

CONTENT BLOCKS OVERVIEW (E01)

Content blocks overview

Content blocks are pieces, which helps you to produce modern and readable web pages for your club or district. They allow you to fill-in your text, place pictures, files, external videos, calendar events, member cards and other visuals and control. You can mix all types of content blocks on one page and design it by varying the content block order.

The layout of the content block is pre-defined, with limited possibility to adapt it. Content blocks do not offer you the the full flexibility of an HTML editor, but ensure that your web-page will always look reasonable and will work also on tablets and smartphones. That's why all content blocks use the full width of the page.

Following content blocks are available:

1. Primary image & text
2. Title
3. Text
4. Image with text
5. Single image
6. Single file
7. Separator
8. Video
9. Related Event
10. File collection
11. Image collection
12. Related content
13. Folder
14. Member
15. Button
16. Image map

More content blocks are yet under construction and will be available in the future Polaris releases.

The best possibility to learn more about content blocks is to try them out!

Create a new article and place content blocks of any type there to see how they look like, how they behave and how they suit your demands.



All Calendar Letters Newsletters News Projects Photo galleries Various



Bremer Stadtmusikanten: Figurentheater St. Gallen...

Die Katzen soll im Bach erstickt werden und der Hahn in der Suppe kochen, den Esel sch...

RC ST. GALLEN-FRIEDRICH...



Foundation: Moldawien - Sanitary for schools USD 7200...

Unterstützung des Rotary GG Projektes: « Wasser und Hygiene in moldawischen Schulen...

RC ST. GALLEN-FRIEDRICH...



Polaris - Questions & Answers (FAQ) (v02)...

On this page you will find frequently asked questions and answers. Help other Rotarians...



ROKJ Solothurn - Rotary für Kinder und Jugendliche

Das neue Video zu ROKJ Solothurn ist da!

RC SOLOTHURN-LAND

CALENDAR

- 30.07.22 RC Verbier St-Bernard: Concert du Verbier Festival
- 16.07.22 RAC Lüzern: Rotaract Kidscamp
- 08.07.22 RFE Rotarian Drivers of Classic Vehicles (CH/FL): Rotary Challenge 2022
- 29.03.22 RFE Rotarian Drivers of Classic Vehicles (CH/FL): Gründungspäpö RDCV
- 25.03.22 RASC Committee Rotaract Switzerland Liechtenstein: EU'CO RIGA

QUICK LINKS

- ICC Inter Country Committees
 - ICC Switzerland-Liechtenstein
- Fellowships Switzerland-Liechtenstein
 - Fellowships
- Rotary CH/FL Projects
 - Our projects / Program

ENGAGIEREN - LEBEN VERÄNDERN



SERVIR POUR CHANGER DES VIES



12 21

NETZWERKE

ROTARY HAS BEEN PRESENT IN SWITZERLAND SINCE 1924

At the end of the First World War there were already 800 Rotary clubs across the world; by 1921 that number had risen to 1000 around the globe. In Europe, too, the first clubs were set up, such as in Madrid and Paris for example. At the Rotary headquarters in Chicago there was an increasing desire to found a club in German-speaking Europe, which finally happened in 1924 in Zurich. The Paris club was instrumental in the club's foundation and became its sponsor. In 1925 further clubs followed in Basel, Bern, Geneva, Lucerne and St. Gallen. The first club in the Principality of Liechtenstein was established in 1957.

Today Rotary has more than 13250 members in Switzerland and Liechtenstein across more than 220 different clubs.

Each district is led by a district governor. During his one-year term of office, he is also a member of the Council of Governors of Switzerland/Liechtenstein

Districts in Switzerland and Liechtenstein



1. Primary image and text

The primary image and text has a special meaning because the text and image are used for the various displays such as the list, the detailed pages and the carousel and slider.

The elements of this block are:

- Primary text
The first sentences may appear on many places, in calendar, in the invitation e-mail, in newsletter, in slider, etc.
- Image
It will also appear in the slider or the carousel. If you do not provide an image the rotary logo will appear there. Line separator appears by default under the description.

There are no other options for this block.

You cannot delete this block but you can change its position in some articles!

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Primary image and text of this page.



Content blocks on a multi-district page

2. Title

Its purpose is to display one or several titles between the various blocks of a given article.

The title, in all languages of that article, is the one and only mandatory element of this block. Line separator appears by default under the title.

Districts in Switzerland and Liechtenstein

Title

3. Text

The text block is the most generic content block. The text, in all languages of that article, is the one and only mandatory element of this block.

Remember, that the text editor gives you the possibility to format the text and also to place small images into it.

ROTARY HAS BEEN PRESENT IN SWITZERLAND SINCE 1924

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Text

4. Image with text

The image with text allows you to place an image and a text side by side on the page.

The elements of this block are:

- Layout (mandatory) one of:
 - image left / text right
 - image right / text left
 - image left / text floating right
 - image right / text floating left
- Image (mandatory)
you can chose between large, medium and small images

- Description (optional) of the image in all languages of that article. Line separator appears by default under the description.
- Text (mandatory) in all languages of that article

In the next dialog the leaving date and the new club are entered. The leaving date can be in the future or in the past.

"Other new home unit" is entered only for transfer cases 2, 3, and 4.

If the target club does not have a secretary defined for this community year, the transfer cannot be started!

Attention:

As long as the transfer of the member is in status "accepted", his user-account is disabled and he cannot log in. Usually the next day the process of transfer is completed and his user-account is enabled in his new club. Be aware that the date "Left home unit on" is one day before the date "New home unit entry on".

It is recommended to clarify the transfer between the two secretaries of the clubs and initiate the transfer in the past not in the future. This allows to complete the transfer within 24 hours.

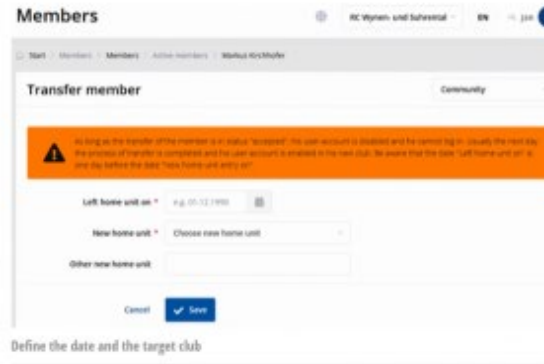


image right / text left

5. Single Image

Allows you to put one image on the page. The image is aligned to the left page boarder and will keep the original size as long as it does not exceed the 1280 x 1024 px size.

Description (optional) in all languages of that article, is the the only element of this block. Line separator appears by default under the description.



escription

Single image

6. Single file

Single file allows you to attach one file to the page. The icon shows the type of the file. If you upload an image, it will be shown as uploaded file, not as an image.

Description (mandatory) in all languages of that article, is the the only element of this block.

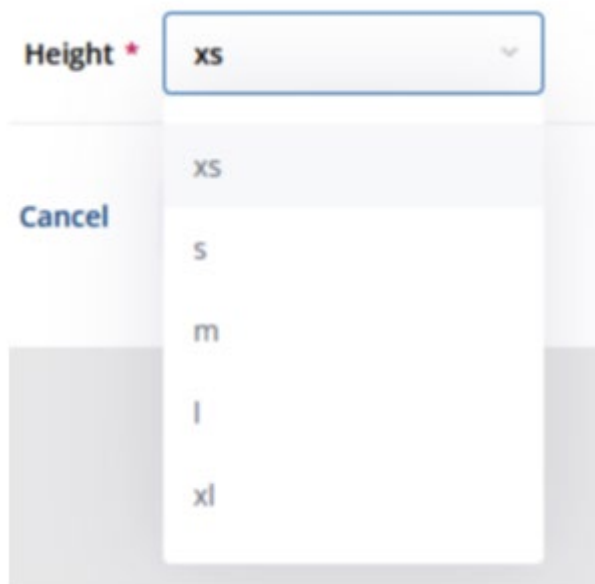
Two line separators appear by default before and after the file.

 **Description** 157.76 KB

Single file

7. Separator

A Separator is the line between two content blocks. You can define it's length as xs, s, m, l, xl



Separator

8. Video

Allows you to place a link to a video. The video player will appear and will allow the user to play the video directly from the page.

The elements of this block are:

- Description (optional) of the video in all languages of that article.
A line separator appears by default under the description.
- URL to the video (mandatory)

Attention: Depending on the format of the video and the compatibility of the player with the user browser, some problems may occur.



ideo

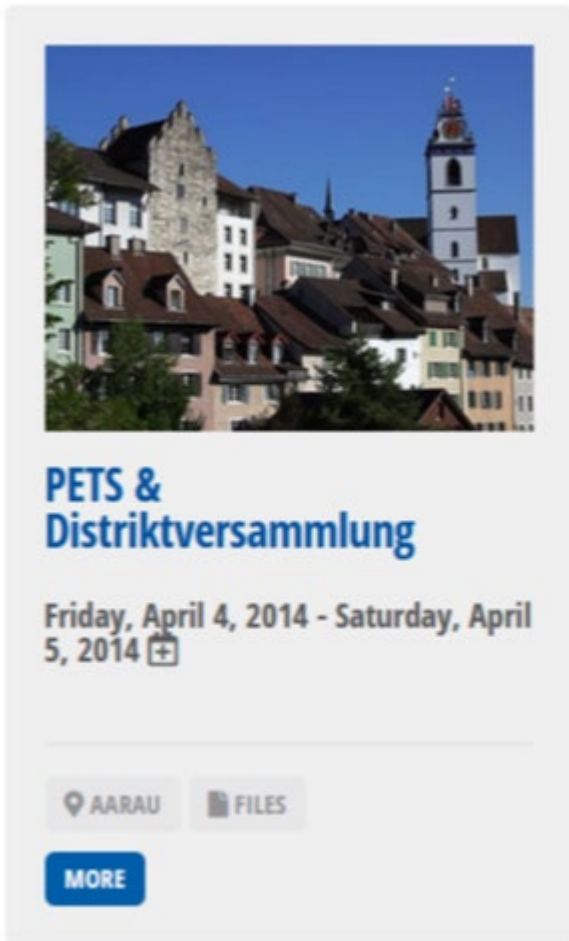
Video

9. Related Event

Allows you to insert an advertising block for an existing event.

In order to select the existing events of your club you must type at least 3 characters in order to display the available ones. Only events of your club are presented.

Attention: take care of visibility of the event and the page on which you put this block.



Event

10. File collection

Allows you to attach multiple files to the page. The icon shows the type of the file. Each file must be uploaded separately. If you upload an image, it will be shown as uploaded file, not as an image.

Description (mandatory) in all languages of that article, must be provided for each file.

Line separator appears by default between each file.



File collection

11. Image collection

Allows you to show a small image gallery on to the page. The images are placed left to right, then top down. Each image must be uploaded separately.

Description (mandatory) in all languages of that article, must be provided for each image.

Line separator appears by default under each image description.



Image collection

12. Related content

Allows you to insert an advertising block for another content of the site.

In order to select the existing contents of your club you must type at least 3 characters in order to display the available ones. Only contents of your club are presented.

Attention: take care of visibility of the content and the page on which you put this block.



All Calendar Letters Newsletters News Projects Photo galleries Videos



Gründet
Schweizerisches
Rotes Kreuz in
Gallen...



Foundation / **Stiftungen**
Secretary for schools
WIR ZÜRICH...



FAQ - Questions & Answers (FAQ)
On this page you will find frequently asked questions and answers. Help other Rotarians...



8000 Jubiläum - Rotary für Kinder und Jugendliche
Seit über 100 Jahren ist Rotary Südtirol in der...

CALENDAR

- 20-01-2021 BC Vorlese im Sternwald Conservatory Vorlese Festival
- 04-01-2021 RAC Evening Rotarian Klänzang
- 04-01-2021 RFF Rotarier Evening of Classic Vehicles
- 05-01-2021 Rotary Challenge 2021
- 19-01-2021 RFF Rotarier Evening of Classic Vehicles
- 05-01-2021 Gefühlsgeopolis RDCV
- 12-01-2021 RAC Committee Rotarier im Sternwald
- Liechtenstein: EUCO 2021

SPONSORS

- ICC Inter Country Committees of SIC Switzerland Liechtenstein
- Fellowship Switzerland-Liechtenstein
- Rotary O/R Projects

MEMBERSHIP - LEADER INFORMATION



MEMBER FROM CHANGING OUR WORLD



2019-2020



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Districts in Switzerland and Liechtenstein



Content blocks overview

Thursday, December 30, 2021

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MORE

Related content

13. Folder

Allows you to place a document folder and its documents as links.

You must first type at least 3 characters before you see the list of the available folders. Only folders of your club are presented.

The user may click on the folder as well as on the documents.

Attention: take care of visibility of the folder and the page on which you put this block.



Folder

14. Member

Allows you to insert the card of a given rotary member.

You must first type at least 3 characters before you see the list of the available members. Only active members of your club are presented.

Attention: take care of personal data protection. For this reason, no example is provided. Try it yourself!

Member

15. Button

Allows you to put one or more buttons on the page.

The elements of this block are:

- Layout - you can chose one of:
 - Button blue - full size
 - Button blue - original size (text size)
 - Button yellow - full size
 - Button yellow - original size (text size)
- Open in new window
- Title of the button in all languages of that article.
- URL of the button in all languages of that article.

Multiple buttons are placed left to right and then top down.

BUTTON 1

BUTTON 2

BUTTON 3

Buttons

16. Image map

Allows you to display a clickable image map .

The elements of this block are:

- Image (mandatory)
- One or more areas consisting of:
 - Link (URL)
 - Coordinates separated with commas
 - Shape (poly-gonal, rect-angular, circle)
 - Target (_blank = open in new tab or window)

Tip: Use the tool on <https://www.image-map.net/> to create the coordinates and test the image map.

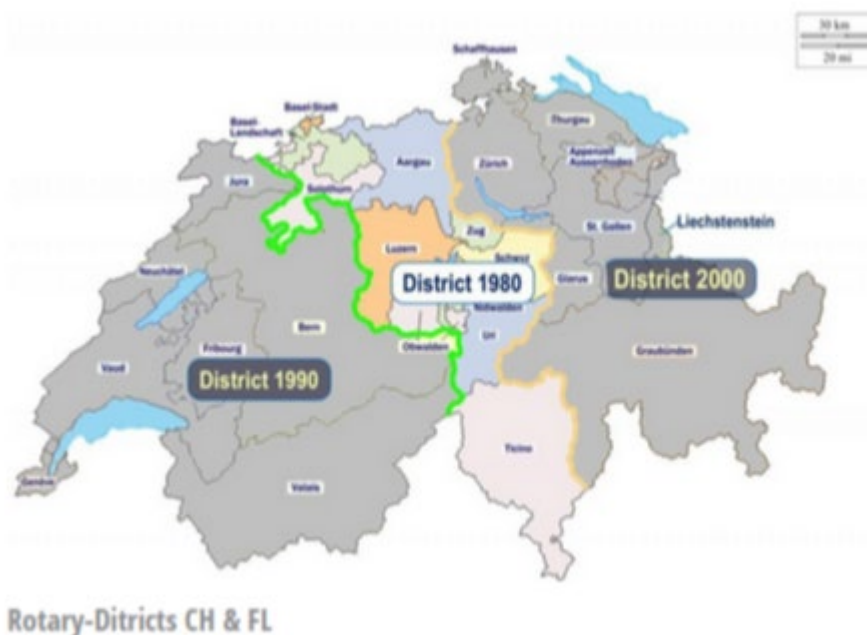


Image map

CROPPING AND CENTERING IMAGES FOR THE SLIDER, THE CAROUSEL AND THE LISTVIEW (E01)

To achieve a good presentation of the images in the list view of the content (calendar, news, actions, etc.), and if necessary in the slider and in the carousel, it is important to

- Have images with sufficient width and height margins to allow cropping around the part to be displayed
- Crop and centre the subjects correctly (see example)
- Use images of good resolution and keep to the pixel dimensions that contribute to a good rendering.

