Polaris

Administration of *Polaris* Club Management System

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1. *Polaris* in summary

The RCMS (Rotary Club Management System) has been developed by Rotary Switzerland-Liechtenstein around 20 years ago and is actually used by 17 European Districts, 945 Clubs in 5 countries with more than 52'000 members (users), for communication and updating of club and district activities. The system is owned by the "Verein Rotary Medien" (VRM), a non-profit legal entity fully controlled by the 3 Rotary Districts Switzerland/Liechtenstein. RCMS is managed by Rotarians; the system is developed and operated by independent companies mandated and paid for that purpose.

With the introduction of RCMS V.5 beginning of 2021, RCMS **is renamed as *Polaris*, the polar star and a remembering of the Rotary founder, Paul Harris**. ***Polaris*** is a multi-language platform (presently German, French, Italian, English and Flemish). **The extension of the language database to further languages may easily be done.**

Rotarian life has not changed => **Polaris is an evolution not a revolution!**

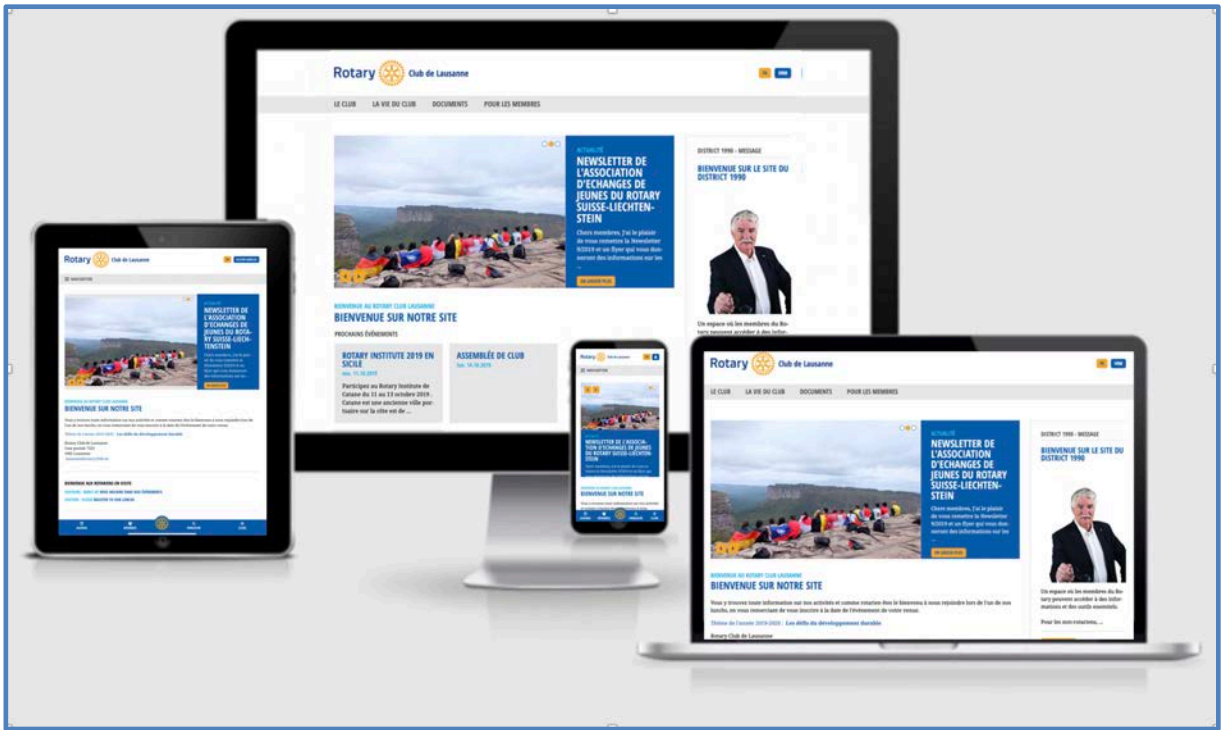
Since April 2012, **the system has been certified by Rotary International (RI) for automatic synchronization of data from *Polaris* database to the RI database.** The synchronization is performed through the Swedish SEMDA-Tool.

Polaris is subject to the **European regulations** "**GDPR**" applicable to the processing of personal data as of May 25, 2018. ***Polaris* complies with GDPR**.

The **continued development of *Polaris*** is ensured by a process whereby members can announce their needs for new functionalities by putting them on a "common listing app" called Redmine. These proposals are taken up by a working group which is responsible for distributing them over future upgrades and versions.

Polaris, a web app "all devices" system, offers all required communication and management features clubs and districts require, including the **integration of Rotaract and Inner Wheel** and the concept of **Metropolitan** and **National** multi-districts website.

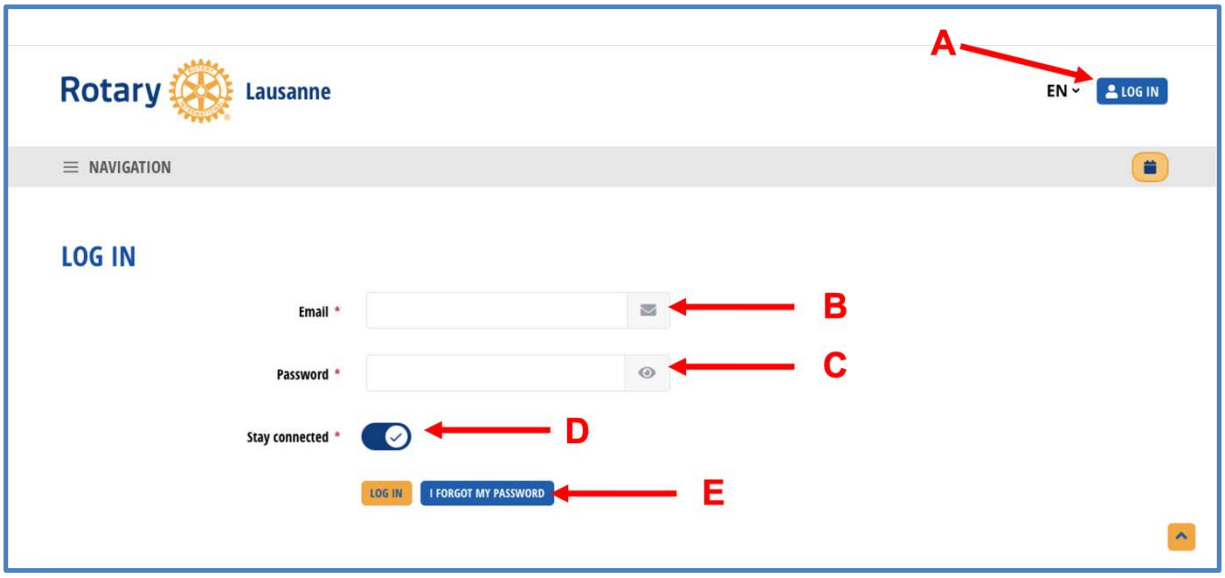
The *Polaris* screen is automatically adapted to the type of device used e.g desktop, laptop, tablet or smartphone



The following chapters describe the **Administration** of ***Polaris.*** Before reading this document, please study the description of Polaris Club Management System for a better understanding of the frontend level (the user's view)

2. Access to the administration level

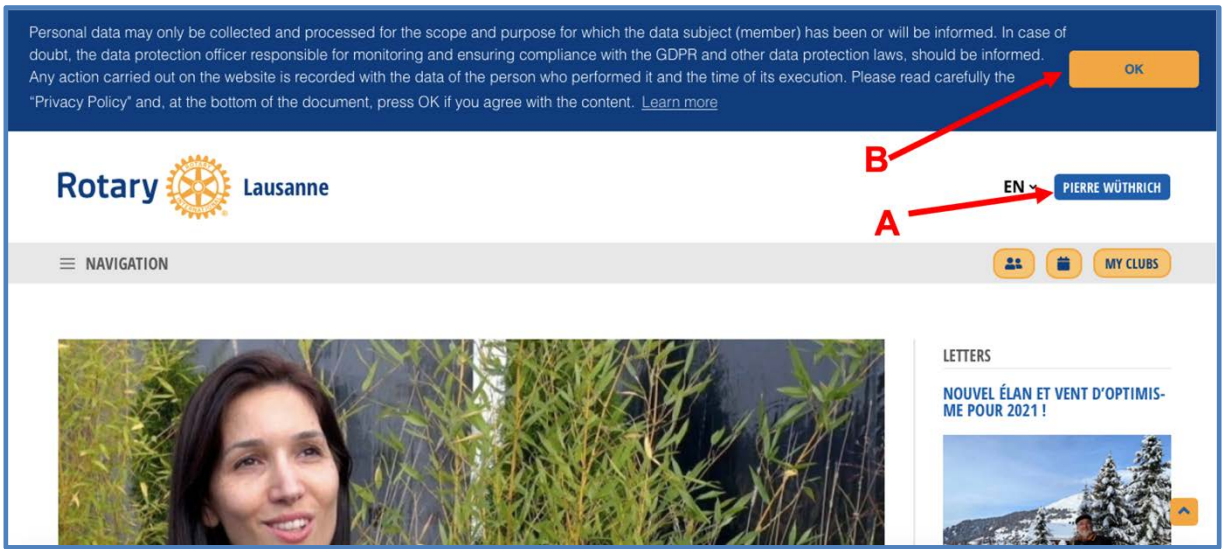
For administration, the member has first to be logged in and has to be granted by the Admin rights.



A. Click Log In

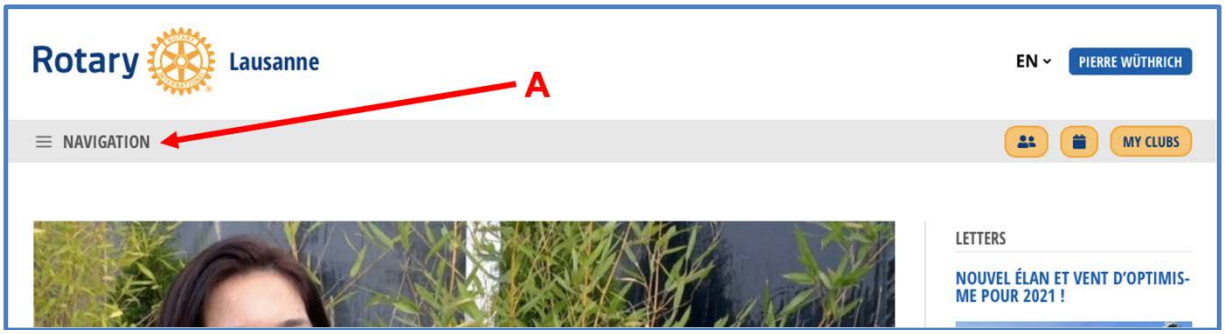
B. Introduce e-mail address ..
C. And password
D. If stay connected is activated, your credentials will be stored in the browser as long as the cache will not be cleaned
E. Log in or let your password be reset, if forgotten

By the 1st login, the member (Administrator) should read the **"Privacy Policy"** and click at the bottom in the case and then **press ACCEPT** before entering the system. The login is registered in the system's logbook. By following logins, only a disclaimer is displayed for remaining the member (A) of his responsibility (B). The login is valid for all "my Clubs"



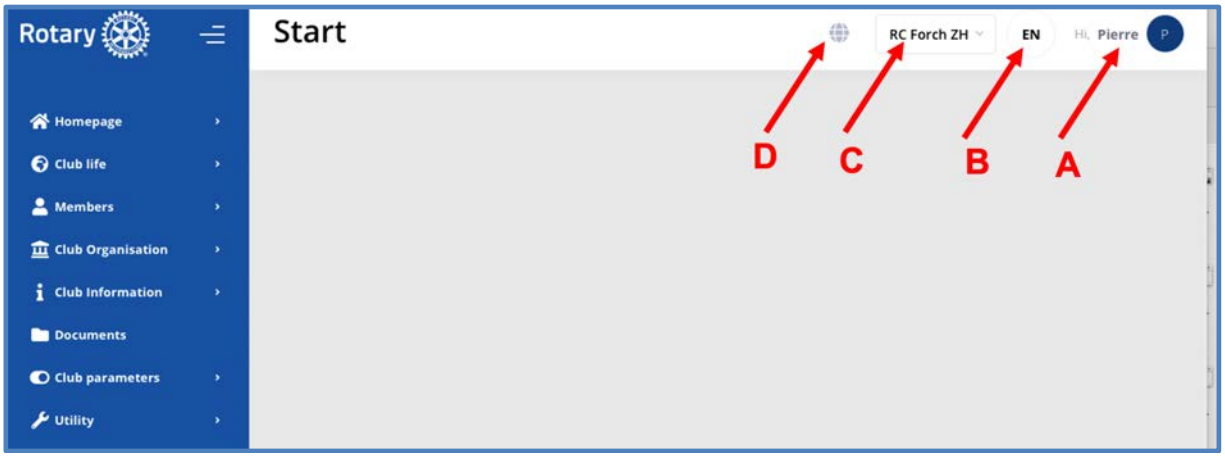
3. Navigation

The pop-up navigation menu is on the left side (A)



And display all available menus. Each menu may be opened or closed by pressing the dart symbol (B)

