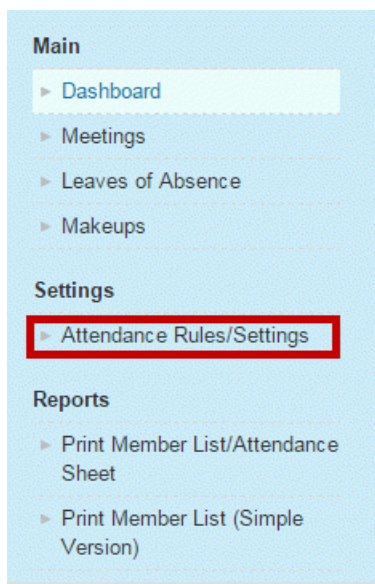
With attendance in ClubRunner 3.0 you now have the ability to edit whether Active Members records should be: Always counted, Counted if attended, or Never Count at all towards the overall count for a meeting. **Please note any changes here will apply to **Open** meetings only!*

Below are the steps to **edit the Active Members rules**:

1. Click on the **Attendance 3.0 (tab)...Dashboard (link)**



2. On the left side under the **Settings** section click on the **Attendance Rules and Settings** link.



- Now under the **System Types** section you will see an **Active** item. Click on the **Edit** (link) to change the rules for this item.

System Types				
Name	Always Count	Count If Attend "Excused"	Never Count "Exempt"	Actions
Active - Regular	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit Restore Defaults
Leave of Absence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Restore Defaults
Honorary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Restore Defaults

- Now select the rule radio button that works best for your club when it pertains to Active Members. Options are: **Always Count**, **Count if attend ("Excused")**, or **Never Count ("Exempt")**.

Name: *

Rule: Always Count Count if attend ("Excused") Never Count ("Exempt")

- Once you have made the selection click on the **Save** (button) to save the changes.

Edit Sub Type Active - Regular

Sub Type Properties

Name: *

Rule: Always Count Count if attend ("Excused") Never Count ("Exempt")

[Cancel](#) [Save](#)

- That should be it; Active Members will now use your rule for counting or not counting towards attendance records.

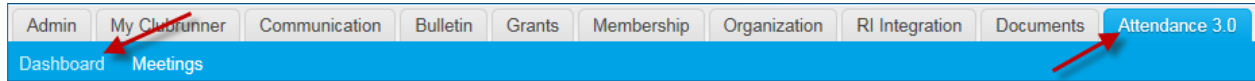
System Types				
Name	Always Count	Count If Attend "Excused"	Never Count "Exempt"	Actions
Active - Regular	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit Restore Defaults
Leave of Absence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Restore Defaults
Honorary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Restore Defaults

How to Customize the Honorary Members Rules

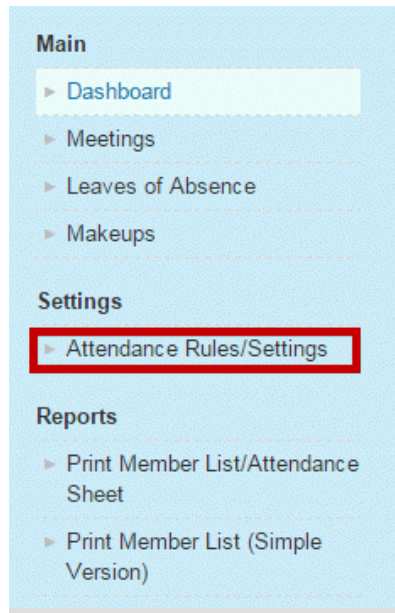
With attendance in ClubRunner 3.0 you now have the ability to edit whether Honorary Members records should be: Always counted, Counted if attended, or Never Count at all towards to the overall count for a meeting. **Please note any changes here will apply to **Open** meetings only!*

Below are the steps to **edit the Honorary Members rules**:

1. Click on the **Attendance 3.0 (tab)...Dashboard (link)**



2. On the left side under the **Settings** section click on the **Attendance Rules/Settings** link.



3. Now under the **System Types** section you will see an **Honorary** item. Click on the **Edit** (link) to change the rules for this item.

