TABLER.WORLD

Association Import Guide

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Preamble

This document is dedicated to guide you through the migration process of your association dataset (member data in particular) into the RTI community & membership platform named **TABLER.WORLD**, explaining the import template, the different requirements of the logos, pictures and data consistency etc. **Please note that you're the sole responsible for the correctness of your members' data. The migration-team will check your import-file and give you a detailed feedback on missing information or incorrect data but will not correct them for you.**

Translations

If requested, you can receive a .po-file with approximately 3.700 text strings to translate (or download it at www.rtionlinevision.com), to make the website available in your members' preferred language. Recommended tools are the online translation editor http://POEditor.com (10-day free trial) or smartcat (www.smartcat.ai) which is free. POEdit (https://poedit.net/) has some very helpful, enhanced functions. If you are sharing the translation work with other members of your association, an online tool might be the best choice.

If you choose to use a translation, you will also have to translate the privacy agreement and the Terms & Conditions (code of conduct) of **TABLER.WORLD**, all of which your members will have to accept prior to be able to login for the first time.

Logo and rondel-usage

If you need to create a new logo or update your logo, please stay within the guidelines in the Round Table International Brand Manual that you can find here: http://rtinternational.org/knowledge-base/

Association, area and club logos shall be delivered in **two versions**:

150x150 px
PNG with transparent background (rondel only)

500x100 px
PNG with transparent background, including text.

Name the logos accordingly
rondel_RT_Cyprus.png
logo_RT_Belgium.png

If available, please also attach a **vectorized file** format (*.ai, *.eps, *.svg etc.)

Preparing your data

You can export your complete member data from your existing database into the Excel-based import template provided by us. There are several sheets for association info, area/district info, club info and member info.

Make sure to **read the instructions** in on the first page of the Excel-file **carefully** and imperatively stick to the naming conventions. The sheets of the Excel file marked in red below are required, all the rest is optional. Please import as much data as you have available to get a good starting point for the administration of your members.

FIRST READ THIS INFO SHEET CAREFULLY

Use the Work Sheets in this template to import your association data.

The **subdomain** is the primary identifier, so use this column to link clubs to an area, and to link areas to an association. Please use the following structure:

Level	Structure	
International	**rti**.roundtable.world	
Association:	**be**.roundtable.world	Use 2-letter country codes (see column M) - lowercase!
Zone / Area / District	**area1-be**.roundtable.world	Use 2-letter country codes (see column M) - lowercase! **area** can be replaced with "zone", "district" or "region"
Club	**92-be**.roundtable.world	Use 2-letter country codes (see column M) - lowercase!

Work Sheet	Description	Remarks
ASSOCIATION (*)	Information about the association	
ZONE - AREA - DISTRICT (*)	List of areas	At least 1 zone is required. If your association does not have areas, create a placeholder for potential future usage.
CLUBS (*)	List of clubs	
MEMBERS (*)	List of members	MemberID should be unique inside this association. This is used to link companypositions, educations and functions t
MEMBER_COMPANYPOSITIONS	List of Company Positions of members	Reuse MemberID from **MEMBERS**. Optional, but if you enter data, take into account the required columns.
MEMBER_EDUCATIONS	List of Educations of members	Reuse MemberID from **MEMBERS**. Optional, but if you enter data, take into account the required columns.
MEMBER_CLUB_FUNCTIONS	Functions of members in a club	Reuse MemberID from **MEMBERS**
MEMBER_AREA_FUNCTIONS	Functions of a member in an area	Reuse MemberID from **MEMBERS**
MEMBER_ASSOCIATION_FUNCTIONS	Functions of a member in an association	Reuse MemberID from **MEMBERS**
		You can add local functions to the lists at the right side of this WorkSheet. Please use the following format: **Group > F**
		For functions, "End date" can be empty (= until "now"). "Start date" is required.

* Always use the appropriate cell format (date, number, text...) that is proposed in this Excel template.
* Columns or Work Sheets marked in RED with (*) are REQUIRED!

If the default roles (global functions) do not cover all your associations needs, you can add more local roles that apply to your association.
Please note: Only global functions are synced over all existing levels!

Use the cells with blue background to add custom functions on the respective local level. (not synced!)

		Combinations Club	Combinations Area	Combinations Association
GLOBAL		Board > President	Board > President	Board > President
LOCAL		Board > Past-President	Board > Past-President	Board > Past-President
		Board > Vice-President	Board > Vice-President	Board > Vice-President
		Board > Secretary	Board > Secretary	Board > Secretary
		Board > Treasurer	Board > Treasurer	Board > Treasurer
		Board > I.R.O.	Board > I.R.O.	Board > I.R.O.
		Board > P.R.O.	Board Assistants > P.R.O.	Board Assistants > P.R.O.
		Board Assistants > P.R.O.		Board Assistants > Editor
		Board Assistants > C.S.O.		Board Assistants > C.S.O.
		Board Assistants > Webmaster		Board Assistants > Webmaster
		Board Assistants > IT Admin		Board Assistants > IT Admin
		Board Assistants > Placeholder 1		Board Assistants > Shopkeeper
		Board Assistants > Placeholder 2		Board Assistants > Placeholder 1
		Board Assistants > Placeholder 3		Board Assistants > Placeholder 2
		Members > Member		Board Assistants > Placeholder 3
		Members > Honorary Member		VIP > Honorary Member
		Past Members > Past Member		VIP > Tabler of the Year
		Local Group > Local Function		

Association

Moving on, you will add one row of information in the "association" sheet:

A	B	C	D	E	F	G	H	I	J
Subdomain (country code)	Name	Charter Year	Begin AGM	End AGM	Status	Status since	Website	Email	International godparent
no	Round Table Norway	1947	5/31/2018	6/3/2018	active-full		https://www.roundtable.no	lf@roundtable.no	Denmark

The correct country code to use can be found in columns M-N of the "info" sheet on the first page of the import template. In the example above, we use "no" as subdomain as it is the two letter code for Norway. Begin AGM and End AGM is the start/end date of the next upcoming AGM.

Possible statuses for an association are:

   a) **active-full member** (voting rights)
   b) **active-associate member** (no voting rights)
   c) **suspended** (no voting rights)
   d) **closed** (for historical purposes)

 Fill the rest of the fields if applicable.

Area / district / zone

Next, you add a row in the "zone – area – district" sheet for each area in your association. The example below is for Norway as well. You are free to use the most suitable shortcode depending on what name you use for the subdivision of you associaton. The format is "<one letter><number>-<association country code>", so if Norway used zones instead of districts it would be "z1-no". "a" for area or "r" for region is also acceptable.

Subdomain	Name	Number	Website	Email
d1-no	Distrikt 1	1		df1@roundtable.no
d2-no	Distrikt 2	2		df2@roundtable.no
d3-no	Distrikt 3	3		df3@roundtable.no
d4-no	Distrikt 4	4		df4@roundtable.no
d5-no	Distrikt 5	5		df5@roundtable.no
d6-no	Distrikt 6	6		df6@roundtable.no
d7-no	Distrikt 7	7		df7@roundtable.no
d8-no	Distrikt 8	8		df8@roundtable.no

If your association has no areas, please do add one area to this sheet, as the hierarchy shall remain the same over the whole globally synced structure. It will be hidden automatically by the system.

Clubs

Now it's time to add every club as well! There are too many columns to show them all at once, so they are broken up in this illustration.

Zone subdomain	Club subdomain	Status	Status since	Club Number + Name	Club Number	Club Website	Club Phone	Club Email
d3-no	1-no	active		1 Bergen	1	http://www.rt1.no		
d8-no	2-no	active		2 Oslo	2	http://www.rt2.no		
d4-no	3-no	active		3 Stavanger	3			

First Meeting	Second Meeting	Charter Date	Dissolution Date	National godparent	International godparent	[Meeting Place] Address (1)	[Meeting Place] Address (2)
		9/18/1947		RT01 Bergen	RT1 Aarhus, Denmark	Kaland & Partners	
		12/9/1948		RT01 Bergen	RT1 Aarhus, Denmark	Ingen Fast lokale	
		6/11/1949		RT01 Bergen	RT1 Aarhus, Denmark	Bryggerikaien 24, 4014 Stavanger	

[Meeting Place] Address (2)	[Meeting Place] Postal Code	[Meeting Place] City	[Meeting Place] Phone	[Meeting Place] Email

Column A | zone subdomain is the same as used in the previous sheet.

Column B | Club subdomain is "<club number without leading zero>-<county code>", i.e. "1-no", "76-no" etc. Do not use a leading zero like "01-no".

Column C | Possible statuses for a club are:

    a) **active** for a regularly running club – **the only option with voting rights!**
    b) **in preparation** if it is in planning but not actually starting up yet
    c) **in formation** for clubs that are being formed at the moment
    d) **closed** for fomer clubs that ceased to exist

Column D | "status since" is optional, and tells when status from the previous column was introduced.

Column E | Club number + name is pretty much self explanatory.

Column F | Club number is only the number of the club with no letters or symbols

Column G | Club website is optional, and can link to the clubs homepage if any.

Column H | Club phone and email is optional.

Column J+K | First meeting/second meeting can be a textual descriptions of meeting dates like "First Tuesday of every month" and "Third Tuesday of every month".

Column M | Charter date is **required***.

Column N | Dissolution date is only required if the club status is "closed".

Column O+P | National and international godparent is preferred, but optional.

Column Q–V | The meeting place information is optional, but please include it if the clubs have a regular meeting place, so that traveling tablers external to the club can easily find out where to meet!

Members

Member ID	Club Subdomain	First name(s)	Last name	Preferred Language	Gender (M/F)	Birth date	Place of birth	Country of birth	Is Deceased (Y/N)	Deceased on
7628	76-no	Francis Billy	Rath	nb	M	10/19/1982		NO	N	
7629	6-no	Arn Sveinung	Pettersen	nb	M	5/17/1976		NO	N	
7632	55-no	Kristian Lindgren	Jørgensen	nb	M	4/3/1982		NO	N	

Name partner	Round Table Number	Date joined	Date left	Address (1)	Address (2)	Postal Code	City	Country
	76	1/22/2011		Tjørnavegen 13		5918	Frekhaug	NO
	6	6/10/2010	6/30/2016	Kastanjeveien 4 A		4515	Mandal	NO
	55	3/20/2010		Dalsbottenlia 29		3726	Skien	NO

Round Table Number	Date joined	Date left	Address (1)	Address (2)	Postal Code	City	Country	Phone number (split by comma)
76	1/22/2011		Tjørnavegen 13		5918	Frekhaug	NO	+47 930 35 967
6	6/10/2010	6/30/2016	Kastanjeveien 4 A		4515	Mandal	NO	+47 416 29 004
55	3/20/2010		Dalsbottenlia 29		3726	Skien	NO	+47 957 94 433

Primary email	Secondary email(s) (split by comma)	Profile picture - filename	Status
fr@ncis.no		7628.jpg	active
arn.pettersen@gmail.com		7629.jpg	former
kristianbj@gmail.com			active

Column A | MEMBER ID is free text, and up to you. <u>But it is extremely important</u>! MEMBER ID glues together the respective member data in the multiple sheets (member, work, education, functions). It can be any string, but if you are importing from an existing database, we recommend using the user id from your database to make cross-referencing easier if there is a need to go back and double check something later.

! Please be aware that Excel rounds up figures with more than 16 digits, which leads to duplicates!

Column B | "club subdomain" must be the exact subdomain for the club that you made in the previous sheet.

Column C+D | "first name", "lastname" should be obvious.

Column E | "preferred language" is according to the two letter code found here: https://en.wikipedia.org/wiki/List_of_ISO_639-1_codes

If you are not translating to your native language, you can use "en" for English.

Column F | Gender should probably be "M" for male...

Column G | "Birth date" is required.

Column H+I | Place of birth and country of birth are optional. It might be reasonable to default to your country and let members correct it in their profile afterwards if it is incorrect.

Column J +K | If the person is known to be deceased, put "Y" in the column N. This can be useful if you are importing historical data. "Deceased on" is the date of passing away, if known. The defunct person will not appear in the upcoming birthday's list anymore and the photo will be marked with a black ribbon.

Column L | "name of partner" is optional.

Column M | "Round Table Number" is required, and would be equal to the club number of the previous sheet, without leading zeros.

Column N+O | "Date joined" is the joining date of the member. If the record is for an ex-member, remember to also include the date the member left the club in column O, "date left".

Column P-T | The address fields are the members' home address / postal mailing address. The phone number must include the international country code as shown in the example above.

Column V | Primary email is **<u>extremely</u>** important, as this is the primary means of contacting the user, and it is required to perform the first login to the system. The members will receive an email on this email address with a link they need to follow to set their individual password. The members can change their primary email address anytime later. Please note: only the user can see his password.

Column W | If you have several email for the member, you can add these here, separated by comma.

Column X | Profile picture-column is for the file name of the image representing the user. This must NOT be set unless you actually provide the image. I.e. DO NOT just put "member id.jpg" here, as this will not be verified on import. There is a section later in this document about the resizing of images to appropriate format and size.

Column Y | The status of a member is a **<u>required</u>** field and can be any of the following:

    a)   active current regular member of the club
    b)   former regular past member, whose membership has ended according to the constitution.
    c)   resigned voluntarily left the club before reaching the age limit. Might not be eligible for a 41-membership, depending on the association.
    d)   expulsed Ex-member that did not leave the club on good terms. Will not receive any communication, cannot login and will be blacklisted.

e) **prospect** a potential future tabler, who will not be able to login to the system unless he was officially accepted at his table. But can be part of mailings of the concerned table.

Column Z | The individual consent of a member is a <u>required</u> field and can be **Y** or **N**. If the value of the field is **Y**, the members' personal data is shown fully, according to his individual privacy settings. If the value of the field is **N**, the members' information is shortened or anonymized to avoid his unambigous identification. He will not get access to the system unless he accepts the privacy statement on the intial onboarding screen.

Former members, club history

Please take care of your "historical data" as well. You can import all former members into the system by selecting the correct status b) – d) in **column Y** in combination with the leave date in **column O.** If you do not know exactly, put in the presumed leave date by calculating the age of the former member at the beginning of each statuory year in the past referring to the age rule of your association. Please also fill in the members respective functions and their start and end date (usually the respective statutory year again). This gives you e.g. the possibility to search easily for the national presidents of the past ten years.

Please note: Former members with no login password are free of charge.

Member education(s)

Member ID	Education	School	Start date	End date	Graduated (Y/N)	Address (1)	Address (2)	Postal Code	City	Country

This is the first optional sheet, you can leave it empty. Nevertheless, if you want to provide this data, fill in at least the columns of **MEMBER ID** and "name of the education". The **MEMBER ID** must match the **MEMBER ID** from the first column in the "MEMBERS" sheet.

Company positions

Member ID	Company name	Job Title	Sector	Start date	End date
348	Alegi Eiendom AS	Daglig leder / Statsautorisert e	industry		
349	Helse-sunnmøre Ålesund	Lege under spesialisering	other		
350	C&C Caitring & Consulting	Kjøkkensjef . Konditor	other		

Address (1)	Address (2)	Postal Code	City	Country	Phone	Email	Website	VAT / Company number
				NO				
				NO				
				NO				

This sheet optional as well. If you have data available, please fill at least **MEMBER ID**, Company name and job title. Again, the **MEMBER ID** ties back to the members sheet.

Members' club functions

Member ID	Function	Start date	End date
7579	Members > Member	5/25/2010	6/25/2014
348	Members > Member	12/12/2000	6/30/2015
349	Members > Member	3/18/1997	6/30/2005

NOTE! Every "active" member needs <u>at least one function</u> to be imported as an active member who is able to login.

Please make sure to put the function "Members > Member" with the members' entrance date as the start date, and the age-out date as the end date (i.e. the end date of the members last year as a tabler) in the "MEMBERS_CLUB_FUNCTIONS" sheet. The **MEMBER ID** ties this record to the correct member. For a

prospect use the function "prospect". Each member can have multiple functions during the same or different periods. No double roles possible! Please refer to the first sheet "Info" for valid club functions.

Honorary membership can be entered as a function on national level and on club level. Honorary members can be granted access to the system. Please note that this is considered then as an "active" member as well for the yearly licence fee.

Members' area functions

Member ID	Function	Start date	End date
6461	Board > President	6/1/2013	5/24/2014
6070	Board > President	6/1/2013	5/24/2014
7069	Board > President	6/1/2013	5/24/2014

Same as above, but only for members with district responsibilities. For example, area president. Refer to the first sheet "Info" for valid area functions.

Members' association functions

Member ID	Function	Start date	End date
5633	Board > President	6/1/2013	5/24/2014
5296	Board > President	6/1/2012	5/31/2013
2761	Board > President	5/24/2014	5/30/2015

Same again, but for national roles, like National President, Webmaster, Secretary etc. Refer to the first sheet "Info" for valid association functions.

