

# Clubs Can Automatically Integrate Club Member Data with Rotary International!!!

*Who can do this? ANY club in District 6630*

Don't you just cringe at the thought of making member updates in more than one place to keep your membership roster current for your Club, the District and Rotary International? How about when the SAR arrives and you have to check, recheck and recheck membership data for days!

We have a solution that can help you with this!

The "synchronization" feature that Rotary International offers can simplify your membership updating process so you can make your changes seamlessly, in one place.

The process is available to Clubs that DO and also for those that DO NOT currently subscribe to ClubRunner for your websites.

**The set up process to "synchronize" your membership data takes  
about 10 minutes from start to finish and only needs to be  
performed ONE time!**

The steps for Clubs that subscribe to ClubRunner versus those who do not are slightly different - so read below for the instructions that fit your Club:

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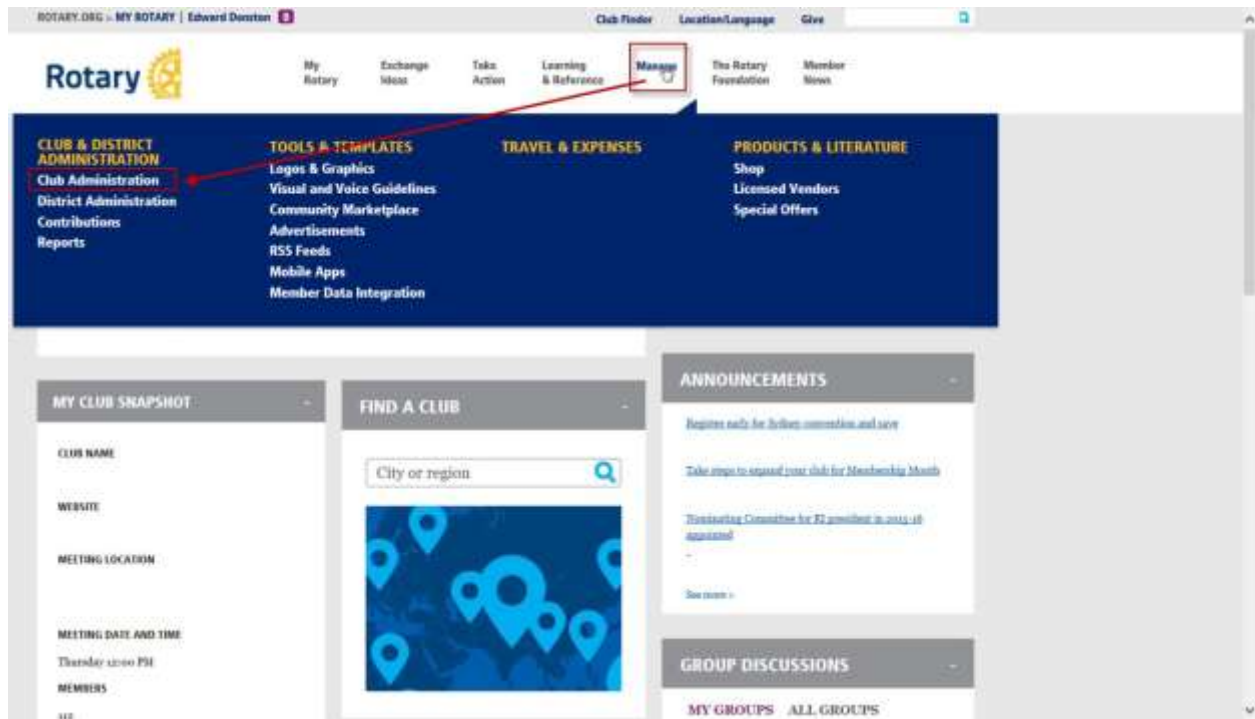
## **INSTRUCTIONS FOR CLUBS THAT DO SUBSCRIBE TO CLUBRUNNER:**

Your membership data is already synchronized to the District website since you are using ClubRunner, but to get your member data changes to ALSO synchronize directly **from your CLUB website to Rotary International**, you must perform these steps.

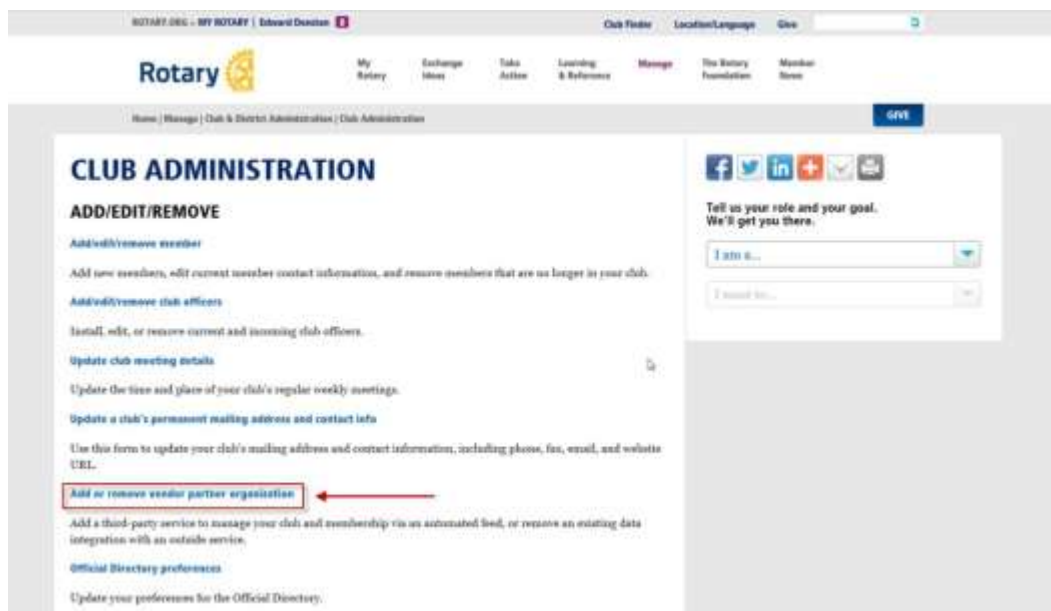
This is a BIG timesaver --- anytime an edit is made to a member profile in your Club's ClubRunner website - the edited member data will be updated (synchronized) automatically in the Rotary International database also which improves communications for all concerned .... AND it's a BIG help for your Club when your SAR reports arrive and they are actually accurate because your updates went straight up to Rotary each time they were made.

1. Your **Club President, Secretary or Executive** must log onto the RI website (<http://www.rotary.org>) and click on the **My Rotary** link. The page will change and you will need to click the **Sign in** button and login. If it is your first time logging into the RI website since they made their site updates, you will need to "register" before you login - this only takes a minute but you will need access to your email when you do so. Once you are logged in,

2. Under Manage, click on the **Club Administration** link.



3. Click the **Add or Remove Vendor Partner Organization** link



4. Select **ClubRunner (if your Club doe NOT subscribe to ClubRunner you will still select this)** from the drop down menu. Read the terms and conditions and if you agree click the **I Agree** button.

***Note:** There is a 24 hour delay from the time a club opts in (authorizes the vendor) to the time the authorization takes effect. Authorizations are processed by a database procedure that is scheduled to run once a day. Once the feature has been setup, moving forward the member profile updates will take place within minutes.*

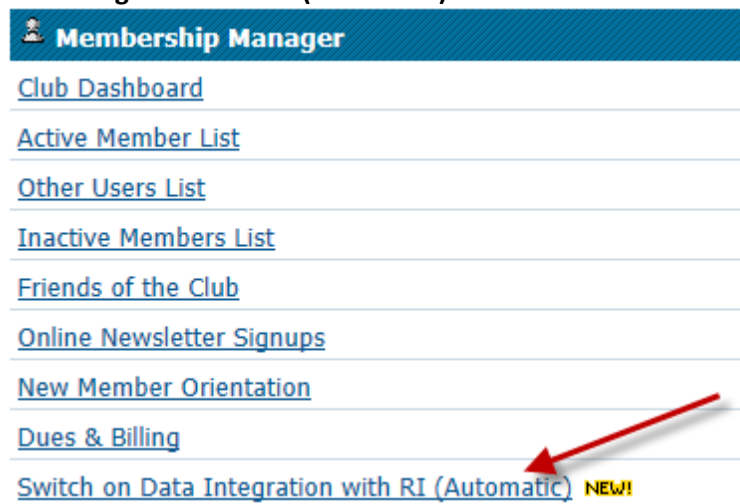
**[Clubs that DO NOT subscribe to ClubRunner should now refer back to their prior instructions, Clubs that DO use ClubRunner should proceed below]**

5. Now all you need to do is set up the Synchronization *within* your CLUB website:

A. Login to YOUR Club's website (powered by ClubRunner).

Note: You must have access level **50** or better so check with your site administrator, President or Secretary.

B. Go to the ADMIN PAGE and under the Membership Manager Section click on the **Switch on Data Integration with RI (Automatic)** link.



C. Check the checkbox to switch on Data Integration between ClubRunner and RI. Please read the Terms and Conditions accordingly.

☐ Switch on Data Integration between ClubRunner and RI for all active member records within my club.

**Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.**

I agree to the [Terms and Conditions](#) of this integration.

D. Clubs can customize any privacy options by selecting the appropriate fields to synchronize. This will set the RI Integration Privacy defaults for all members.

*Note: Members will still have the option to decline sharing information if they choose - members do this within their profiles on an individual basis.*

Now Press the **Update Privacy** button.

Choose Club RI Integration Privacy

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Allow Name             | <input checked="" type="checkbox"/> Allow Home Phone     |
| <input checked="" type="checkbox"/> Allow Home Address     | <input checked="" type="checkbox"/> Allow Cell Phone     |
| <input checked="" type="checkbox"/> Allow Business Address | <input checked="" type="checkbox"/> Allow Business Phone |
|  | <input checked="" type="checkbox"/> Allow Home Fax       |
|  | <input checked="" type="checkbox"/> Allow Business Fax   |
|  | <input checked="" type="checkbox"/> Allow Primary Email  |

**Update Privacy**

For Club members who prefer not to send data updates: Go to their ClubRunner member profile and select the **Privacy Tab**.

## Member Profile



**Test Account**  
[Printable Version](#)

[Update](#)

[Personal](#) [Rotary](#) [Biography](#) [Commitments](#) [Settings](#) [Privacy](#)

Uncheck the fields that the member does not wish to share with RI. Then click the **Save** button.

**Communication Preferences**  
**District Emails** ☒  
**District Bulletin** ☒

**RI Privacy**  
This section allows you to specify which fields you would like to update at Rotary International's database. If your club has opted out of certain fields, those will not be updated, even if you opt in. For a field that your club has opted into, you can choose to opt out by unchecking it from the list below.

<b>Name</b> <input checked="" type="checkbox"/> (Club Opted In)	<b>Home Phone</b> <input checked="" type="checkbox"/> (Club Opted In)
<b>Home Address</b> <input checked="" type="checkbox"/> (Club Opted In)	<b>Cell</b> <input checked="" type="checkbox"/> (Club Opted In)
<b>Business Address</b> <input checked="" type="checkbox"/> (Club Opted In)	<b>Business Phone</b> <input checked="" type="checkbox"/> (Club Opted In)
	<b>Home Fax</b> <input checked="" type="checkbox"/> (Club Opted In)
	<b>Business Fax</b> <input checked="" type="checkbox"/> (Club Opted In)
	<b>Primary Email</b> <input checked="" type="checkbox"/> (Club Opted In)

*Note: Name (highlighted in red) is required and is not uncheck-able.*

6. Remember, after you have completed these steps, each time your Club makes a change to a member of within your Club's website (powered by ClubRunner) the changes are automatically synchronized up to Rotary International. The only time member data will not be synchronized is if a member has "opted out" within their own personal "privacy" settings.

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## INSTRUCTIONS FOR CLUBS THAT **DO NOT** SUBSCRIBE TO CLUBRUNNER:

***Note: You must be listed with the District as a Club Executive to have access.***

1. Follow Steps #1 - #4 above then
2. Go to [www.RotaryDistrict6630](http://www.RotaryDistrict6630) and login.
3. Click on Admin tab (upper right corner)
4. Scroll down to the to the Club Executives box
5. Select Switch on Data Integration with RI (Automatic)

For Club Executives	
<a href="#">Active Members List</a>	
<a href="#">Other Users List</a>	
<a href="#">Inactive Member List</a>	
<a href="#">Club Information Page</a>	
<a href="#">Define Club Executives</a>	
<a href="#">Club Attendance Report</a>	
<a href="#">Define Club Attendance Manager</a>	
<a href="#">Switch on Data Integration with RI (Automatic)</a>	NEW!
<a href="#">Report Data Changes to RI (Manual Emails)</a>	
<a href="#">Missing RI Member ID Report</a>	
<a href="#">RI Updates Archive</a>	
<a href="#">RI Member Synchronization</a>	

6. Check the checkbox to switch on Data Integration between ClubRunner and RI. Please read the Terms and Conditions accordingly.

☐ Switch on Data Integration between ClubRunner and RI for all active member records within my club.

**Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.**

I agree to the [Terms and Conditions](#) of this integration.

7. Customize any privacy options by selecting the appropriate fields to synchronize. This will set the RI Integration Privacy defaults for your club updates that are entered via the District website

*Note: Members will still have the option to decline sharing information if they choose - members do this within their personal member profiles on an individual basis.*

Now Press the **Update Privacy** button.

8. Now, moving forward, your Club should ALWAYS edit, add or delete your Club member data within the District website -- this way your club's membership information will be automatically synchronized with Rotary International and this process also provides the District with consistent and accurate information for your members. If you need instructions on how to manage your member data within the District website, please contact Cheryl Warren at 330-495-9814.