Go to the tab “Polaris Admin” (C) to access

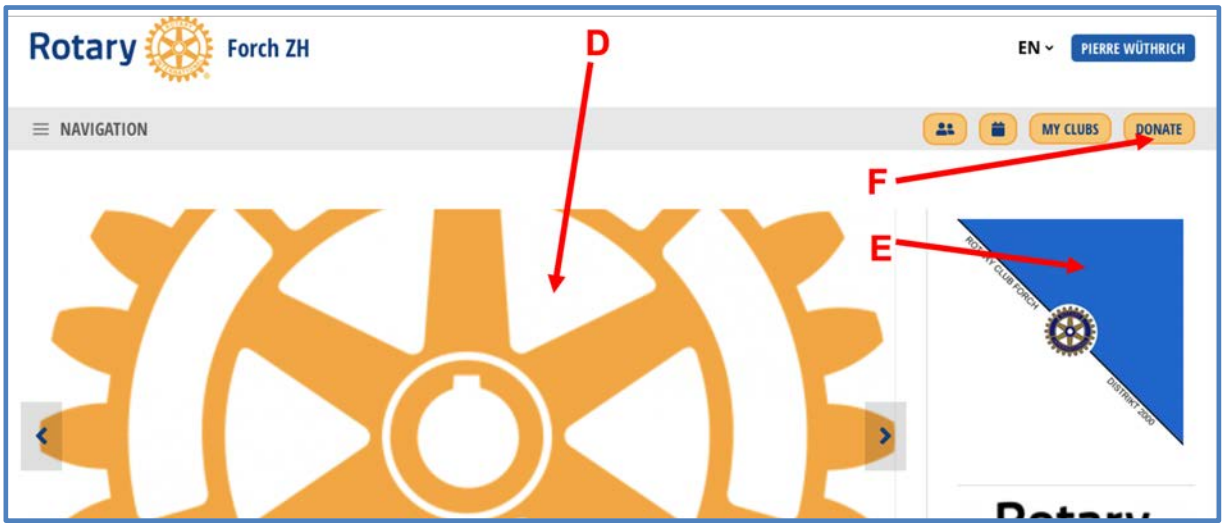


A. The person logged in as administrator
B. Le language used

C. The unit to be managed (the club or district)
D. The button for leaving the admin mode

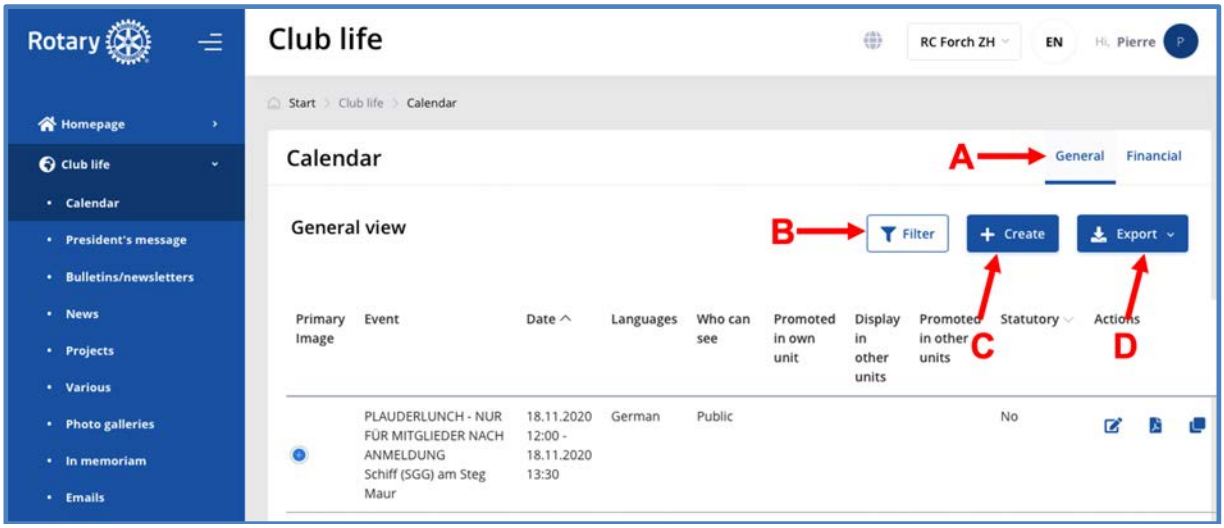
3.1 Configuration of the "Homepage"

A. The menu
B. The general content with languages and title
C. The content with text and images
D. The banner displayed if no content in the slider
E. The vignette displayed on the top of the right bar
F. The creation of a donate button



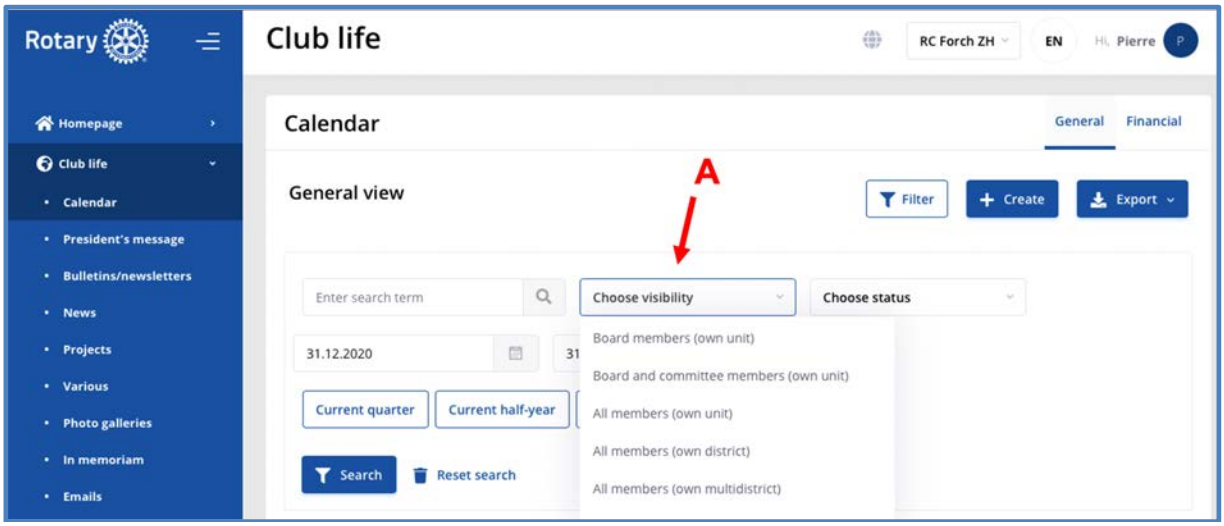
3.2 *Configuration of the* Club Life

3.2.1 The calendar

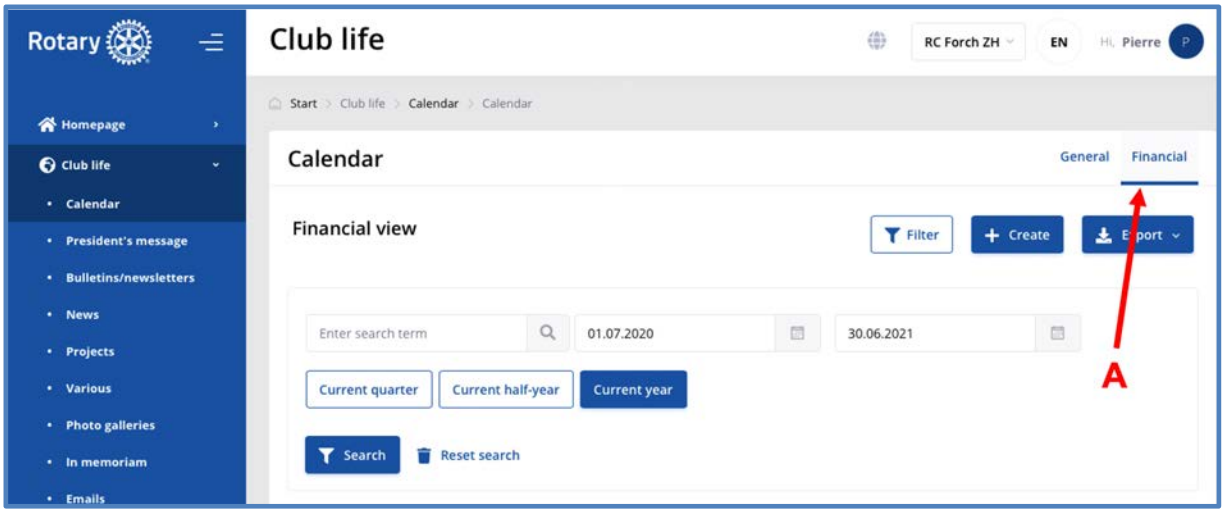


A. the General content with
B. a filter for a search,
C. for creating a new event and
D. for an export of the calendar in XLSX (Excel) or CSV format

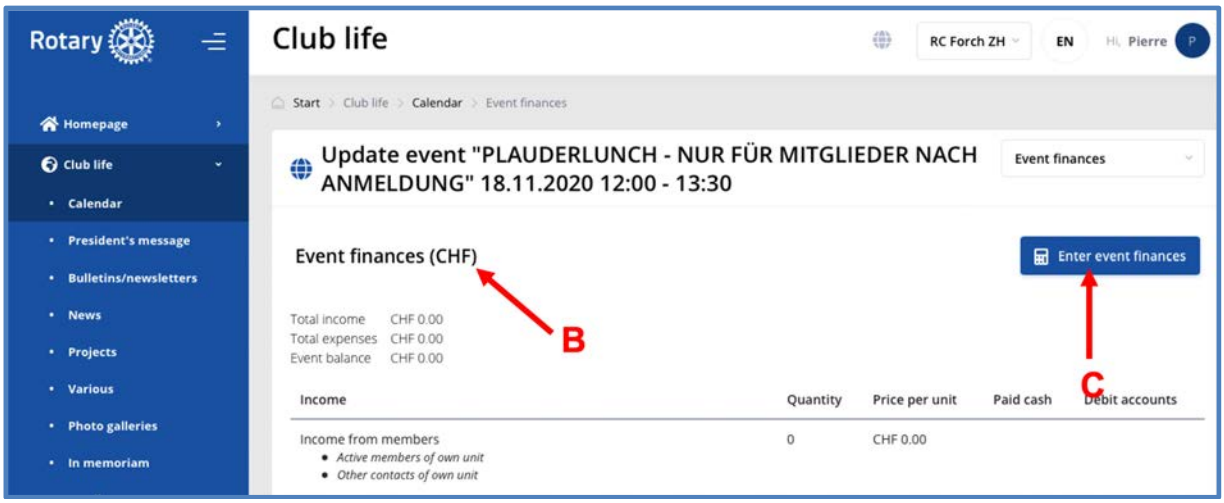
the visibility of the calendar event may be restricted (A)



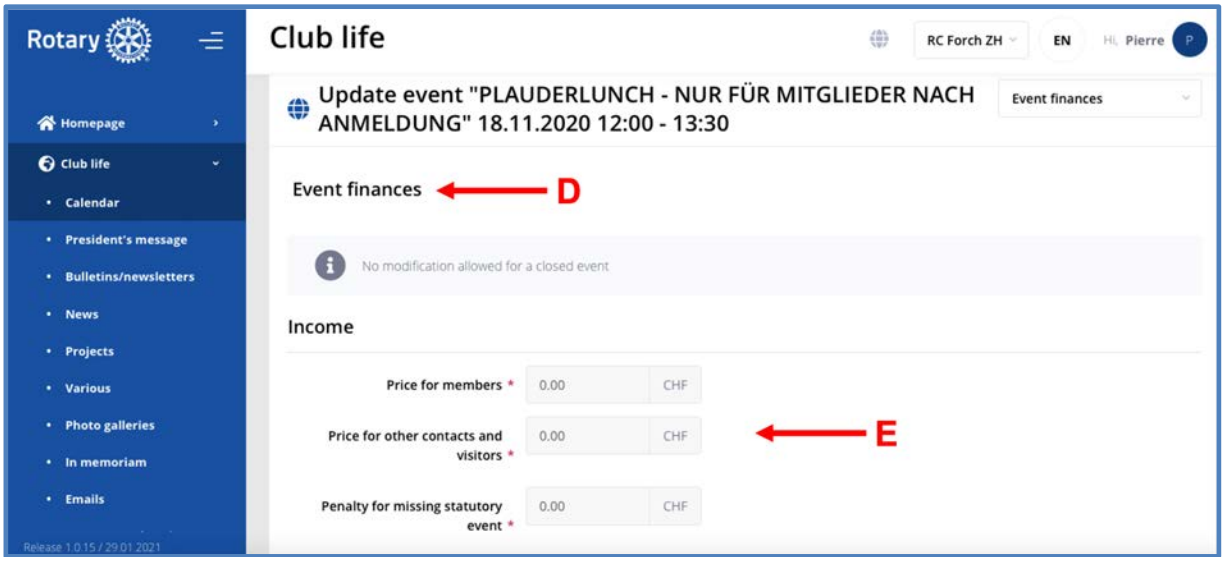
3.2.2 The calendar, event finance (A)

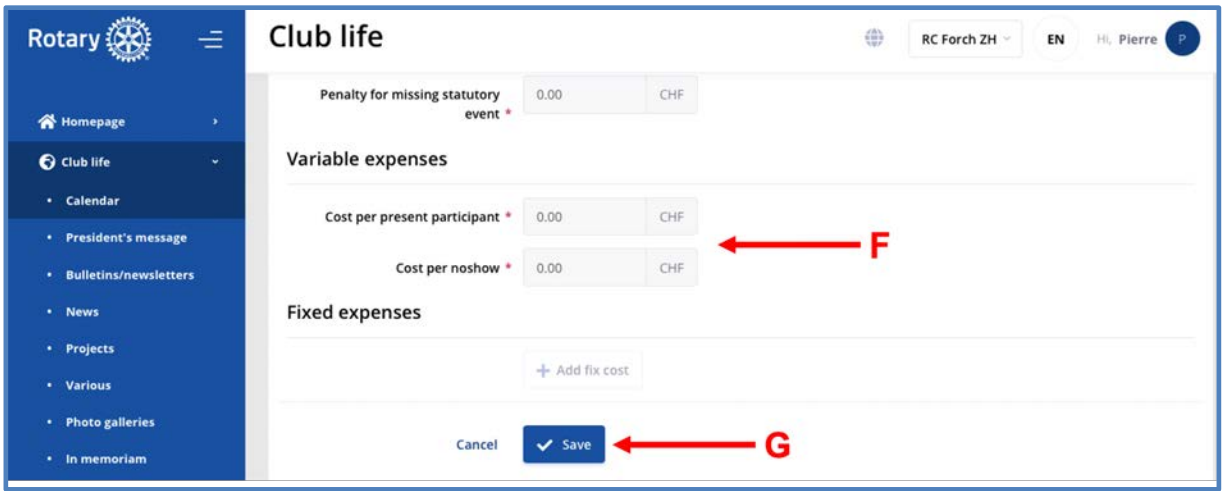


With an overview (B) and the access to the configuration of the event finances (C).



