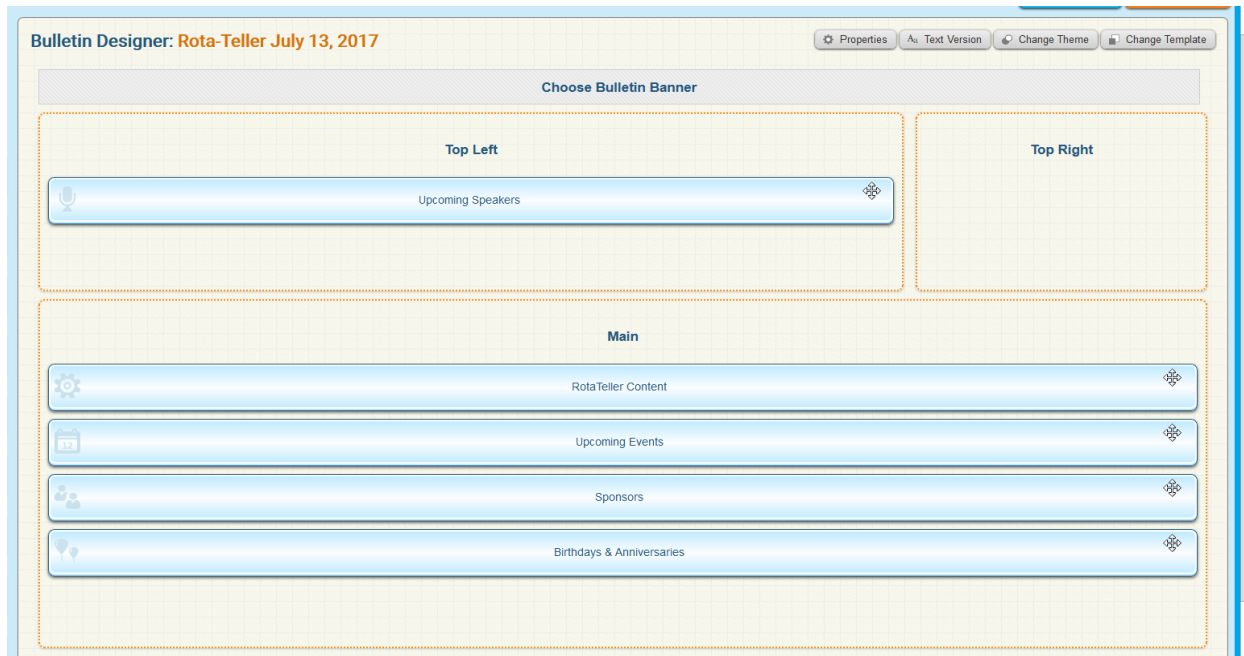


The Rota-Teller in 59 Simple Steps – How to Publish the Rota-Teller

(Last updated: April 2, 2023)

What's in the Rota-Teller?



What members don't see when that slick-looking Rota-Teller arrives in their inbox each week is what's under the fancy wrapping. The Rota-Teller consists of the seven modules (called "widgets") shown above. In addition to the five self-explanatory light blue widgets, there is the Bulletin Banner (our Rota-Teller masthead) and the mysterious "Top Right" widget. This widget contains national advertising which, by terms of its contract, our Club is required to display.

Six of the seven widgets are automatically generated from data elsewhere in the ClubRunner system. So it may be said that the Rota-Teller almost writes itself. Your task as a Rota-Teller editor is to input text and photos into the "Rota-Teller Content" widget and then publish the bulletin by clicking buttons. The ClubRunner software integrates all the widgets into the finished Rota-Teller. This guidance attempts to walk you through the process.

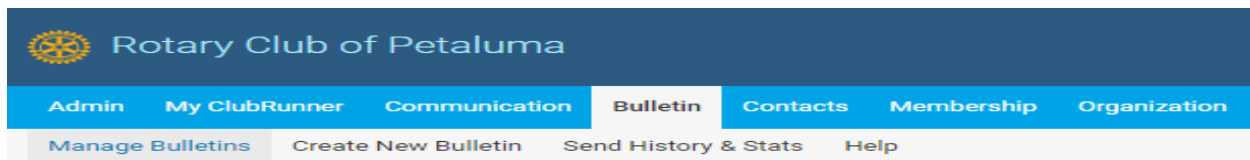
What you need before you start:

- **Your text.** While you can compose your text within the ClubRunner program, you'll find it much easier to use Microsoft Word. Style rules are simple and are intended to present a standard appearance from week to week. Paragraphs are not indented. Member names are in bold type (**Jane Saldaña-Talley**). Feel free to use italics when you wish. Hyperlinks are welcome. (Select the word or words you want to serve as the link, press Ctrl + K, enter the URL in the address block, and click OK.) It's a good idea to insert several blank lines between paragraphs. That makes it easier to insert photos later in the process.
- **Photos.** These will be emailed to you by the photographer. When they arrive, save them to a folder on your computer. If they arrive as discrete attachments it's a simple matter of "Save Attachments". If the photos arrive displayed in the text of the email, instead of as attachments, the save process is different. Right click each photo, then click "Save as Picture..." Don't try to transfer photos directly from the email into the ClubRunner software!