Editing in Polaris is done in the following three steps:

1. Step 1: **Downloading the complete image**
2. Step 2: **Basic cropping** of the image for publication in the list view, and if necessary in its slider and/or carousel view
3. Step 3: **X-Y centering** of the image for these 3 possible views

Slider



Carousel



List



One image for 3 possible views

Step 1: Upload the image

Upload the complete image with as much margins as possible to facilitate cropping

Picture



Warning: the maximum size of an uploaded file is 20 MBytes.
Be aware that uploading many large files such as pictures
and films may incur additional accommodation costs for
your unit.

Image: jpg, jpeg, gif, png

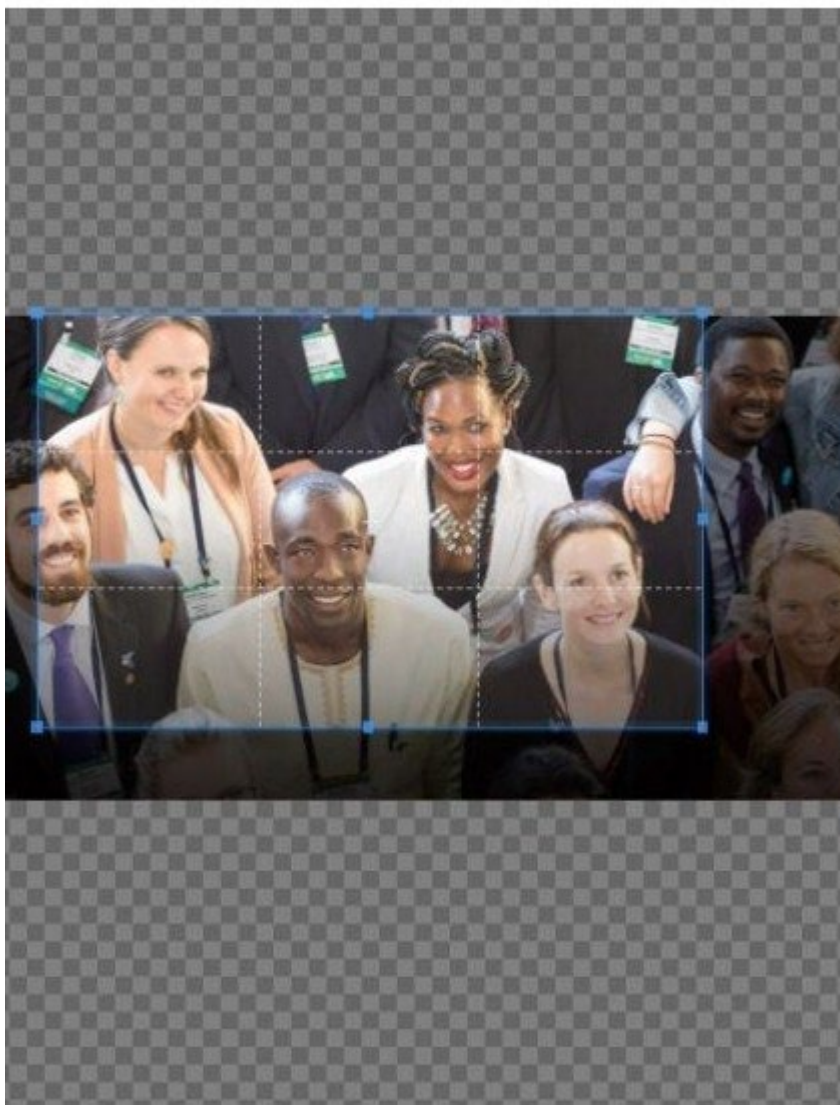
Drag the file here or click on the highlighted area.

Step 2: upload the image

Step 2: Crop the image

This involves cropping the image for its various views, bearing in mind that if one of the views is the slider, the title and description overlay the image. These are of varying heights depending on the length of the texts.

After choosing the desired frame, click on "*Crop*".



Step 2: crop the picture

Step 3: Centre the image in the three views

Moving the focus point with the cursor allows you to move the cropped image from top to bottom and from left to right and to observe the result in the three possible views of the slider, the carousel and the content list.

When the result for the view(s) is adequate, click on the "*Set focus point*" button

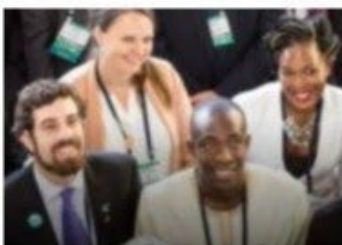
Choose focus point: The focus point is used to determine the area of the cropped image for the different displays. Drag and drop that focus point (round circle) for the most appropriate part of the image and check at the same time how it will look like in the different displays



Slider



Carousel



List



Step 3: Set the focus point

Tip

For the slider view, you need to leave the necessary margin at the bottom of the image for the title and the text which will appear as a transparent overlay

To ensure the best rendering, it is sometimes necessary to do steps 1 to 3 more than once



Slider: leave room for the title and text

Step 4: Choose the size of the image and the descriptions

Choose the width proportion that the image should occupy in the content detail view

then enter the image label and text

Picture



Warning: the maximum size of an uploaded file is 20 MBytes. Be aware that uploading many large files such as pictures and films may incur additional accommodation costs for your unit.

Image: jpg, jpeg, gif, png



Drag the file here or click on the highlighted area.

0.5 MB

FAQ_pictures.jpg

Image size in % *

75%

Description DE

25%

50%

75%

Text DE

100%

Step 4: choose the ratio of the image and the text

PROMOTION AND PUBLICATION RULES FOR SLIDER AND CAROUSEL (E02)

Important differences between slider and carousel

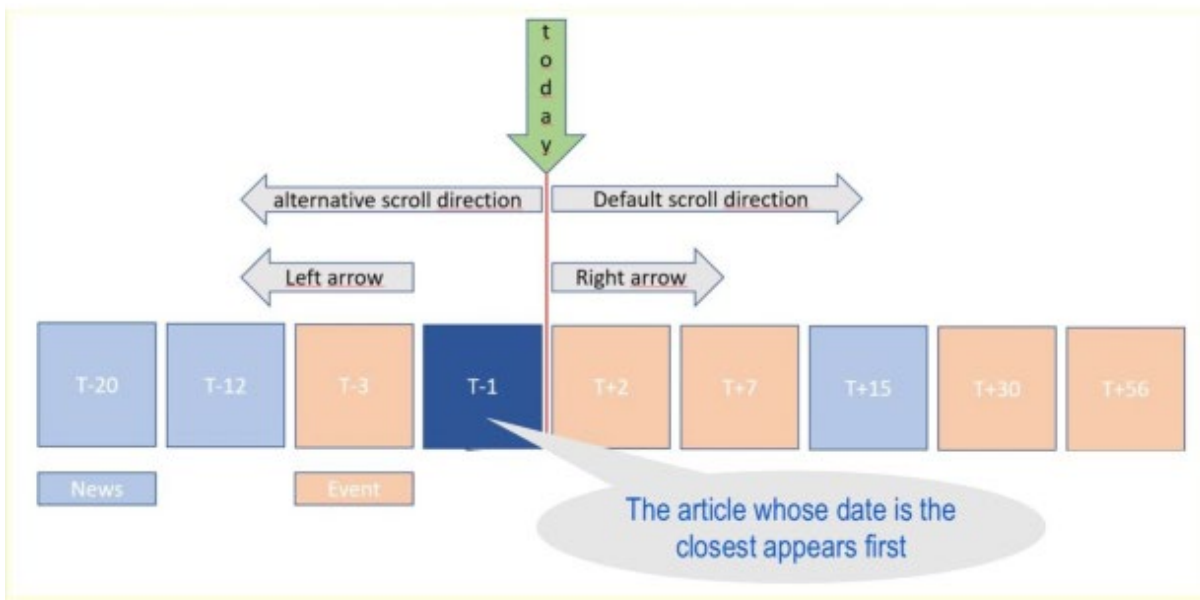
Slider :

- Only events and news of your own club can appear in the slider.
- The date of the event or news item determines the order.
By default it is chronologically ascending from left to right, but can be set to be chronologically descending from left to right by activating the appropriate club parameter
Club parameters > Other parameters > Slider on frontpage in reverse chronological order
- The article whose date is the closest appears first.

- Decisive for the display in the slider is the corresponding marking and the period from - to.

Carousel :

- In the carousel you can display events, presidential announcements, newsletters, news, projects and miscellaneous from your club, district or Rotary CH&FL.
- Carousel offers the possibility to filter the display according to the type of article.
- The date of the article determines the order. It is chronologically ascending from left to right. The oldest article appears first.
- The decisive factor for the display in the carousel is the corresponding mark and the period from - to.



Content options and display order

Promotion in own unit

Promote in main slider on entry page

Promote in carousel on entry page

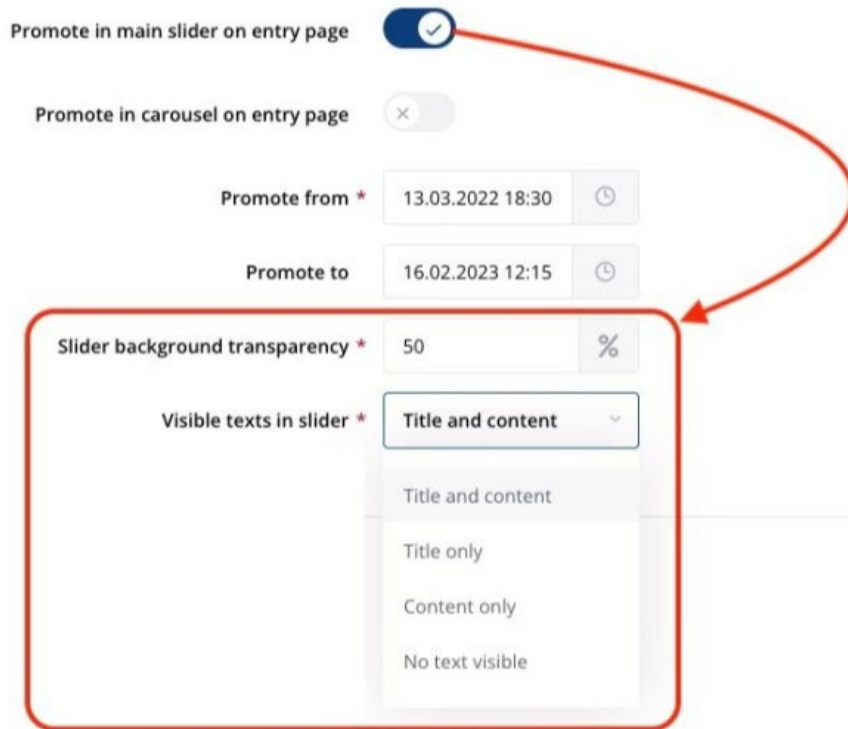
Promote from * 13.03.2022 18:30

Promote to 16.02.2023 12:15

Slider background transparency * 50 %

Visible texts in slider * **Title and content** ▼

- Title and content
- Title only
- Content only
- No text visible



Display choices

Making choices for the displays

The tab *Visibility*, paragraph *Promotion in own unit* allows the following choices:

- display the article in the slider
- display the article in the carousel
- the dates of the display period

If the display in the slider is activated, the following settings are available:

- the transparency of the text block, by default 50%, but adjustable to take into account the brightness of the image behind the block
- the choice of which text(s) to display:
 - the title and the text
 - the title only
 - the text only
 - neither title nor text

The above choices allow you to limit the height of the semi-transparent block. Note that both the title and the text are truncated to occupy a single line.

The best practices for promotion and publication of your content in slider and carousel

General rules:

- Consider using slider for the more prominent topics in the near future, and the carousel for less important ones far from now.
- Do not make visible more than 5 topics in the slider, and more than 15 in the carousel at the same time.
Some 2-5 topics may be published in the carousel by higher organization levels like district or metro-club. You can turn them off in "*Club-life > Content moderation*" menu.
- Always use a picture for topics in the slider and if possible also in the carousel. It looks much better!
- Do not promote the same content in both slider & carousel.

Promotion in own unit

- "*Promote from*" is set to now, when you create the content.
Do not promote future events earlier than 1-3 month before they start.
- Always set the "*Promote to*" to the end date of a future event or one day after.
- For past actions set the "*Promote to*" to a date not later than 3 month after the action ends.

Display in other units:

- Do not display to District or Multi-district contents related solely to your own club. Consider what may be interesting for others and why.
- Do not display regular meetings to other units.
- Use the same or shorter promotion periods as for your own unit.
- Set the visibility to at least "*All members (own district)*" but not to "*Public*". Consider the [GDPR rules!](#)

Troubleshooting:

- Old articles appear first in the slider
=> Adjust the publication parameters (period) of the articles or switch off publication in the slider.
- The order of the news in the slider is not good.
=> Adjust the date of the new, but not the publication period
- In the carousel an article appears which is already notoriously known.
=> Disable this article in the moderation of the contents.

EVENT LIFE CYCLE (E03)

Event life cycle explained on an example of a Rotary event.