Under (D) the event income (E) and expenses (F) may be filled. Do not forget to save (G) the changes!


Rotary
Club life
RC Forch ZH
EN
Hi, Pierre
Homepage
Club life
Calendar
President's message
Bulletins/newsletters
News
Projects
Various
Photo galleries
In memoriam
Emails
Release 1.0.15 / 29.01.2021
Update event "PLAUDERLUNCH - NUR FÜR MITGLIEDER NACH ANMELDUNG" 18.11.2020 12:00 - 13:30
Event finances
Event finances
D
No modification allowed for a closed event
Income
Price for members *
0.00
CHF
Price for other contacts and visitors *
0.00
CHF
E
Penalty for missing statutory event *
0.00
CHF


Rotary
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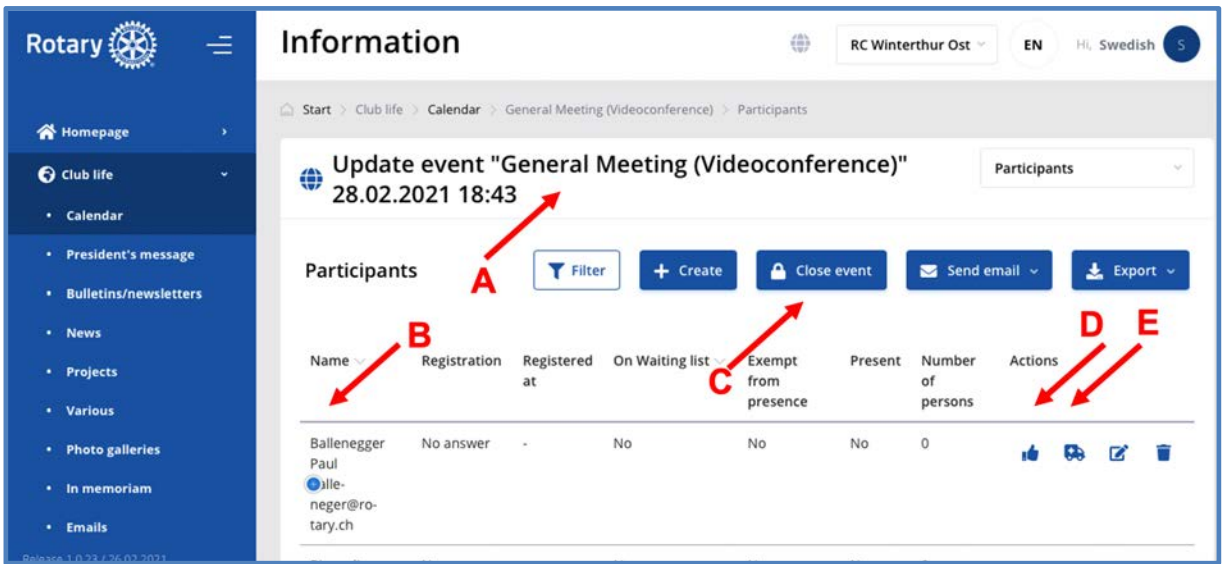
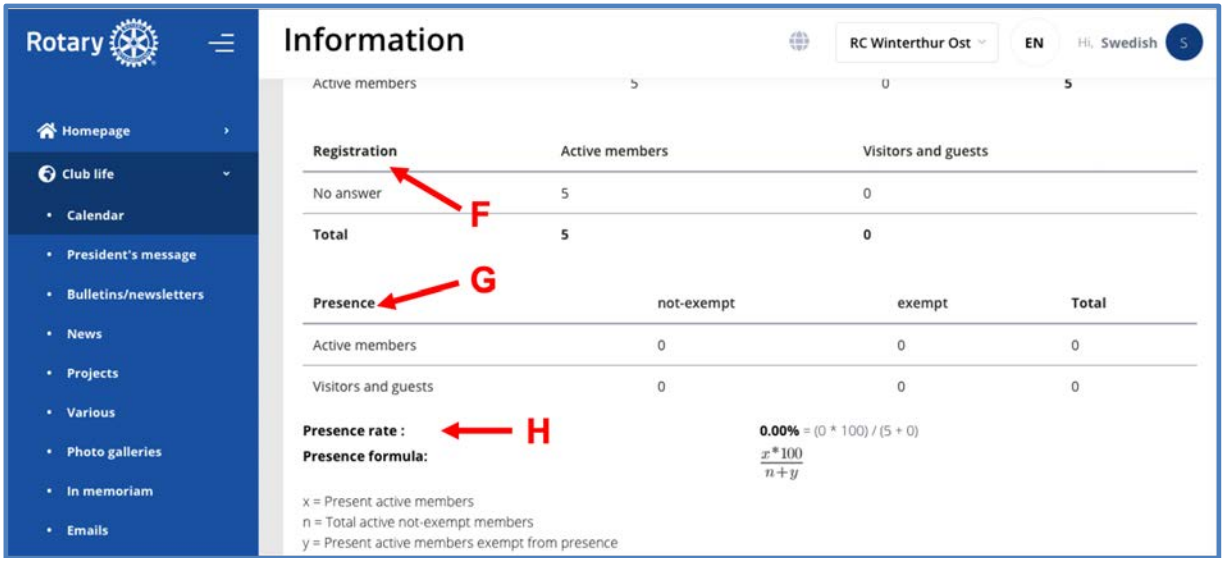
Bulletins/newsletters
News
Projects
Various
Photo galleries
In memoriam
Penalty for missing statutory event *
0.00
CHF
Variable expenses
Cost per present participant *
0.00
CHF
Cost per noshow *
0.00
CHF
F
Fixed expenses
Add fix cost
Cancel
Save
G

3.2.3 Capture of the attendance and stats of the event

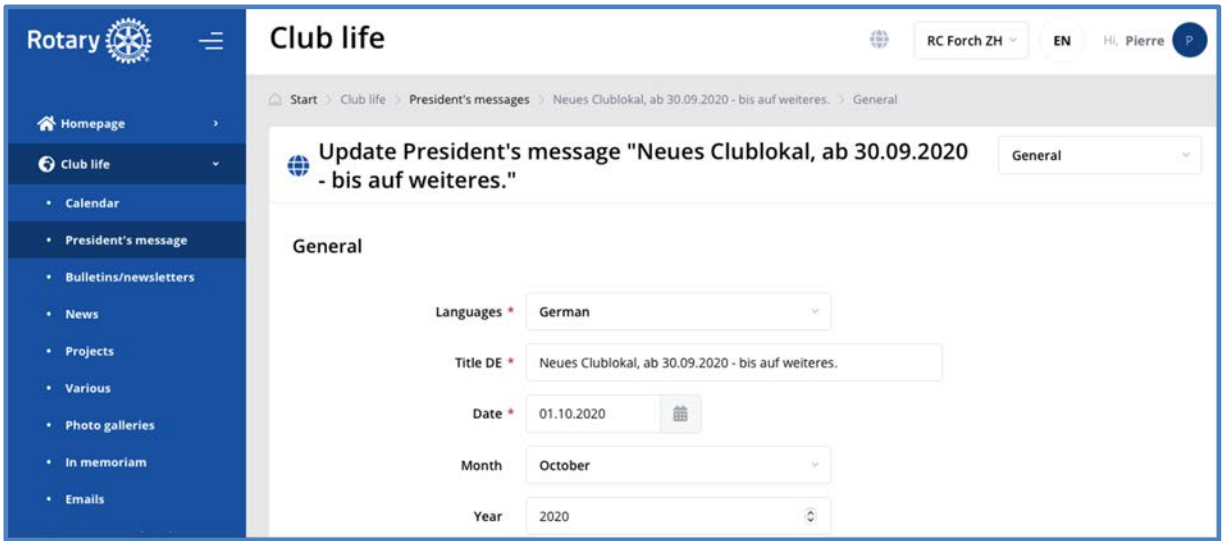
A. The event
B. The participant
C. The attendance (presence) may be registered after the event, as long as the event has not be closed
D. Register the attendance of member “B” at event “A”
E. Member “B” is exempt of presence



At the bottom of the screen for Event “A” the recap of registration “F”, presence “G” and presence rate “H”

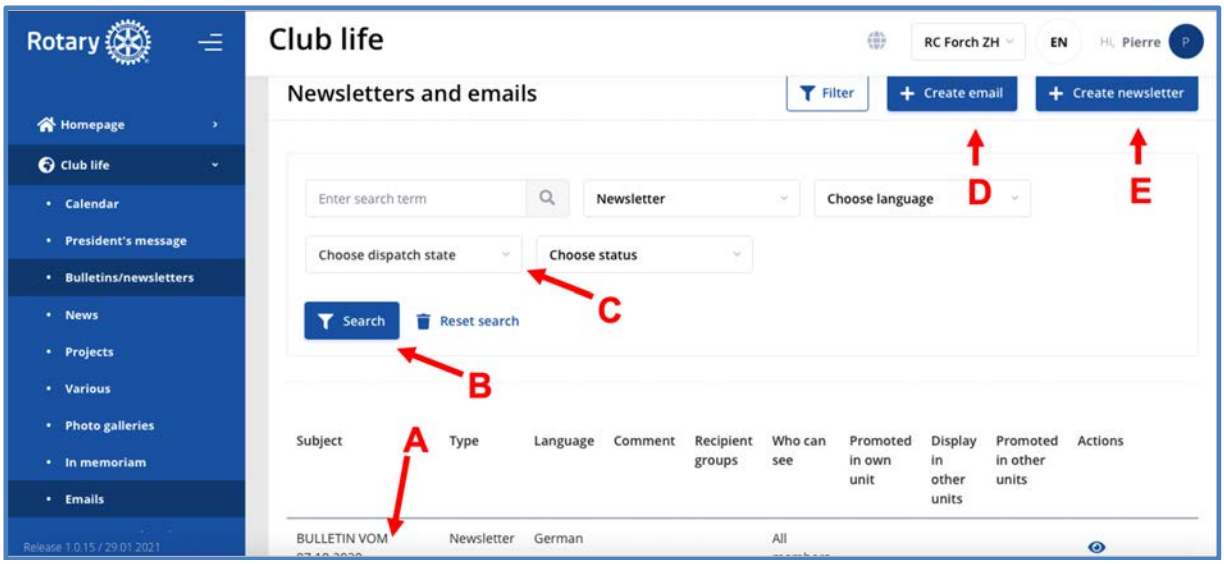


3.2.4 The president's message



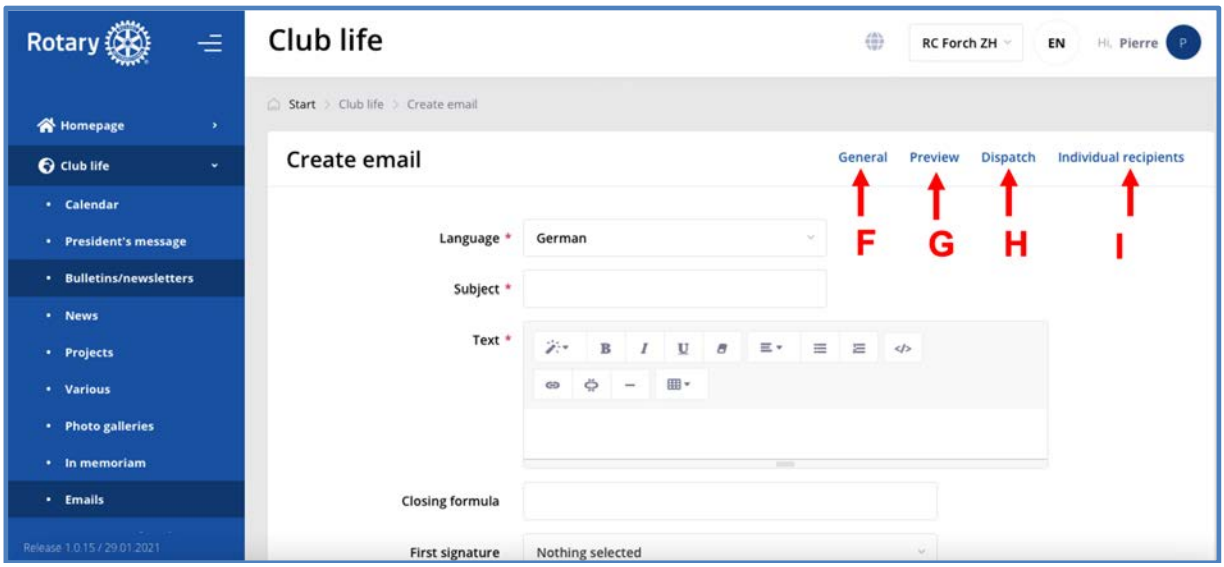
3.2.5 The bulletins, newsletters and emails

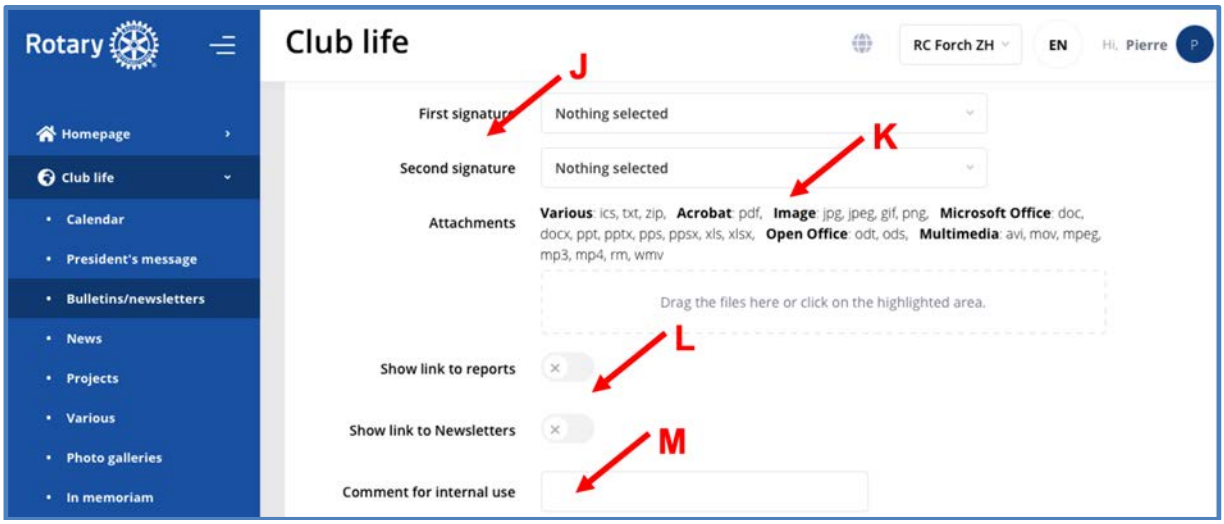
The bulletins being send in many club as a pdf-document may easily be replaced by the newsletter, thus massively reducing the workload for secretary, secretary, president, etc.



