



## District 5020 Officer/Chair Instructions On Line Directory Information Management February 2009



The purpose of this document is to outline the basic steps for **entering and updating** incoming Club Officer names and contact information into the District 5020 Officer Online Directory. Incumbent Presidents and Secretaries are authorized to make these changes and updates. This information is also utilized in the printed district directory. **It is important to note that Club Runner software does not perform this function for you.**

It is also important that updates are made in a timely manner **throughout the year** when there is a new e-mail address, mailing address or phone number; otherwise your leadership might miss critical notices during the year.

**PLEASE NOTE:** Club members should not be listed in the Officer Directory if they are NOT current or incoming club or district officers, Past District Governors, Assistant District Governors, board directors or essential committee chairs as listed in the Club Listings. Names should be deleted from the member list if they are not in any of the positions listed above.


Deadlines: Jan 31: All club officers and directors  
Critical positions are the President and Secretary

### 1. Obtain your UserID and password

If you do not know your password or userID (which is a number between 1 and 999999), you can obtain it by following these steps:

- A) Go to <http://directory.rotary5020.org/sendpassword.php>
- B) Enter your email address.
- C) You will receive an email message containing your userID and your password (be patient the online manager isn't at her computer 24 hours a day).

### 2. Enter the Club Officer Names

- A) Go to the link <http://directory.rotary5020.org/clublist.php>
- B) You will see the logon box shown. 
- C) Enter your userID (a number between 1 and 999999) and your password.
- D) After the login you will be taken to the Club Listings page, part of which is shown below. You will see the editing options for your club. **Assistant Governors will see the editing options for all clubs in their area.** Note: Sample below may not reflect current year.

<a href="#">Centralia</a>	<a href="#">Members</a>			
<a href="#">Chehalis</a>	<a href="#">Members</a>	<a href="#">Edit club info 2008/09</a>	<a href="#">Edit exec info for 2009/10</a>	<a href="#">View exec info for 2009/10</a>
<a href="#">Chemainus</a>	<a href="#">Members</a>			

- E) Click on the link to **Edit exec info for (upcoming year)** you will see the Club Executive Editor Page shown:
 

President : 
  
 President Elect :
- F) For each position, click on the down arrow on the right of each line. This will bring up a menu of all the members in your club who are in the database.
- G) Select the name of the member who will hold the position in the coming year. If the person coming into the office is missing from the data base, go to Step 5, enter the data and then come back to this location to complete your entries.

- H) Do this for all the Club Officers and Chairs.
- I) When finished don't forget to go all the way to the bottom of the list and click on "UPDATE CLUB FUTURE" to save the information
- J) Enter the names of Secretary and President for the upcoming Rotary year in the Rotary International Directory. This needs to be completed by January 1st. See <http://rotary5020.org/docs/riloin.pdf> for instructions on this process.

**NOTES:**

Please note that the list of Board Director positions reflects the new club structure from RI using the new Director titles of Club Administration, Service Projects, Membership, Foundation and Public Relations.

The position of Directory Updater should ONLY be used if the Club Secretary designates that task to another person.

**3. View missing phone and email information**

- A) Return to the Club Listings Page <http://directory.rotary5020.org/clublist.php>
- B) Click the link "View club executive info (coming year)" for your Club—See 2(D) for example.
- C) You will see a table showing the club positions, the names you entered in step 2 and the phone and email information as entered in the Officer Directory.
- D) Print a copy of this page for use in Step 4.

**4. Enter any missing email and phone information**

- A) Make sure that you have a copy of your club roster that contains current phone numbers AND email addresses of the Club Executive Officers and Chairs. It would be a very good idea to check this information with each member personally before entering the information in the Directory.
- B) Go to the link <http://directory.rotary5020.org/clublist.php>
- C) Click on the Members link. This will bring up the Officer Listing page where you will see a screen similar to the one below listing the names of current or incoming Club or District Officers/Chairs in your club.
- D) Look at the copy of the names, phone numbers and email addresses that you printed in Step 3 and click on the "EDIT" by the name of an officer for whom there is missing information.
- E) You will be taken to the Officer Editor page and will see the information form for email addresses, phone numbers and mailing address. The address for (snail) mail can be either the home address or business address, as preferred.
- F) Enter any missing or incorrect phone numbers or email address, then click the **Edit Details** button at the bottom of the page to enter the updated information into the Directory.

**District 5020 Online Officer Directory – Current and Incoming Officer Listings**

**New Officer**

Names: 9

[Go to Club Listings](#) | [View My Club](#) | [Edit My Information](#)

Bernabei, Joe	Edit	Delete	Upload Picture	Delete Picture
Hjelholt, Erik	Edit	Delete	Upload Picture	Delete Picture
Jones, Donald	Edit	Delete	Upload Picture	Delete Picture

**5. Enter any names missing from the menu used in Step 2**

- A) If you have any incoming officers whose names were not listed on the drop-down menu in step 2, enter their names and information by using the **Add Club New Officer** link at the top of the Current and Incoming Officer Listings  
**NOTE AGAIN:** It is not necessary to enter all club member names in the Officer Directory, only the names and information of incoming officers and those members who are in district leadership or hold an appointed district position. Please delete any names of members who are not current or incoming Club (OR DISTRICT) Officers. Also, do not delete PDG's or ADG's from the list.
- B) Enter the name, a password, email address, phone numbers and other information requested. The Members Rotary number may be found on the Rotary International Club Foundation Donation report.
- C) Click the **Edit Details** button at the bottom of the page to save the information into the Directory.
- D) Return to step 2 to enter the name of the club officer using the [Edit Exec for \(coming year\)](#) link for your club on the Club List Page you can get there by clicking on the "back arrow" at the top of your browser or going to <http://directory.rotary5020.org/clublist.php>

**Further Help** — If you have any questions about any of these steps, please email Rose Bowman at [Rose.Bowman@lewiscountywa.gov](mailto:Rose.Bowman@lewiscountywa.gov) OR phone days at 360.520.0163 home and evenings 360.736.5954.