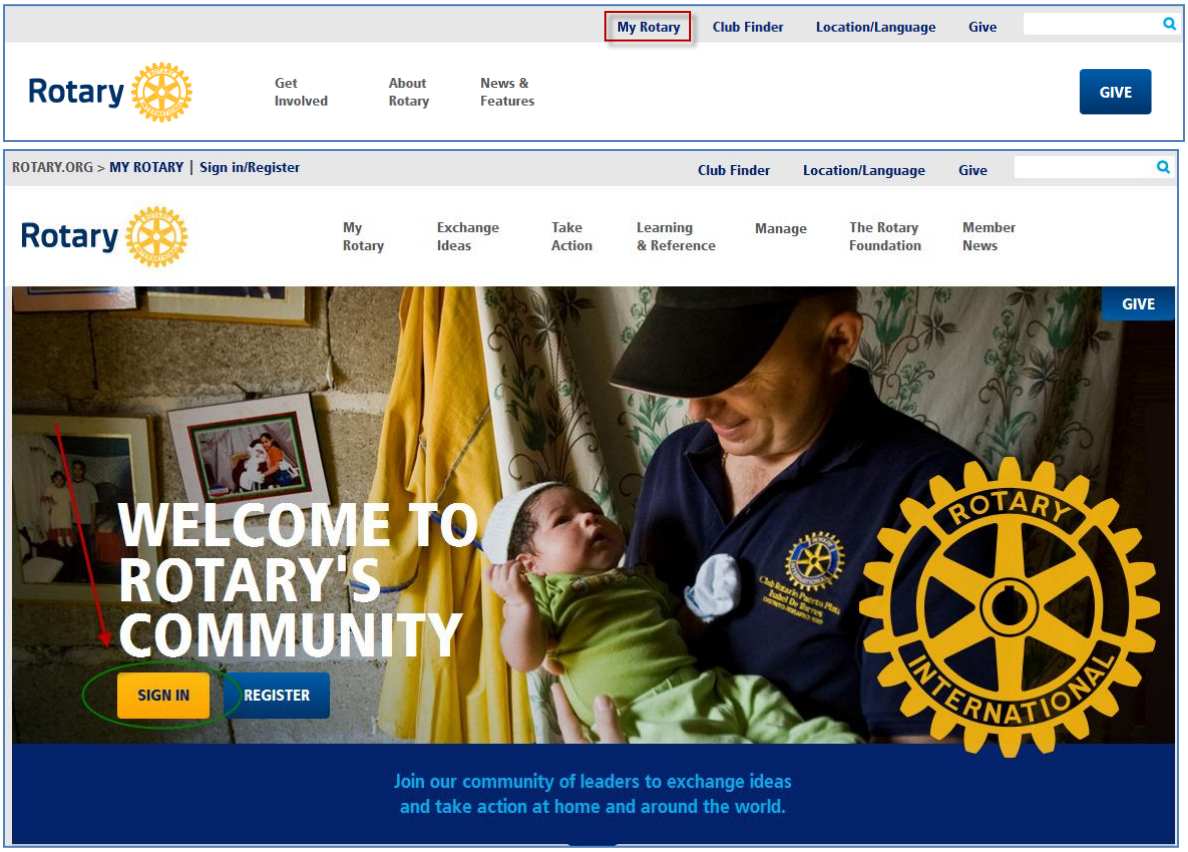
RI & ClubRunner Automatic Data Synchronization Procedure

Since 2010, ClubRunner has provided its subscribers with the ability to share information with Rotary International. This function allows Rotarians to enter information in ClubRunner and have it update Rotary International's end. The following guide will assist you with the set-up of this feature.

Step 1: Setting up synchronization from RI website:

1. The 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.



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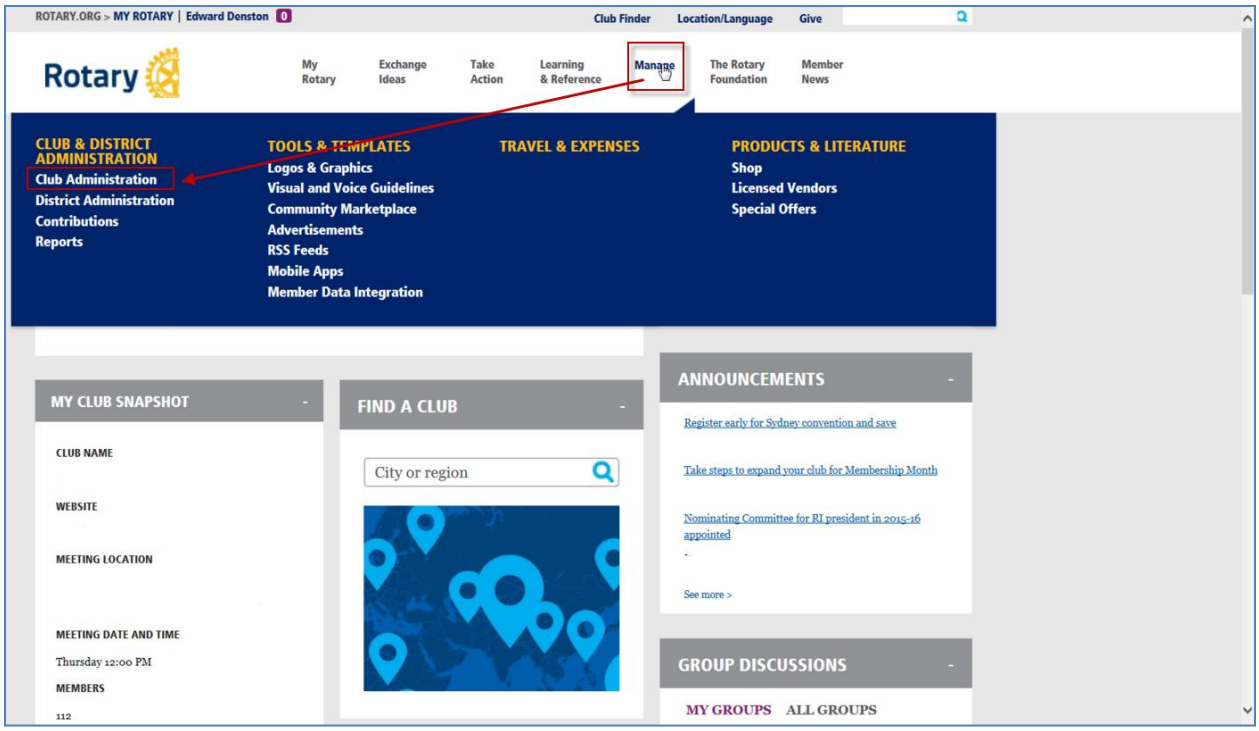
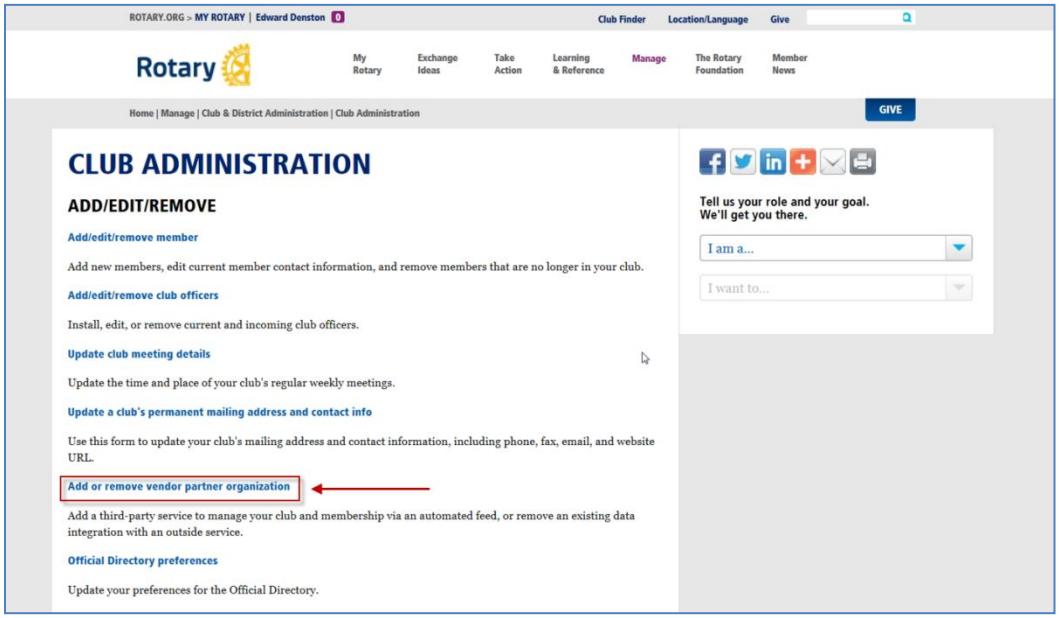
2. Under Manage, click on the **Club Administration** link.