System Types				
Name	Always Count	Count If Attend "Excused"	Never Count "Exempt"	Actions
Active - Regular	✓			Edit Restore Defaults
Leave of Absence		✓		Edit Restore Defaults
Honorary			✓	Edit Restore Defaults

4. Now select the rule radio button that works best for your club when it pertains to Honorary Members. Options are: **Always Count**, **Count if attend ("Excused")**, or **Never Count ("Exempt")**.

Name: x *

Rule: Always Count Count if attend ("Excused") Never Count ("Exempt")

- Once you have made the selection click on the **Save** (button) to save the changes.

Edit Sub Type Honorary

Sub Type Properties

Name: *

Rule: Always Count Count if attend ("Excused") Never Count ("Exempt")

[Cancel](#) [Save](#)

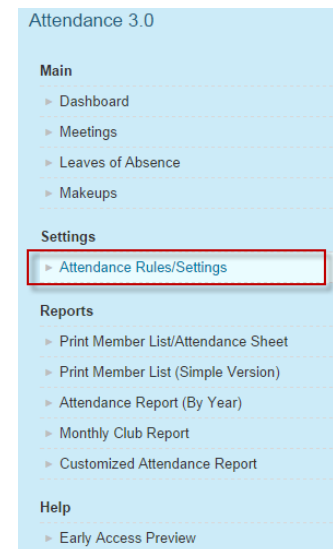
- That should be it; Honorary Members will now use your rule for counting or not counting towards attendance records.

Name	Always Count	Count If Attend "Excused"	Never Count "Exempt"	Actions
Active - Regular	✓			Edit Restore Defaults
Leave of Absence		✓		Edit Restore Defaults
Honorary			✓	Edit Restore Defaults

How to Customize Exempt and Excused settings

When exclusions for attendance are necessary for setup, settings for these options can be found within the following area.

- Within the attendance module, click on the **Attendance Rules/Settings** link of the left menu
- Within the settings page, you will see a list of System types and Exempt types. These are based on the status of the account. Using the **Edit** button, click the following options that are suited for attendance:



Always Count: This Membership type will always show and be counted for attendance.

Count if Attended "Excused": This member will show on the attended list and will not go against membership totals if a meeting is missed.

Never Count "Exempt": These members are not part of attendance or counted for attendance.

Exempted/Excused Status*

Name	Always Count	Count If Attended	Never Count	Actions
Excused Members		✓		Members Edit Delete
Exempted Members			✓	Members Edit Delete

*Overrides Membership Types rules, but overridden by Leaves of Absence

3. Once the changes to your System/Exempt type has been selected, click the **Save** button.

Edit Sub Type Active - Regular

Sub Type Properties

Name: *

Rule: Always Count Count if attend ("Excused") Never Count ("Exempt")

Cancel

Below are the steps to add a member as part of an **exempt type**:

1. Click on the **Members** link to the right of the type you wish to add them too.

Exempt Type				
Name	Always Count	Count if Attend "Excused"	Never Count "Exempt"	Actions
Active - Rule 85		✓		Members Edit Delete
Rule of 85	✓			Members Edit Delete

2. Click on the **Add** button

Members for Active - Rule 85


First Name	Last Name	Effective Date	Actions
Governors	Assistant	Mar 05, 2014	Edit Remove
Martin	Caceres	Aug 02, 2013	Edit Remove

3. Select the member and the date, and click the **Add** button to finalize the change.

Add Member for Active - Rule 85

Select Member

Select Member: Cagle, Luis ▼

Effective Date: Oct 06, 2014 *

Cancel **Add**

How to Customize Enforcement of the Two-Week Rule

By Rotary International standards it is required that all make ups be completed two weeks before a meeting or two weeks after. While this option is flexible with some Rotary Clubs, the following instructions will provide you with the setting to enforce or remain flexible.

1. Within the attendance module, click on the **Attendance Rules/Settings** link of the left menu
2. Within the settings page, you will see a check box with the label, **Enforce 2-week makeups rule (recommended)**
3. Check the box, if you wish to enforce the rule, if you wish to open up the rule to any date, leave the box unchecked.


Enforce 2-week makeups rule (recommended)

It is recommended that you enforce the 2-week makeup rule. If this is checked, then the system will check that the makeup date is within two weeks of the associated meeting date (either two weeks prior or two weeks after).