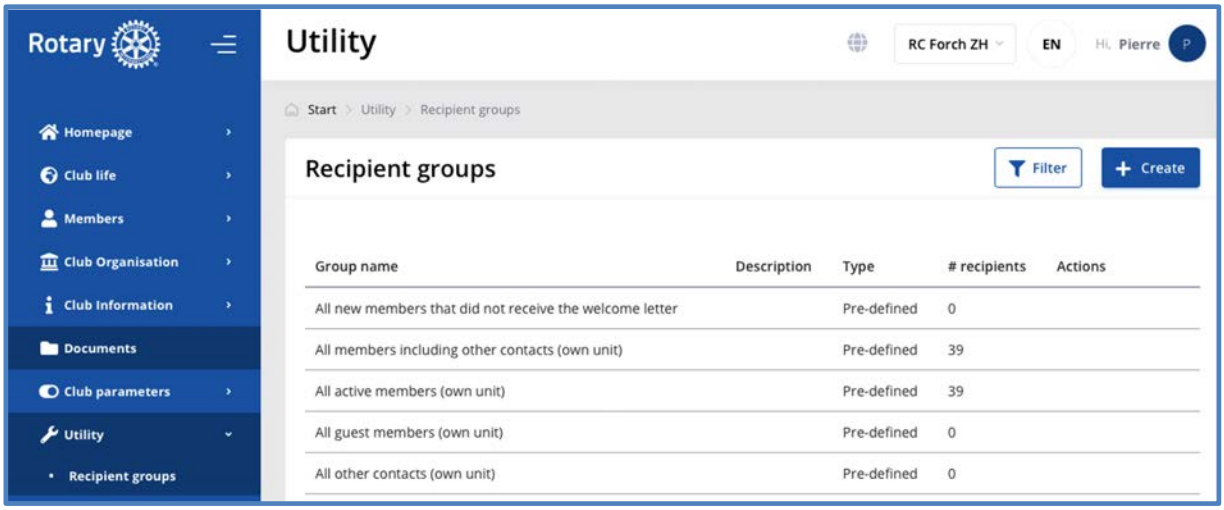
A. Listing of existing documents
B. Search in the documents according to …
C. The criteria
D. Create a new email or …
E. A new newsletter
F. The General content
G. A preview of the document before being sent
H. The dispatch of the document acc. to …
I. The recipient selected
J. The signature (1st and 2nd) as picture

K. The attachment in all supported formats
L. The link of the document to a report or a newsletter
M. A comment for internal use

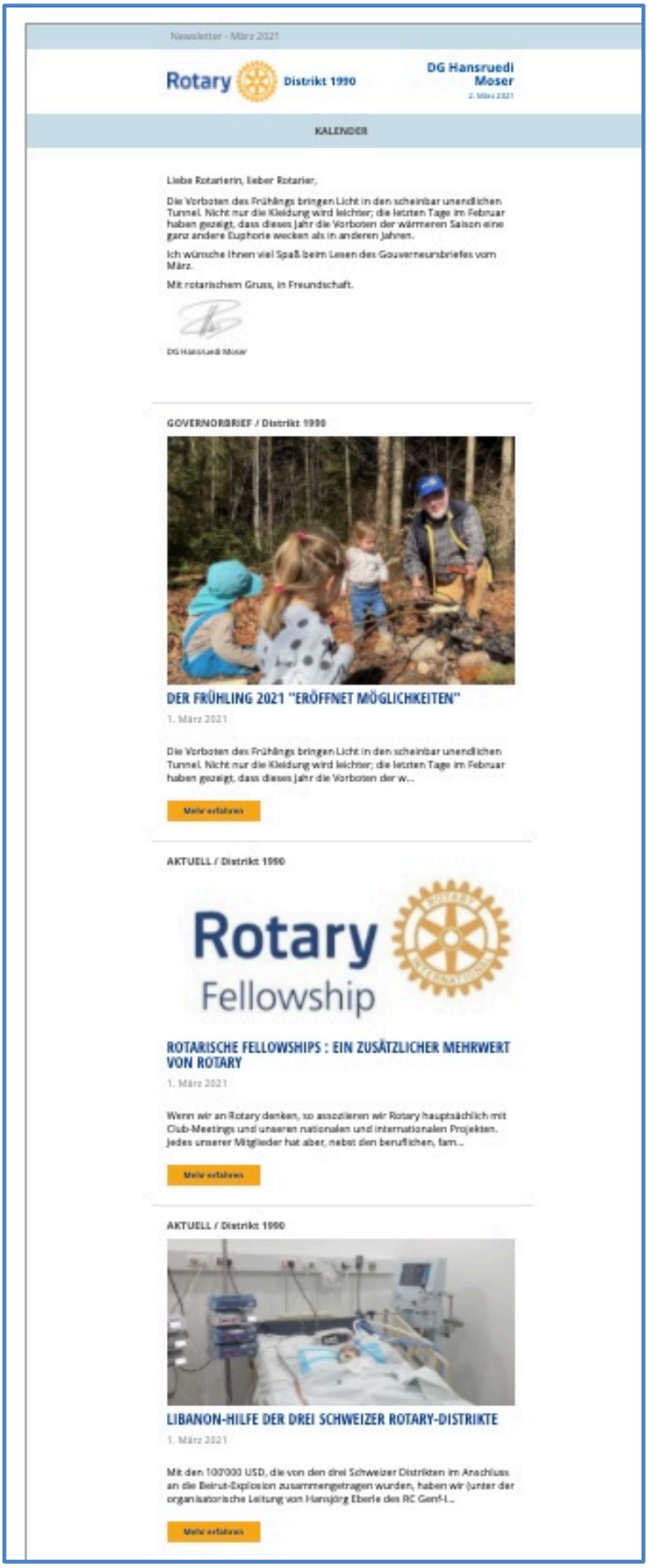




The recipient groups are predefined under “Utility”. The list may be extended with new groups.



Hereafter an example of a newsletter coming from the governor of D1990



Newsletter – März 2021

Rotary Distrikt 1990

DG Hansruedi Moser

2. März 2021

KALENDER

Liebe Rotarierin, lieber Rotarier,

Die Vorboten des Frühlings bringen Licht in den scheinbar unendlichen Tunnel. Nicht nur die Kleidung wird leichter; die letzten Tage im Februar haben gezeigt, dass dieses Jahr die Vorboten der wärmeren Saison eine ganz andere Euphorie wecken als in anderen Jahren.

Ich wünsche Ihnen viel Spaß beim Lesen des Gouverneursbriefes vom März.

Mit rotarischem Gruss, in Freundschaft.

DG Hansruedi Moser

GOVERNORBRIEF / Distrikt 1990

DER FRÜHLING 2021 "ERÖFFNET MÖGLICHKEITEN"

1. März 2021

Die Vorboten des Frühlings bringen Licht in den scheinbar unendlichen Tunnel. Nicht nur die Kleidung wird leichter; die letzten Tage im Februar haben gezeigt, dass dieses Jahr die Vorboten der w...

Mehr erfahren

AKTUELL / Distrikt 1990

Rotary Fellowship

ROTARISCHE FELLOWSHIPS : EIN ZUSÄTZLICHER MEHRWERT VON ROTARY

1. März 2021

Wenn wir an Rotary denken, so assoziieren wir Rotary hauptsächlich mit Club-Meetings und unseren nationalen und internationalen Projekten. Jedes unserer Mitglieder hat aber, nebst den beruflichen, fam...

Mehr erfahren

AKTUELL / Distrikt 1990

LIBANON-HILFE DER DREI SCHWEIZER ROTARY-DISTRIKTE

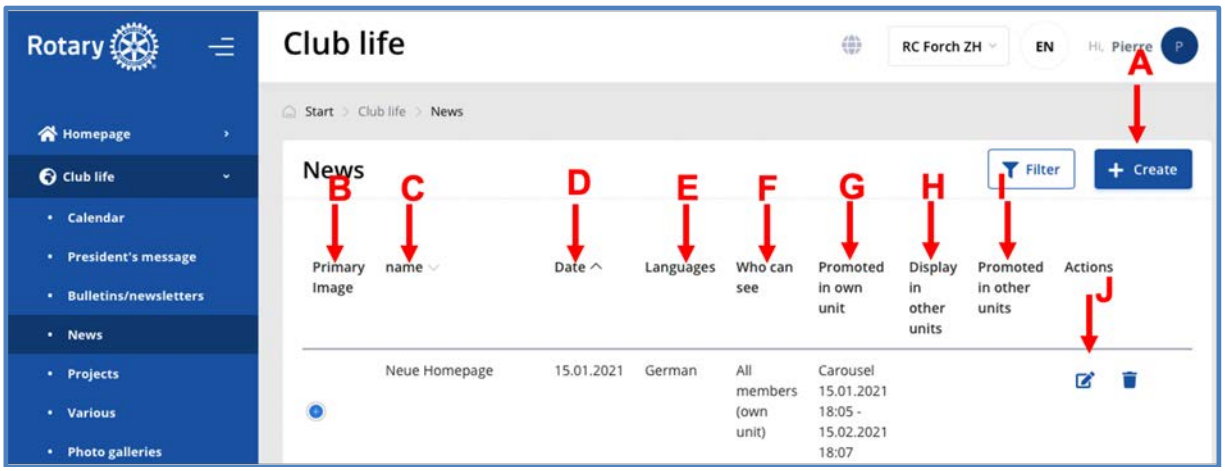
1. März 2021

Mit den 100'000 USD, die von den drei Schweizer Distrikten im Anschluss an die Beirut-Explosion zusammengetragen wurden, haben wir (unter der organisatorische Leitung von Hansjörg Eberle des RC Genf-L...

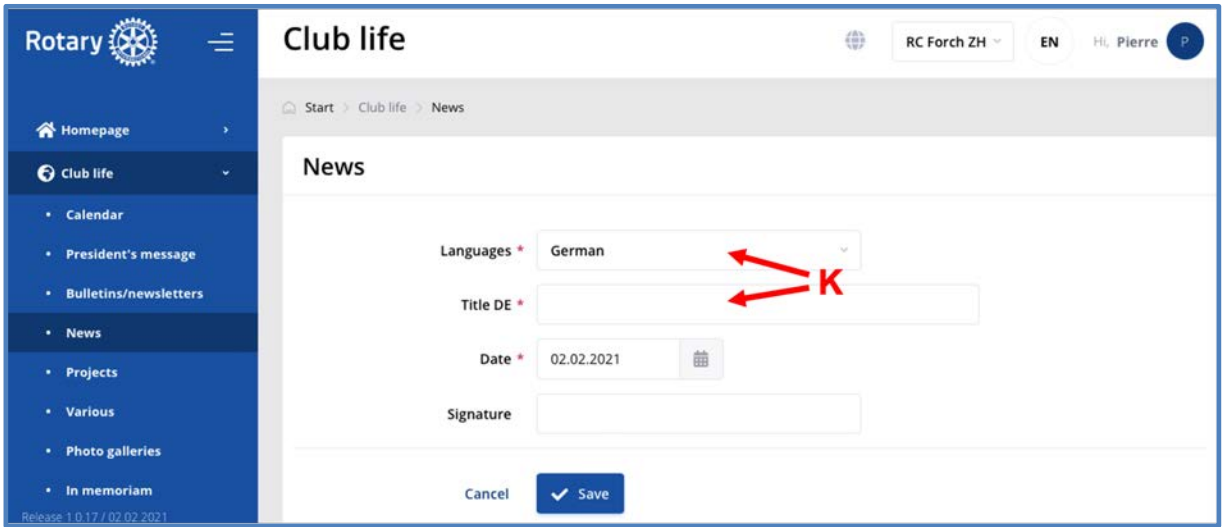
Mehr erfahren

3.2.6 News, project, various and photo galleries

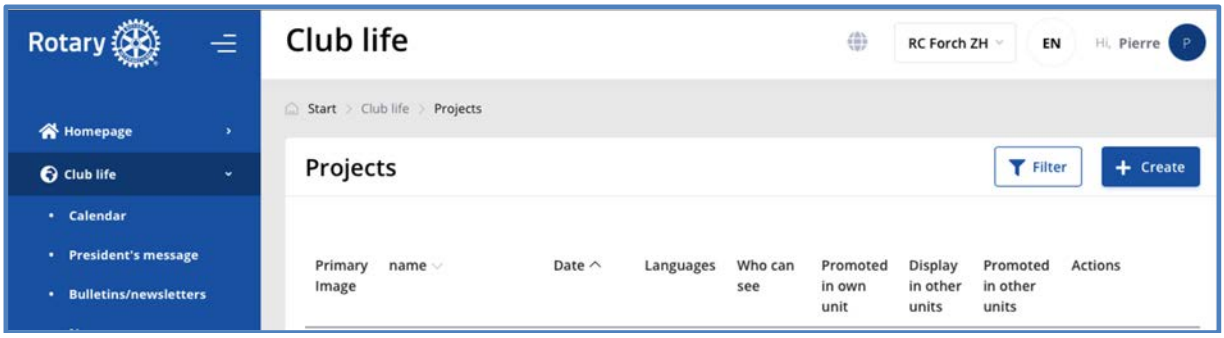
The configuration page is identical for all, see below