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



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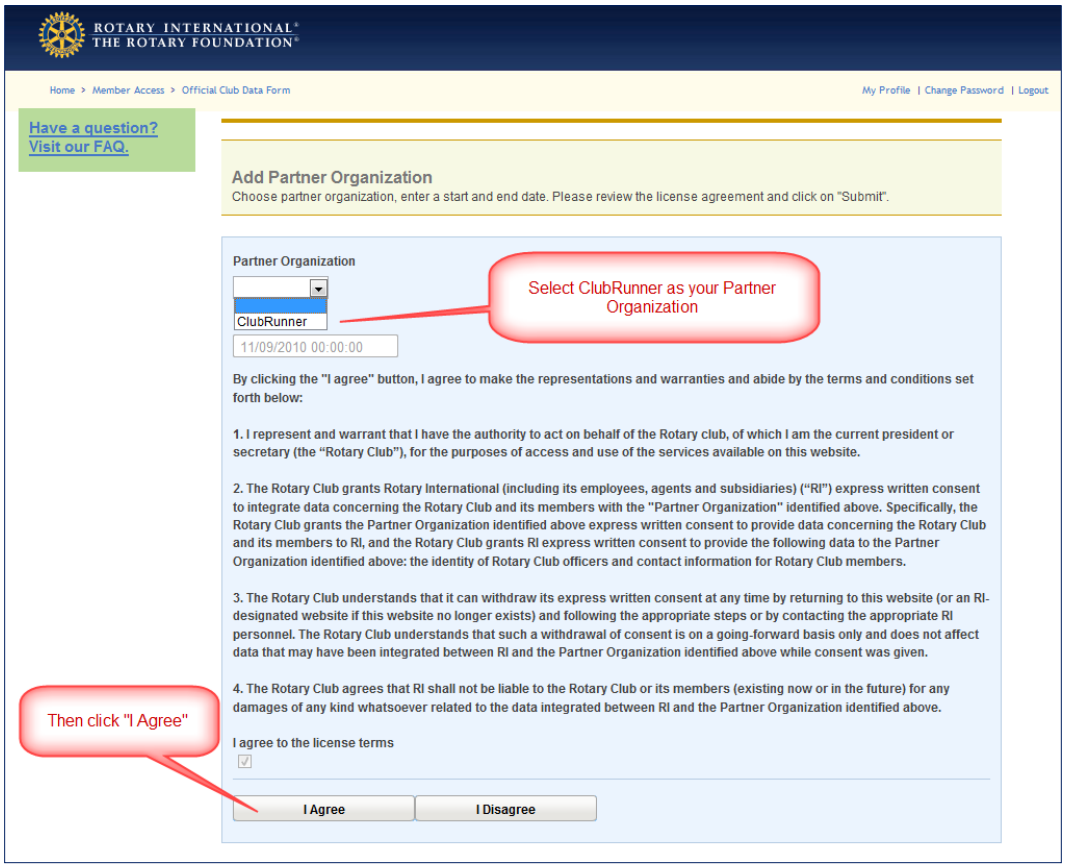
Scroll down to the bottom of the page and look for the **Partner Organization** section. Click on the **Add Partner Organization** link.