4. When finished, click the **Save Changes** button to save the setting change.

Enforce 2-week makeups rule (recommended)

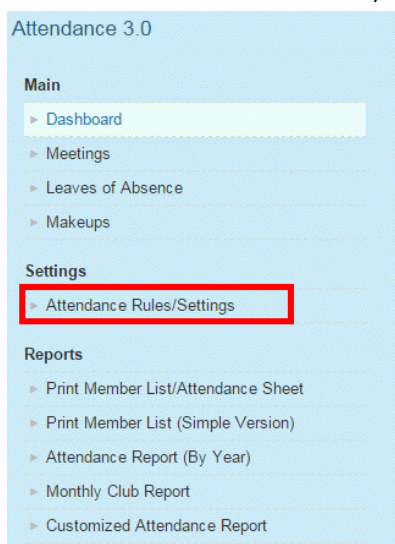
It is recommended that you enforce the 2-week makeup rule. If this is checked, then the system will check that the makeup date is within two weeks of the associated meeting date (either two weeks prior or two weeks after).



How to Exempt Members from Attendance

You can identify exempt members within the Attendance 3.0 module.

1. Within the attendance module, click on the **Attendance Rules/Settings** link of the left menu



Attendance 3.0

Main

- ▶ Dashboard
- ▶ Meetings
- ▶ Leaves of Absence
- ▶ Makeups

Settings

- ▶ **Attendance Rules/Settings**

Reports

- ▶ Print Member List/Attendance Sheet
- ▶ Print Member List (Simple Version)
- ▶ Attendance Report (By Year)
- ▶ Monthly Club Report
- ▶ Customized Attendance Report

2. You are now on the **Attendance Rules and Settings** page. Halfway down the page, under the **Exempted/Excused Status** heading, click on the **Members** link.

Exempted/Excused Status*

Name	Always Count	Count If Attended	Never Count	Actions
Excused Members		✓		Members Edit Delete
Exempted Members			✓	Members Edit Delete

*The above status rules will override the Membership Types rules.

3. You are now viewing the list of **Exempted Members**, if any. To add a single exempted member, click the **Add Member** button. We'll look at adding multiple members in a later step.

Members for Exempted Members

[Add Multiple Members](#) [Add Member](#)

Last Name ▲	First Name ▼	Effective Date	Actions
No members assigned			

- On the **Add Member** screen, select the exempted member from the alphabetical drop-down menu.

Add Member for Exempted Members

Select Member

Select Member: Brackett, Leigh ▼

Effective Date: Mar 06, 2015 *

[Cancel](#) [Save](#)

- Click the **Effective Date** field to select the starting date for exemption. By default, this is set to today's date.

Select Member

Select Member: Brackett, Leigh ▼

Effective Date: Mar 06, 2015 *

[Cancel](#) [Save](#)

Mar ▼ 2015 ▼

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

- When you have selected a member and date, click **Save**. Click **Cancel** if you wish to discard your entries.

Select Member

Select Member: Brackett, Leigh

Effective Date: Mar 06, 2015

Cancel Save

- If you wish to add multiple member exemptions, select the **Multiple Members** button from Members screen.

Members for Exempted Members

Add Multiple Members Add Member

Last Name ▲	First Name ▼	Effective Date	Actions
No members assigned			

- On the **Add Multiple Members** screen, you are first asked to set the effective exemption date for all exempt members using a calendar tool. The date defaults to the current date.

Set Exemption Date for All to: Mar 06, 2015

Filter records:

Save

Su		Mo		Tu		We		Th		Fr		Sa		Membership Type ▼
<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	<input type="checkbox"/>	6	<input type="checkbox"/>	7	Active
<input type="checkbox"/>	8	<input type="checkbox"/>	9	<input type="checkbox"/>	10	<input type="checkbox"/>	11	<input type="checkbox"/>	12	<input type="checkbox"/>	13	<input type="checkbox"/>	14	Active
<input type="checkbox"/>	15	<input type="checkbox"/>	16	<input type="checkbox"/>	17	<input type="checkbox"/>	18	<input type="checkbox"/>	19	<input type="checkbox"/>	20	<input type="checkbox"/>	21	Active
<input type="checkbox"/>	22	<input type="checkbox"/>	23	<input type="checkbox"/>	24	<input type="checkbox"/>	25	<input type="checkbox"/>	26	<input type="checkbox"/>	27	<input type="checkbox"/>	28	Active
<input type="checkbox"/>	29	<input type="checkbox"/>	30	<input type="checkbox"/>	31									Active
<input type="checkbox"/>	Merril		Judith											Active
<input type="checkbox"/>	Moore		Catherine											Active
<input type="checkbox"/>	Osimov		Isaak											Active
<input type="checkbox"/>	Passworthy		Raymond											Active
<input type="checkbox"/>	Pohl		Fred											Active
<input type="checkbox"/>	Smith		Edward											Active
<input type="checkbox"/>	Williamson		Jack											Honorary
<input type="checkbox"/> Total: 11 member(s)														