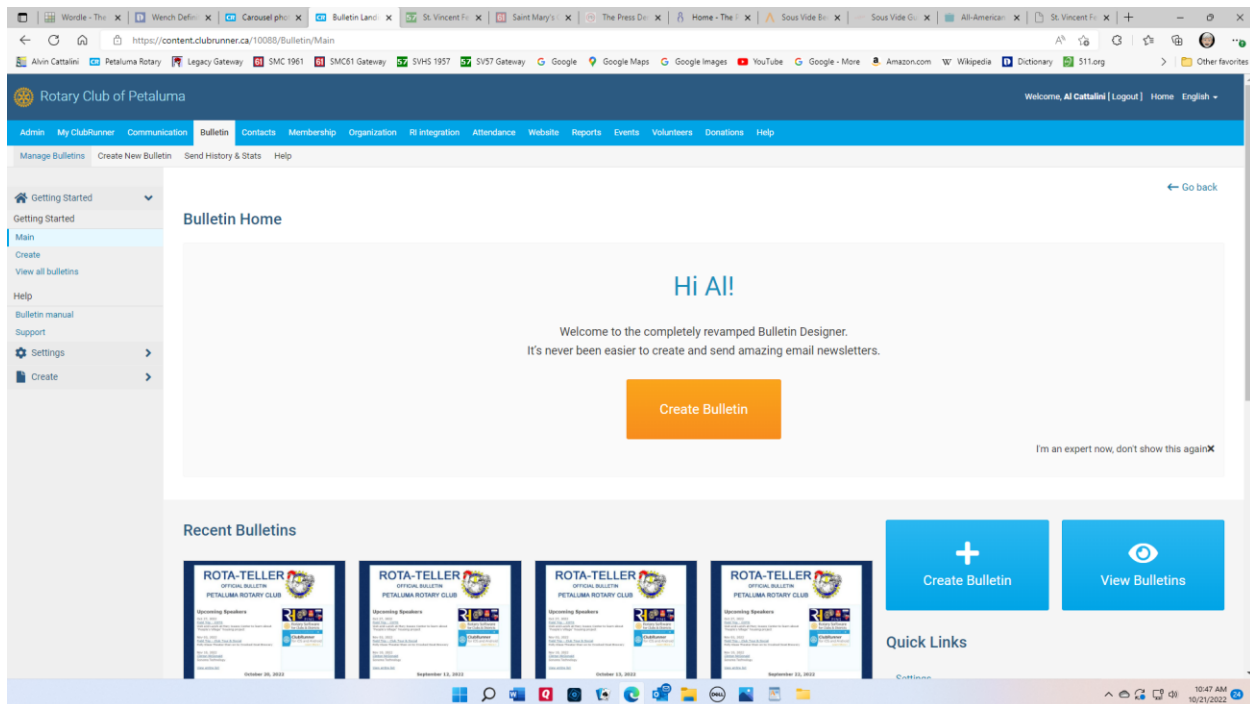
Information for Photographers. Select your candidate photos, tweak and crop them as appropriate, and reduce them to 600 pixels in width. (That's the space available in the preset bulletin format. If you send larger photos, the ClubRunner software will automatically shrink them when they are inserted into the bulletin. Larger photos are OK but unnecessary and can present email difficulties.) Email the photo files to the editor.

Adding your Text to the Rota-Teller:

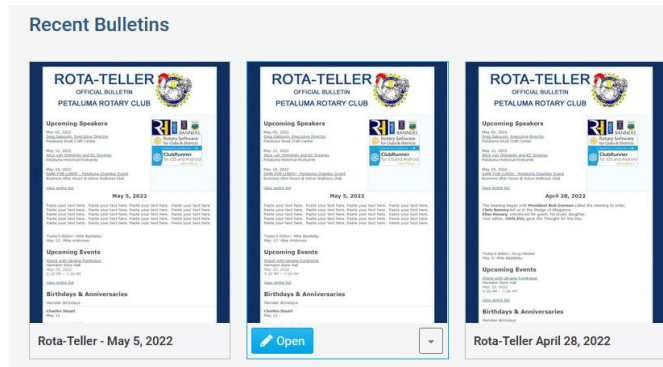
Now that you have your text and photos it's time to assemble them into the Rota-Teller. Open the petalumarotary.org home page and click **Member Area** at the very top. Then click on the **Bulletin** tab.



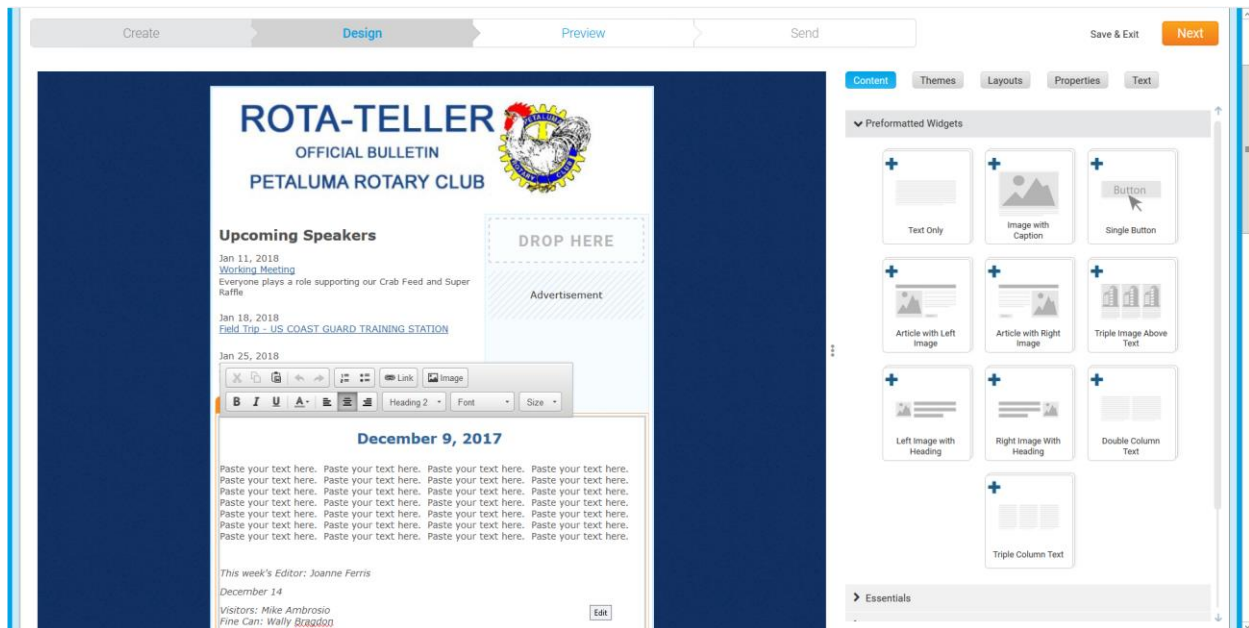
Then, on the line that will appear immediately below, click the **Manage Bulletins** tab. A page like this will appear:



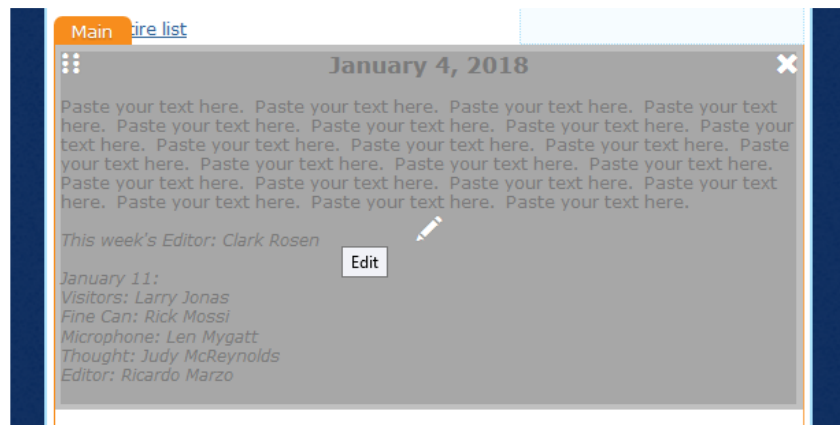
Do NOT click the "Create Bulletin" button! Instead, scroll down to find your partially drafted Rota-Teller. You'll see thumbnails of "Recent Bulletins" including two whose name includes the date of the issue you will be publishing. There is a subtle, *but important*, difference in their names. One has a hyphen between Rota-Teller and the date. This is the bulletin that you will edit. Move your cursor onto this bulletin.



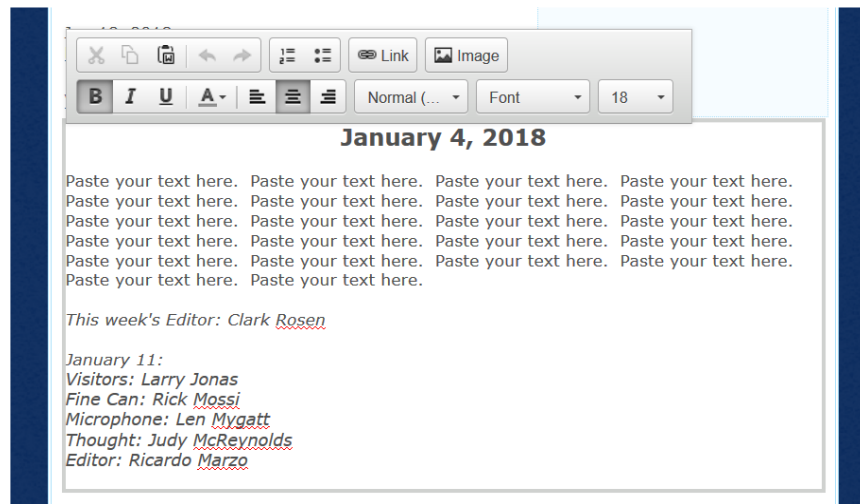
When the cursor moves onto the bulletin, a blue **Open** button appears in place of the name. Click the **Open** button and you'll see something like this:



Note the highlighted progress bar at the top which shows you are in the Design mode of the software. Place your cursor over the Rota-Teller content (the text that begins with the date and concludes with duty assignments for the next meeting). This area will become highlighted and look like this:



Note the white pencil icon in the center of the highlighted area. Click on it to edit this section. When you click the pencil (or anywhere in the highlighted area) you'll see something like this:



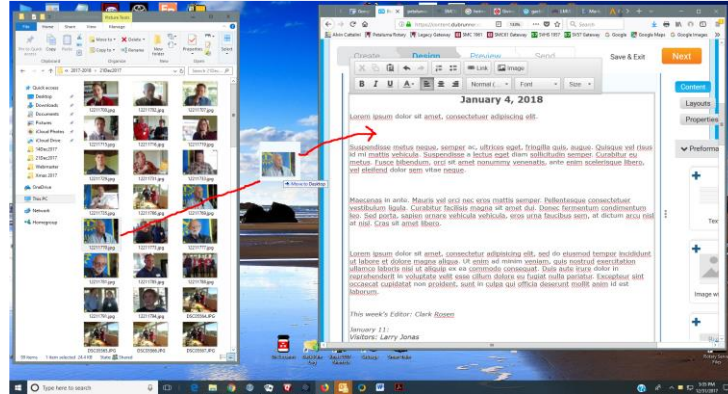
Paste your entire Rota-Teller text over the dummy filler following the date. Using the **Ctrl + V** command works well here. While you can use ClubRunner's built-in word processor (the clipboard icon) this introduces more complexity. It's easier if you just use **Ctrl + V**.

Adding Photos to the Rota-Teller:

Now that your text has been entered, it's time to add the photos. You don't have to use all the photos. Select the ones that fit your story. If there's a photo you'd like to include — but which doesn't fit into your story — just put it somewhere on the page and add a caption. You're in charge! Some editors have built their story around the photos, adapting their text to fit. Others insert photos into their text where they seem to fit. It's up to you. *But make sure the photos are in a file on your computer.*

Note. *The procedures described below should work with all browsers. One editor had problems adding photos using Internet Explorer and also with Microsoft Edge. While this may have been a security issue of some sort, the problem was solved by using the Chrome browser. Firefox or Safari should work equally well.*