4. Select **ClubRunner** 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.*

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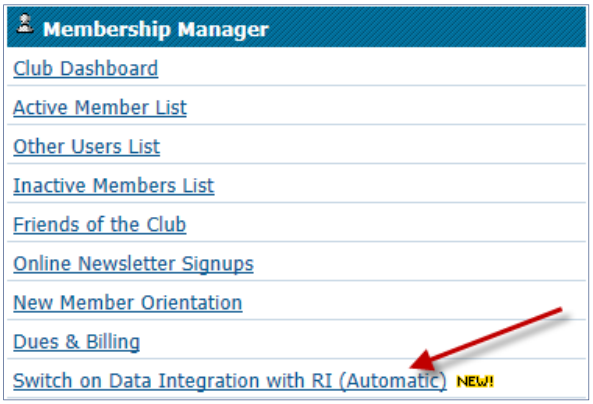
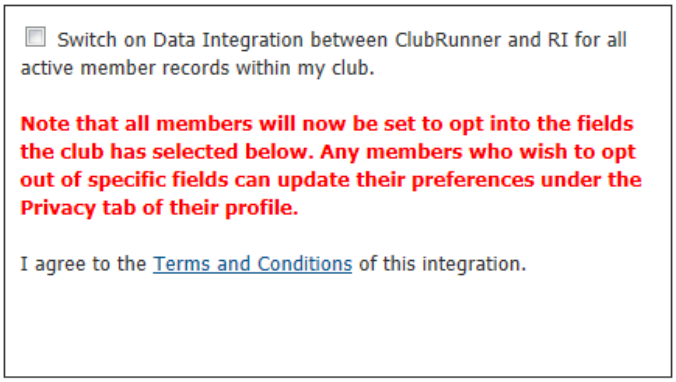
i. Club Version:

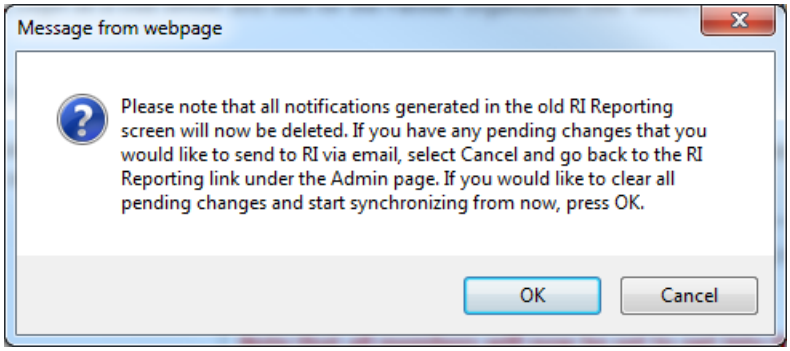
Step 2: Setting up synchronization from within the Club:

1. Login to the Club Version of ClubRunner. Note: You must have access level **50** or better.
2. Under the Membership Manager Section click on the **Switch on Data Integration with RI (Automatic)** link.



3. Check the checkbox to switch on Data Integration between ClubRunner and RI.





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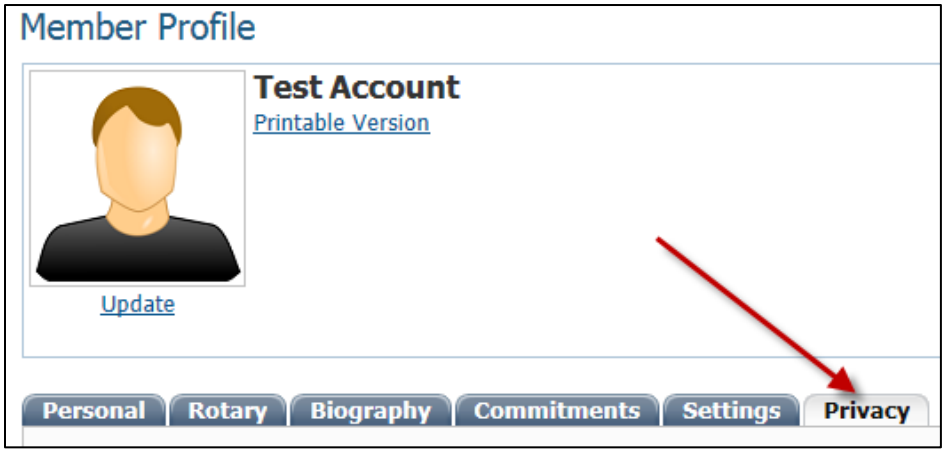
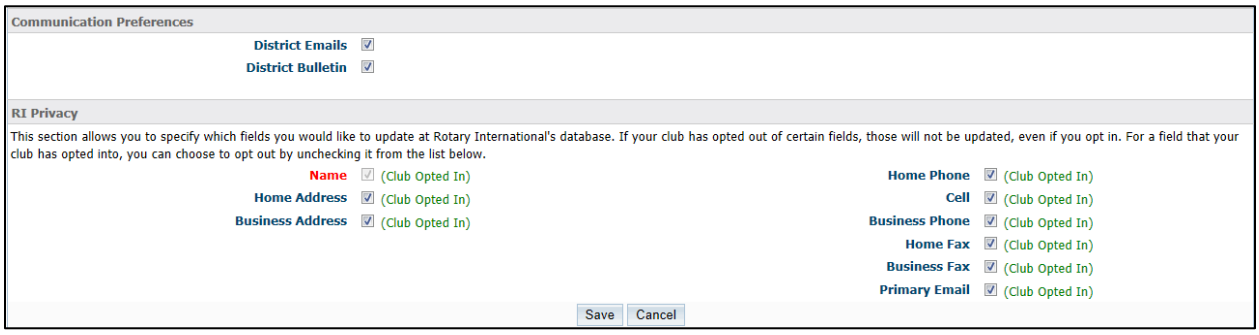
4. Customize any privacy options by selecting the appropriate fields to synchronize. This will set the RI Integration Privacy defaults for all members. Members will still have the option to decline sharing information if they choose. Now Press the **Update Privacy** button.