A. The button to create a new document
B. The picture on this document
C. The name of the document
D. The date of publication
E. The language (one or many). If the document contains different languages, all of these must be selected
F. The visibility
G. The promotion e.g in the carousel from day 1 to day n
H. Document published for example on the district site
I. Like “G” above
J. The action “edit” or “delete”
K. Like “E” above

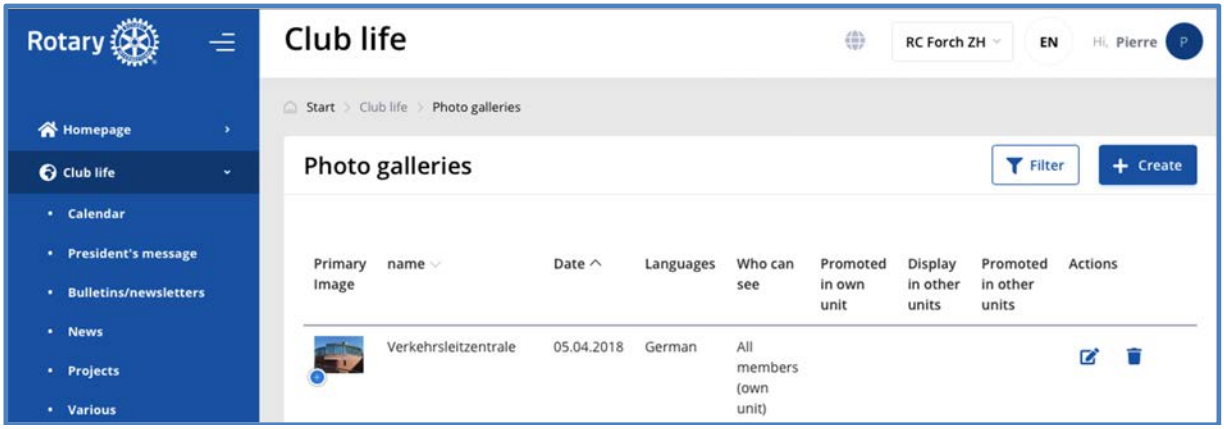


The projects



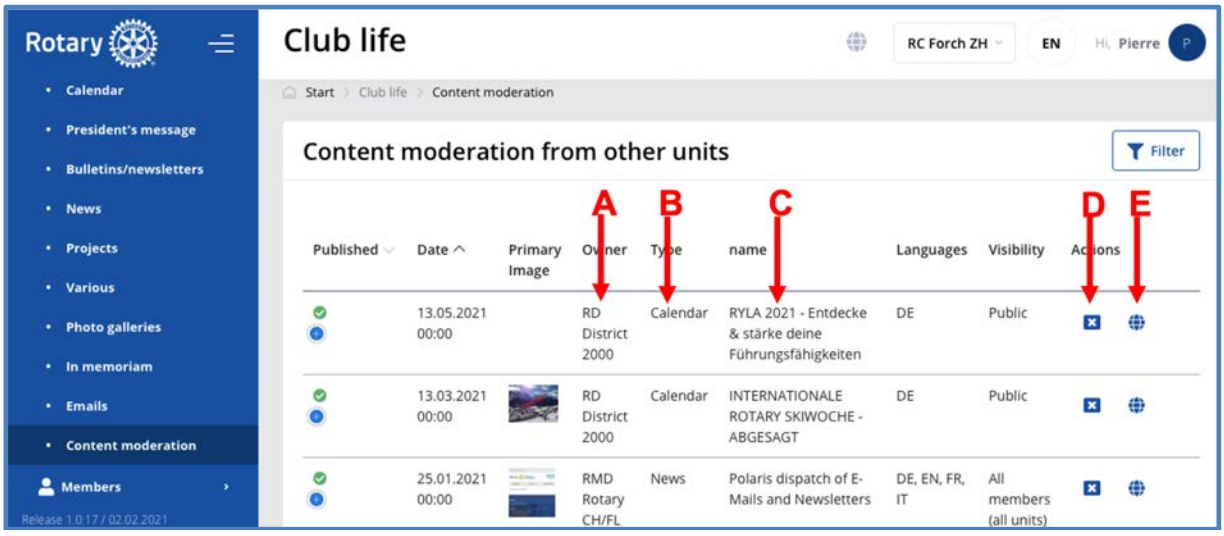
The various

The photo galleries



3.2.7 The content moderation

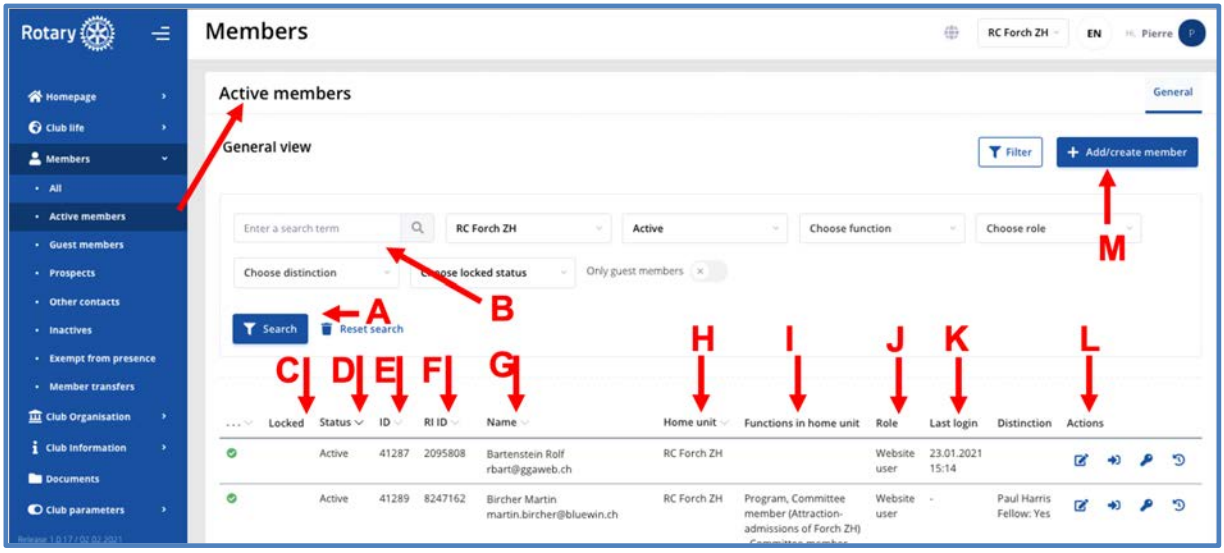
Since content may be pushed from district (A) to clubs or vice-versa, the content moderation allows the club or the district to delete (D) a content.



A. Another unit publish a document in the club e.g the RD (Rotary District) or RMD (Rotary Multi-District) …
B. In the calendar or news or somewhere else
C. The name of the document
D. The button to cancel/delete the publication
E. A shortcut to see the document in the frontend

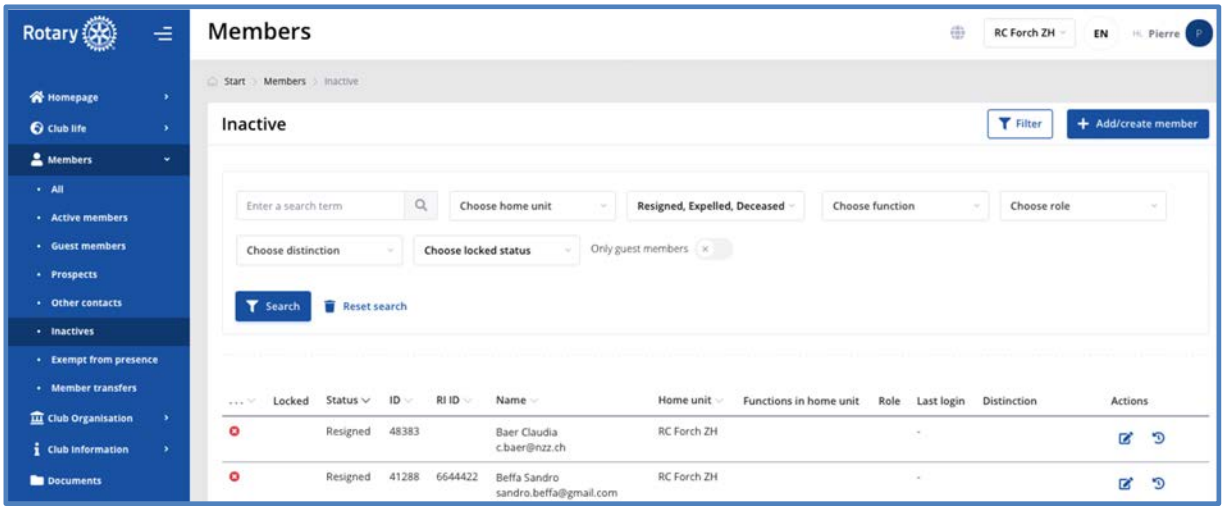
3.3 The members

The members are splitted into categories e.g Active, Guest, Prospects, etc. Below the list of the active members

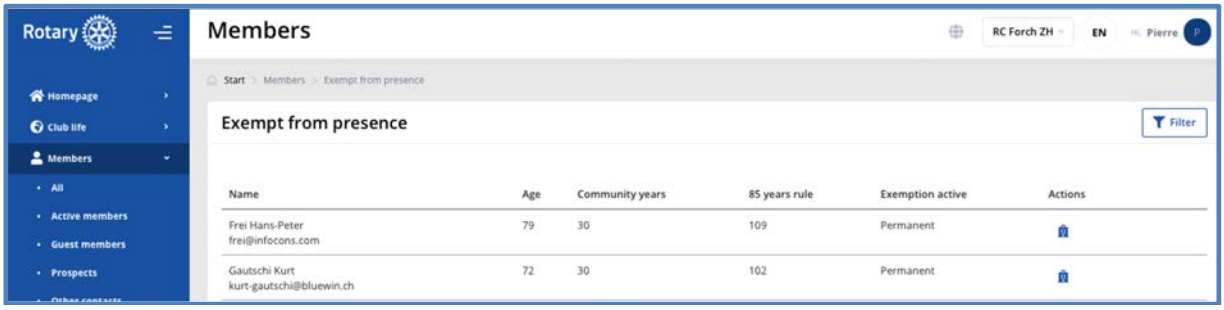


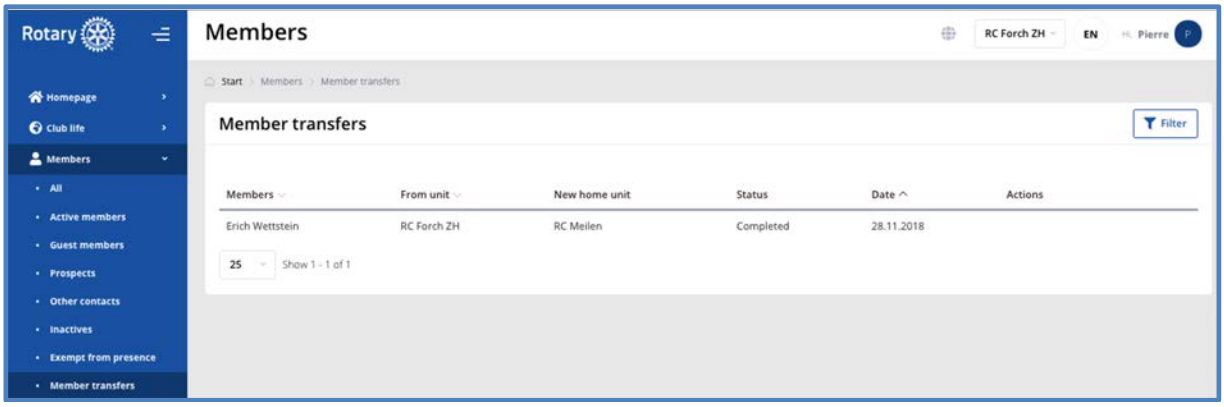
A. For a search according to …

B. The search criteria
C. If the record is locked
D. The member's status
E. The member's ID in Polaris
F. The member's ID in Rotary International (RI)
G. The member's name with e-mail address
H. The member's club (home unit)
I. The member's function, if any
J. The member's role
K. The member's last login
L. The possible actions like, "edit record", "login as", "account" and "member's history" with all his previous roles
M. Add/create a new member



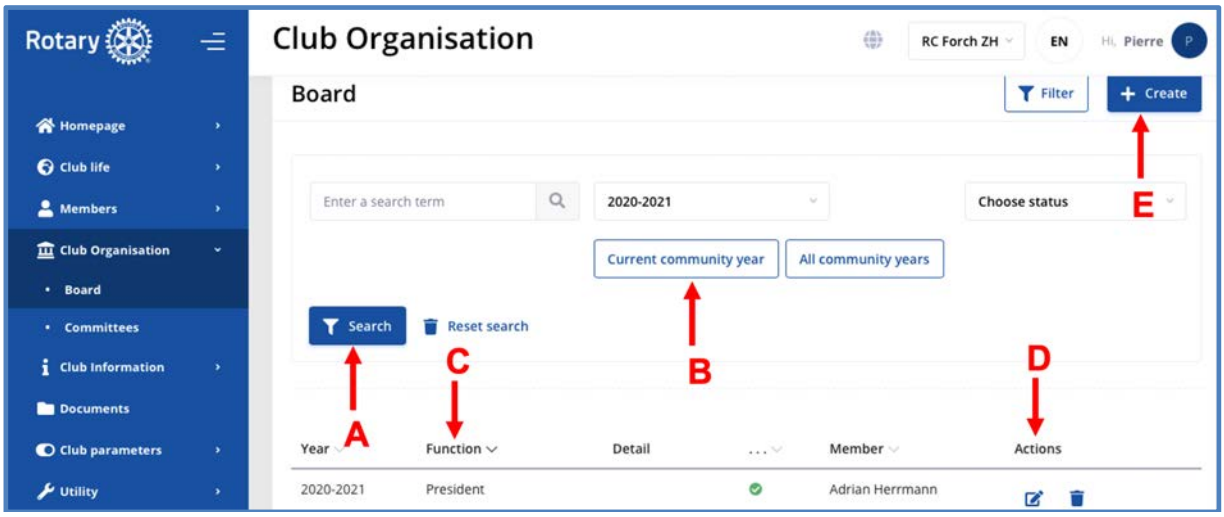
Polaris offers a simple way for the management and the changes of member status.





3.4 The club organization

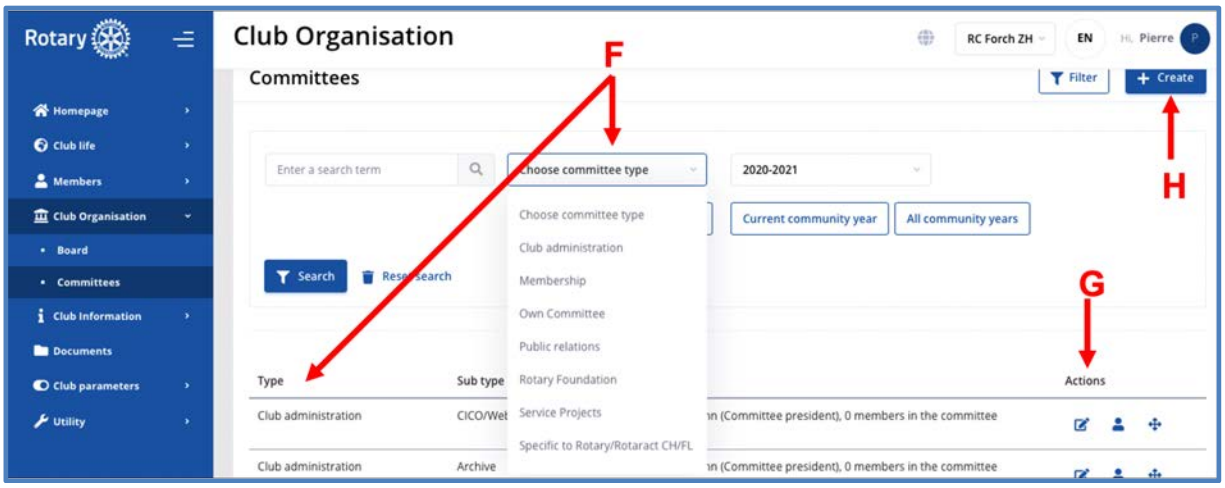
3.4.1 The club board



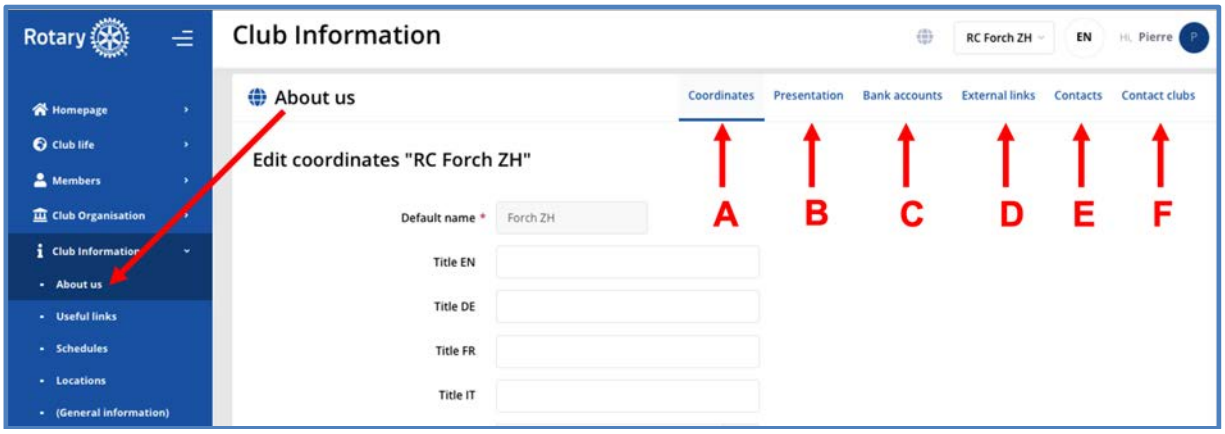
A. For a search in …
B. The Current community year of …
C. The member function
D. The actions “edit” and “delete”
E. Create a new record in the club board
F. Choose a committee
G. With the actions “edit”, “committee members” and “move the committee” up or down the list with the cross
H. Create an new committee

3.4.2 The club committees

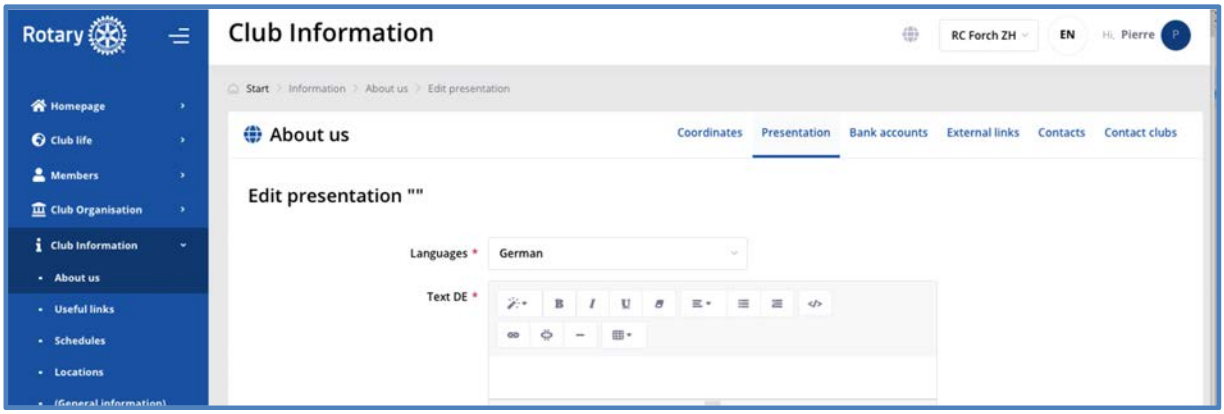
Some of the committees are mandatory by Rotary International. The club may create additional committees for its own purpose.

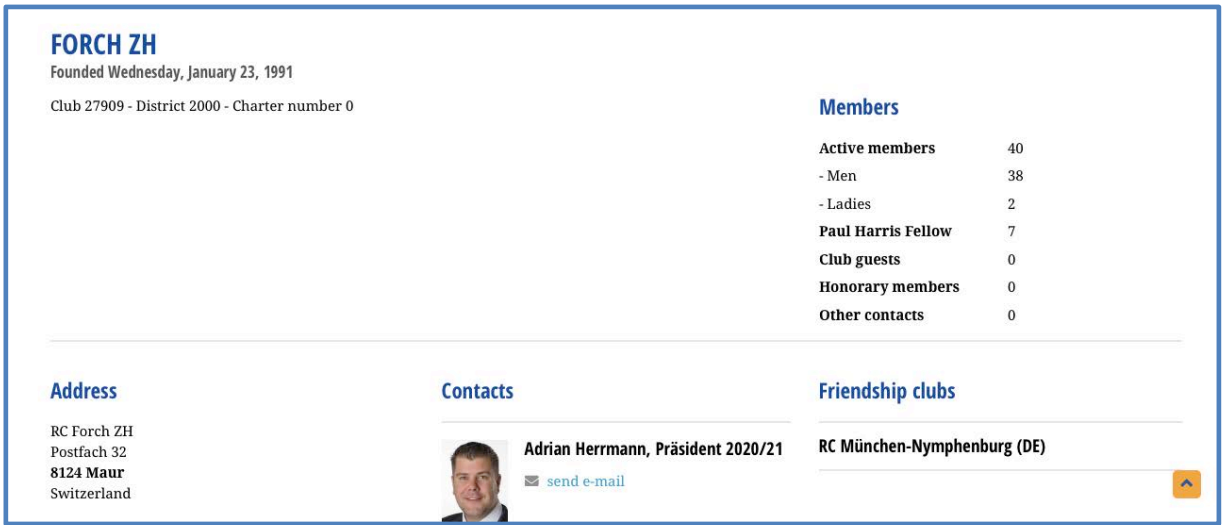


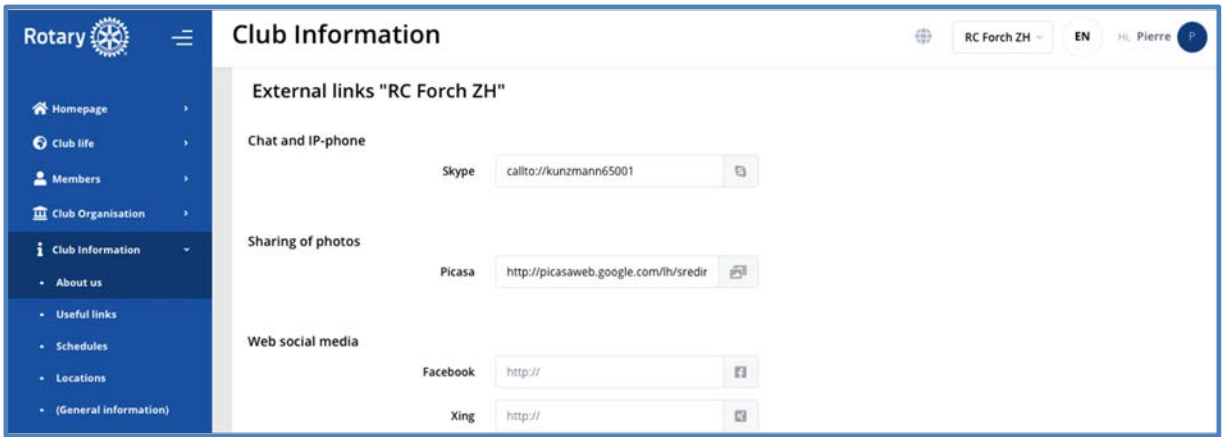
3.5 The club information



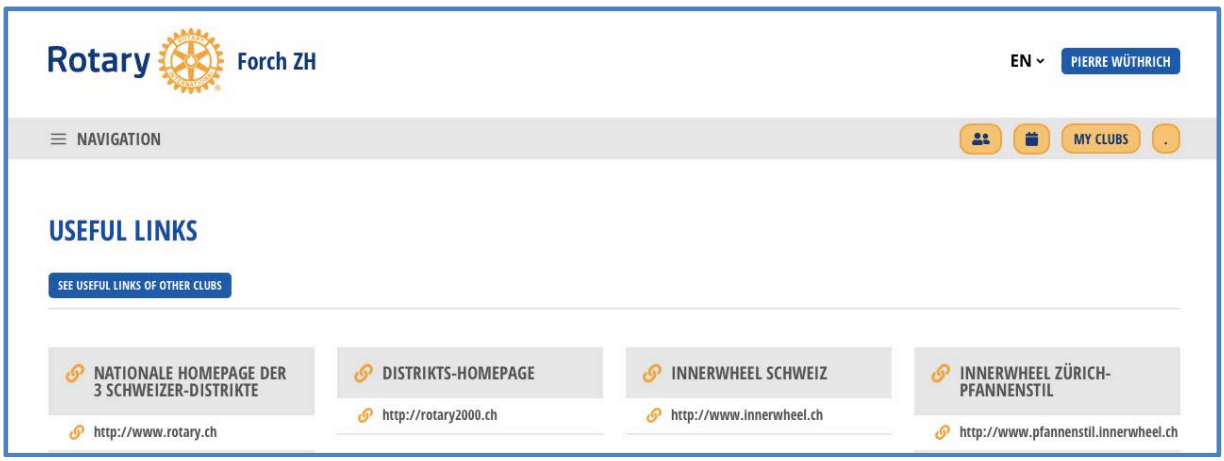
A. The coordinates (address) of the meeting point
B. The short presentation of the club
C. The bank account
D. The external links like “chat”, “photos”, “social medias” and “videos”
E. The contact person (member) of the club
F. The contact club(s) if any