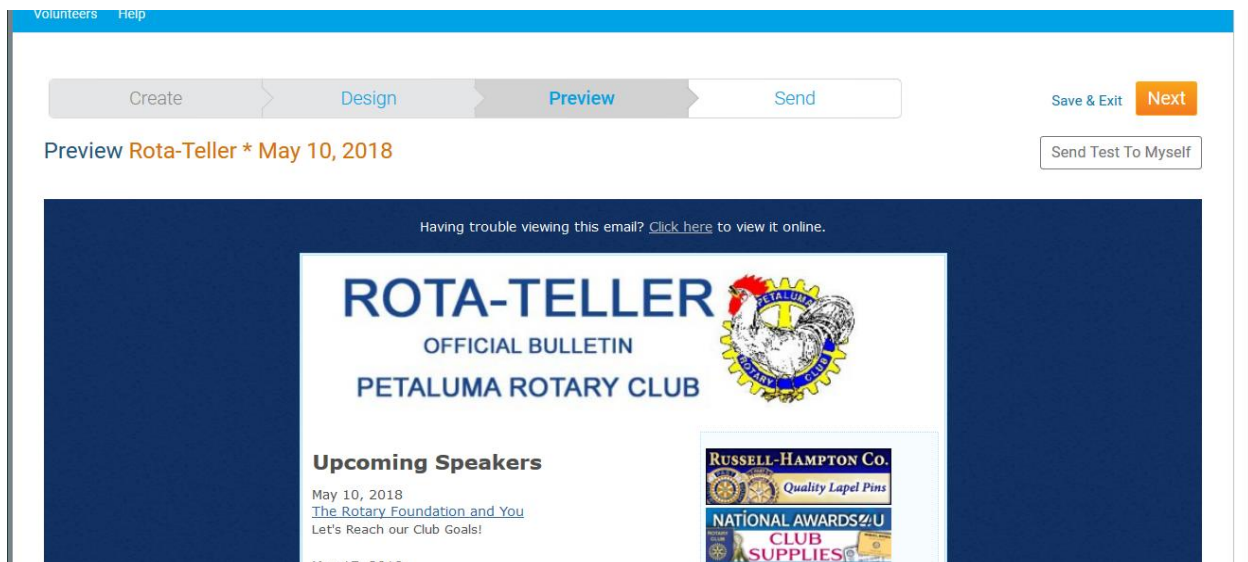
Dragging photos is an easy way to add photos to your text.



Resize your ClubRunner window and your photo file window so they are both visible on your monitor. Place your cursor on the photo you desire to import, click down on the cursor and, **while continuing to hold the cursor down**, move the cursor across your screen. You will see the photo moving along with the cursor. (The screenshot above shows a photo partway on its journey.) When the photo is located where you want it in your story, release the cursor button. A copy of the photo will now be located within your text. You can then move it around in the text as you wish. Repeat with the next photo until all desired photos are copied.

You may need to add — or remove — blank lines between paragraphs to present an attractive appearance.

When you've finished adding photos, click the orange **Next** button at the upper right corner of your window. This window will appear:



Note that the progress bar shows that you are now in the **Preview** mode. Scroll through the Rota-Teller to make sure that it's the way you want it. If you see something that needs fixing, click **Design** on the

progress bar, click on the text to highlight it, and then click to allow editing. When finished with your editing click the orange **Next** button again to return to the **Preview** mode

Sending a Test Rota-Teller to Yourself:

Now that you have created the Rota-Teller and you are satisfied with its appearance (ignoring any commitments gobbledygook at the very bottom), it's time for the acid test. You need to see what it actually looks like when it arrives by email. So you send it to yourself.

Click the **Next** button and you should arrive at the Send window. If, instead, you see this (or a similar message)

Firefox Can't Open This Page

To protect your security, content.clubrunner.ca will not allow Firefox to display the page if another site has embedded it. To see this page, you need to open it in a new window.

[Learn more...](#)

[Open Site in New Window](#)

Report errors like this to help Mozilla identify and block malicious sites

just click **Open Site in New Window** and you'll be at the Send window. (Note that the progress bar shows that you are now in the **Send** mode.)

The screenshot shows the 'Send Rota-Teller' window in the ClubRunner system. The window title is 'New Bulletin (Beta)'. The navigation bar at the top includes 'Admin', 'My ClubRunner', 'Communication', 'Bulletin', 'New Bulletin (Beta)', 'Contacts', 'Membership', 'Organization', '3rd Integration', 'Attendance', 'Website', 'New Website (Beta)', 'Reports', 'Events', 'Volunteers', 'Donations (Beta)', and 'Help'. The main content area is titled 'Send Rota-Teller April 29, 2021'. It features a progress bar with steps: 'Create', 'Design', 'Preview', and 'Send'. Below the progress bar, there are two columns of options. The left column is 'Select your recipients' with checkboxes for 'Active and Honorary Members (71/76)', 'Other Users (2/2)', 'Inactive Members (0/26)', 'Custom Distribution Lists (0/34)', and 'Contact Groups (0/57)'. The right column is 'Options' with fields for 'Email Subject' (Rota-Teller April 29, 2021), 'Archive bulletin after sending' (Yes/No), 'Copy me on this bulletin' (Yes/No), 'Reply To' (Me, Bulletin Editor, Custom), and 'When would you like to send your bulletin?' (Send now, Schedule for later). At the bottom right, there is a 'Send Test To Myself' button.

Click the **Send Test To Myself** button at the bottom of the window. Then click **OK** when this pop-up appears.

The screenshot shows a pop-up dialog box with the title 'Rota-Teller April 29, 2021'. The main text inside the dialog is 'Send test bulletin to yourself?'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'OK'.

“Test message successfully sent” will appear in a green banner atop your screen. The Rota-Teller will be in your inbox shortly.

Sending the Rota-Teller to our Readers:

If the emailed Rota-Teller looks OK, you are ready to send it to our members and to certain others authorized to receive it.

