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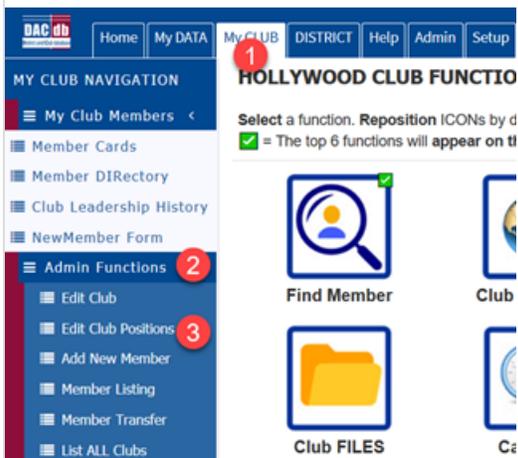
A new screen opens where you will see is an edit pencil in front of each member. Click on the pencil of the first individual you need to edit, and it will open to their information.

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) (05/26/19 - 06/30/19)

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
✔	07/01/18	06/30/19	iPast President	✔	4	32	Kelly, Lin 06/05/17
	07/01/17	06/30/18	President	✔	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 postion (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:

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.

Now click on Add:

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:

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

Now you can review the results.

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

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.

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

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

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