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



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



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

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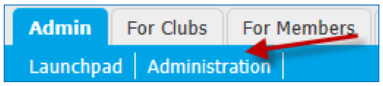
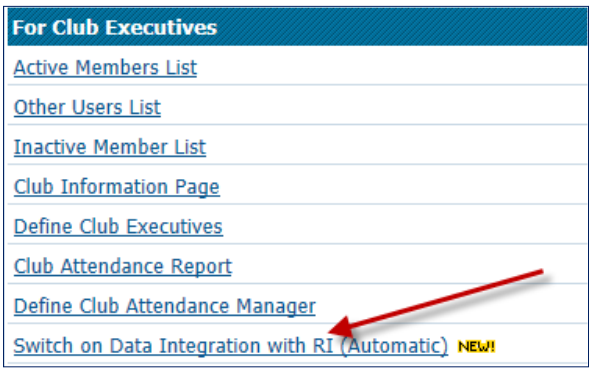
ii. District Version:

Step 2: Setting up synchronization from within the District:

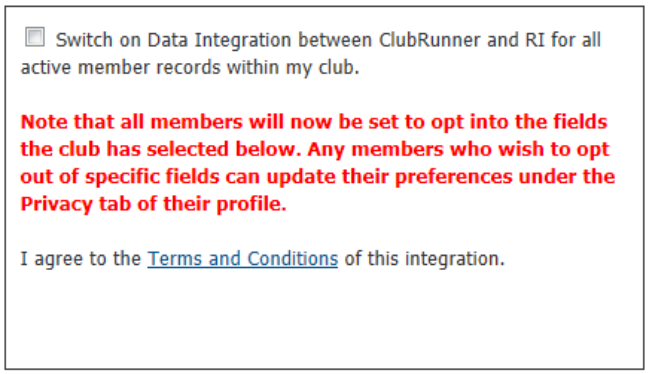
1. Login to the District Version of ClubRunner. Note: You must be a Club Executive: President, President Elect, or Secretary to have access.
2. In the menu bar click **Admin (tab)** and then on **Administration**.

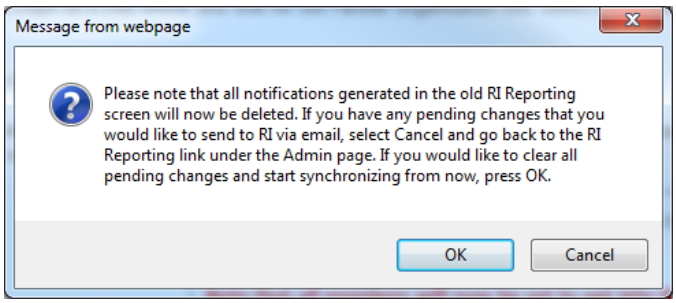


3. Under the "For club Executives" section click on the Switch on Data Integration with RI (Automatic) link.



4. Check the checkbox to switch on Data Integration between ClubRunner and RI.





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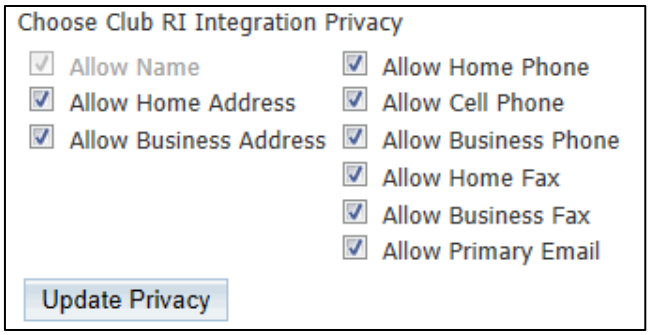
5. Customize any privacy options by selecting the appropriate fields to synchronize. This will set the RI Integration Privacy defaults for all members. Members will still have the option to decline sharing information if they choose. Now Press the **Update Privacy** button.