Admin My ClubRunner Communication Bulletin Contacts Membership Organization RI integration Attendance Website Reports Events Volunteers Donations Membership Success Help

Create Design Preview **Send** Save & Exit **Send**

Send Rota-Teller March 23, 2023

Select your recipients

- Active and Honorary Members (68/72)
- Other Users (2/2)
- Inactive Members (0/33)
- Custom Distribution Lists (0/75)
- Contact Groups (16/210)
 - Bulletin Subscribers Expand (16/17)
 - Crab Feed Outreach 2022 Expand (0/59)
 - Friends Expand (0/72)
 - Meeting Guests Expand (0/40)
 - Volunteers Expand (0/21)
 - No Group Expand (0/1)
- Prospects by Status (0/0)

Options

Email Subject *
Rota-Teller March 23, 2023

Archive bulletin after sending
 Yes No

Copy me on this bulletin
 Yes No

Reply To
 Me Bulletin Editor Custom

Al Cattalini - ac@cattalini.com

When would you like to send your bulletin?
 Send now
 Schedule for later

Check the boxes exactly as shown above (important!), confirm the subject for your email is correct, and then click the orange **Send** button.

Click OK when the confirmation box appears:

Send bulletin to 84 recipients then archive?

Cancel **OK**

The Rota-Teller will be emailed to the recipients you have specified above:

- Active and Honorary Members
- Other Users
- Bulletin Subscribers

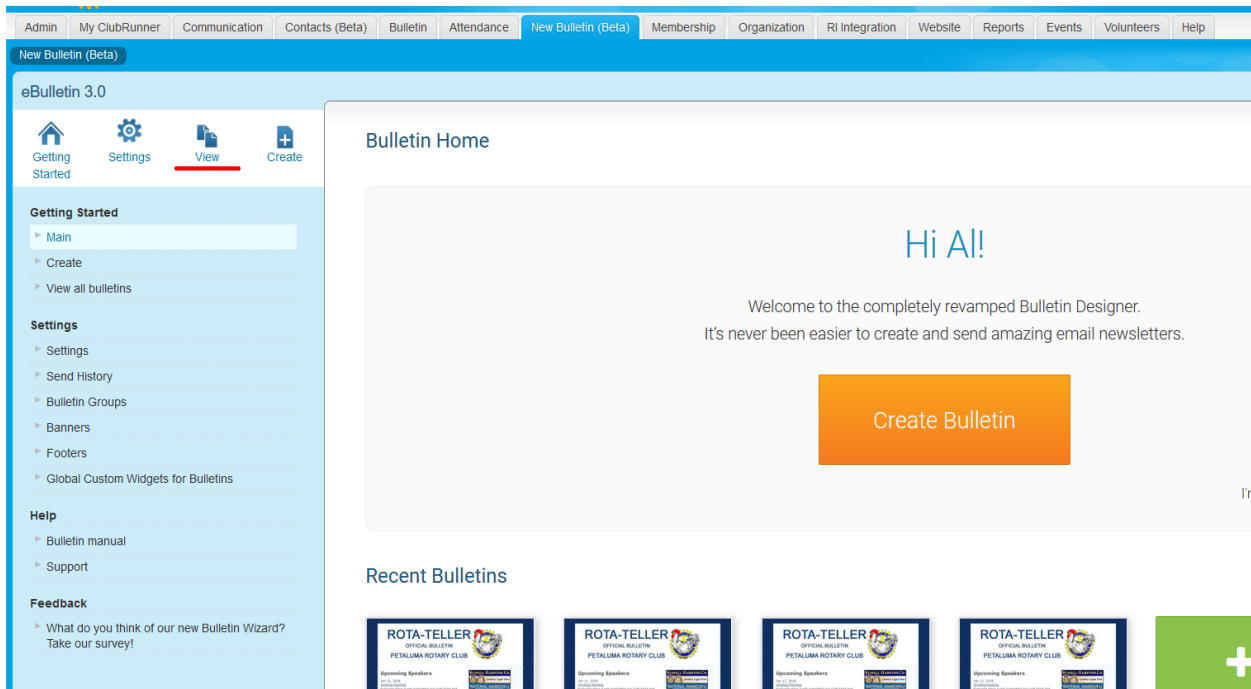
You are now done. Congratulations!

About those checkboxes: The boxes on the left select to whom the Rota-Teller is emailed. The first box on the right insures that the Rota-Teller will be archived and no longer editable. It's now history. The second box makes sure you get another copy.

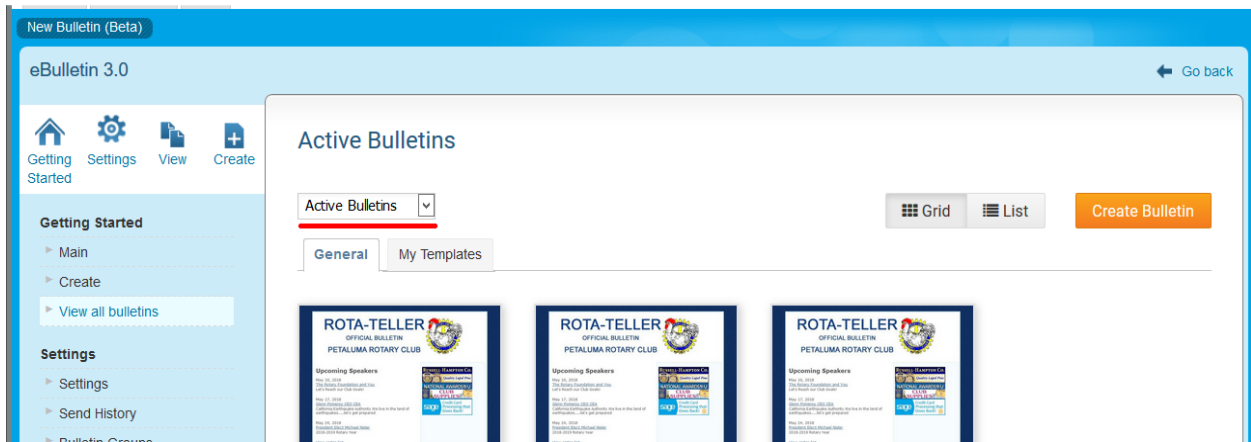
Why do you want another copy? When you find that second copy in your inbox, you'll know that the Rota-Teller has been distributed to everyone and your job is complete. (We have had editors who missed a step along the way and somehow unknowingly failed to actually distribute their creation.)