9. Next, use the check boxes beside the member names to select exempt members.

Filter records: Save

<input type="checkbox"/>	Last Name ▲	First Name ▼	Membership Type ▼
<input type="checkbox"/>	Brackett	Leigh	Active
<input type="checkbox"/>	Harris	Clare	Active
<input type="checkbox"/>	Kombluth	Cyril	Active
<input type="checkbox"/>	Kuang	Ni	Active
<input type="checkbox"/>	Merril	Judith	Active
<input type="checkbox"/>	Moore	Catherine	Active
<input type="checkbox"/>	Osimov	Isaak	Active
<input type="checkbox"/>	Passworthy	Raymond	Active
<input type="checkbox"/>	Pohl	Fred	Active
<input type="checkbox"/>	Smith	Edward	Active
<input type="checkbox"/>	Williamson	Jack	Honorary
<input type="checkbox"/>	Total: 11 member(s)		

10. When you have selected at least one member, you have the option to **Save** your selections. Or, click **Cancel** if you don't wish to save.

<input type="checkbox"/>	Last Name ▲	First Name ▼	Membership Type ▼
<input type="checkbox"/>	Brackett	Leigh	Active
<input type="checkbox"/>	Harris	Clare	Active
<input type="checkbox"/>	Kombluth	Cyril	Active
<input type="checkbox"/>	Kuang	Ni	Active
<input checked="" type="checkbox"/>	Merril	Judith	Active
<input type="checkbox"/>	Moore	Catherine	Active
<input type="checkbox"/>	Osimov	Isaak	Active
<input checked="" type="checkbox"/>	Passworthy	Raymond	Active
<input type="checkbox"/>	Pohl	Fred	Active
<input type="checkbox"/>	Smith	Edward	Active
<input type="checkbox"/>	Williamson	Jack	Honorary
<input type="checkbox"/>	Total: 11 member(s)		

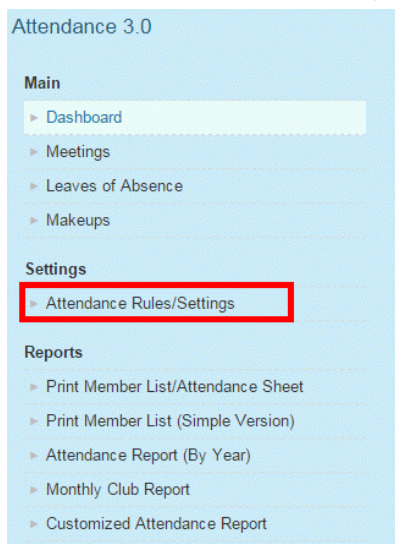
Showing all 11 records

Cancel Save

How to Edit Exempted Members

You can edit exempt members within the Attendance 3.0 module, or remove them from exempt status.

1. Within the attendance module, click on the **Attendance Rules/Settings** link of the left menu



2. You are now on the **Attendance Rules and Settings** page. Halfway down the page, under the **Exempted/Excused Status** heading, click on the **Members** link.

Exempted/Excused Status*

Name	Always Count	Count If Attended	Never Count	Actions
Excused Members		✓		Members Edit Delete
Exempted Members			✓	Members Edit Delete

*The above status rules will override the Membership Types rules.

3. You are now viewing a list of exempted members. To edit the details of the exemption, click **Edit**. To take the member off of the exempt list, click **Remove**.

Members for Exempted Members

Filter records:

[Add Multiple Members](#) [Add Member](#)

Last Name ▲	First Name ▼	Effective Date	Actions
Passworthy	Raymond	Mar 06, 2015	Edit Remove
Trout	Kilgore	Mar 06, 2015	Edit Remove

4. Clicking **Edit** gives you the option to adjust the member's effect exemption date with the calendar field. Click **Save** when you are finished.