Event passes several phases:

1. Creation
2. Invitation (optional)
3. Registration (optional)
4. Attendance capture
5. Report
6. Event closure



1. Creation

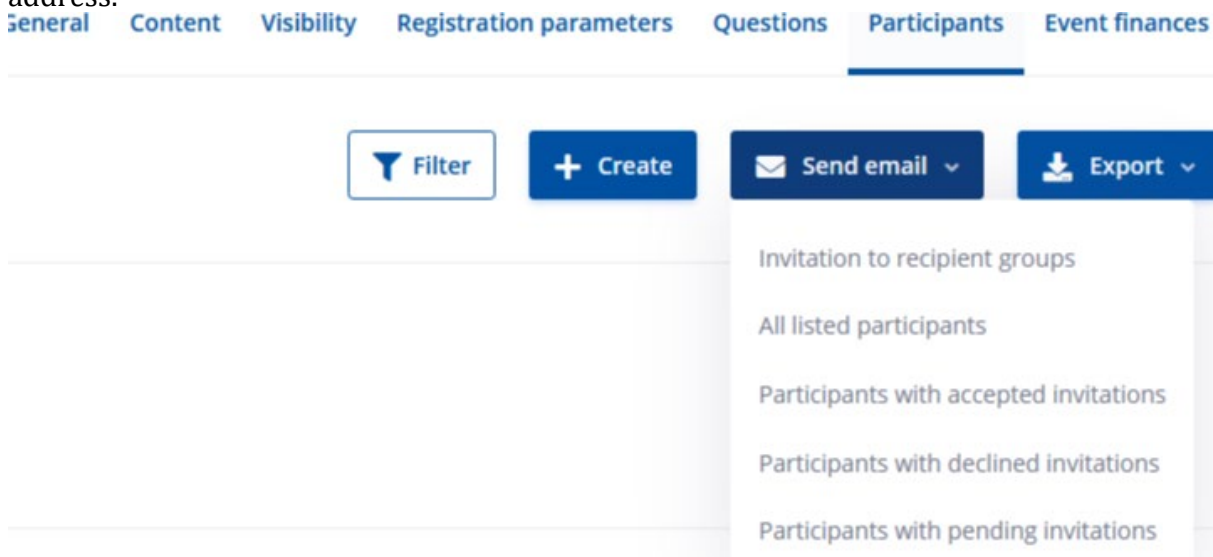
The timeline begins in Polaris with the **creation** of the event **in calendar**. For club events the active members, prospects and guests are inserted as potential participants into the participant list at the creation time. For district events the participant list is empty. The participant list can be extended manually with members from any club and with other people.

Newly created event is inactive in the Web and its visibility is set to All members (own unit) by default. Consider the [GDPR guide](#) when setting the visibility. (The Polaris team strongly advises to consider making events non-public for the sake of GDPR.)

Before you make the event visible in Web consider the registration, questions and answers you want to get from the participants. Verify the functionality of the registration form. Once the people start registering, it is no longer possible to modify the questions!

2. Invitation (optional)

The organizer issues an **invitation** i.e. an announcement of a future event to the invited audience. Invitation is optional and can occur by e-mail or just by publishing the event on the Website in the slider or in the carousel. Events with regular schedule usually do not have an invitation. Invitation by e-mail can be created directly in the "Participants" tab of that event. The created e-mail is visible in the Menu "Club-Life > Emails" and can be modified there before sending. The invited audience can be defined by means of predefined recipient groups and can be extended with members of the community or with any e-mail address.



Creating invitation e-mail

3. Registration (optional)

Registration is enabled in the "Registration parameters" tab of the event. After making the event visible on the web and enabling registration, people can register to that event. **Registration is a confirmation of a prospective participation or denial of participation to a future event.** The registration is recorded in the event and is visible in the tab "Participants".

The visibility of the event defines who can register. If the event is public, any person can register. People who are not yet on the participant list are automatically added when they fill the registration form. For all Polaris users who logged-in, the registration form is pre-filled with their personal data. They may be duplicates when users do not login before registration or when people register twice with different names. **The Polaris team strongly advises to consider making events non-public** (for the sake of GDPR). An e-mail of confirmation with his/her choices is sent to the person. This makes it necessary to login first and eliminates the problem with duplicates.

Each event has a registration deadline. The users may modify or withdraw their registration by this deadline. While the registration period is active, the organizers (can be multiple), defined in the "General" tab will receive an e-mail for each registration, de-registration or registration change, including all registration options (answers).

For club events, it is possible, before the registration deadline expires, to automatically send reminders to members who did not register or de-register yet ("no answers").

When the maximum number of participants is reached, registered users are put on a waiting list. They are finally registered, if the current number of participants drops below the maximum. In such case they will receive the final confirmation e-mail.

After the deadline, registration is not possible from the Website. However administrators can still register people on their behalf for that event. Such participants will also receive an e-mail of confirmation.

Registration

Registration until : Tuesday, August 22, 2023 at 12:15 PM

Max. number of participants: 1000

First name

Name

Gender

Phone

Email

Home unit

Nehmen Sie teil?

Ich nehme teil Ich nehme nicht teil

Comment (visible to other users)

VALIDATE MY ANSWERS

Registration form

4. Attendance capture

An Attendance is the confirmation of the physical appearance of the participant to an event. The purpose of the attendance capture is to keep track on the effective presence of the participants and of their payments. Attendance is recorded in the event in the tab "*Participants*". The capture can be easily performed manually on the form, or by scanning the QR-code of the participants (see below).

Alternatively, the attendance list can be printed out via "Export" button, signed by the participants and manually entered by an administrator.

This action can be performed by administrators only. A special role "Attendance capture" allows non-administrators, e.g. the rotarian in charge of the welcome, or the restaurant personnel to capture the attendance, but not to perform any other function.

The recording of attendance is possible only on the day of the event or afterwards.

Update event "Ferien-Plauderlunch" 04.08.2021 12:15 - 13:30 Participants

Participants Filter + Create Scan QR-Code Close event Send email Export

Name	Email	Home unit	Registration	Registered at	Last modification made	Number of persons registered	On Waiting list	Exempt from presence	Present	Actions
[REDACTED]	[REDACTED]	RC Wynen- und Suhrental	No answer	-	04.08.2021 12:26	1	No	No	Yes	[Clock] [Edit] [Trash]
[REDACTED]	[REDACTED]	RC Wynen- und Suhrental	No answer	-	-	0	No	No	No	[X] [Edit] [Trash]
[REDACTED]	[REDACTED]	RC Wynen- und Suhrental	Accepted	03.08.2021 19:06	03.08.2021 19:06	1	No	No	No	[X] [Edit] [Trash]
[REDACTED]	[REDACTED]	RC Wynen- und Suhrental	Accepted	04.08.2021 12:26	04.08.2021 12:26	1	No	No	Yes	[Clock] [Edit] [Trash]

Attendance capture form

Attendance capture with QR-code

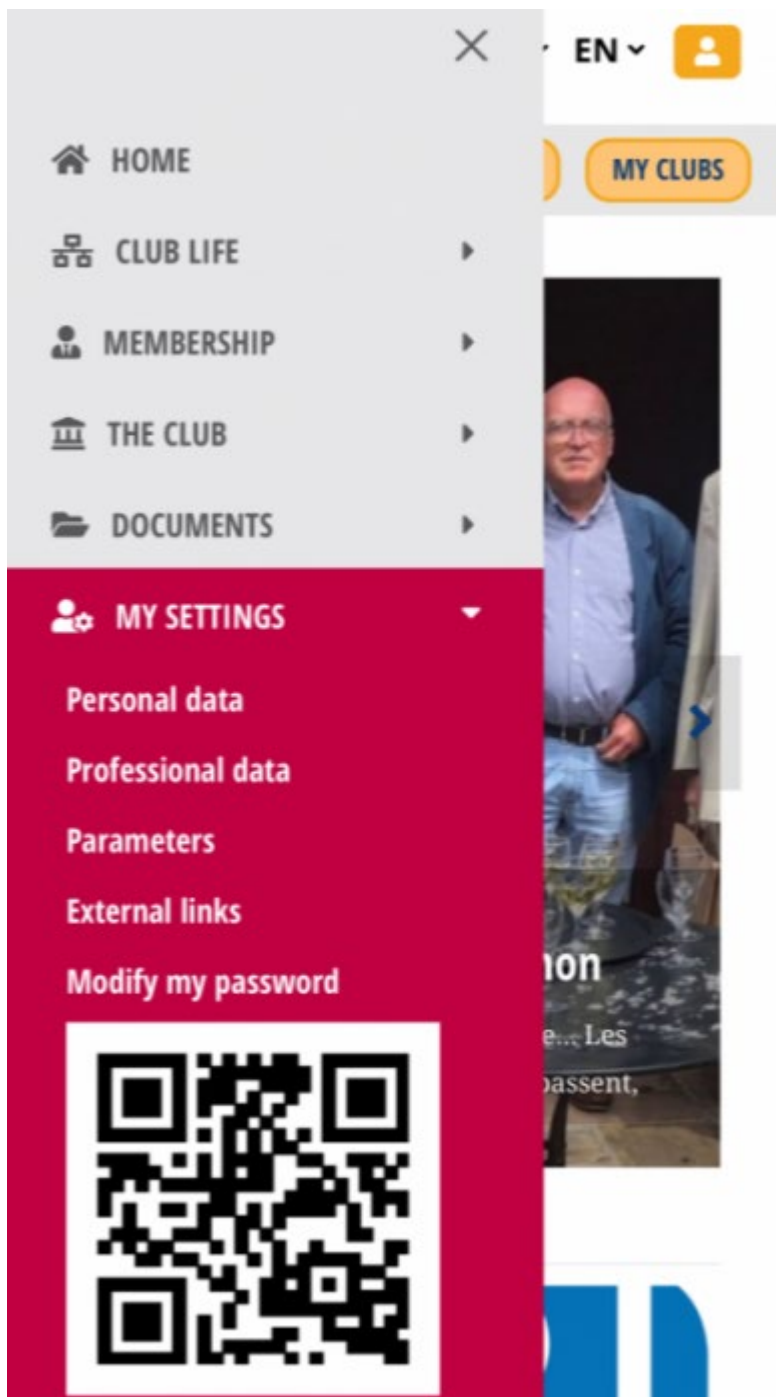
The attendance capture can be simplified by scanning the QR-code of the members. The one in charge opens the event on his smartphone and clicks on the "Participants" button in the event detail page. Then he invokes the camera by clicking on the "Scan QR-code" button and starts the scanning process.

The attendees present their personal QR-code either on smartphone or printed on a sticker. The individual QR-code is available on smartphones or tablets by clicking on the blue icon "little man" in the top-right corner, or by invoking the NAVIGATION symbol then MY-SETTINGS. The printed stickers with the QR-codes can be made available by the administrator or printed by the members themselves. For a members missing both his smartphone and his sticker, one can prepare a pre-printed set of all members QR-codes. (See next section)

Successful scan is confirmed by a pipes-tone, errors are signaled as quack-tone. Visual message shows the scan outcome. Duplicate scans are detected.

QR-code scanning is applicable to all members of the club, i.e. to active members + guests + prospects + other contacts, but also to any active rotarian of the same multi-district (CH/FL, resp. France, resp. Belux, etc...)

The QR-code is an encoded representation of the Rotary-ID. No other data is present in the code.



Personal QR-code

5. Report

The best way to record the club's history is to attach the minutes of events directly to the event. Modern communication of reports is done by an attractive newsletter containing links to these reports, together with the announcement of future events and news. Event reports are entered by adapting or replacing the primary text block announcing the event, and by adding photos taken at the event.

6. Event closure

The purpose of the closure is to finalize all transactions related to this event. The presence points are assigned to the attendees and fees are deducted from the financial accounts of the members.

A closed event can be re-opened to correct the attendance. Financial transactions cannot be undone for audit reasons. Compensating reverse transactions are issued in a such case.

Closing/Reopening an event will generate account transactions



Are you sure you have captured all attendances and financial transactions?

Closing the event will deduct all fees from member accounts. They cannot be changed and only be corrected with a reverse transaction.

Cancel

Close event ✓

Printed formats of the QR-codes

The QR codes can be provided on paper in two different formats.

1. Stickers

Stickers are handy small labels which the member sticks on a credit card or any other means in their wallet. The stickers are printable on any laser or ink-jet printer. A PDF file is available in administration under *Utility > Member list > Export > QR Stickers*

A4 pages of 13 columns by 5 stickers are printed on Avery sticker pages whose order references are:

- Universal stickers for both printers: Avery 3666 (will be better aligned in R1.1)
- Older stickers for laser printers: Avery L7615-15
- Older stickers for ink-jet printers: Avery J8651-12

Various on-line providers exist:

- Amazon.fr, search for: AVERY - 3666
- Avery <https://www.avery.fr/etiquettes>
- Avery <https://www.avery-zweckform-fachshop.de/>

Warning: a proper printing is obtained by setting the scale to 100%, other wise the QR-codes will not fit to the sticker layout!

2. Folder with printed QR-codes

For scanning the QR-code of a member who misses both his smartphone and his sticker, one can scan his QR-code in a pre-printed set of all members QR-codes available for being printed, in administration under *Utility > Member list > Export > QR Overview*

The printout includes all active members of the own club, but not guests and other contacts.



Universal-Etiketten
38,0 x 21,2 mm, permanent haftend, weiß, mit ultragrip

Artnr 366f
Inhalt 100 Blatt / 6500 Etiketter
Besonderheit QuickPEEL Abziehhilfe, ultragrip
Druckertyp für Inkjet-, Laser-, Farblaserdrucker und Kopierer

Varianten
Etikettengröße 38,0 x 21,2 mm
Inhalt Blatt 10 Blatt 30 Blatt 100 Blatt 220 Blatt

Material

Universal Avery stickers for Polaris QR-codes for both printers



Address Labels
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Etichette per buste
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Prix : 11,40 € **prime**
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Taille : 38,1 x 21,2 mm

38,1 x 21,2 mm	45,7 x 25,4 mm	46 x 11,1 mm
63,5 x 33,9 mm	63,5 x 38,1 mm	99,1 x 33,9 mm
99,1 x 38,1 mm	99,1 x 57 mm	99,1 x 139 mm
198,6 x 143,5 mm	198,6 x 286,1 mm	

Style: Laser
Jet d'encre Laser

Couleur Blanc
Taille 38,1 x 21,2 mm
Marque AVERY

À propos de cet article

- Conditionnement spéciale pour particuliers, PME et microentreprises.
- Pour imprimantes Laser
- Matières pour : Enveloppes format C6, DL, C5/6, C5, C4, Pochettes format C5, B5, C4
- Produit certifié FSC

↳ Voir plus de détails

Avery stickers for Polaris QR-codes for laser printers



Avery stickers for Polaris QR-codes for inkjet printers

MEMBER TRANSFERE BETWEEN CLUBS (E03)

There are four different transfer cases:

1. Transfer between clubs using the **same Polaris instance**. (E.g. transfer between clubs within CH&FL) This includes a transfer from a Rotaract club to a Rotary club
2. Transfer between clubs using **different Polaris instances**. Eg. RC Lyon (F) to RC Lausanne (CH)
3. Transfer from **abroad to a club using Polaris**. (E.g. from RC Konstanz (D) to RC Kreuzlingen (CH))
4. Transfer from a **club using Polaris to a club abroad**. (E.g. from RC Lugano (CH) to RC Milano (I))

The case 1. must be handled by the secretaries of the respective clubs and is described here below.

For cases 2. and 3. please contact the NICO nico@rotary.ch

Attention: Only active members can be transferred!

Guests remain in their home clubs and can be invited into other clubs, other contacts can be only members of one club. For special cases please contact the NICO nico@rotary.ch.