Archived Bulletins:

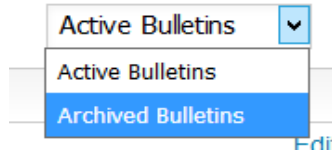
To find the list of archived bulletins return to the Bulletin Home page and click the **View** button, underlined in red on this screenshot.



Clicking the View button will give you a listing of active bulletins:



Note the drop-down list (underlined above in red). Click the arrow and select Archived Bulletins.



You'll now have a listing of archived bulletins:

The screenshot shows the website interface for the Rotary Club of Petaluma. The main navigation bar includes 'Admin', 'My ClubRunner', 'Communication', 'Contacts (Beta)', 'Bulletin', 'Attendance', 'New Bulletin (Beta)', 'Membership', 'Organization', 'RI Integration', 'Website', 'Reports', 'Events', 'Volunteers', and 'Help'. The 'New Bulletin (Beta)' tab is active. Below the navigation bar, there is a sidebar with 'Getting Started' (Main, Create, View all bulletins) and 'Settings' (Settings, Send History, Bulletin Groups, Banners, Footers, Global Custom Widgets for Bulletins). The main content area is titled 'Archived Bulletins' and contains a table of bulletins. A search box for 'Filter records' is present above the table. The table has columns for Group, Date, Name, Last Sent On, Archived On, Visible on Website, and Actions. The 'Visible on Website' column contains checkmarks, and the 'Actions' column contains links for Hide, Properties, View, Copy, Send, and Delete.

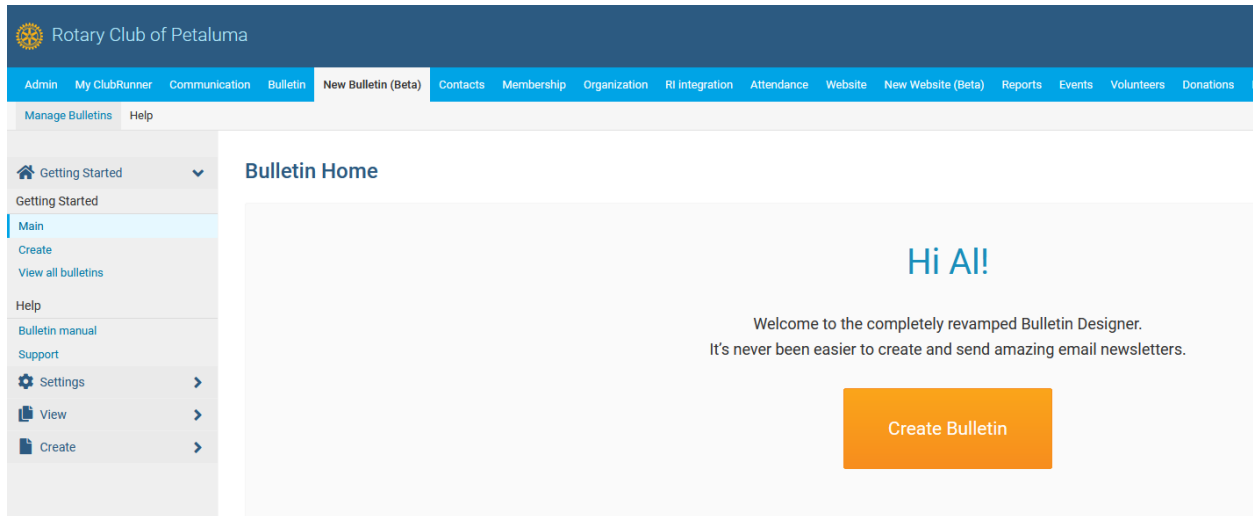
Group	Date	Name	Last Sent On	Archived On	Visible on Website	Actions
General	Jan 01, 2018	Rota-Teller - January 4, 2018	Jan 06, 2018	Jan 06, 2018	✓	Hide Properties View Copy Send Delete
General	Dec 22, 2017	Rota-Teller - December 21, 2017	Dec 22, 2017	Dec 22, 2017	✓	Hide Properties View Copy Send Delete
General	Dec 11, 2017	Rota-Teller - December 14, 2017	Dec 21, 2017	Dec 21, 2017	✓	Hide Properties View Copy Send Delete
General	Dec 06, 2017	Rota-Teller - December 9, 2017	Dec 12, 2017	Dec 12, 2017	✓	Hide Properties View Copy Send Delete
General	Nov 29, 2017	Rota-Teller - November 30, 2017	Dec 05, 2017	Dec 05, 2017	✓	Hide Properties View Copy Send Delete
General	Nov 13, 2017	Rota-Teller - November 16, 2017	Nov 17, 2017	Nov 17, 2017	✓	Hide Properties View Copy Send Delete
General	Nov 06, 2017	Rota-Teller - November 9, 2017	Nov 15, 2017	Dec 11, 2017	✓	Hide Properties View Copy Send Delete
General	Oct 31, 2017	Rota-Teller - November 2, 2017	Nov 05, 2017	Nov 05, 2017	✓	Hide Properties View Copy Send Delete
General	Oct 23, 2017	Rota-Teller - October 26, 2017	Oct 27, 2017	Nov 06, 2017	✓	Hide Properties View Copy Send Delete
General	Oct 16, 2017	Rota-Teller - October 19, 2017	Oct 25, 2017	Oct 25, 2017	✓	Hide Properties View Copy Send Delete
General	Oct 03, 2017	Rota-Teller - October 5, 2017	Oct 05, 2017	Oct 05, 2017	✓	Hide Properties View Copy Send Delete

While archived bulletins can no longer be edited, they can be copied. If it is necessary to update or correct a bulletin that has already been archived, click the **Copy** button, give the copy a new name (perhaps by adding a second hyphen to the name), then edit and publish it.