Update Member for Exempted Members

Select Member

Selected Member: Kilgore Trout

Effective Date: Mar 06, 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Cancel Save

5. Clicking **Remove** triggers a pop-up window asking if you are sure you wish to remove the member from the exempt list. Click **OK** to confirm this, or **Cancel** if you do not wish to remove the member from the exempt list.

The page at admin.clubrunner.ca says:

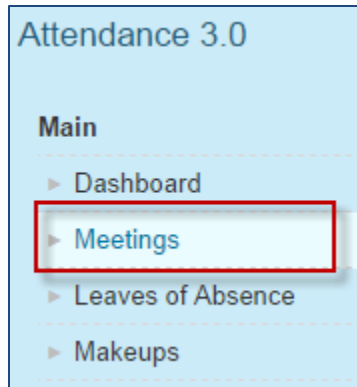
Are you sure you want to remove Kilgore Trout from the Exempted Members status?

OK Cancel

How to Close a Meeting

Below are the steps on how to **close an open meeting**:

1. Within the attendance 3.0 section, click on the **Meetings** link on the left-hand side menu bar



2. To the right of the listed meeting, you will see a **Close** link, click on this link to close the meeting.

Meetings

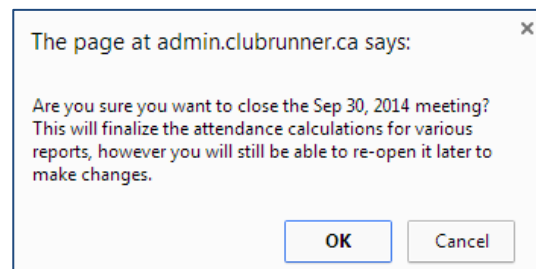
« Previous Year | **2014-15** | Next Year »

[+ Add Meeting](#)

Meetings	Member Count				Member Present				Actual Attended	Makeups	Reported	
	Regular	Excused	Exempt	Total	Regular	Excused	Exempt	Total				
Sep 30, 2014	28	1	0	29	0	0	0	0	0.00 %	1	3.57 %	Close Delete
Jul 30, 2014	27	1	0	28	0	0	0	0	0.00 %	1	3.70 %	Re-open Delete
Jul 23, 2014	27	1	0	28	0	0	0	0	0.00 %	1	3.70 %	Close Delete
Jul 23, 2014	27	1	0	28	0	0	0	0	0.00 %	0	0.00 %	Re-open Delete
YTD									0.00 %	3	2.23 %	

Regular members: Attendance always counts
 Excused members: Attendance counts if they attend
 Exempt members: Attendance does not count whether or not they attend

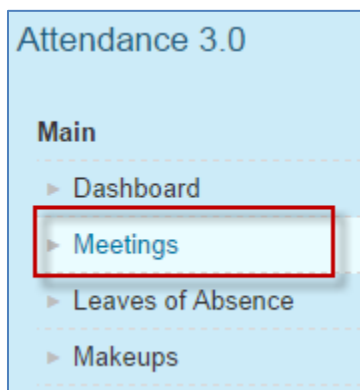
3. You will be prompted with a window to confirm the closing of the meeting, click the **OK** button to continue closing, otherwise click **Cancel**.
**Please Note: Once the meeting has been closed, the meeting will turn green.*



How to Re-Open a Meeting

Below are the steps on how to **re-open a closed meeting**:

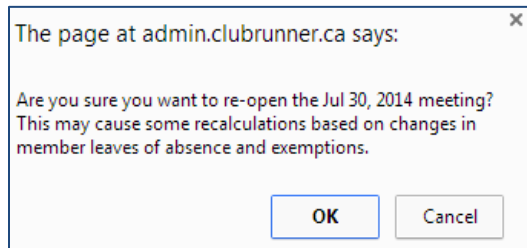
1. Within the attendance 3.0 section, click on the **Meetings** link on the left-hand side menu bar.



2. To the right of a closed meeting (highlighted in green), you will see a **Reopen** link, click on this link to re-open the closed meeting.