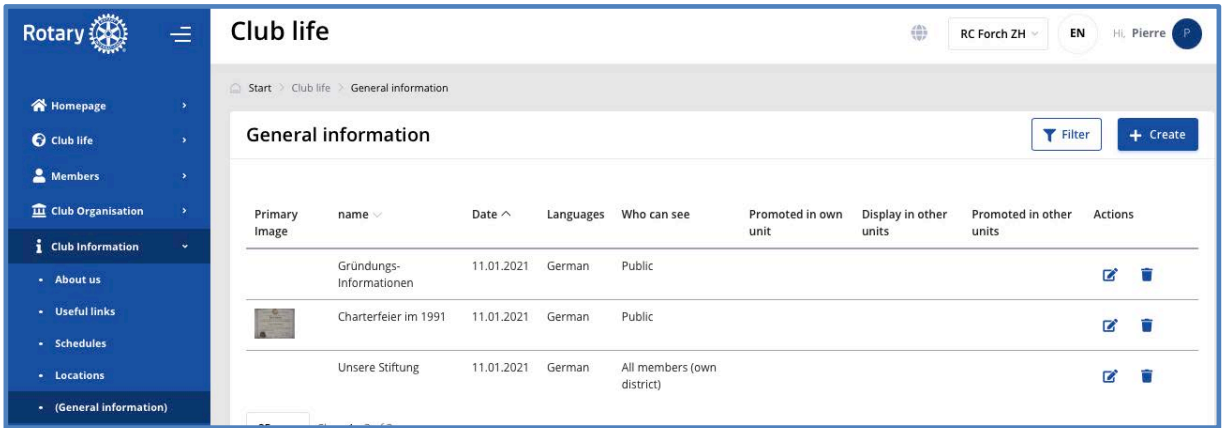

Rotary
Club Information
RC Forch ZH
EN
Hi, Pierre
Homepage
Club life
Members
Club Organisation
Club Information
About us
Useful links
Schedules
Locations
Start > Information > About us > Edit presentation
About us
Coordinates
Presentation
Bank accounts
External links
Contacts
Contact clubs
Edit presentation ""
Languages *
German
Text DE *


FORCH ZH
Founded Wednesday, January 23, 1991
Club 27909 - District 2000 - Charter number 0
Members
Active members 40
- Men 38
- Ladies 2
Paul Harris Fellow 7
Club guests 0
Honorary members 0
Other contacts 0
Address
RC Forch ZH
Postfach 32
8124 Maur
Switzerland
Contacts
Adrian Herrmann, Präsident 2020/21
send e-mail
Friendship clubs
RC München-Nymphenburg (DE)

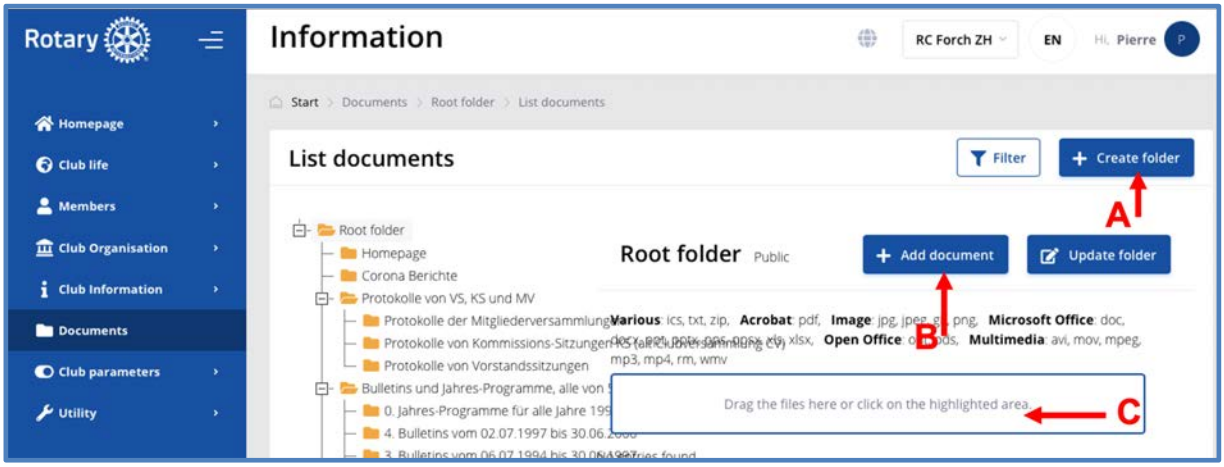

Rotary
Club Information
RC Forch ZH
EN
Hi, Pierre
Homepage
Club life
Members
Club Organisation
Club Information
About us
Useful links
Schedules
Locations
(General information)
External links "RC Forch ZH"
Chat and IP-phone
Skype
callto://kunzmann65001
Sharing of photos
Picasa
http://picasaweb.google.com/lh/sredir
Web social media
Facebook
http://
Xing
http://

Useful links like “district”, “national (multi-district)”, partner clubs, etc.





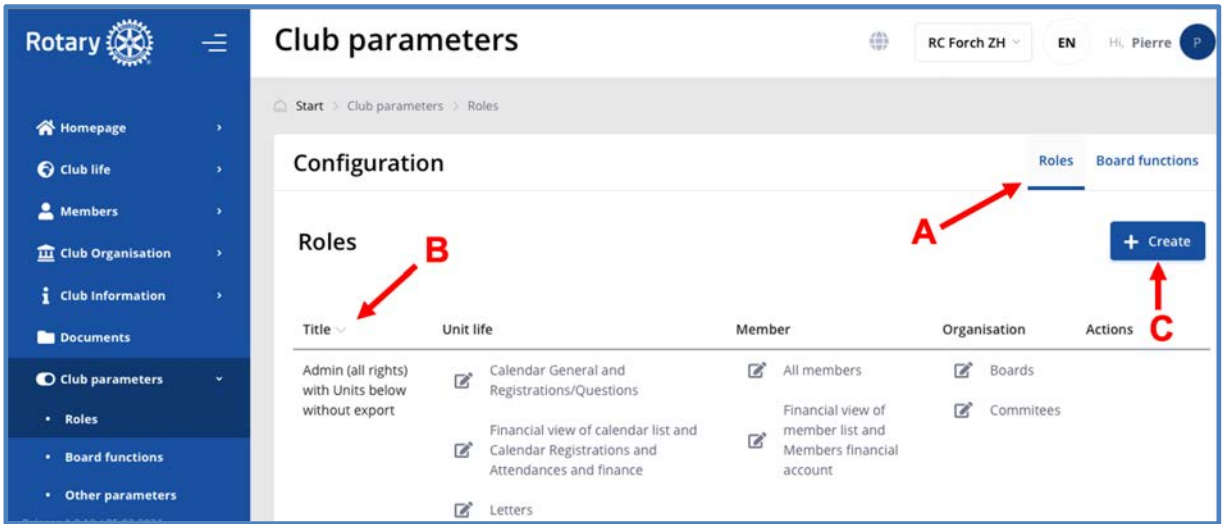
3.6 The document archives



A. The creation of an additional folder
B. To add a document by …
C. Drag the file in the frame

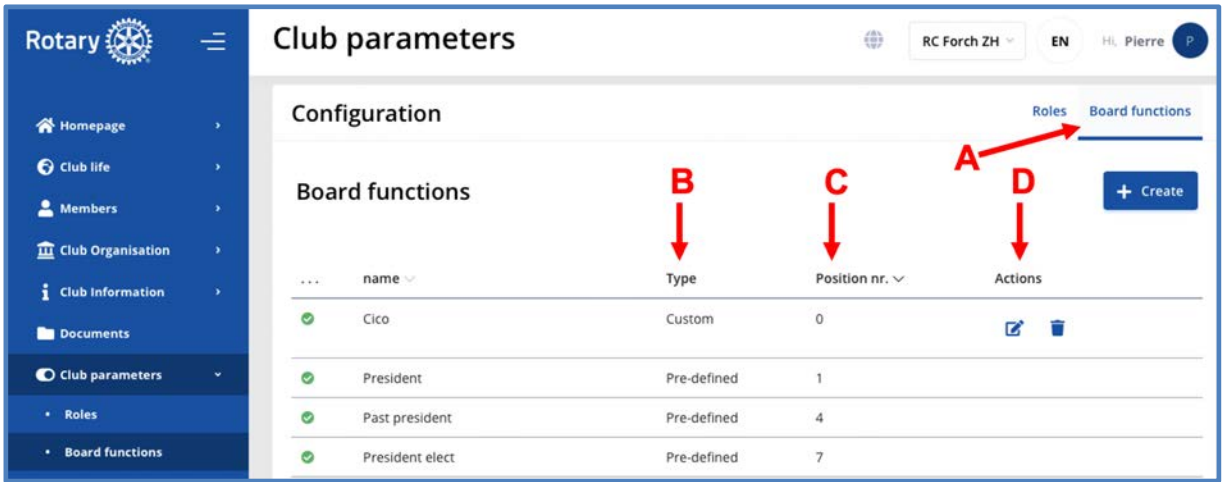
3.7 Club parameters

3.7.1 The list of roles



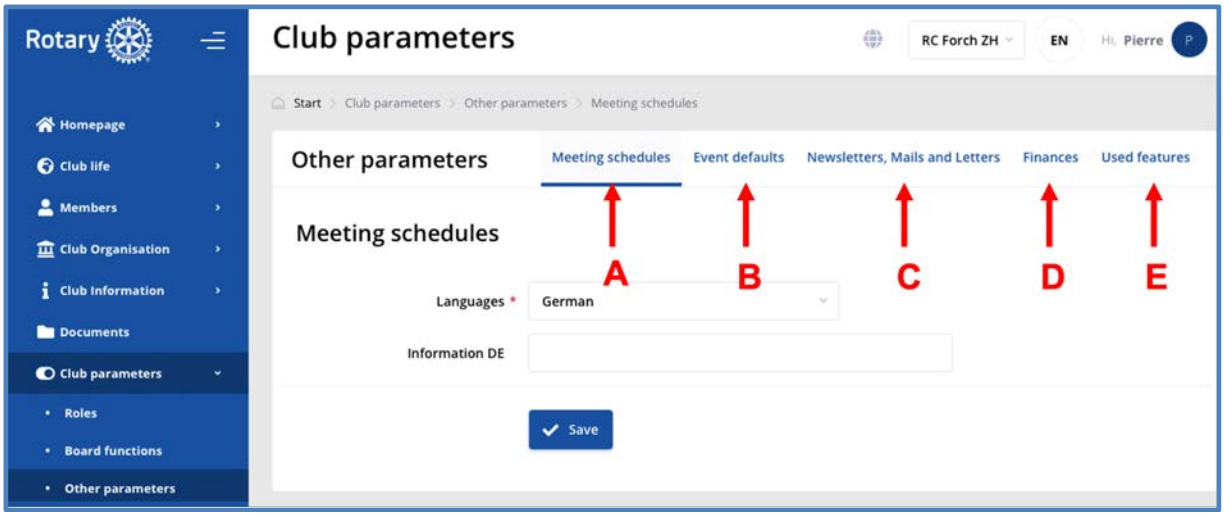
A. With the definition of the roles like “website user”, “Finance”, “Member administrator”, “Unit life administrator”, “Unit administrator without data export right” and “Unit administrator with all rights”
B. The title of the different roles
C. The creation of new roles

3.7.2 The board functions

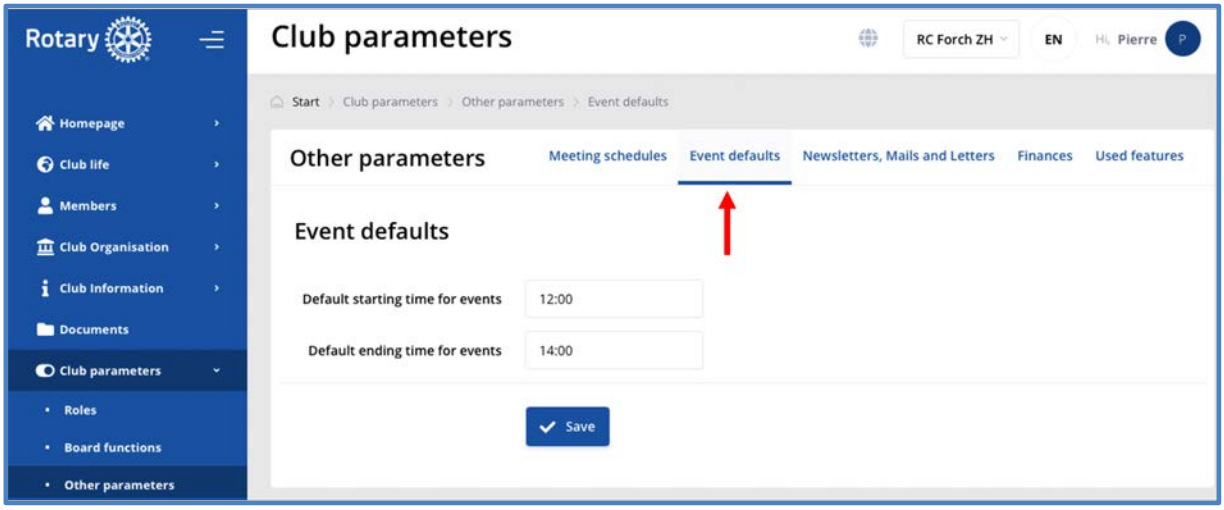


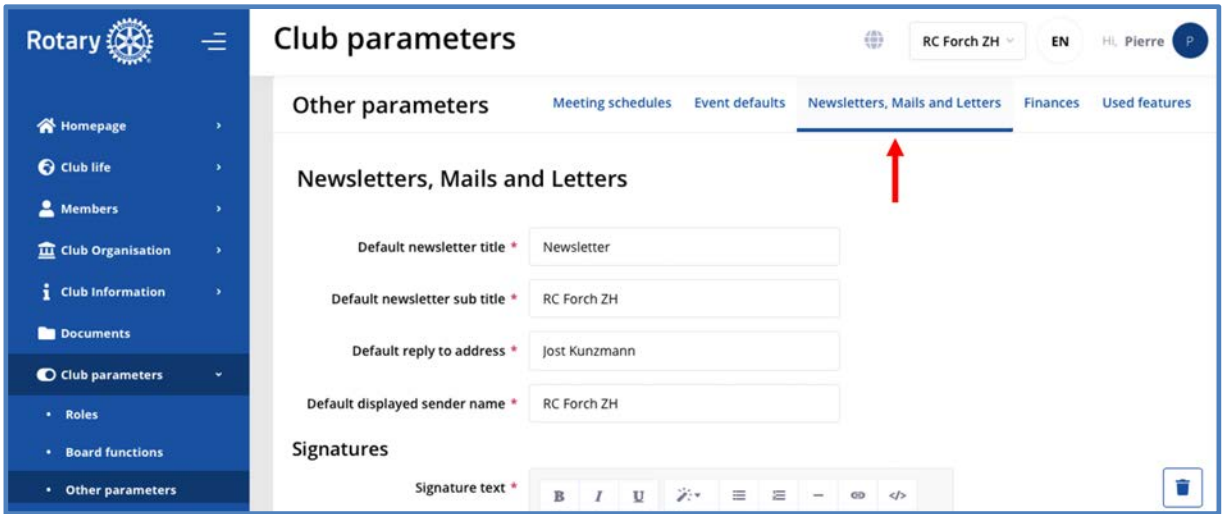
A. The board functions
B. Type “custom” means club own function and “Pre-defined” the RI mandatory functions
C. The position in the listing
D. The actions “edit” and “delete”