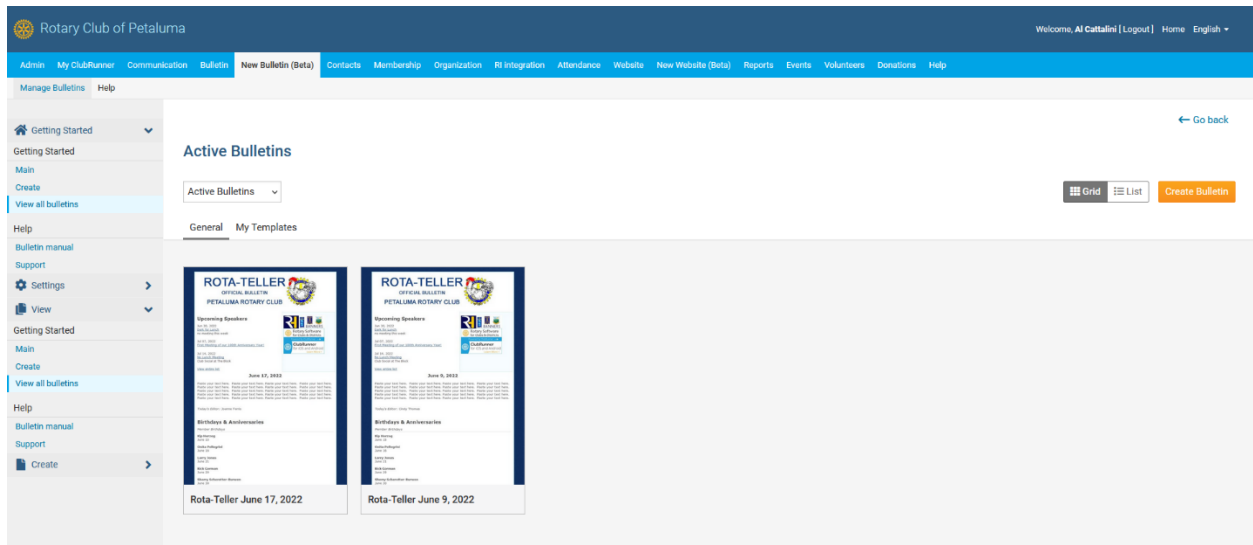
Building a Rota-Teller from Scratch

You've prepared bulletins by completing ones that have already been started for you. They've had the correct issue date at the top and editor information at the bottom. But what happens if your bulletin guru failed to prepare one? No problem. You just do what the guru should have done. You copy an earlier, uncompleted bulletin (one without the dash between Rota-Teller and the date), save it with a new name, and do some simple editing. Here's how.

First, go to the Bulletin Home like you usually do.



From the menu on the left, click **View all bulletins**. You'll see a screen like the one below, with thumbnail photos of bulletins. Note the name (date) of an existing, uncompleted Rota-Teller that you will use as the starting point for your Rota-Teller.



This is considered a “grid” view of the bulletins. But you’ll need a “list” view, so click the **List** button, off to the right, next to the orange button.

The screenshot shows the 'Active Bulletins' page in a grid view. The page header includes the Rotary Club of Petaluma logo and navigation links. The main content area displays a table of active bulletins with columns for Group, Date, Name, Last Sent, Published On, Scheduled On, and Actions. A search filter is present above the table. On the right side, there are buttons for 'Active Bulletins', 'Grid', 'List', and 'Create Bulletin'.

Group	Date	Name	Last Sent	Published On	Scheduled On	Actions
General	Jun 23, 2022	Rota-Teller June 17, 2022		Jun 27, 2022		
General	Jun 01, 2022	Rota-Teller June 9, 2022		Jun 27, 2022		

Now, instead of thumbnails, you’ll see the bulletins arranged in a list. Click the orange button off to the right. (Don’t be tempted to click the identical button on the previous grid view page; it’s a trap!)

The screenshot shows the 'Create New Bulletin' page in a list view. The page header includes the Rotary Club of Petaluma logo and navigation links. The main content area displays the 'Bulletin Settings' form with fields for Name, Date, Bulletin Code, Copy Bulletin From, Bulletin Group, Access Level, Email Subject, Editor Name, and Editor Email. There are also checkboxes for 'Visible on Website' and 'Show Commitments', and a section for 'Content Template' with several thumbnail options. A 'Next' button is visible at the bottom right.

You’ll now be on this Create New Bulletin page. You are going to create a new bulletin by copying an existing one, giving it a new name, making a few changes, and then saving it. It’s that simple. Here’s how.

Rotary Club of Petaluma

Welcome, Al Cattalini [Logout] Home English

Admin My ClubRunner Communication Bulletin **New Bulletin (Beta)** Contacts Membership Organization RI Integration Attendance Website New Website (Beta) Reports Events Volunteers Donations Help

Manage Bulletins Help

Getting Started > Settings > View > Create >

← Go back

Create New Bulletin

Bulletin Settings

Name Rota-Teller - July 7, 2022

Date Jun 29, 2022

Bulletin Code

Copy Bulletin From Rota-Teller June 17, 2022 (Jun 23, 2022)

Bulletin Group General or create new

Visible on Website

Show Commitments

Access Level Public Requires Login

Email Subject Rota-Teller July 7, 2022

Editor Name Al Cattalini

Editor Email ac@cattalini.com

Content Template

You can change this later by clicking the change template button in the Bulletin Designer.