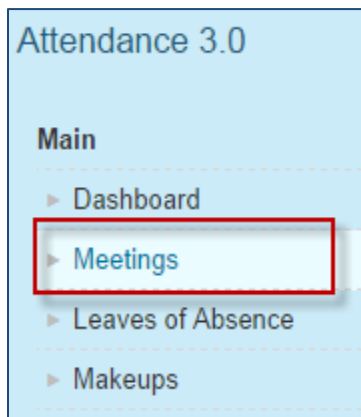
Meetings												
« Previous Year 2014-15 Next Year »												
+ Add Meeting												
Meetings	Member Count				Member Present				Actual Attended	Makeups	Reported	
	Regular	Excused	Exempt	Total	Regular	Excused	Exempt	Total				
Sep 30, 2014	28	1	0	29	0	0	0	0	0.00 %	1	3.57 %	Close Delete
Jul 30, 2014	27	1	0	28	0	0	0	0	0.00 %	1	3.70 %	Re-open Delete
Jul 23, 2014	27	1	0	28	0	0	0	0	0.00 %	1	3.70 %	Close Delete
Jul 23, 2014	27	1	0	28	0	0	0	0	0.00 %	0	0.00 %	Re-open Delete
YTD									0.00 %	3	2.23 %	

Regular members: Attendance always counts
 Excused members: Attendance counts if they attend
 Exempt members: Attendance does not count whether or not they attend



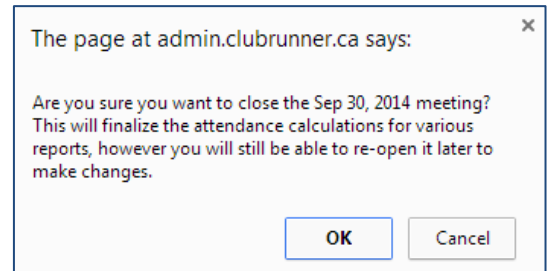
- You will be prompted with a window to confirm the reopening of the meeting, click the **OK** button to continue the reopening process, otherwise click **Cancel**.
**Please Note Once the meeting has been reopened; your totals will be recalculated when closing*

How to Report to the District



- Within the attendance 3.0 section, when you click on the **Meetings** link on the left-hand side menu bar, to the right of the listed meeting, you will see a **Close** link, click on this link to close the meeting.

- You will be prompted with a window to confirm the closing of the meeting, click the **OK** button to continue closing, otherwise click **Cancel**. **Please Note: Once the meeting has been closed, the meeting will turn green.*



- Whenever a meeting has been closed, the number will be applied to the ClubRunner subscribed district.

Meetings

« Previous Year | 2014-15 | Next Year »

Meetings	Member Count				Member Present				Actual Attended	Makeups	Reported	
	Regular	Excused	Exempt	Total	Regular	Excused	Exempt	Total				
Sep 07, 2014	100	5	13	118	0	0	0	0	0.00 %	0	0.00 %	Close Delete
Sep 01, 2014	100	5	13	118	85	4	6	95	85.58 %	2	87.50 %	Close Delete
Aug 24, 2014	101	4	13	118	101	4	8	113	100.00 %	0	100.00 %	Re-open Delete
Aug 17, 2014	101	4	11	116	88	3	5	96	87.50 %	2	89.42 %	Re-open Delete
Aug 10, 2014	94	4	11	109	34	1	5	40	36.84 %	0	36.84 %	Re-open Delete
Aug 03, 2014	88	3	10	101	2	0	0	2	2.27 %	0	2.27 %	Re-open Delete
YTD									60.99 %	5	61.19 %	

Regular members: Attendance always counts
Excused members: Attendance counts if they attend
Exempt members: Attendance does not count whether or not they attend

Please note: Until you decide to migrate your data, attendance information is not forwarded to the district. If you wish to delay data migration while you familiarize yourself with Attendance 3.0, please use the **Monthly Club Report** for your totals, these will need to be manually entered on the District website.