Initiating the transfer process

The transfer is initiated **by the secretary of the sending club**. The role Admin. member or Admin. (all rights) is required for this function.

Transfer is initiated by the INITIATE MEMBER TRANSFER button in the community tab of the active member.

Start > Members > Active members > Markus Kirchofer

Update Member [REDACTED] (Active) Community

ID	12672
RI ID	7019722 RI
Status	Active Change status RI
Home unit	Wynen- und Suhrental Initiate member transfer
Home unit entry	01.02.2009 🗑️ RI
Start of community membership	01.02.2009 🗑️ RI
End of community membership	e.g. 01.12.1990 🗑️ RI
Date of death	e.g. 01.12.1990 🗑️ RI
Paul Harris Fellow	Yes ⌵
Assign RI honorary membership status	<input checked="" type="checkbox"/> RI

Starting the transfer

In the next dialog the leaving date and the new club are entered. The leaving date can be in the future or in the past.

"Other new home unit" is entered only for transfer cases 2. 3. and 4.

If the target clubs does not have a secretary defined for this community year, the transfer cannot be started!

Attention:

As long as the transfer of the member is in status "accepted", his user-account is disabled and he cannot log in. Usually the next day the process of transfer is completed and his user-account is enabled in his new club. Be aware that the date "Left home unit on" is one day before the date "New home unit entry on".

It is recommended to clarify the transfer between the two secretaries of the clubs and initiate the transfer in the past not in the future. This allows to complete the transfer within 24 hours.

Transfer member

Community



As long as the transfer of the member is in status "accepted", his user-account is disabled and he cannot log in. Usually the next day the process of transfer is completed and his user-account is enabled in his new club. Be aware that the date "Left home unit on" is one day before the date "New home unit entry on".

Left home unit on *

New home unit *

Other new home unit

Cancel

Save

Define the date and the target club

E-Mail sent to the secretary of the target club

When the transfer has been successfully started, Polaris sends an e-mail to the secretary of the target club.

KALENDER

AKTUELL

Member transfer initiate

The RC Wynen- und Suhrental has initiated the transfer of the member to your unit.

Please accept or decline the member transfer through the following link:

[Accept/Decline transfer...](#)

RC WYNEN- UND
SUHRENTAL

RD DISTRICT 1980

ROTARY INTERNATIONAL

2021 © RC Wynen- und Suhrental - Alle Rechte vorbehalten

Notification e-mail

Completing the transfer to the target club

The secretary of the target club accepts or declines the transfer.

When the transfer has been accepted, the secretary of the sending club is notified by e-mail, the transfer process is completed and the member becomes an active member of the target club. The transfer appears as completed in both clubs.

The entry date in the new club cannot be set. It is automatically calculated from the leaving date in the sending club.

When the transfer has been declined the secretary of the sending club is notified by e-mail, the transfer process is canceled and the member is back in his original club. The transfer appears as declined in both clubs.

Rotary Members

Start > Members > Member transfers

Member transfers

Members	From unit	New home unit	Status	Date	Actions
[Redacted]	RC Wynen- und Suhrental	RC Arosa	Initiated	07.09.2021	[Edit]
[Redacted]	RC Arosa	RC Zugerland	Completed	16.01.2013	

25 Show 1 - 2 of 2

Complete the transfer

Final notification

The transfer process ends with the notification of the secretary in the sending club.

Attention:

Member transfer cannot be reverted!. The only way to correct an error is to initiate a new transfer. However the transfer history of the member is always preserved.

KALENDER

AKTUELL

Member transfer accepted

The RC Appenzell has accepted the transfer of the member [REDACTED]

[REDACTED].

RC APPENZELL

RD DISTRICT 2000

ROTARY INTERNATIONAL

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Final notification

Impact of a failed transfer

The transfer may fail for several reasons. The most probable one is that the secretary of the target club, instead of waiting for the transfer message from the sending club, creates a new member which then gets a new Rotary International-ID, In such case the Member in transfer will be blocked as long as his data in Rotary-International is not cleaned up. This can take several weeks.

The secretary of the receiving club must thus wait until he gets a message from the sending club.

FINANCE MODULE (E01)

[SHARE](#)

[BACK](#)

Thursday, October 14, 2021

How do I get started with the finance module ?

Contents

Basic principles

A. Choosing the basic parameters

B. Event Accounting

C. Individual club member accounts

C.1 MAIN individual account WITHOUT automatic transactions

- Accounting periods and grouped transactions
- Most common transactions in a period

C.2 MAIN individual account WITH automatic transactions

C.3 MEAL PACKAGE System

D. Overview of members' accounts

E. How to experiment with the finance module?

F. Improvements planned for a future version.

Basic principles

The following functions are available in the finance module:

1. An **income-expenditure account of each event** in the calendar:
for each event it is possible to record as income the individual contributions of members, guests and visitors,
and expenses to service providers: restaurant,...

2. A **current debit/credit account for each active member or Other contacts of the club:**

Debits such as regular membership fees, and credits such as payments into the club's bank account

Optionally, contributions to club events can be automatically recorded as debits

Alternatively a "Meal package system" can be activated, based on a fixed amount per period, regardless of the number of meals consumed.

Visibility: the active member can view his current account at any time under NAVIGATION > MY FINANCES, which displays for the selected period

- its balance at the beginning of the period
- the debit/credit entries relating to it during the period
- its current balance, or end of period balance.

The finance module is therefore **not** a club accounting system as such.



How to activate the various event and member accounts

A. Choose the basic settings

Under *Club Parameters > Other Parameters > Finance* enter the default prices offered when creating an event:

- Country currency
- Default event price for active members, prospects and guests of the club and multi-district
- Default event price for visitors
- Penalty for "noshows", i.e. members registered for an event but absent without announcing it.

At this stage do not activate the other parameters: they will be described later.

Other parameters

Finances

Currency *	CHF
Default event price for members	52.00 CHF
Default event price for other contacts and visitors	52.00 CHF
Penalty for noshows at events	0.00 CHF

Enable members financial



Finances

Defaults

Meeting schedules

Event defaults

Newsletters, Mails and Letters

Finances

Used features

B. Event accounting

B.1. To be done before the event:

Edit Event, *Event Finances* tab, then button *Enter event finance* button to enter:


1. The various prices to be applied, and possibly the penalty charged to an active member unable to attend,
2. The cost per participant used to pay the provider e.g. the caterer,
3. The cost charged by the provider for "no shows" e.g. meals ordered but not served,
4. The various possible fixed costs, e.g. room hire, beamer, etc.

B.2 During and after the event

1. Record all member and visitor attendance (QR-code, or manually),
2. Collect contributions on site (cash, credit/debit cards, smartphones, etc.), except those of active members if their individual accounts are debited,
3. Check that the account is complete (see below) and if necessary correct it,

4. When all attendance and expenses are in order, close the event.

Attention: closing the event affects the attendance rates of the members present, but also debits, if necessary, their individual account for their contribution to the event.

 **Update event "Member to members-evening" 25.11.2021 19:00 - 21:00**

General Content Visibility Registration parameters
Questions Participants Event finances

Event finances


Income

Price for members *	<input type="text" value="52.00"/>	<input type="text" value="CHF"/>
Price for other contacts and visitors *	<input type="text" value="52.00"/>	<input type="text" value="CHF"/>
Penalty for missing statutory event *	<input type="text" value="10.00"/>	<input type="text" value="CHF"/>

Variable expenses


Cost per present participant *	<input type="text" value="50.00"/>	<input type="text" value="CHF"/>
Cost per noshow *	<input type="text" value="40.00"/>	<input type="text" value="CHF"/>

Fixed expenses



Fixed cost description *

Fixed cost amount *



Fixed cost description *

Fixed cost amount *

The *Event Finances* tab displays the full event count allowing you to check everything before closing the event.

Please note: re-opening a closed event will create reverse entries in the individual member accounts, not delete them.

Update event "Member to members-evening" 25.11.2021
19:00 - 21:00

Event finances

Event finances (CHF)

Enter event finances

Total income CHF 2'860.00
 Total expenses CHF 2'980.00
 Event balance CHF-120.00

Income (assuming that all active members registered and «no answer» attend the event)	Quantity	Price per unit	Paid cash	Debit accounts
Income from members <ul style="list-style-type: none"> Active members of own unit Other contacts of own unit 	55	CHF 52.00	CHF 2'860.00	
Income from guests <ul style="list-style-type: none"> Active members of another unit Other contacts of another unit 	0	CHF 52.00		
Income from visitors <ul style="list-style-type: none"> Participants registered by themselves or manually added to the event Companions of other participants 	0	CHF 52.00		
Income from active members missing statutory events	0	CHF 10.00		
Income from noshows	0	CHF 40.00		
Invited free of charge by the unit (no income)	0	CHF 0.00		
Total income	55		CHF 2'860.00	CHF 0.00
Expenses	Quantity	Price per unit	Total	
Variable costs per present participant	55	CHF 50.00	CHF 2'750.00	
Variable costs per no show	0	CHF 40.00	CHF 0.00	
Room			CHF 200.00	
Beamer			CHF 30.00	
Total expenses	55		CHF 2'980.00	

Income-expenditure account for an event

C. Individual accounts of club members

Introduction

To activate the individual account system, in the *Club parameters > Other Parameters > Finance* toggle the *Enable member financial account* switch

This gives each active member a current account "debits - credits - balances".

Depending on the choice of the club, the current accounts can be of various complexities:

- A single **"Main"** account **WITHOUT** automatic entries
- A single **"Main"** account **WITH** automatic debit entries for contributions to events
- A second account called **"Meal"** with automatic debit entries for contributions to events

The screenshot shows the 'Other parameters' settings page. On the right, a dropdown menu is open, showing options: Defaults, Meeting schedules, Event defaults, Newsletters, Mails and Letters, Finances (highlighted), and Used features. The main content area is titled 'Finances' and contains several settings:

- Currency ***: A dropdown menu set to 'CHF'.
- Default event price for members**: A text input field containing '52.00' and a 'CHF' dropdown.
- Default event price for other contacts and visitors**: A text input field containing '52.00' and a 'CHF' dropdown.
- Penalty for noshows at events**: A text input field containing '0.00' and a 'CHF' dropdown.
- Enable members financial account**: A toggle switch that is turned on (blue with a white checkmark).
- Debit event fees from member account**: A toggle switch that is turned off (grey with an 'x' icon).
- Uses meal package**: A toggle switch that is turned off (grey with an 'x' icon).

C.1 Individual MAIN account WITHOUT automatic entries

Only one "main" current account per member to enter the various possible accounting entries.

It is accessed via *Members > Active members > Edit icon of the selected member > Financial account tab*, alternatively via *Members > Active members > Financial tab > Edit icon of the selected member*.

- **Debits:**

- Club admission fee for a new active member
- Periodic membership fee
- Compensation for absence at a statutory event
- Donation call ...

- **Credits:**

- Payment by the member to the club bank account
- Cash payment by the member to the treasurer
- etc..

Each entry is created by the treasurer via the button **+ Add transaction**

Transaction Date	Booking date	Type	Description	Credit	Debit	Account	Balance	Created by
01.07.2021		Initial balance	main account			Main	CHF 198.00	
11.07.2021 16:57		Attendance fee	Extourné: Contribution pour l'événement Propos de table et compte-rendu de Corinne Monnard Séchaud 11.06.2021	CHF 52.00		Main	CHF 250.00	Olivier Gardiol
11.07.2021 16:57		Attendance fee	Contribution pour l'événement Propos de table et compte-rendu de Corinne Monnard Séchaud 11.06.2021		CHF- 52.00	Main	CHF 198.00	Olivier Gardiol
17.07.2021 09:38	17.07.2021	Other	reset		CHF- 198.00	Main	CHF 0.00	Olivier Gardiol
21.09.2021 23:30	21.09.2021	Membership fee			CHF- 250.00	Main	CHF- 250.00	Olivier Gardiol
21.09.2021 23:31	21.09.2021	Admission fee			CHF- 200.00	Main	CHF- 450.00	Olivier Gardiol
21.09.2021 23:33	21.09.2021	Other	Payment to club account	CHF 450.00		Main	CHF 0.00	Olivier Gardiol
30.09.2021		Final balance	main account	CHF 502.00	CHF- 700.00	Main	CHF 0.00	

Individual active member account

An entry requires a choice:

- The individual **account** concerned, **by default the *Principal*** (the sub-account "Meal" is described later)
- The ***type*** of entry: by default *Other*, and by choice the admission fee, the periodic contribution, a participation to an event (meal packages are described later)
- The **description** of the entry
- Whether it is a **debit** or a **credit**
- The **amount**, which will appear in red if it is a debit

- The **accounting date**, i.e. the date on which the transaction actually took place; e.g. the date of the payment into the club's bank account.

IMPORTANT: as in any accounting system, **once an entry has been created it cannot be deleted.** If an entry needs to be corrected, a "reversal" is created, i.e. an entry which cancels the entry to be corrected.

Update Member "Olivier Gardiol"

Financial account ▼

Create transaction

Account *	<input style="width: 95%;" type="text" value="Main"/>	
Type *	<input style="width: 95%;" type="text" value="Membership fee"/>	Membership fee
Description	<input style="width: 95%;" type="text" value="Half-year membership fee"/>	Other
		Fixed meal package
		Meal package
Transaction *	<input style="width: 95%;" type="text" value="Debit"/>	Admission fee
Amount *	<input style="width: 80%;" type="text" value="250"/> <input style="width: 15%;" type="text" value="CHF"/>	Membership fee
Booking date *	<input style="width: 80%;" type="text" value="15.10.2021"/> <input style="width: 15%;" type="text" value="📅"/>	Attendance fee

Cancel

Example of debit

The **date of the transaction** appearing in the first column of the current account is the date of recording by Polaris.

IMPORTANT: as in any accounting system, after its creation **an entry cannot be deleted.** If it is necessary to correct an entry, a **reversal** is created, i.e. an entry that cancels the entry to be corrected.

Transaction Date	Booking date	Type	Description	Credit	Debit	Account	Balance	Created by
15.10.2021 16:21	17.10.2021	Attendance fee	Contribution au lunch du 17 août		CHF-35.00	Main	CHF-375.00	Olivier Gardiol
15.10.2021 16:22	16.10.2021	Other	Versement sur cc club	CHF 600.00		Main	CHF 225.00	Olivier Gardiol
15.10.2021 16:59	16.10.2021	Other	Extourne versement sur cc club		CHF-600.00	Main	CHF-375.00	Olivier Gardiol
15.10.2021 17:00	16.10.2021	Other	Versement sur cc club	CHF 800.00		Main	CHF 425.00	Olivier Gardiol
16.10.2021 16:23		Attendance	Contribution d'absence (noshow) à l'événement Conférence de		CHF-	Main	CHF 395.00	Olivier

Accounting periods and grouped transactions


Accounting **periods** of 3 months, 6 months or 12 months can be decided.