Cancel Next

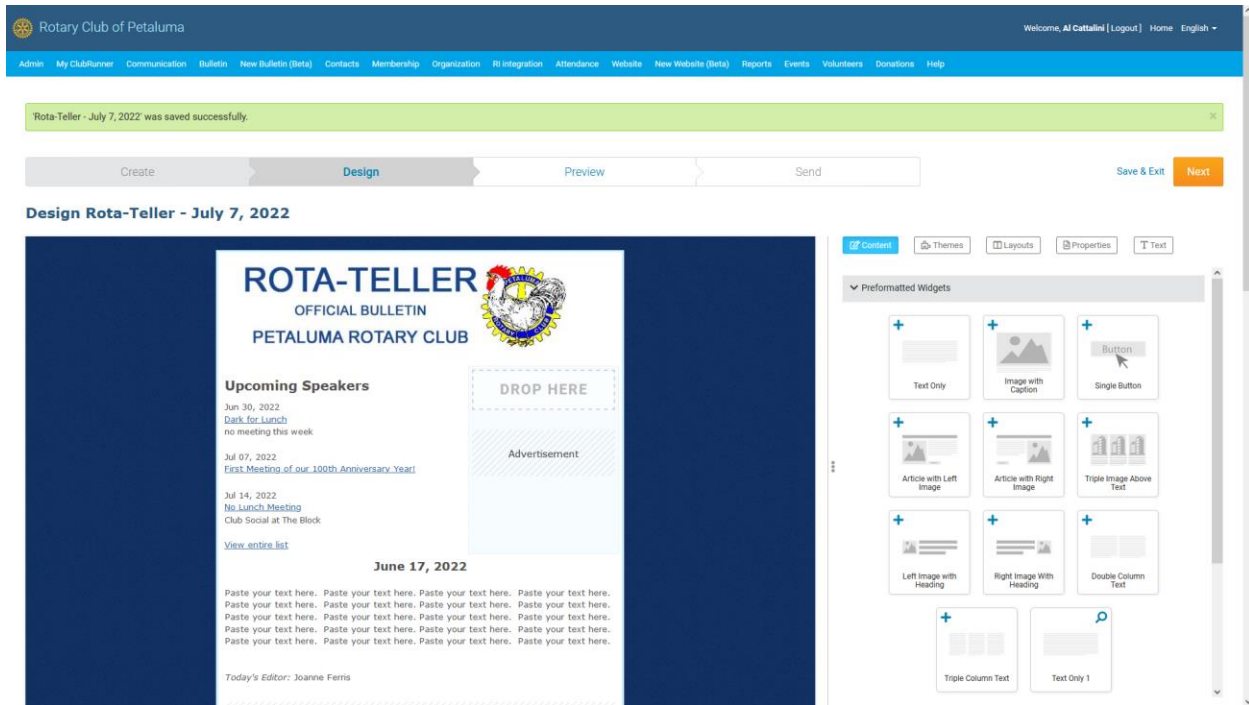
← Go back

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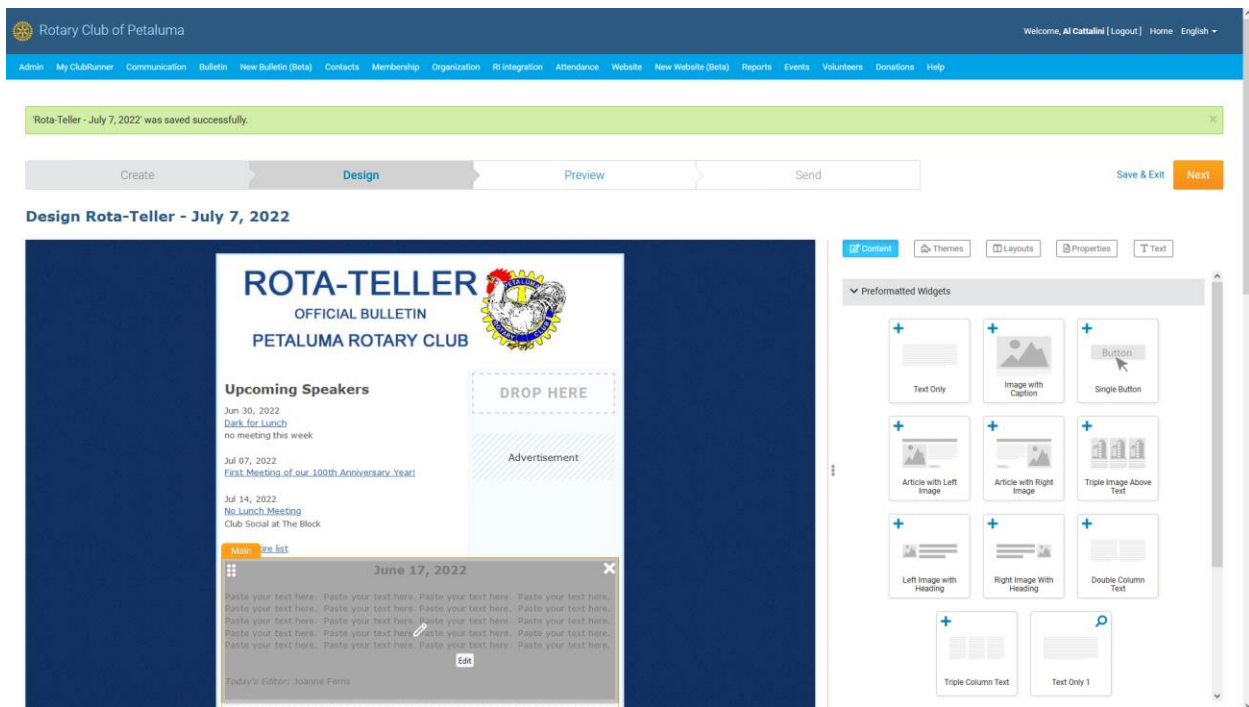
This is a sample with the Bulletin Settings properly filled out. Here are the details:

- Name: Rota-Teller – (desired date)
- Date: Ignore this; it's automatic.
- Bulletin Code: Leave blank
- Copy Bulletin From: Use drop-down menu to select a bulletin.
- Bulletin Group: Ignore this; leave as General.
- Visible on Website: Ignore this; leave checked.
- Show Commitments: Ignore this; leave checked.
- Access Level: Change this to **Requires Login**
- Email Subject: Ignore this; it is automatically filled in with the bulletin name.
- Editor Name: Change to your name.
- Editor email: Will fill automatically when your name is entered above.

Then, click **Next** (the orange button on the lower right).



You'll now see the familiar design page for the Rota-Teller you copied.



Just as you've done for preparing past Rota-Tellers, click on the text area (the "Rota-Teller Content") to edit it. You'll need to change the date at the top and the editor names at the bottom. If you are ready to insert new text below the date, just proceed as usual. If you are done for now, just click **Save & Exit** (next to the orange Next button on the right). It will be waiting for you when you return. You're done!