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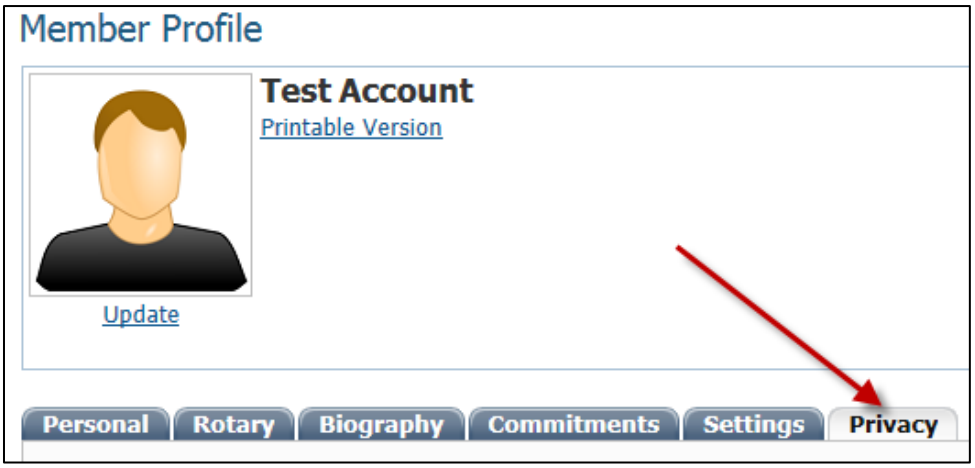
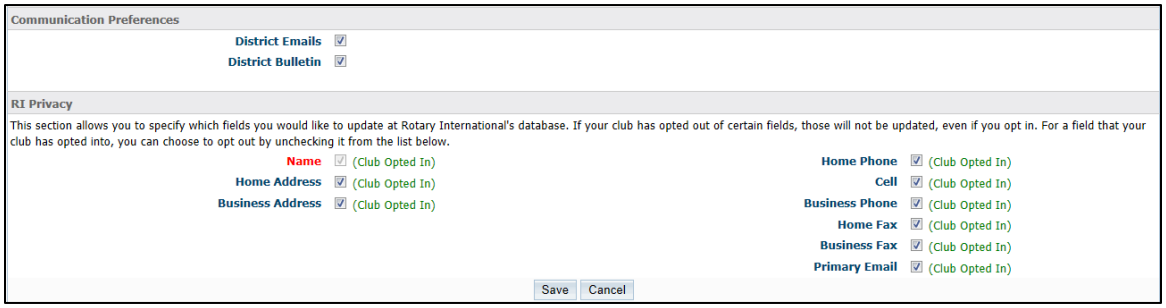


7. Uncheck the fields that the member does not wish to share with RI. Then click the **Save** button.



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

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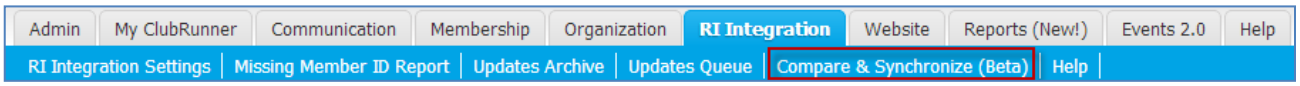
iii. New Feature: Compare & Synchronize (Beta)

Newly added to ClubRunner is the Compare & Synchronize (Beta) function. This function allows member with an access level of 30-50 to synchronize the date in ClubRunner with what has been added to Rotary International and vice versa.

To start, click the RI Integration Tab and select Compare & Synchronize (Beta).