Month	Number of Members	New Members	Terminated Members	Closed Meetings	Gain/Loss	YTD Gain/Loss	MTD %
Jul 14	110	4	1	8	3	3	0.48%
Aug 14	119	9	0	4	9	12	0.57%
Sep 14	119	1	1	0	0	12	0.00%
Oct 14	118	0	1	0	-1	11	0.00%
Nov 14	118	0	0	0	0	11	0.00%
Dec 14	118	0	0	0	0	11	0.00%
Jan 15	118	0	0	0	0	11	0.00%
Feb 15	118	0	0	0	0	11	0.00%
Mar 15	118	0	0	0	0	11	0.00%
Apr 15	118	0	0	0	0	11	0.00%
May 15	118	0	0	0	0	11	0.00%
Jun 15	118	0	0	0	0	11	0.00%

Print Member List/Attendance Sheet

To access the member list/attendance sheet, click on the **Print Member list/Attendance** link on the left-hand side menu bar. When the report loads up, you will see that the sequence order is done by last name, click the **Sort by First Name** button to resort the order. Using the **Print** button, you can print a copy of the report to paper.

Members List for Test Rotary Club

Meeting Date:

Sort by First Name [Print](#)

Active Honorary [Refresh](#)

Name	Cash	Cheque
Baker, Sue		
Barnes, Bill		
Barnes, William		
...		

Reports

- ▶ Print Member List/Attendance Sheet
- ▶ **Print Member List (Simple Version)**
- ▶ Attendance Report (By Year)
- ▶ Monthly Club Report
- ▶ Customized Attendance Report

Print Member List (Simple Version)

To access the member list/attendance sheet, click on the **Print Member list (Simple Version)** link on the left-hand side menu bar.

Attendance Report (By Year)

1. To access the member list/attendance sheet, click on the **Attendance Report (By Year)** link on the left-hand side menu bar.
2. Use the **Print** button, to print a copy of the report on to paper.

Membership Attendance

« Previous Year | **2014-15** | Next Year »

Print

Search:

Name ▲	Special Notes ▼	Meetings Attended ▼	Meetings Missed ▼	Makeups ▼	Banked Makeups ▼	YTD Attendance ▼
Baker, Sue		2	2	1	0	75.00 %
Barnes, Bill		3	1	0	0	75.00 %
Barnes, William		2	5	0	0	28.57 %
Jackson, Eva		1	1	0	0	50.00 %
Kombluth, Cyril		1	1	0	0	50.00 %

3. To view a breakdown of each member’s individual attendance information, click on the **Members Name** for a full list of meeting information and for the totals of banked makeups. Use the **Print** button to print the information on to paper.

Print

Search:

Meeting	Description	Type	Attended	Missed	Makeup	Makeup Description
Jan 08, 2015	Normal Weekly Meeting	Regular - Active	✓			
Jan 07, 2015		Active - All		✓		
Nov 10, 2014		Regular - Active	✓			
Nov 03, 2014		Regular - Active	✓			
Oct 27, 2014		Regular - Active	✓			
Sep 17, 2014		Active - All	✓			
Sep 10, 2014		Active - All	✓			
Meetings:						6 / 7
YTD Actual Attendance ^[1] :						85.71 %
YTD Reported Attendance ^[2] :						85.71 %

Showing 1 to 7 of 7 records found

Monthly Club Report

To access the Monthly Club Report, click on the **Monthly Club Report** link on the left-hand side menu bar. The report will provide you with a list of monthly totals for all closed meetings. To print a copy of the monthly club report, use the **Print** button.



Club Attendance Report by Month for Rotary Club of Green Town

« Previous Year | 2014–15 | Next Year »

Print

Month	No. of Members (End of This Month)	New Members	Terminated Members	Closed Meetings	Gain/Loss	YTD Gain/Loss	MTD %
Jul 14	2	0	0	0	0	0	0.00%
Aug 14	2	0	0	0	0	0	0.00%
Sep 14	2	0	0	0	0	0	0.00%
Oct 14	4	2	0	1	2	2	1.00%
Nov 14	6	2	0	2	2	4	1.00%
Dec 14	11	5	0	0	5	9	0.00%
Jan 15	11	0	0	1	0	9	1.00%
Feb 15	12	2	1	0	1	10	0.00%
Mar 15	13	1	0	0	1	11	0.00%
Apr 15	13	0	0	0	0	11	0.00%
May 15	13	0	0	0	0	11	0.00%
Jun 15	13	0	0	0	0	11	0.00%

Customized Attendance Report

To access the Customized attendance Report, click on the **Customized Attendance Report** link on the left-hand side menu bar.



Support & Training

Visit our **Support Center** at [http: www.ClubRunnerSupport.com](http://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. 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:

