

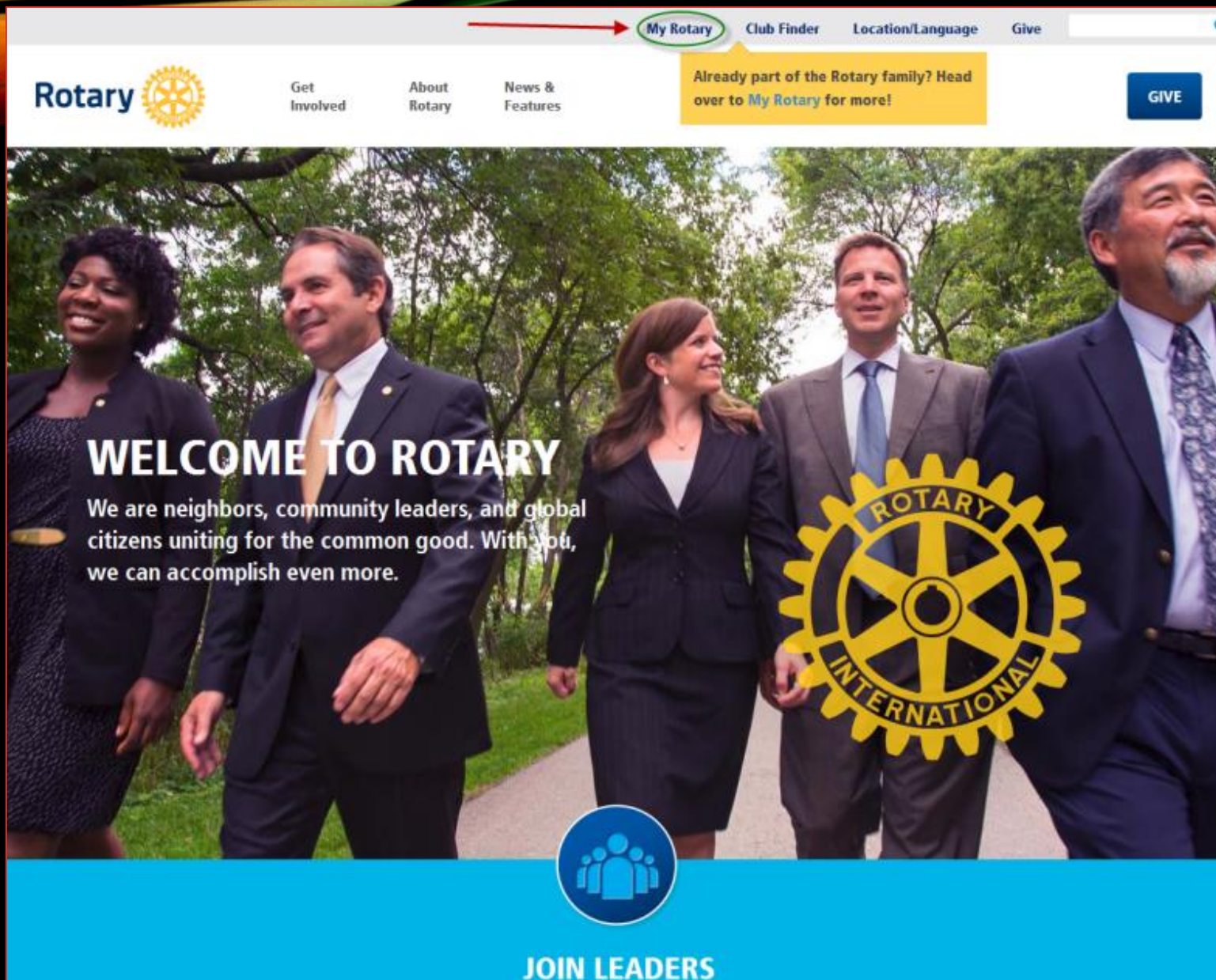


# SYNCHRONIZATION

Connect Rotary International and District 6840 ClubRunner Member Data

# CLUBRUNNER & MY ROTARY SYNCHRONIZATION

- Opt in on Rotary's end from My Rotary
- Opt in at ClubRunner
- Set your Club's privacy options
- Wait for RI Member No.s to get populated (under one hour)
- Compare & Synchronize Member Data
- Make updates through ClubRunner



ROTARY.ORG > MY ROTARY | Sign in/Register

Club Finder Location/Language Give

Rotary My Rotary Exchange Ideas Take Action Learning & Reference Manage The Rotary Foundation Member News

GIVE

## WELCOME TO MY ROTARY

[SIGN IN](#)

### SIGN IN

SIGN-IN EMAIL \*

[Forgot email?](#)

PASSWORD \*

[Forgot password?](#)

☒ REMEMBER ME ?

[SIGN IN](#)

[CREATE ACCOUNT](#)

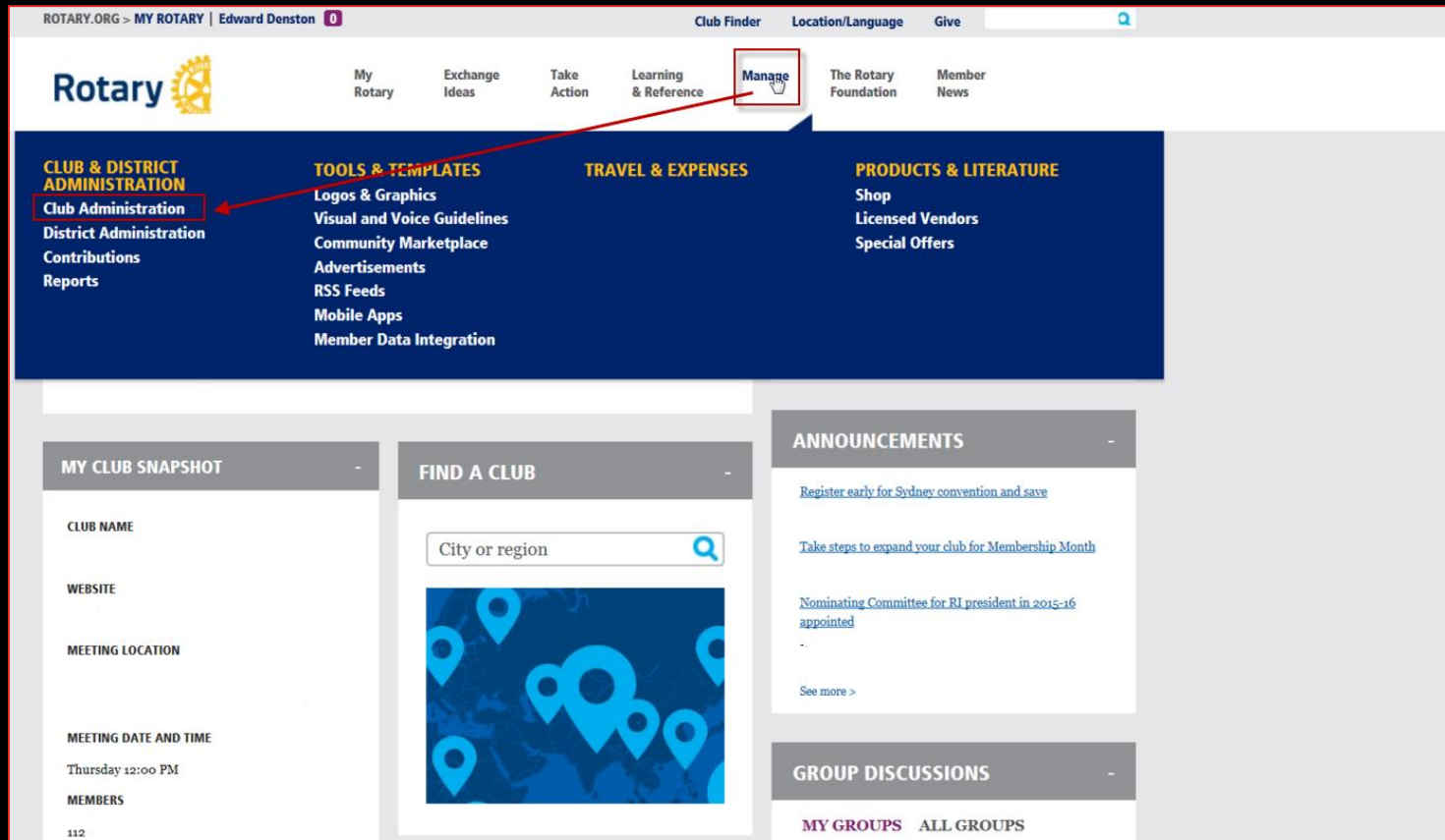
**WHY CREATE AN ACCOUNT?**  
Signing in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Anyone can create an account and sign in. Existing Member Access users can register with their current ID and password to activate their new account. For assistance, [contact us](#).

[JOIN LEADERS](#) [EXCHANGE IDEAS](#) [TAKE ACTION](#)

# MY ROTARY

# OPT IN AT ROTARY.ORG



- Log in as Club President, Secretary or Executive Secretary/Director
- Click on **Manage** on the top menu and click the **Club Administration** link

# OPT IN AT ROTARY.ORG

ROTARY.ORG > MY ROTARY | Edward Denston 0

Club Finder Location/Language Give

Rotary My Rotary Exchange Ideas Take Action Learning & Reference Manage The Rotary Foundation Member News

Home | Manage | Club & District Administration | Club Administration GIVE

## CLUB ADMINISTRATION

### ADD/EDIT/REMOVE

[Add/edit/remove member](#)

Add new members, edit current member contact information, and remove members that are no longer in your club.

[Add/edit/remove club officers](#)

Install, edit, or remove current and incoming club officers.

[Update club meeting details](#)

Update the time and place of your club's regular weekly meetings.

[Update a club's permanent mailing address and contact info](#)

Use this form to update your club's mailing address and contact information, including phone, fax, email, and website URL.

[Add or remove vendor partner organization](#)

Add a third-party service to manage your club and membership via an automated feed, or remove an existing data integration with an outside service.

[Official Directory preferences](#)

Update your preferences for the Official Directory.

Tell us your role and your goal. We'll get you there.

I am a... I want to...

- Click on the Add or Remove Vendor Partner Organization link

# OPT IN AT MY ROTARY

Rotary.org: map.rotary.org/en/secureselfservice/Pages/AddReadOnlyVendorOrganization.aspx

**Identify and authorize a Club Management Vendor**  
Please review the Agreement below and click on "I Agree" to authorize Rotary International to complete the data integration process and submit your authorization.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

Identify the club management vendor you are authorizing from the dropdown menu below.

Club management vendor  
ClubRunner

If you are allowing this vendor to view or to view and update your club data on behalf of your club, under the dropdown menu "Access granted to" below, please select "Club".

If you are allowing this vendor view-only access to your club data for viewing by your district or zone, under the dropdown menu "Access granted to" below, please select "District" or "Zone," as applicable.

Access granted to  
District

You can allow multiple vendors view-only access to your club data, but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

Start Date  
04/14/2017 00:00:00

By clicking the "I agree" button, I make the representations and warranties, authorize RI to complete the data integration process in rotary.org/myrotary and agree to abide by the terms and conditions set forth below:

1. I represent and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be

- Select **ClubRunner** from drop down menu
- Select Access Granted to Club (if you do not have a club website or if club website is hosted by ClubRunner)

# OPT IN AT MY ROTARY

Rotary.org: map.rotary.org/en/secureselfservice/Pages/AddReadOnlyVendorOrganization.aspx

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1. I represent and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be

- Select **ClubRunner** from drop down menu
- Select Access Granted to District (if club website is hosted by someone other than ClubRunner, e.g. DACDb)

# OPT IN AT MY ROTARY

Rotary.org: map.rotary.org/en/secureselfservice/Pages/AddReadOnlyVendorOrganization.aspx

**Identify and authorize a Club Management Vendor**  
Please review the Agreement below and click on "I Agree" to authorize Rotary International to complete the data integration process and submit your authorization.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

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Club management vendor

If you are allowing this vendor to view or to view and update your club data on behalf of your club, under the dropdown menu "Access granted to" below, please select "Club".

If you are allowing this vendor view-only access to your club data for viewing by your district or zone, under the dropdown menu "Access granted to" below, please select "District" or "Zone," as applicable.

Access granted to

You can allow multiple vendors view-only access to your club data, but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

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04/14/2017 00:00:00

By clicking the "I agree" button, I make the representations and warranties, authorize RI to complete the data integration process in rotary.org/myrotary and agree to abide by the terms and conditions set forth below:

1. I represent and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be

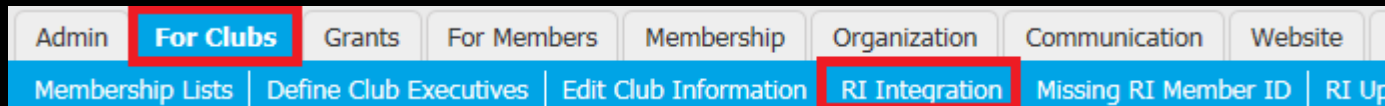
- Read the terms and conditions, and if you agree, press **I Agree** button

# OPT IN AT CLUBRUNNER

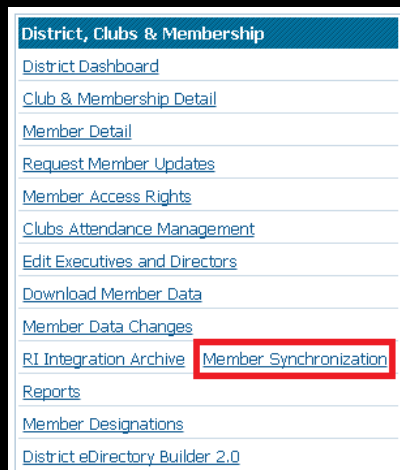
Clubs with ClubRunner:



Clubs without ClubRunner, on the District:



District Administrators, on the District:



| RI Member Synchronization |           |         |           |                                                                                       |
|---------------------------|-----------|---------|-----------|---------------------------------------------------------------------------------------|
| RI                        | Club Name | Club Id | President | Action                                                                                |
| ✓                         | Aville    | 000     | John      | <a href="#">RI Member Synchronization</a> <a href="#">RI Synchronization Settings</a> |
| ✓                         | Bylon     | 000     | John      | <a href="#">RI Member Synchronization</a> <a href="#">RI Synchronization Settings</a> |

- Wait 24 hours then
- Log into your ClubRunner site
- Click on the RI Integration Settings or RI Integration link

# OPT IN AT CLUBRUNNER

Club Information **Rotary Club of Green Town** [Print Page](#)



President: [Clare Harris](#)  
Members: 15 active, 0 honorary

Meetings: Tuesdays, 7 PM  
Memorial Hall  
[View Map](#)

[Website](#)

**Club Details**

| Club Details                         | Edit |
|--------------------------------------|------|
| Club Name: Rotary Club of Green Town |      |
| Short Name: Green Town               |      |
| <b>Club Id: 1234</b>                 |      |
| Club Type: Rotary                    |      |
| Date Chartered: Nov 13, 2012         |      |
| Club Motto: Service Above Self       |      |
| Club Greeting:                       |      |

| Meetings                                                             | Edit |
|----------------------------------------------------------------------|------|
| Schedule: Tuesdays, 7 PM                                             |      |
| Location: Memorial Hall                                              |      |
| Address: 100 Merrill Street<br>Green Town, WI 54459<br>United States |      |

[View larger map](#)

- Verify your Rotary Club ID is properly set by going to **Edit Club Info & Settings** from the Admin page
- Enter your **Club ID** if not already populated, then press **Save Changes**

# OPT IN AT CLUBRUNNER

Admin | My ClubRunner | Communication | Contacts (Beta) | Bulletin | New Bulletin (Beta) | Membership | Organization | **RI Integration** | Attendance 3.0 (Beta) | Website | R

RI Integration Settings | Missing Member ID Report | Updates Archive | Updates Queue | Compare & Synchronize | Help

RI Integration [Go back](#)

### RI Database Integration for

Using this feature, member data changes you make on ClubRunner will be automatically updated at Rotary International Headquarters within minutes. For more information on this feature, [click here](#).

In order to set this up, there are **two steps** that need to be completed by your club:

- 1. Opt in at Rotary International's Member Portal.**  
As a Club President, Secretary or Executive Secretary/Director, you will need to sign in to your My Rotary account. To access the sign in page use this link: <https://www.rotary.org/myrotary/en/user/login?destination=/>  
Click on "Manage" on the top menu, and then click on "Club Administration".  
Then click "Add or remove vendor partner organization". Look for the Partner Organization section, and click on "Add Partner Organization".  
Select ClubRunner from the Partner Organization drop-down list.  
Click "I Agree" to activate the agreement.
- 2. After 24 hours, opt in by selecting the checkbox below.** Note that this checkbox will only become available once you complete the above step and wait for the RI database to refresh which may take up to 24 hours.

☒ 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.  
  
Integration confirmed on 2011-03-20 7:01:22 PM by

#### Choose Club RI Integration Privacy

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

[Update Privacy](#)

- Check the checkbox to switch on integration
- Customize your privacy options by selecting the fields to synchronize
- Press the **Update Privacy** button to save the changes

## RI MEMBER NO.

- This is the key to making successful updates
- Found within ClubRunner member profile, under Rotary tab
- Automatically populated once you switch on RI Integration
- Allow one hour for completion
- Unmatched members report found in RI Integration Compare and Synchronize link, under Membership tab

# COMPARE & SYNCHRONIZE

- Allows you to compare your member data in ClubRunner with what is available in Rotary International's Member Access
  - Sync data between two systems by “pushing” from ClubRunner to RI or “pulling” data from RI to ClubRunner
  - Remove inconsistencies between two systems
  - Add member directly to RI
  - Add member to ClubRunner

# OPT IN AT CLUBRUNNER

Member Profile



**John Smith**  
[Printable Version](#)

[Update](#)

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

[Edit](#)

Communication Preferences

|                                     |                              |
|-------------------------------------|------------------------------|
| Club Emails ✓                       | ClubRunner Connect ✓         |
| Club Bulletin ✓                     | ClubRunner Service Updates ✗ |
| District Emails ✓                   | ClubRunner Product ✓         |
|                                     | Announcements/News ✓         |
| District Bulletin ✓                 |                              |
| Zone Emails ✓                       |                              |
| Zone Bulletin ✓                     |                              |
| Inter Club Email ✓                  |                              |
| Register Guest Confirmation Email ✓ |                              |

RI Integration 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.

|                          |                        |
|--------------------------|------------------------|
| Allow Name ✓             | Allow Home Phone ✓     |
| Allow Home Address ✓     | Allow Cell ✓           |
| Allow Business Address ✓ | Allow Business Phone ✓ |
| Allow Birthday ✓         | Allow Home Fax ✓       |
|                          | Allow Business Fax ✓   |
|                          | Allow Primary Email ✓  |

[Edit](#)

- If you have some members who prefer not to send data updates, go to their ClubRunner member profile, and select the **Privacy** tab
- Uncheck the fields which you do not wish to share with RI for that member

# ONGOING UPDATES

Active Members List

Members per Page: 25 ▼

[All](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Add New Member](#)

| Email                                                                              | <input type="checkbox"/> By First Name | Name ▼                           | Type   | Access | Action                                                   |
|------------------------------------------------------------------------------------|----------------------------------------|----------------------------------|--------|--------|----------------------------------------------------------|
|    |                                        | <a href="#">Baker, Sue</a>       | Active | 70     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|    |                                        | <a href="#">Brackett, Leigh</a>  | Active | 40     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|    |                                        | <a href="#">Harris, Clare</a>    | Active | 70     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|    |                                        | <a href="#">Jones, Mickey</a>    | Active | 30     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|    |                                        | <a href="#">Kornbluth, Cyril</a> | Active | 50     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|    |                                        | <a href="#">Kuang, Ni</a>        | Active | 30     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|                                                                                    |                                        | <a href="#">Lankton, Greer</a>   | Active | 90     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|                                                                                    |                                        | <a href="#">Merril, Judith</a>   | Active | 70     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|  |                                        | <a href="#">Moore, Catherine</a> | Active | 70     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|  |                                        | <a href="#">Pohl, Fred</a>       | Active | 70     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|  |                                        | <a href="#">Smith, Edward</a>    | Active | 30     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|  |                                        | <a href="#">Smith, John</a>      | Active | 70     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|  |                                        | <a href="#">Stapledon, Olaf</a>  | Active | 60     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|  |                                        | <a href="#">Trout, Kilgore</a>   | Active | 70     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |
|  |                                        | <a href="#">Woods, Zach</a>      | Active | 30     | <a href="#">Mark Ex</a>   <a href="#">Reset Password</a> |

Click on the member's name to make updates

- Now that Integration is switched on, continue to make updates through your club or district ClubRunner site

# ONGOING UPDATES

Member Profile



**Ni Kuang**  
[Printable Version](#)

[Update](#)

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

[Edit](#)

Click the Edit button to make changes

**Member Details**

|                          |                     |                                     |             |
|--------------------------|---------------------|-------------------------------------|-------------|
| <b>Title</b>             |                     | <b>Gender</b>                       | Male        |
| <b>First Name</b>        | Ni                  | <b>Date of Birth</b>                | May 23 1990 |
| <b>Middle Name</b>       |                     | <b>Anniversary</b>                  |             |
| <b>Last Name</b>         | Kuang               | <b>Spouse/Partner First Name</b>    |             |
| <b>Nickname</b>          |                     | <b>Spouse/Partner Last Name</b>     |             |
| <b>Suffix</b>            |                     | <b>Spouse/Partner Nick Name</b>     |             |
| <b>Preferred Address</b> | Home                | <b>Spouse/Partner Date of Birth</b> |             |
| <b>Preferred Phone</b>   | Home                |                                     |             |
| <b>Email</b>             | kuangni@example.com | <b>Alternate Email</b>              |             |

*\*All emails will only be sent to the primary email address      Birthday and anniversary years can only be viewed by Club Executive level or higher.*

**Home**

|                        |                |                   |  |
|------------------------|----------------|-------------------|--|
| <b>Address Line 1</b>  | 22b Drury Lane | <b>Home Phone</b> |  |
| <b>Address Line 2</b>  |                | <b>Cell</b>       |  |
| <b>City</b>            | Green Town     | <b>Home Fax</b>   |  |
| <b>Country</b>         | United States  |                   |  |
| <b>State/Province</b>  | WI             |                   |  |
| <b>Zip/Postal Code</b> | 54459          |                   |  |

**Work**

|                        |  |                       |  |
|------------------------|--|-----------------------|--|
| <b>Company Name</b>    |  | <b>Position/Title</b> |  |
| <b>Address Line 1</b>  |  | <b>Business Phone</b> |  |
| <b>Address Line 2</b>  |  | <b>Business Fax</b>   |  |
| <b>City</b>            |  | <b>Website URL</b>    |  |
| <b>Country</b>         |  |                       |  |
| <b>State/Province</b>  |  |                       |  |
| <b>Zip/Postal Code</b> |  |                       |  |

**Custom Fields**

[Edit](#)

- Click on Edit to make changes

# ONGOING UPDATES

- Click Save, and synchronization with RI will happen automatically

Member Profile

**Ni Kuang**  
[Printable Version](#)

Personal Rotary Biography Commitments Settings Privacy

Save Cancel

Fields marked in red are required.

**Member Details**

|                          |                                                                                                 |                                     |                                                                                                                              |
|--------------------------|-------------------------------------------------------------------------------------------------|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| <b>Title</b>             | <input type="text"/>                                                                            | <b>Gender</b>                       | <input checked="" type="radio"/> Male <input type="radio"/> Female                                                           |
| <b>First Name</b>        | <input type="text" value="Ni"/>                                                                 | <b>Date of Birth</b>                | <input type="text" value="May 23 1990"/>  |
| <b>Middle Name</b>       | <input type="text"/>                                                                            | <b>Anniversary</b>                  | <input type="text"/>                      |
| <b>Last Name</b>         | <input type="text" value="Kuang"/>                                                              | <b>Spouse/Partner First Name</b>    | <input type="text"/>                                                                                                         |
| <b>Nickname</b>          | <input type="text"/>                                                                            | <b>Spouse/Partner Last Name</b>     | <input type="text"/>                                                                                                         |
| <b>Suffix</b>            | <input type="text" value="v"/>                                                                  | <b>Spouse/Partner Nick Name</b>     | <input type="text"/>                                                                                                         |
| <b>Preferred Address</b> | <input checked="" type="radio"/> Home <input type="radio"/> Work                                | <b>Spouse/Partner Date of Birth</b> | <input type="text"/>                    |
| <b>Preferred Phone</b>   | <input type="radio"/> Business <input checked="" type="radio"/> Home <input type="radio"/> Cell | <b>Alternate Email</b>              | <input type="text"/>                                                                                                         |
| <b>Email</b>             | <input type="text" value="kuangni@example.com"/>                                                |                                     |                                                                                                                              |

*\*All emails will only be sent to the primary email address*

*Birthday and anniversary years can only be viewed by Club Executive level or higher.*

Home

**Address Line 1**  **Home Phone**

After you press save  
changes will synchronize  
with RI automatically