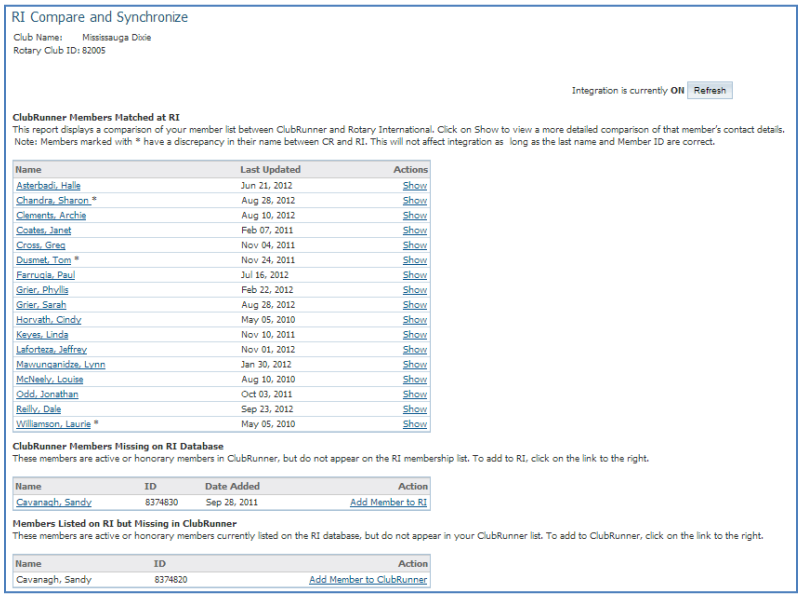


Using Compare & Synchronize (Beta)

Once the page has loaded up, you will see a list of members with a date stamp of when the account was last integrated. You will also see a list of **ClubRunner Members Missing on RI Database** and **Members Listed on RI but Missing in ClubRunner**.

Add Member to RI: This function will send an email to data services at Rotary international. Once the email has been received from RI, they will process the request manually. This process can take 7-14 business days (dependant on the amount of Requests RI receives)

Add Member to ClubRunner: This function will create a new profile on ClubRunner, using the data from Rotary Internationals' database.


RI Compare and Synchronize

Club Name: Mississauga Dixie
Rotary Club ID: 82005

Integration is currently ON Refresh

ClubRunner Members Matched at RI
This report displays a comparison of your member list between ClubRunner and Rotary International. Click on Show to view a more detailed comparison of that member's contact details.
Note: Members marked with * have a discrepancy in their name between CR and RI. This will not affect integration as long as the last name and Member ID are correct.

Name	Last Updated	Actions
Asterbadi, Halla	Jun 21, 2012	Show
Chandra, Sharon *	Aug 28, 2012	Show
Clements, Archie	Aug 10, 2012	Show
Coates, Janet	Feb 07, 2011	Show
Cross, Greg	Nov 04, 2011	Show
Dusmet, Tom *	Nov 24, 2011	Show
Farrugia, Paul	Jul 16, 2012	Show
Grier, Phyllis	Feb 22, 2012	Show
Grier, Sarah	Aug 28, 2012	Show
Horvath, Cindy	May 05, 2010	Show
Keyes, Linda	Nov 10, 2011	Show
Laforteza, Jeffrey	Nov 01, 2012	Show
Mavunganidze, Lynn	Jan 30, 2012	Show
McNeely, Louise	Aug 10, 2010	Show
Odd, Jonathan	Oct 03, 2011	Show
Reilly, Dale	Sep 23, 2012	Show
Williamson, Laurie *	May 05, 2010	Show

ClubRunner Members Missing on RI Database
These members are active or honorary members in ClubRunner, but do not appear on the RI membership list. To add to RI, click on the link to the right.

Name	ID	Date Added	Action
Cavanagh, Sandy	8374830	Sep 28, 2011	Add Member to RI

Members Listed on RI but Missing in ClubRunner
These members are active or honorary members currently listed on the RI database, but do not appear in your ClubRunner list. To add to ClubRunner, click on the link to the right.

Name	ID	Action
Cavanagh, Sandy	8374820	Add Member to ClubRunner

Note: Members marked with an asterisk (*) have a discrepancy in their name between ClubRunner and Rotary International.