From the list of members, *Financial* tab, the treasurer can create at the beginning of the period the fees due in a single operation for all the members, named **Grouped** or "**en bloc**" transaction

Following the same model as an individual transaction, the members concerned must be selected from a multiple choice drop-down list. By default all members are pre-selected.

In the case of different subscription amounts depending on the type of active member (compulsory or exempt from attendance, exempt from subscription, etc.), as many grouped transactions are created as possible.

Create transaction

Members *	Alain Wurzburger, Albert Einstein, Alessan	
Account *	Main	
Type *	Other	
Description	Half-year membership fee H2'2021	
Transaction *	Debit	
Amount *	250	CHF
Booking date *	15.10.2021	

Cancel

 Save

Most common transactions in a period

- Debits at the beginning of the period for contributions due
- Sending of invoices for membership fees, calls for donations, etc. by email or post, via *Utility > Serial letters*
- Payments to bank accounts by members and transfer to individual accounts
- Reminders sent by email or post via *Utility > Serial letters*

The advantage of the individual current accounts is that they are easily visible to members on their smartphone or laptop under NAVIGATION > MY FINANCES

C.2 Individual MAIN account WITH automatic transactions

In addition to the manual transactions, it is possible to automate the entries of the contributions of the members present at statutory and non-statutory meetings.

To do this, in *Club parameters > Other parameters > Finance*, activate the switch *Debit event fees from member accounts*

In this case only guests and visitors pay their contribution to the event on the spot, those of active club members are automatically debited from the individual member's account. These automatic debits are the event prices, but optionally also a "no-show" contribution for a member registered but absent at the event.

The automatic creation of the entries is done when the event is closed by the administrator.

Attention: the closing of an event should only be done **when all the attendances are entered and verified**. In case where a re-opening of the event is required to make corrections, "reversed" entries are automatically created.

Other parameters

Finances ▼

Finances

Currency *	<input type="text" value="CHF"/>
Default event price for members	<input type="text" value="52.00"/> CHF
Default event price for other contacts and visitors	<input type="text" value="52.00"/> CHF
Penalty for noshows at events	<input type="text" value="0.00"/> CHF
Enable members financial account	<input checked="" type="checkbox"/>
Debit event fees from member account	<input checked="" type="checkbox"/>
Uses meal package	<input type="checkbox"/>

Needs members financial account to be enabled. Cannot be disabled

15.10.2021 16:15	15.10.2021	Membership fee	Cotisation semestrielle pro rata temporis 2.5 mois sur 6 x 250.-	CHF-105.00	Main	CHF-305.00	Olivier Gardiol
15.10.2021 16:18	15.10.2021	Attendance fee	Contribution au lunch du 10 août	CHF-35.00	Main	CHF-340.00	Olivier Gardiol
15.10.2021 16:21	17.10.2021	Attendance fee	Contribution au lunch du 17 août	CHF-35.00	Main	CHF-375.00	Olivier Gardiol
15.10.2021 16:22	16.10.2021	Other	Versement sur cc club	CHF 600.00	Main	CHF 225.00	Olivier Gardiol

Examples of automatic meal contribution entries

Additional operations related to the automatic debiting of contributions to events

- At the beginning of the period debit all individual accounts with an amount to cover part of the period's contributions, e.g. 50% of statutory meetings
- Add the amount due to the membership fee invoice
- At the end of the period ask members to pay the negative balance:
 - by an email referring them to their individual account
 - or by an invoice for the negative balance
- A positive balance is carried forward naturally to the next period

C.3 Meal package system

Many clubs use a fixed-rate meal system for a pre-defined period (formerly known as the "meal ticket" system). The principle is to charge members at the beginning of the period a flat fee to cover part of the contributions to the events of the period, typically meals at weekly meetings.

Clubs using the meal plan can choose between two systems:

- **Flat rate meal package:** for the given period, regardless of the number of statutory events the member attends (no balance charged or refunded)
- **Minimum meal package:** members pay in advance a pre-defined fixed amount for n "meal tickets". Unused tickets are forfeited to the club and cannot be carried over to the next period, unless exceptionally authorised for a particular member. Additional meals will be charged to the member.

In both cases a **second individual "Meal" account** is used, from which the contributions due are automatically debited at the end of an event, instead of being debited from the member's main account.

To **activate this meal package system**, in *Club parameters > Other parameters > Finances*, activate the *Use meal package* switch

When creating an event, in its *Event Finances* tab, a **switch** appears activated by default **Debit Meal Package Account**. If you do not want a particular event to automatically debit the "Meal" accounts, simply deactivate this switch.

The difference between the two solutions "fixed price" and "minimum price" is regulated by the difference in accounting entries at the end of the period (see below)

Other parameters Defaults Meeting schedules Event defaults Newsle

Finances

Currency * CHF

Default event price for members 52.00 CHF

Default event price for other contacts and visitors 52.00 CHF

Penalty for noshows at events 0.00 CHF

Enable members financial account

Debit event fees from member account

Uses meal package

Needs members financial account to be enabled. Cannot be disabled while there are still outstanding balances on meal accounts.

Update event "Conférence de Patrick de Preux sur le Lausanne Hockey Club" 19.11.2021 12:15 - 14:00

Event finances

Income

Price for members * 52.00 CHF

Debit meal package account *

Price for other contacts and visitors * 52.00 CHF

Penalty for missing statutory event * 0.00 CHF

Variable expenses

Second "Meal" account with automatic debit entries for contributions

For both types of meal packages, a second individual "Meal" account is used, from which the contributions due are debited automatically at the close of an event, instead of being debited from the member's main account.

In accounting terms this is:

- **At the beginning of the period to:**
 - debit all "main" accounts for the meal package
 - credit all "meal" accounts with the same meal package
 - Invoice the members for the meal package, simply at the same time as the membership fees for the period

- **At the end of the period of:**
 - if the **flat rate** is in force:
 - reduce the positive and negative balances of the "meal" accounts to zero, by making the appropriate entries
 - credit the total of the positive and negative balances in the club accounts
 - if the **minimum fee** is in force:
 - reduce the positive balance of the "meals" accounts to zero, by making the appropriate entries, and credit them in the club accounts
 - reduce the negative balance of each "meal" account to zero, by making the appropriate entries, and debit the member's main account by the same amount
 - ask the members to settle the negative balance:
 0. by an email referring them to their individual account
 1. or by an invoice for the negative balance

Transaction Date	Booking date	Type	Description	Credit	Debit	Account	Balance	Created by
01.10.2021		Initial balance meal account				Meal	CHF 0.00	
16.10.2021 11:20	01.07.2021	Fixed meal package	Forfait pour 1/3 des 24 repas du semestre 1/3 x 24 x 35 = 560 CHF	CHF 560.00		Meal	CHF 560.00	Olivier Gardiol
16.10.2021 11:24		Attendance fee	Contribution pour l'événement Conférence de Fabrice de Icco, préfet du District du Jura-Nord vaudois. Compte-rendu de Vincent Dessenne. 02.07.2021		CHF-35.00	Meal	CHF 525.00	Olivier Gardiol
16.10.2021 11:26		Attendance fee	Contribution pour l'événement Propos de table. Compte-rendu de Francis Michot. 09.07.2021		CHF-35.00	Meal	CHF 490.00	Olivier Gardiol
16.10.2021 11:28		Attendance fee	Contribution pour l'événement Propos de table. Accueil d'une nouvelle membre, Aurore Muller-Gaudard. Flash de Philippe Rebord. Compte-rendu de Philipp Spring. 23.07.2021		CHF-35.00	Meal	CHF 455.00	Olivier Gardiol
16.10.2021 11:29		Attendance fee	Estourné: Contribution pour l'événement Propos de table. Accueil d'une nouvelle membre, Aurore Muller-Gaudard. Flash de Philippe Rebord. Compte-rendu de Philipp Spring. 23.07.2021	CHF 35.00		Meal	CHF 490.00	Olivier Gardiol
16.10.2021 11:34		Attendance fee	Contribution pour l'événement Propos de table. Accueil d'une nouvelle membre, Isabelle Cohen Solal. Compte-rendu de Antoine Rochat. 30.07.2021		CHF-35.00	Meal	CHF 455.00	Olivier Gardiol
16.10.2021 11:35		Attendance fee	Estourné: Contribution pour l'événement Propos de table. Accueil d'une nouvelle membre, Isabelle Cohen Solal. Compte-rendu de Antoine Rochat. 30.07.2021	CHF 35.00		Meal	CHF 490.00	Olivier Gardiol
16.10.2021 11:40		Attendance fee	Contribution pour l'événement Propos de table. Accueil d'une nouvelle membre, Isabelle Cohen Solal. Compte-rendu de Antoine Rochat. 30.07.2021		CHF-35.00	Meal	CHF 455.00	Olivier Gardiol
16.10.2021 11:43		Attendance fee	Contribution pour l'événement Lunch des Aînés 08.10.2021		CHF-52.00	Meal	CHF 403.00	Olivier Gardiol
16.10.2021 11:43		Attendance fee	Estourné: Contribution pour l'événement Lunch des Aînés 08.10.2021	CHF 52.00		Meal	CHF 455.00	Olivier Gardiol
16.10.2021 11:43		Attendance fee	Contribution pour l'événement Lunch des Aînés 08.10.2021		CHF-35.00	Meal	CHF 420.00	Olivier Gardiol
16.10.2021 11:45		Attendance fee	Contribution pour l'événement Conférence de Claude Desama sur la réalité européenne 15.10.2021		CHF-52.00	Meal	CHF 368.00	Olivier Gardiol
16.10.2021 11:48	16.10.2021	Attendance fee	pour l'exemple: Contributions à 5 événements du 22.10 au 31.12.2021 5 x 35.-		CHF- 175.00	Meal	CHF 193.00	Olivier Gardiol
16.10.2021 11:50	31.12.2021	Other	Don au club du côté positif		CHF- 193.00	Meal	CHF 0.00	Olivier Gardiol
16.10.2021		Final balance meal account		CHF 582.00	CHF- 682.00	Meal	CHF 0.00	

D. Overview of members' accounts

The *Members > Active Members > Finances* page allows the treasurer to display the balances of all members as of the current date.

Display filters are available to differentiate between:

- older members
- members who are obliged or exempt from attendance
- members with a negative or positive main account
- members with a negative or positive meal account

ID	Name	Age	Exemption active	Main account balance	Meal account balance	Last transaction	Actions
51020	[REDACTED]	58		CHF 0.00	CHF 0.00		
5897	[REDACTED]	59		CHF 0.00	CHF-35.00	16.10.2021 11:24	
975	[REDACTED]	72		CHF 0.00	CHF 52.00	16.10.2021 11:29	
50809	[REDACTED]	53		CHF 0.00	CHF 0.00		
5903	[REDACTED]	70		CHF 0.00	CHF 0.00	16.07.2021 22:45	
1112	[REDACTED]	67		CHF 0.00	CHF 86.00	16.10.2021 11:24	

E. How to experience the finance module?

Before making the various functionalities of the finance module active for the club, it is important to experiment with them.

Note: the following experiment will create entries for the members present, and therefore visible to the members concerned in MY FINANCES. The day the club decides to activate the finance module for members, it is necessary to create zero entries for accounts that are not activated.

The **suggested test steps** are:

1. Choose in the club parameters the basic functionality *Activate the members' financial account*
2. Create a fictitious Other Contact, e.g. "Test Finances", and give it a user account
3. Create entries for the various debits and credits for a quarter
4. Check the main account settlement in the backend
5. Verify the main account's frontend settlement by "loggin as" the member
6. Cancel the "log n as".
7. Select in the club settings the functionality *Debit event fees from members' accounts*
8. Create for "Test Finances" presences in some events of the past (you can't put presence in the future)

Warning: provided there are no valid entries for other members yet, the easiest way is to reopen closed events

9. Check the main account in the backend
10. Check the balance of the main account in the frontend by "login as" the member
11. Cancel the "login as"
12. Select in the club settings the *Use a meal package* functionality
13. Create a "Meal package" debit in the main account and a credit in the meal plan account for "Test Finances"
14. Create for "Test Finances" attendances in some past events (you can't put an attendance in the future)
15. Check the main account in the backend
16. Check the main account in the frontend by "login as" the member
17. Cancel the "login as".
18. Experiment also with grouped entries such as membership fees, meal packages, etc.
19. At the end of the experiment, set the balances of all the affected accounts to zero.

GOOD EXPERIMENTATION!

F. Improvements planned for a future version

- Be able to select members with or without financial accounts
- Hide financial accounts in frontend
- Grouped entries:
 - Allow to make them on a particular group:
 - older than...
 - obliged or exempt from attendance
 - exempt from contribution
- Allow penalties for
 - noshow

- show not registered
- not participating in a statutory event
- Automate the two entries of a meal package
 - Debit from main account
 - Credit meal account
- Automate the zeroing of meal accounts at the end of the period

WHY FORWARDING OF POLARIS E-MAILS AND NEWSLETTERS DOES NOT WORK (E01)

SHARE

BACK

Thursday, September 23, 2021

Jan Trnka, Polaris-Team

When you forward an e-mail or newsletter from Polaris to other people, you may receive their complains about the readability of the forwarded message. Possibly these recipients will get partially distorted message (like the one on the right) which is hard to read and parts of it (links) are missing.

This is not caused by Polaris! It is your SPAM or Virus software which scans your outgoing mail traffic and is changing the message. Depending on the product you are using and on its configuration, images, links, styles ad other elements may be removed.

Also the mail server of your provider or your company may perform additional checks of the outgoing mails, filter out certain elements or add signatures or footers with legal notices. **As result, the message you are sending is not what the recipient will get!**

The solution

The solution of this problem is rather simple. Instead of forwarding the message you should send the original message to all recipients you need. You should create in Polaris a recipient group of those you want to sent your club communication very often or you enter them ad-hoc as individual recipients before you send that message from Polaris.

Attention:

Regardless if you forward a message or enhance the recipient list in Polaris you should consider GDPR, because you may distribute information that contains personal data. E.g. lunch reports, etc. outside the club.



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Kalender: TEST EVENT

3. August 2021

KALENDER

Einladung

Rotary Club Wynen- und Suhrental lädt Sie zu einer Veranstaltung in dessen Kalender ein:

test event 08.08.2021 19:00 an 21:00 Wirtshaus Rütihof, Rütihof 1, 5722 Gränichen, Switzerland

[Mehr erfahren...](#)

Bitte nehmen Sie die Frist für die Anmeldung zur Kenntnis: 20.07.2021 19:00

Um diese Veranstaltung in Ihrem persönlichen Kalender zu speichern, klicken Sie bitte auf die angehängte Datei (.ics).



TABLES IN POLARIS (E01)

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Wednesday, September 8, 2021

Jan Trnka, Polaris-Team

In Polaris it is possible to integrate a table into the text. You can use this option, for example, for the layout of the bulletin.