Preparing member photos

All member photos should be square at max 512x512 px jpg. You can choose any method that works for resizing images, but we have prepared a PHP-snippet that can help if you have non-square images. It will automatically try and find the best crop, and then resize to the correct size.

You can find it at https://gist.github.com/francisrath/d76224f0821b570ac0458896f36589ed

You need to include the file name for each members' photo in the excel file. Our recommendation is to use the naming scheme "<member id>.jpg" for all the photos. Please only provide the file name (not folder name) in the excel file. And **only provide file names where the photo is actually provided** as it will **not be verified** on the server on import.

Zip the images up and send the files to migration@roundtable.world, mentioning which association the images are for. You can use e.g. the free wetransfer.com to send large files instead of attaching it to an email.

If you need assistance resizing images, please contact Francis at web@roundtable.no

After importing | initial settings

After your member data has been imported, you will be notified that you can log in to the website. You will be the initial association admin, and you can configure settings on the national level. We show you a selection of the most important settings to know and to configure in the beginning.
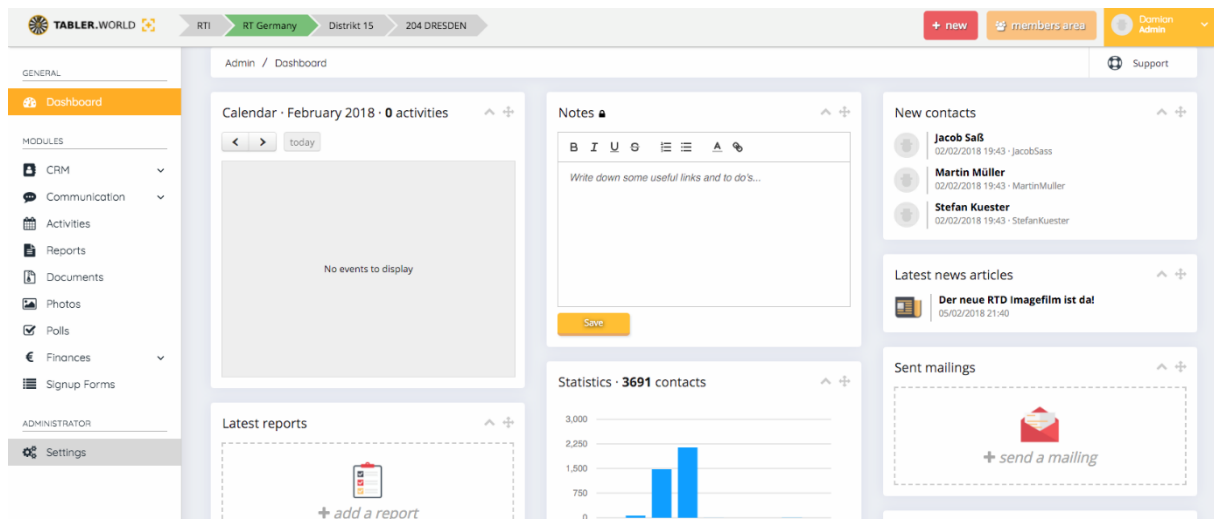
General

settings
Logo: Large for directory, small for login page of association (rondel)
Background image for login page
Social media accounts
Contact data (of the admin / support)

tags
you can create tags to make your content filterable / searchable more finegrained.

RT «My association»

public profile
charter year, AGM dates, godparent etc.

add new clubs
Note: this action cannot be undone, so be careful and accurate with the data you fill in.

Standard modules

CRM
> Groups & functions
manage your groups, functions, types of addresses.

> Statutory years
define statutory year periods for your association / areas / clubs
Note: statutory year for association and clubs can be different

ACTIVITIES
> Locations
Add locations that are going to be used regularly – e.g. always same meeting place

> Reminder
set your reminder patterns individually

MEMBER AREA
> Overview page
configure whether to show new contacts and upcoming birthdays on the overview page, who is going to see it, based on their groups & functions, including exceptions.

> Menu
configure who is going to see which menu topic, based on their groups & functions, including exceptions.

ADVANCED
> Access Management
configure who is allowed to create new content on which module – contacts, news, photos, polls, mailings, events, documents, finances, sign-up forms. (handle with care!)