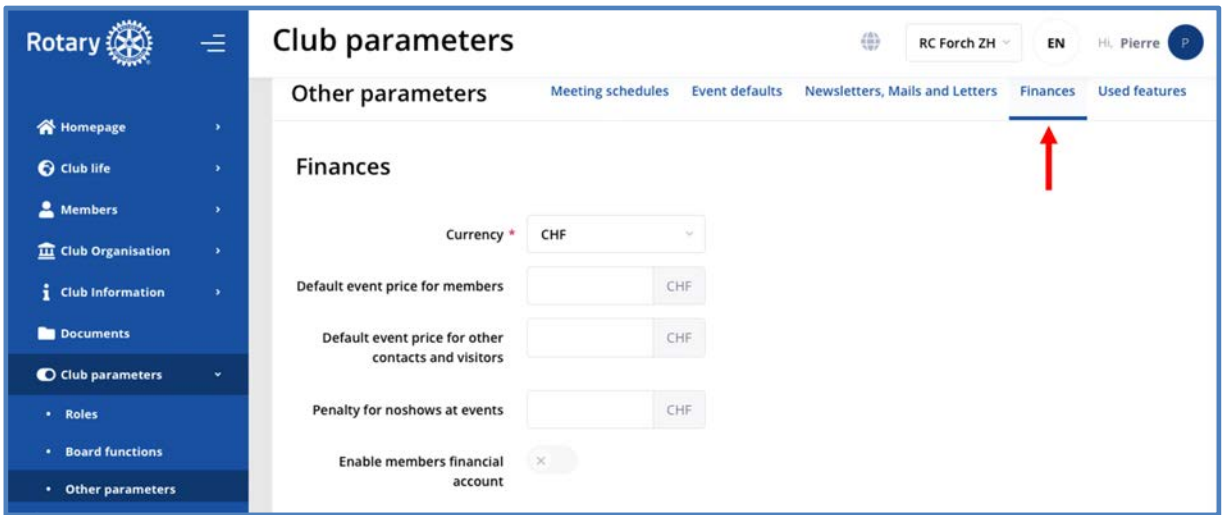
3.7.3 The other parameters



A. Description
B. The default values like starting and ending time of the event
C. Title, subtitle, signatured and default reply address for newsletters, mails and letters
D. Default amount for lunches and all default parameters for accounting
E. Used features like “calendar”, “letters”, “news”, “photo albums”, “various”, “general information”, “newsletter”, “mails”, “projects”, etc.




Rotary
Club parameters
RC Forch ZH
EN
Hi, Pierre
Homepage
Club life
Members
Club Organisation
Club Information
Documents
Club parameters
Roles
Board functions
Other parameters
Other parameters
Meeting schedules
Event defaults
Newsletters, Mails and Letters
Finances
Used features
Newsletters, Mails and Letters
Default newsletter title *
Newsletter
Default newsletter sub title *
RC Forch ZH
Default reply to address *
Jost Kunzmann
Default displayed sender name *
RC Forch ZH
Signatures
Signature text *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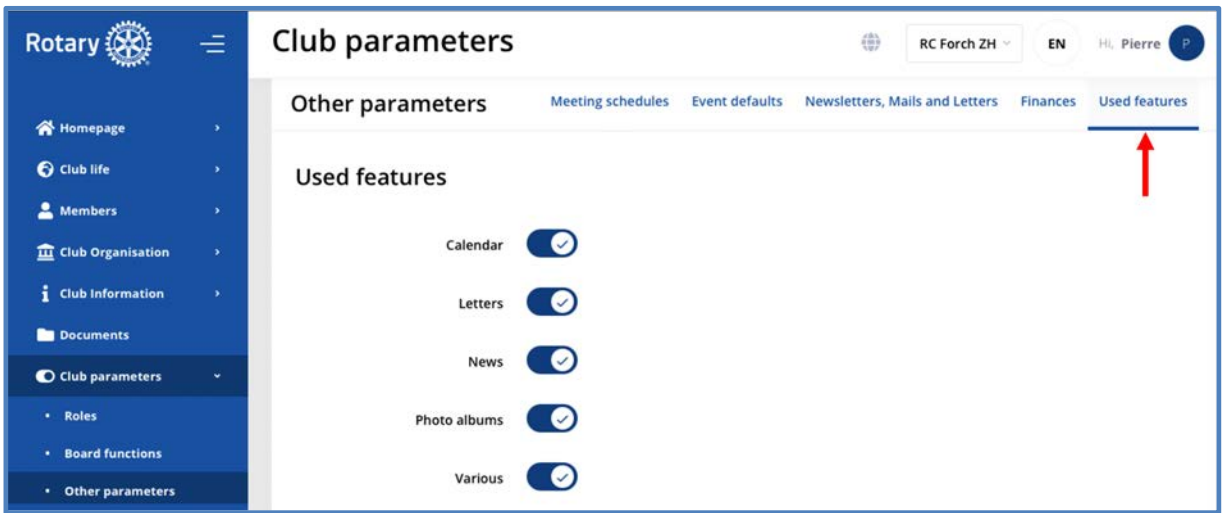
Other parameters
Other parameters
Meeting schedules
Event defaults
Newsletters, Mails and Letters
Finances
Used features
Finances
Currency *
CHF
Default event price for members
CHF
Default event price for other contacts and visitors
CHF
Penalty for noshows at events
CHF
Enable members financial account


Rotary
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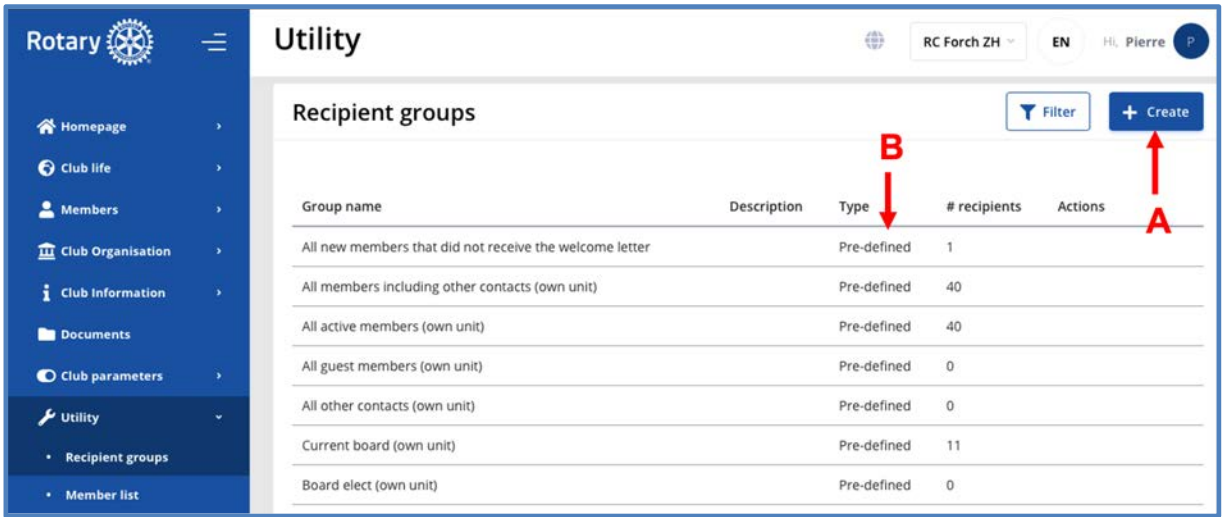
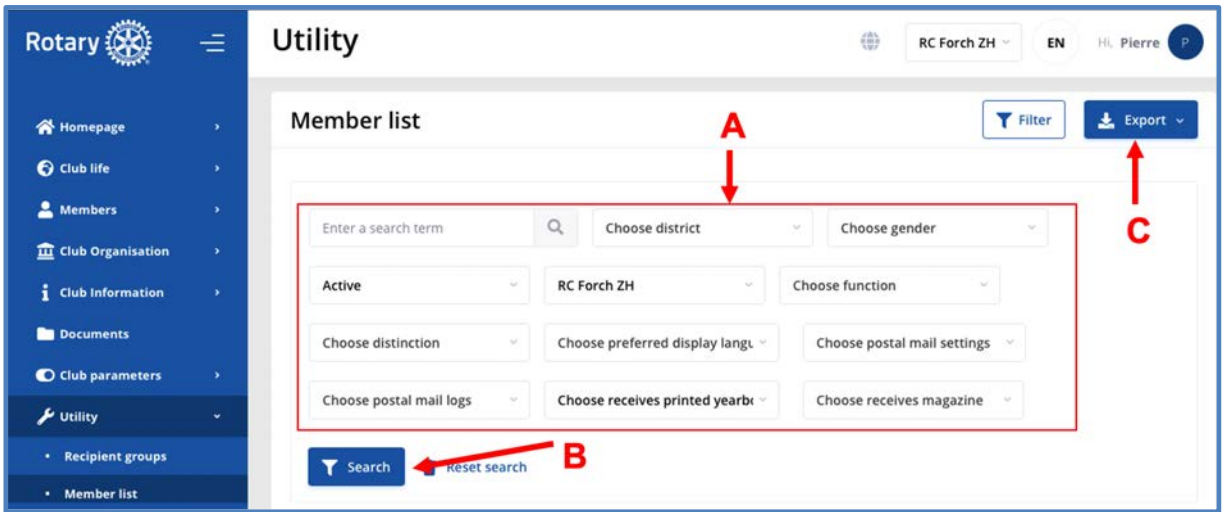
Board functions
Other parameters
Other parameters
Meeting schedules
Event defaults
Newsletters, Mails and Letters
Finances
Used features
Used features
Calendar
Letters
News
Photo albums
Various

3.8 Utility

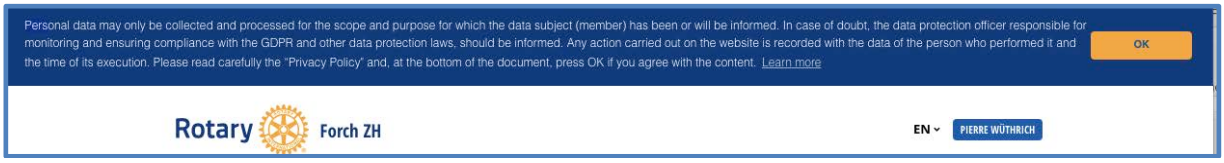
3.8.1 Recipient groups



3.8.2 Member list



Before exporting a member list, please refer to the privacy policy on the top of the page.



4. Conclusion

The digitalization of clubs and districts requires the choice of an IT tool such as ***Polaris***.
Before making a choice, it is important to answer the following questions:

- What functions are essential for this digitalization, communication, management, interfacing with Rotary International, etc. What is the coverage of these functions by the evaluated tool?
- What does the district plan? The development with volunteers or with a contractor of an own system based on a toolbox (it's not ***Polaris***) OR buy an existing "mature" system already in function in many different European districts (it's ***Polaris***)
- How does the new tool simplify the work of the board, the committees, the officers and the members of the Club?
- What is the support provided by the supplier of this tool? How responsive is it?
- What are the experiences of other districts? How long did it take to go into production?

Clubs making good use of the ***Polaris*** were able to reduce or even eliminate expenses such as professional secretarial services.

To answer questions about ***Polaris***, contact:

Rot. Pierre Wüthrich
Head of relationship to European Rotary districts
Medias Association of Rotary Switzerland-Liechtenstein
Mobile: +41 76 397 40 34
E-mail: pierre.wuethrich@rotary.ch

Examples of current ***Polaris*** sites:

4.1 French districts

Rotary District 1520	https://www.rotaryd1520.org
Rotary District 1650	http://www.rotary-bretagne-mayenne.org
Rotary District 1680	https://www.rotary1680.org/fr/
Rotary District 1690	https://rotary-1690.org
Rotary District 1710	https://www.rotary1710.org
Rotary District 1780	https://www.rotary1780.org

4.2 Switzerland & Liechtenstein districts

Rotary District 1980	https://rotary1980.ch/en/
Rotary District 1990	https://rotary1990.ch/en/
Rotary District 2000	https://rotary2000.ch/en/
Rotaract Committee	https://rotaract.ch/en/
Inner Wheel 199	https://innerwheel.ch/en/

4.3 Belgium and Luxemburg districts

Rotary District 2130	https://rotary2130.org
Rotary District 2140	https://rotary2140.org
Rotary District 2150	https://rotary2150.org
Rotary District 2160	https://rotary2160.org