You have two possibilities:

- Either you use the possibilities of the table in the text editor.
- Or you know HTML and can use the enclosed template. With this variant, you are yourself responsible for the correct display.

Attention: The sent e-mails and newsletters contain the table as HTML code. Depending on which mail client the recipient uses, the display of the message may be distorted or even not possible at all! This problem is NOT in Polaris. Most mail clients offer the display in the browser as a workaround.

Brief instructions for using the template:

1. Open the template attached here with a text editor, e.g. Notepad. You need to see the HTML code, not the display!
2. In Polaris, switch to HTML mode "</>" in the editor.
3. Copy the HTML code in Notepad into the Polaris editor CTRL-C / CTRL-V.
4. Adapt the HTML code to your needs.
5. Switch back to the display mode "</>" in the Polaris editor.
6. Save the text block

A table created in this way can only be changed in HTML mode . The contents of the cells can also be changed in display mode.

Attention: You need knowledge of HTML if you want to use the table template!

Vorsitz:	
Thema, Referat:	
Referent:	
Mitglieder Präsenz:	
Auswärtige Präsenzen:	
Gäste Rotarier: / Andere:	
Präsidiale Mitteilungen:	
Mitteilungen und Hinweise:	
Gratulationen:	
Wir danken, spenden:	

Mit rotarischen Grüßen



Jan Trnka
Polaris Team
Mail: jan.trnka@rotary.ch

ATTENDANCE AND PRESENCE (E02)

SHARE

BACK

Thursday, September 2, 2021

Jan Trnka, Polaris-Team

Nomenclature:

The **Statutory meetings** are the regular weekly meetings the club has to organize

A **Registration** is a confirmation of a prospective participation or denial of participation to a future event. It has nothing to do with attendance and presence and is described in the [Event life cycle](#).

An **Attendance** is the confirmation of the physical appearance of the participant to an event.

The **Presence** (points and percentage) are on one hand the **points accumulated** on the personal presence point balance of the active member and on the other hand the **calculated ratio in %** to the number of statutory meetings of the club for the given period.

Presence points are issued for an event attendance or for voluntary work. Presence point balance is a decimal number, but normally only integer numbers are entered.

The individual presence is visible in Web mode in the menu "MY PRESENCE".

Club administrators can collect statistical information about presence figures for events in a certain time period or for club members in a certain time period.

District officers have access to club presence statistics. Periodic report to district is required only when the club is not using Polaris for presence capture.



Attendance and presence

1. Attendance

The attendance is captured at the event or after in the participant list. How to capture attendance is described in the [Event life cycle](#).

The participant list of a club event contains **all active members** of that club. In order to keep track on all participants, visitors from other clubs must be added to this list by their QR-code or with the "*create*" button. All members of the community can be simply found and selected. Also any other person e.g. the speaker can be added.

For events like a board meeting, the attendance is confirmed just for the participating members.

For district event the participant list is empty. It is assumed, that the participants will register and thus added to the list, or manually added to the list by the organizer.

Keeping the participant list **consistent** and **complete** is essential for the correct accounting of the presence points and also for the accounting of the financial transactions.

For the maintenance of the participant list various roles allow it.

2. Presence points allowance

When the event gets closed by the administrator the presence points are automatically booked to the personal presence point balance of the active members, and of the guests and visitors . Closing an event is described in [Event life cycle](#).

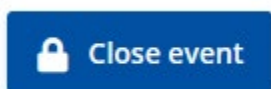
Guests and visitors from other clubs will also receive their presence points with this action. Filling a presence card is not necessary anymore. For guests from other countries or from clubs not using Polaris you will still have to issue a printed presence card.

Members attending events in other clubs will thus get their presence points by that club. This is also true for district events.

Compensations

When the visited club does not capturing attendance with Polaris, e.g. a club in another country, the member will bring back a printed presence card. The presence points for such an attendance must be manually entered as a compensation in the Menu "[Members > Active members > tab Presence](#)". Here is also the place where presence points for voluntary work can be allocated. On this page the presence points of the member can also be checked by the administrator.

For the maintenance of member compensation the Role "*Member Admin.*" or "*Unit Admin (all rights)*" is required.



3. Presence statistics

Presence statistics are available in two forms:

Presence rates at the events for a time period

This statistic is visible in the menu "*Club life > Calendar*" at the bottom of the page. The presence rate is also displayed for each individual event. You can select any time period for the calculation.

To see this statistic the Role "*Unit life Admin.*" is required.

Presence rate of the members for a time period

This statistic is visible in the menu "*Members > Active members > tab Presence*". The presence rate is displayed for each individual member. You can select any time period for this calculation. From this page you can get directly into the maintenance of the member's compensations.

To see this statistic the Role "*Member Admin.*" or "*Unit Admin (all rights)*" is required.



4. Presence computation

A member's presence rate for a given period is the result of dividing the number of attendance points accumulated by the number of statutory meetings in that period.

According to the RI, the presence rate is capped at 100%, but Polaris also displays calculated the presence rate in excess of 100%.

Presence formula:
$$\frac{(x + y) * 100}{(n + y)}$$

x = Present active members not exempt from presence

n = Total active not-exempt members

y = Present active members exempt from presence

Formula

ATTENDANCE AND PRESENCE (E02)

[SHARE](#)

[BACK](#)

Thursday, September 2, 2021

Jan Trnka, Polaris-Team

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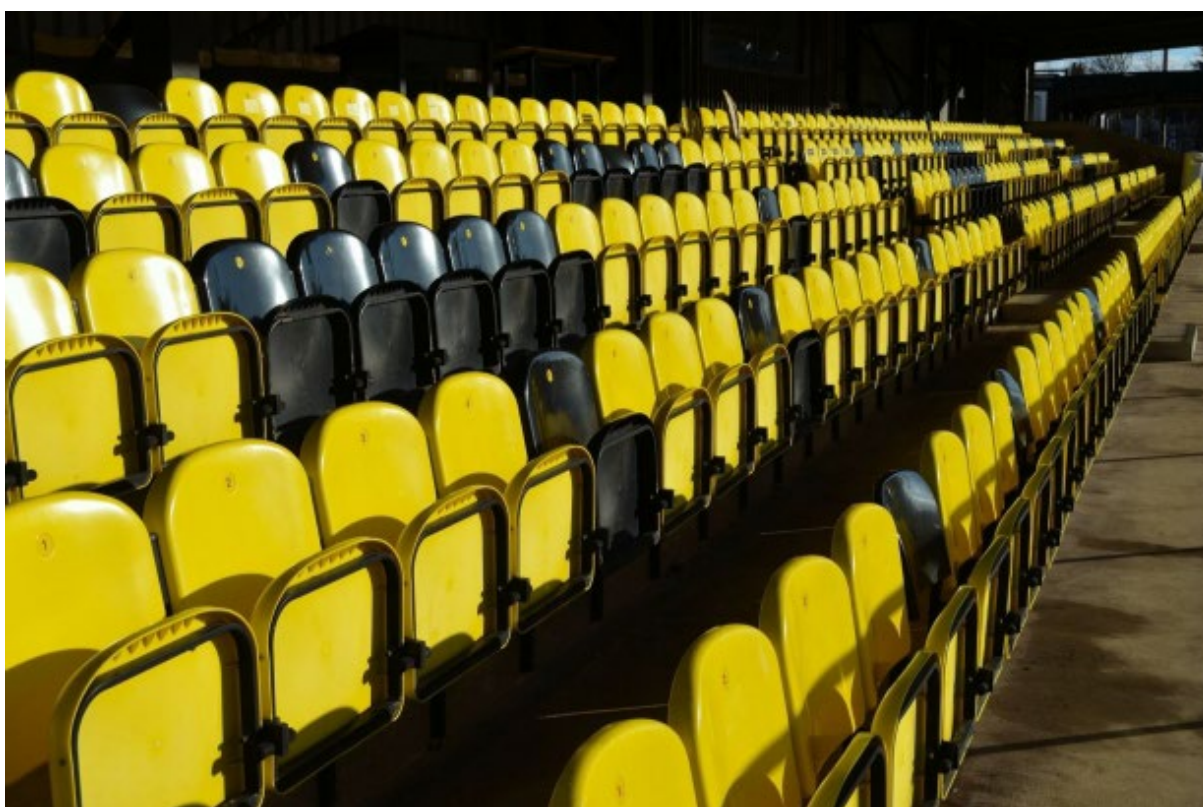
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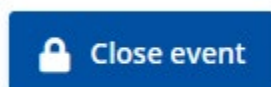
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Members attending events in other clubs will thus get their presence points by that club. This is also true for district events.

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For the maintenance of member compensation the Role "*Member Admin.*" or "*Unit Admin (all rights)*" is required.



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Presence rates at the events for a time period

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To see this statistic the Role "*Unit life Admin.*" is required.

Presence rate of the members for a time period

This statistic is visible in the menu "*Members > Active members > tab Presence*". The presence rate is displayed for each individual member. You can select any time period for this calculation. From this page you can get directly into the maintenance of the member's compensations.

To see this statistic the Role "*Member Admin.*" or "*Unit Admin (all rights)*" is required.



4. Presence computation

A member's presence rate for a given period is the result of dividing the number of attendance points accumulated by the number of statutory meetings in that period.

According to the RI, the presence rate is capped at 100%, but Polaris also displays calculated the presence rate in excess of 100%.

Presence formula:
$$\frac{(x + y) * 100}{(n + y)}$$

x = Present active members not exempt from presence

n = Total active not-exempt members

y = Present active members exempt from presence

Formula

UNCTIONS, ROLES AND RIGHTS IN THE UNITS (E01)

Tuesday, June 1, 2021

Jan Trnka - Polaris Team (mit freundlicher Unterstützung von S.Richter RC Augst-Raurica)

Club function = board function, committee function, office, or charge of a person in the club / district. Example: President, secretary, programme manager, committee member, etc.

Role = Administrative task in a club / district. Example: Club life Administrator, Finance Administrator, Member Administrator, Administrator (all rights), User, etc.

Right = a feature in Polaris that is administered. Example: newsletters, calendar, documents, projects, finances, staffing of the board, etc.

Basic:

The club function and role are not linked. With the change of persons in the board or in a committee, the leaving or joining persons do NOT automatically lose or gain their roles. The CICO and / or the Secretary of the Club must ensure that the assignment of the roles to the persons corresponds to their respective Club functions. Only with this decoupling can new incumbents exercise their role before their term of office and make the handover of office seamless.

The relationship between roles and rights is complicated, because Polaris areas have interdependencies. E.g. mail and calendar.



Functions, roles, rights

Club functions

The Club functions consist of the one in the Board resp. in the Committees. Both are maintained in the menu "*Club Organisation*".

Board

With the filter the club year can be set. With the button "*Create*" the board functions are entered and the staffing is defined. The actions change the composition or delete the board functions. If the composition of the board has not yet been defined for a new club year, the option to copy the board from the previous year is displayed.

Club-specific board functions must be defined beforehand in the menu "*Club Parameters > Board Functions*". The position no. defines the order of listing on the website.

Only active members of the club can be assigned a position and function in its board.

Year	Function	Detail	Member	Actions
2020-2021	Secretary	Sekretärin	Susann Richter	

Committees

Performs similarly to the board. With the filter, the club year can be set. With the button "*Create*" the committee can be entered and filled. It is also possible to create your own club committees and fill them, but we strongly recommend to use as much as possible the official committee types recommended by Rotary International. With the action icons, the composition or the order of the display can be changed. If the composition of the committees has not yet been defined for a new club year, the option to copy all committees and their members from the previous year is displayed as a button.

Any member of a club (Active, Guest, Other contact) can be assigned to a committee.

Type	Sub type	Members	Actions
Club administration	CICO/Webmaster	Daniel Christ (Committee president), 0 members in the committee	
Club administration	Archive	Hildy Haas-Graf (Committee president), 2 members in the committee	

Roles

Roles are assigned to members in the member administration "*User account*". Roles can also be assigned to guests, prospects and other contacts. A role always applies to the club in which the user is currently located. If a user is a guest in the district resp. a special club, his role may change when he enters the district resp. the special club pages.

The recommended assignment of roles in a club is as follows:

- Role "*Unit Admin (all rights)*" => Allows full administration of all areas in Polaris. it is reserved for the CICO and the Secretary. There are two additional administrator roles which inherit the rights to

the hierarchically lower organizations / clubs. These are useful for the DICO and the district secretary and for clubs having a satellite club.

- Role "*Member Administrator*" => Allows the administration of member data. It is recommended for the Deputy Secretary. The number of persons with the role "*Unit Admin (all rights)*" together with persons who have the role "*Member Administrator*" is limited to 4. This means that a maximum of 4 persons can administer the member data in the club.
- Role "*Finance Administrator*" => Allows to manage the accounts of the members and of the events and to perform the bookings. It is intended for the treasurer.
- Role "*Unit life Administrator*" => Allows to maintain all areas of the club life and documents. It is assignable to any member of the Board or a Committee.
- Role "*Attendance capture*" => Allows the capture of the attendances by a club member or by a third party. E.g. the staff of the restaurant can scan the QR code and thus record the attendances.
- Role "*Website user*" => is the standard non-administrative role, which must be assigned to all other members.

Clubs can define their own roles. However, the Polaris team advises against this because of the complexity of the relationships.

Rights

The rights define which features of Polaris can be accessed in administration and how. An access has three different levels:

1. No access
2. Read only
3. Manage (read & write & delete)

The following matrix shows which rights each role has.

Title	Unit life	Member	Organisation	Information	Documents	Parameters	Utility	Actions
Unit life administrator	<ul style="list-style-type: none"> Calendar General and Registrations/Questions Financial view of calendar list and Calendar Registrations and Attendances and finance Letters News Projects Photo galleries Various In memoriam Newsletter and emails Content moderation General information 	<ul style="list-style-type: none"> All Members Financial view of member list and Members financial account 	<ul style="list-style-type: none"> Boards Committees 	<ul style="list-style-type: none"> All features (Home) About us and schedules/locations Useful links 	<ul style="list-style-type: none"> All documents and folders 	<ul style="list-style-type: none"> All features 	<ul style="list-style-type: none"> Recipient groups Member list Website statistics (Matomo) 	

It is possible to define new club roles. However, due to the complexity and dependencies of the areas, it is not easy. For example, areas like calendar, newsletter/bulletin have a dependency on e-mail.

Some areas, e.g. the administration of member data cannot be assigned because otherwise the GDPR could be undermined.

The Polaris team advises against defining your own club roles. If you still need to define your own roles, contact the DICO or the Polaris Team.

MEETING LOCATIONS AND SCHEDULES (E01)

[SHARE](#)

[BACK](#)

Wednesday, May 12, 2021

Jan Trnka, Polaris-Team

Location = The place where the club meets.

Schedule = The schedule of when the club meets.

Each club can have several locations and several schedules. A schedule always refers to a single location. That is why you must first create the possible location(s) before you can create a schedule.

Locations are typically restaurants or places where the club meets regularly or occasionally. A web meeting with a constant address can also be considered as a location.

The location of a one-off event should be entered in the event itself.

The schedules include details such as the day of the week and the frequency of regular meetings.

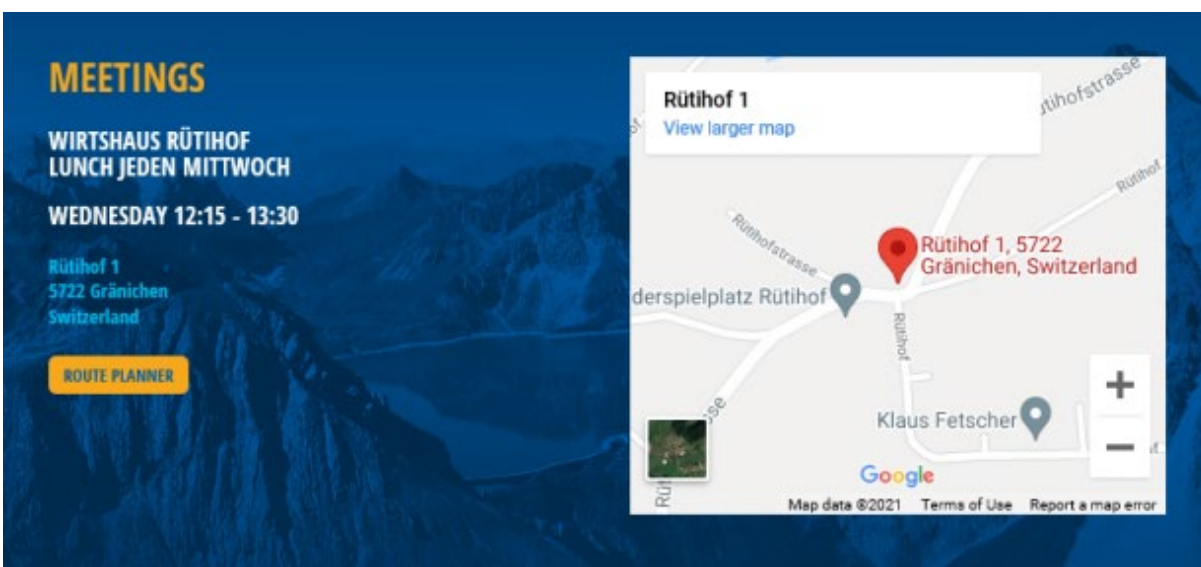


Locations

The schedules and locations are displayed in the footer on the club's home page, including a route planner and a google map. If there are several schedules, the display changes every 4 seconds. If no schedule or location is defined, or if they are not linked together, an empty footer appears.

On the left and right edges of the blue image there are arrows to scroll through the schedules. (Slider)

The name is sufficient for the description of the location, but in order for the map and directions to be displayed, it is necessary to enter the complete postal address.



Schedules

Schedules define when and with which periodicity the meetings take place.

You must define the day of the week and the periodicity. In addition, you define the start and end time, and the location, as well as some default parameters of the meetings.

If your meetings take place every first week of the month, then select the periodicity "every first week". If your meetings take place every week, you must select the first, second, third, fourth and last week.

Recurring periods *	Every first week, Every fourth week, Every : ▾
Time from *	Every first week ✓
Time to *	Every fourth week ✓
Enable registration	Every last week
Registration ends	Every second week ✓
	Every third week ✓

If you have a different periodicity in summer and winter, either create two schedules or describe the rules in the Content tab of the schedule.



Generation of the events

Once you have created the locations and schedules, you can have the future events automatically generated into the calendar. To do this, select for the respective schedule the tab "Depending Events"

You must now enter a future time window, then start the creation of the events.

Tip: Create only events for a maximum of 6 months. If the events are not correct, you must then delete them one by one.

If one performs as an update of events, only the ones which have not been edited manually will be updated. Deleted events are re-created. The creation is done via a background job, so the results will only be visible after a few minutes. As long as the creation is running, the following message is displayed:

✔ The creation/update of the events is in progress, it should be finished in a couple of minutes

To see the created events, you must either click its Search button or switch to the calendar. In order to display the created events one needs to refresh the page.

The created events have all the same standard parameters, the name of the schedule and the same content including the picture. They remain hidden in frontend (Visibility "Content is made visible" OFF)

The events are also created on public holidays and must eventually be deleted manually.

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2-FACTOR AUTHENTICATION FOR ADMINISTRATORS (E02)

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Sunday, April 18, 2021

Jan Trnka, Polaris-Team

Two factor authentication (2FA) is required for users having privilege to manager personal data in Polaris. This means if the user has one of the following roles in one of his units (home/guest units):

- Polaris admin
- Admin (all rights) with Units below with or without export
- Unit Admin (all rights)
- Member administrator

The user will be requested to enter a PIN when he enters the menu "Polaris admin" (he switches to the back-end) The current unit where he switches to the back-end, or in which he has the role is not meaningful.

The PIN is generated by Polaris and sent to the user by e-mail to the address the user has used to login.

The PIN entry is required when the user has logged-in by entering his username & password, or by using the password saved in the browser. The PIN is no longer valid after log-out.

The PIN entry is not required when the user gets into Polaris via the "stay connected" feature and his last login date is no longer then one week in the past. The stay-connected feature is based on cookies saved on the particular user device which can be considered as his own property. Admins using Polaris very often will not be annoyed by the PIN entry.

Using Polaris on different devices DOES NOT require to enter the PIN on each device. The PIN is stored in the database and is valid for any device within the time period of one week.

—
If you have problems with the logout function, please delete all cookies in your browser.

Enter PIN

PIN entry

PIN e-mail

POLARIS AS APP ON YOUR SMARTPHONE (E01)

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Sunday, April 4, 2021


Jan Trnka, Polaris-Team

Instructions for setting up Polaris as an App on a smartphone.

Attention: The steps described here may vary depending on the version and type of smartphone and the browser used. If necessary search the internet for "Add page to home screen" for instructions.




Safari

1. Enter the address of your club: e.g. rotary-neckertal.ch/de
2. Log in with your email and password. Use the option "Stay connected"
3. Click share 
4. "to Home-Screen"
5. "Rotary" as titel, or e.g. "Rotary Neckertal"
6. "Save"




Chrome


1. Enter the address of your club: e.g. rotary-neckertal.ch/de
2. Log in with your email and password. Use the option "Stay connected"
3. Click on menu 
4. "Add to home screen"
5. "Rotary" as titel, or e.g. "Rotary Neckertal"
6. "Add"





Samsung

1. Enter the address of your club: e.g. rotary-neckertal.ch/de
2. Log in with your email and password. Use the option "Stay connected"
3. Click on menu 
4. "add page to"
5. "Home screen"
6. "Add"



1. Enter the address of your club: e.g. rotary-neckertal.ch/de
2. Log in with your email and password. Use the option "Stay connected"
3. Click on menu 
4. "Add to home screen"
5. "Rotary" as titel, or e.g. "Rotary Neckertal"
6. "Add"



1. Enter the address of your club: e.g. rotary-neckertal.ch/de
2. Log in with your email and password. Use the option "Stay connected"
3. Click on menu 
4. Install 
5. Add to home screen

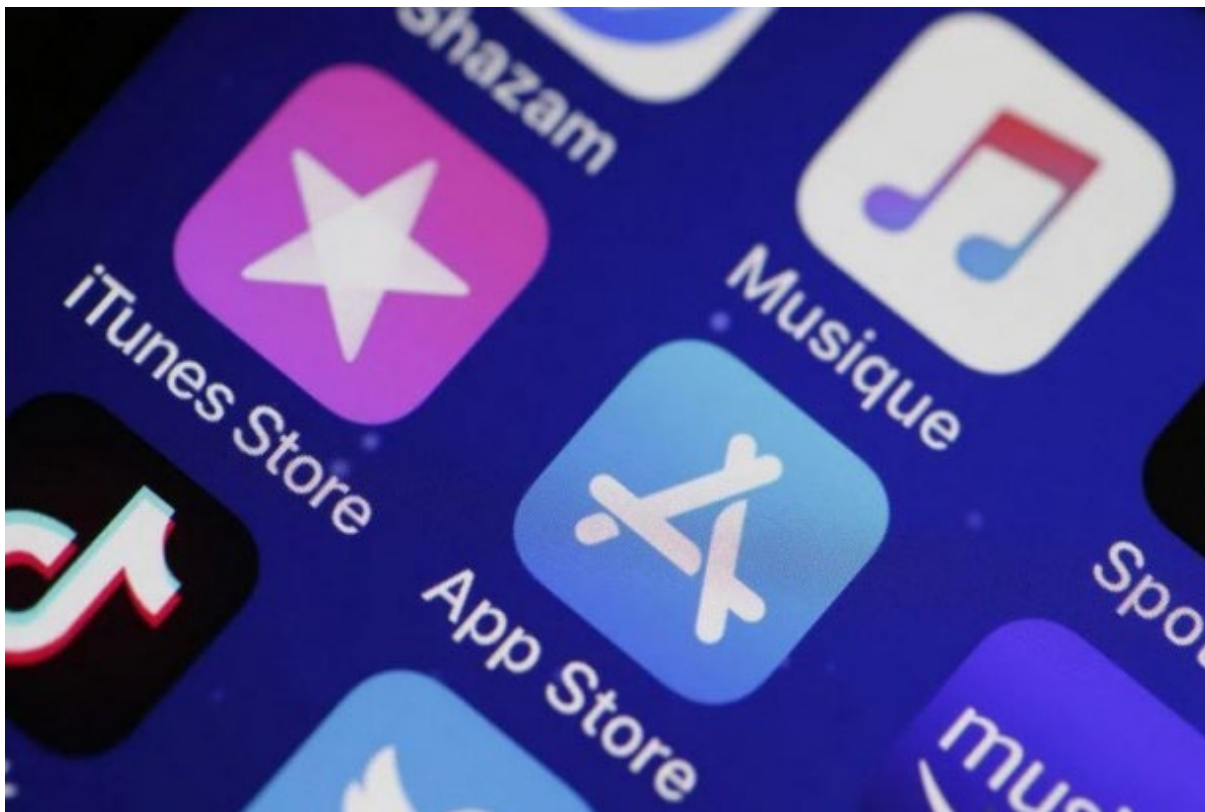
6. "Add"



1. Enter the address of your club: e.g. rotary-neckertal.ch/de
2. Log in with your email and password. Use the option "Stay connected"
3. Click on menu
4. Add to home screen
5. "Add"



1. Enter the address of your club: e.g. rotary-neckertal.ch/de
2. Log in with your email and password. Use the option "Stay connected"
3. Click on menu
4. Add to home screen
5. "Add"



UPLOAD OF MULTIPLE FILES (E02)

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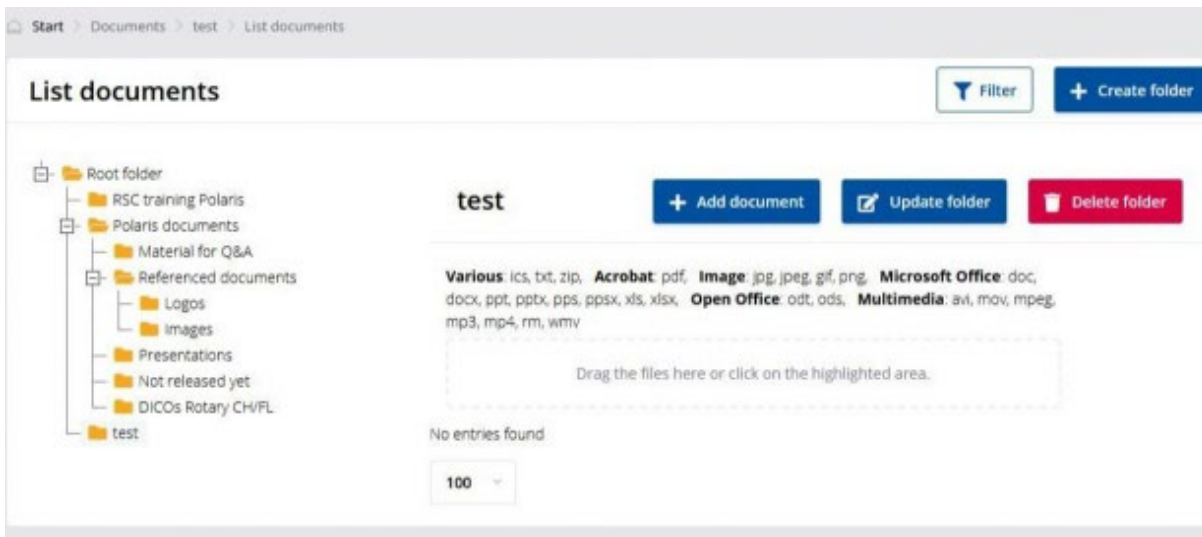
Thursday, March 11, 2021

Jan Trnka, Polaris-Team

In the **documents** and **galleries** it is possible to upload several files / pictures at once. Either drag several files into the upload window with the mouse or click on the window and select several files.

However, the following conditions must be observed:

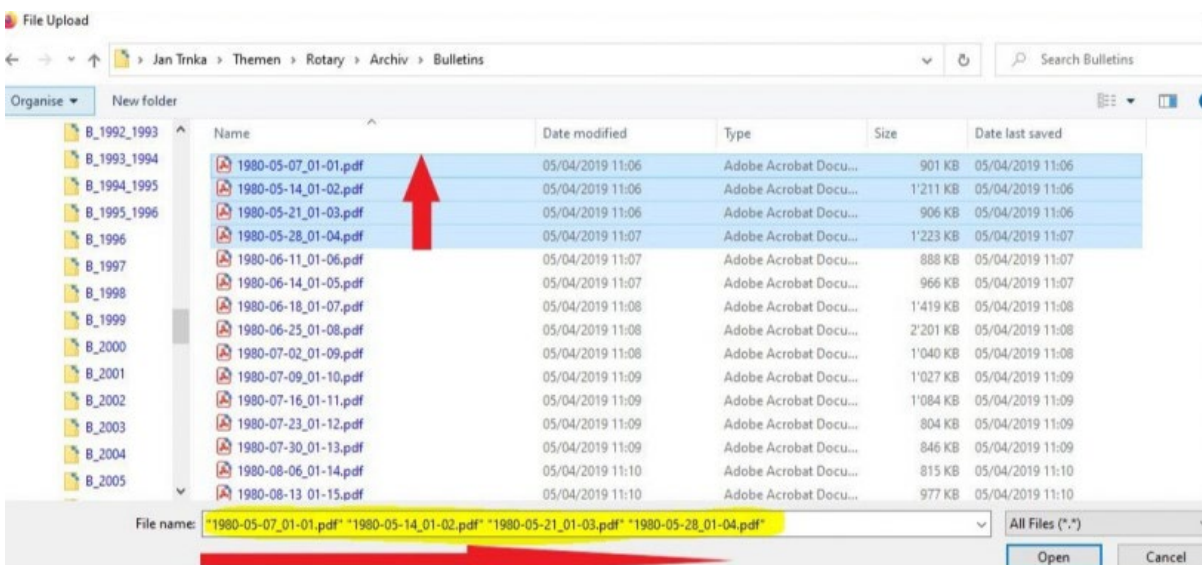
- The maximum size of one file is 20MB.
- For uploading, the selected files must be saved temporarily. This memory is limited to approx. 100MB. This means that the size of all files selected at once must not exceed 100MB. This also results in a limitation of the number of selected files.
- Images that exceed the width of 2000px are automatically and proportionally reduced to this size when uploaded. This results in a maximum size of approx. 4MB per image. This applies to all images in Polaris
- The last uploaded file/image comes first in Polaris.
- The order in which the files are saved in Polaris corresponds to the order of selection. With MS-Windows this is different from MAC and is not easy to control. See below.



Upload window for documents

Practical advice for uploading multiple files / images.

1. Do not move several files into the window with the mouse if you want to keep the file order. This procedure is only suitable if you want to upload individual files. If you want to keep a certain order, proceed as follows:
 0. Click into the upload window, the file selection window opens. (picture on the right)
 1. Sort the files into the desired order, by name, date, etc.
 2. Select the last file first!
 3. Hold down the Shift key and select the first file.
 4. If necessary, check the order in the line below.
2. Work in steps of max. 10-20 files at a time. If something goes wrong, you can correct it more easily. In Polaris, all files must be deleted individually.
3. Try it first in a test folder.



Right order of the files

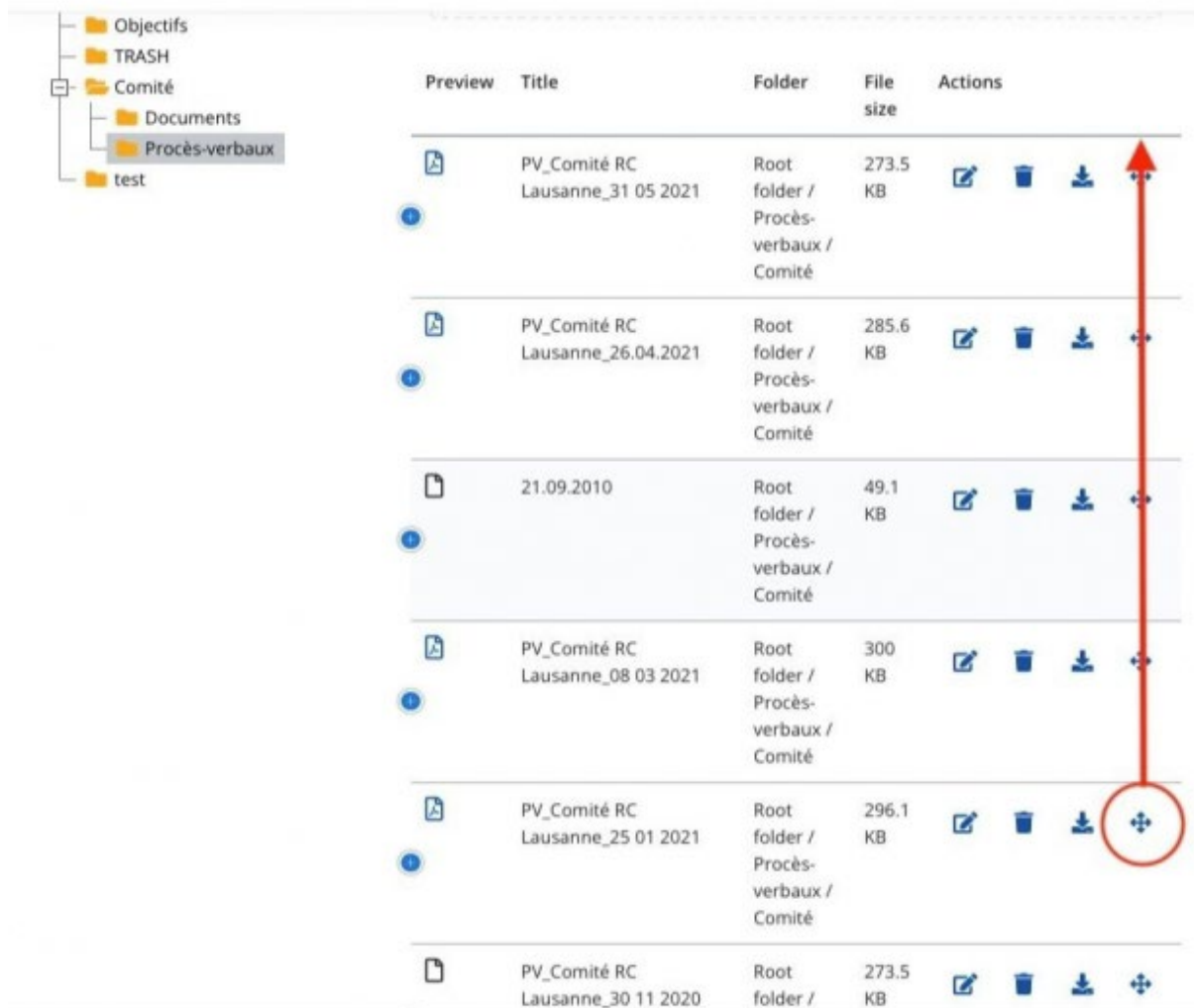
How to change the order of files

If you want to organise your files in a folder, the cross allows you to drag and drop them.

If the number of files exceeds the height of the screen, the simple "drag and drop" does not work beyond the part of the page displayed on the screen.

In order to be able to move the file concerned within the page of 100 or 200 files, the solution is to use one of the two following means:

1. if you are using a **wheel mouse**:
 - put the cursor on the line of the file to be moved,
 - hold down the left mouse or trackpad button to detach the file,
 - then turn its wheel to move it
2. if you only use the **trackpad**:
 - put the cursor on the line of the file to move,
 - keep the left button of the mouse or trackpad pressed,
 - move the cursor to detach the file,
 - use the Up or Down arrows or Page Up or Page Down to move it



The screenshot shows a file manager interface with a sidebar on the left and a main list on the right. The sidebar contains a tree view with folders: Objectifs, TRASH, Comité, Documents, Procès-verbaux (highlighted), and test. The main list has columns: Preview, Title, Folder, File size, and Actions. The list contains several files, with the first one selected. A red arrow points from a cross icon at the bottom of the list to the top of the list, indicating a scroll action.

Preview	Title	Folder	File size	Actions
	PV_Comité RC Lausanne_31 05 2021	Root folder / Procès- verbaux / Comité	273.5 KB	
	PV_Comité RC Lausanne_26.04.2021	Root folder / Procès- verbaux / Comité	285.6 KB	
	21.09.2010	Root folder / Procès- verbaux / Comité	49.1 KB	
	PV_Comité RC Lausanne_08 03 2021	Root folder / Procès- verbaux / Comité	300 KB	
	PV_Comité RC Lausanne_25 01 2021	Root folder / Procès- verbaux / Comité	296.1 KB	
	PV_Comité RC Lausanne_30 11 2020	Root folder /	273.5 KB	

SENDER OF THE E-MAILS / NEWSLETTER (E01)

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Sunday, February 28, 2021

Jan Trnka, Polaris-Team

Who is the sender of the emails and newsletters and how can I change it?



The sender of the e-mails and newsletters is no-reply@polaris.rotary.ch and cannot be changed. The recipient must identify the sender's address and his IP must be configured accordingly. Otherwise the message will be rejected as SPAM. Therefore, all Polaris emails and newsletters are sent from a single address.

However, it is possible to change the name of the sender. The name is displayed before the sender's e-mail address. Typically, the name of the club or district can be set there. Attention: The name of the sender must not contain any special characters!

It is also possible to set the "Reply to address". This can be used to ensure that a reply is forwarded to a specific e-mail address. Typically, this can be the e-mail address of the club in the form <club-name>@rotary.swiss or the e-mail address of the person sending the e-mail.

The name of the sender and the "reply to address" can be set as default in the parameters of the club. They can be overwritten when sending.

TERM DEFINITION: MEMBER, GUEST, VISITOR, PROSPECT ETC. (E03)

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Friday, February 19, 2021

Jan Trnka, Polaris-Team

Within Polaris, these terms are used as follows:

The general understanding of these terms may differ from these definitions.

Start > Members > Create Member

Create Member

- 1 Choose status
- 2 Add basic data
- 3 Choose parameters
- 4 Add additional data
- 5 Add optional data

Active Other contact

Cancel Next Step

Members, guests, etc.

Members = active members + guests + prospects + other contacts

Active member

Rotarian or Rotaractor in his own club. One person can be member in only one club (his home unit). The home unit is highlighted in blue.

When transferring membership from abroad, the [NICO](#) must first be contacted at nico@rotary.ch

Guest member (guest)

Rotarian or Rotaractor who has been invited as a guest in another club, district organization, committee or special club. Guest members participate in the life of the club, can be members of a committee, but cannot serve in the board. You can be a guest in as many clubs as you like. Being a guest is not a state, but a relationship with another organisation. Guest organisations have yellow background color. (see picture on the right)

When accepting a guest member from abroad, [NICO](#) must be contacted first at nico@rotary.ch



Prospect

Member of a club before definitive admission. The membership of a prospect should not last for more than one year. Prospect cannot have a function in the board or in a commission.

Other contact

A person who is not a member of the Rotary community (not a Rotarian or Rotaractor). For example, a widow, an interested person, the responsible person of the restaurant where the club meets, a member's assistant who helps to carry out the member's duties (secretary), etc. This person cannot have any function in the board or commission, but may have administrator roles.

Visitor

A person visiting a club lunch or action.. Unlike a guest, the visitor has no relationship with the club.

Honorary membership

According to the [Manual of Procedure 2016 Art 4.010 and Art 4.050](#), Honorary Member can only be a Rotarian guest from another Club, or a non-Rotarian. In other words: an active member cannot be an honorary member in his own club!

In Switzerland and Liechtenstein, many clubs have a different approach and grant honorary membership also to active members. To make this possible, Polaris has two types of honorary membership.

1. Honorary membership according to RI rules
A club can award a guest or other contact by granting him/her RI honorary membership.

2. Local Honorary Membership

When a club gives a member this honorary membership, his honorary membership will only be shown in Polaris. He cannot be reported to RI as an honorary member because it violates RI rules.

Many Rotarians do not understand this rule. However, it is not in our power to change these rules. We can only refer to the Manual of Procedure.

POLARIS - DISPATCH OF E-MAILS AND NEWSLETTERS (E01)

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Monday, January 25, 2021

Jan Trnka, Polaris-Team

The reasons why a newsletter or e-mail did not reach the desired recipients may have various reasons. The most probable are listed here under.

KALENDER

AKTUELL

NEWSLETTERS

online Anlass vom 14. Januar

Dateien

- Bulletin 30 2020-2021.pdf
- Erich Kästner 30 2020-2021.pdf

Agenda

- 28.01.2021 Rotes Telefon – Verein
Oberbaselbieter Gemeinden
- 09.02.2021 Vorstandssitzung
- 11.02.2021 Rotes Telefon - WB-

Sending of Newsletters or E-Mails

For the correct receipt of newsletter or e-mails the profile of the user must be correctly configured.

1. The private or business e-mail address must be valid
2. The configured standard e-mail must be valid
3. The communication per e-mail must be enabled
4. The receipt of newsletters and e-mails from club, district etc. must be enabled.
5. The preferred language of the user must be set

If one of the conditions above is not met, Polaris will NOT consider this user to be recipient of newsletters or e-mails.

Default postal address * Private address

Default phone number * Private mobile phone

Default email address * Professional email

Communicates by * Email and postal mail

Email and newsletter notifications settings

Receives newsletter(s) Club, District

User-Configuration Communication

There are two ways to send newsletters or e-mail.

1. **The district/club sends only one e-mail, in one language, to all.** In this case ALL possible languages must be selected in the mailing. If only French is selected, recipients whose preferred language is not French will not receive the email. The warning above serves this purpose.
2. **The district/club sends one e-mail per language.** In this case, you must select the language of the desired recipients.

 Edit email "test"


Be aware that when using a recipient list for the sending of an email, resp. of a newsletter, only the recipients whose parameters allow for, will receive your sending. Their specific parameters "Communicates by", "Receive newsletter(s)" and "Preferred display and newsletter languages" will sort out your list of actual recipients.

Recipient groups choose recipient groups

Send to members of the selected recipient group(s) with display language German

Send to members with community No restrictions

State * Draft

Schedule dispatch on *

Reply to address * info@rotary.ch

Displayed sender name * Rotary Service Center CH-FL

Sending of newsletters or e-mails

Hard Fail = the e-mail cannot be delivered (many possible reasons) Typically, the recipient address does not exist.

Soft Fail = temporary technical reason why the e-mail is not delivered to the receiving mail server. (many possible reasons) Typically, the sender is temporarily blacklisted.

Bounced = the e-mail can not be delivered the user mailbox or the user has rejected the message. (many possible reasons)

In both cases the sender (Polaris) will try several times to re-send the message after some time. The number of repetitions and the timeouts depend on the configuration and are quite complex.

62677	Bounced
62940	Bounced
63283	Hard Fail
63314	Hard Fail
62654	Hard Fail
62666	Hard Fail
62669	Hard Fail
62950	Hard Fail
62720	Sent
62976	Sent

E-mail sent status

Please note that Polaris will only send your emails to recipients whose settings allow it.



Be aware that when using a recipient list for the sending of an email, resp. of a newsletter, only the recipients whose parameters allow for, will receive your sending. Their specific parameters "Communicates by", "Receive newsletter(s)" and "Preferred display and newsletter languages" will sort out your list of actual recipients.

Group name	Description	Type	# recipients	Receives club newsletter	Receives district newsletter	Actions
All new members that did not receive the welcome letter		Pre-defined	0	0	0	
All members including other contacts (own unit)		Pre-defined	182	2	182	
All active members (own unit)		Pre-defined	182	2	182	
All guest members (own unit)		Pre-defined	0	0	0	

Caution: Filters!

Club life

Start > Club life > Edit email/newsletter



Edit email "Calendrier: TEST FINANCES #3067"

Dispatch



Be aware that when using a recipient list for the sending of an email, resp. of a newsletter, only the recipients whose parameters allow for, will receive your sending. Their specific parameters "Communicates by", "Receive newsletter(s)" and "Preferred display and newsletter languages" will sort out your list of actual recipients.



Be aware that there are already individual recipients specified (see tab), only select other recipient groups if you want to send the email to these recipients as well.

Recipient groups

choose recipient groups

Send to members with display language

German, English, French, Italian

if your message is in only one language, select all languages to ensure that all your recipients receive it

Send to members with community

No restrictions

State *

Draft

Schedule dispatch on

Selection of recipients and languages

- SWITZERLAND / LIECHTENSTEIN