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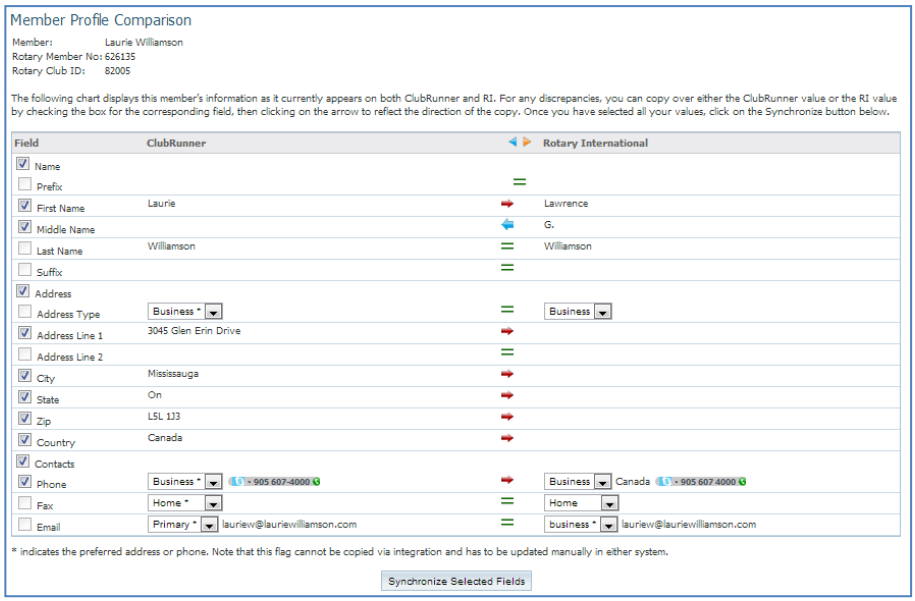
Show: This function brings you to the Member Profile Comparison page. From here, you will see what information has been entered in RI and ClubRunner as well as your changes.



Member Profile Comparison

When at the Member Profile Comparison Page, you will see a breakdown of the fields shared between RI and ClubRunner. The items listed under ClubRunner displays the member information as listed on ClubRunner, while the data under Rotary International lists the data as it appears in RI.

Between the information within ClubRunner and Rotary International are arrows and equal signs. Clicking on the option will allow you to make changes from ClubRunner to RI and vice versa.

- - Indicates the information listed in RI will be replaced with the information from ClubRunner
- - Indicates the information listed in ClubRunner will be replaced with the information from RI
- - Indicates the information matches and is the same in ClubRunner and RI

Once you have made the necessary changes, click the **Synchronized Selected Fields** button to apply the changes. Please note, the change can take up to 24 hours to be applied on Rotary Internationals' end.

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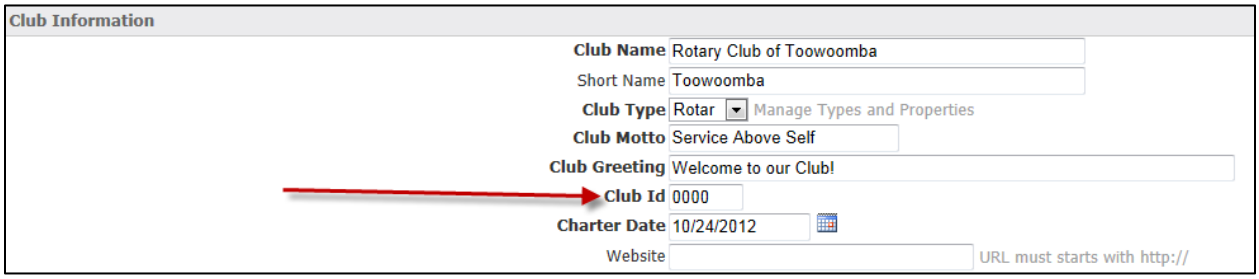
iv. FAQ for Troubleshooting

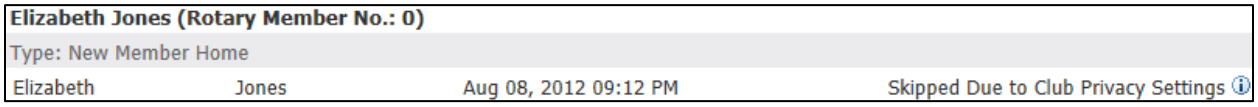
Issue: I'm trying to opt in and went to Membership Manager and clicked on Switch on Data integration with RI (Automatic) but there is no Switch on data integration check box. Instead, I see:

> Note: If your club code starts with a zero (0) (like 0000) you cannot switch on the RI Integration. Please go to the Edit Club Info & Settings page to update your RI Club ID.

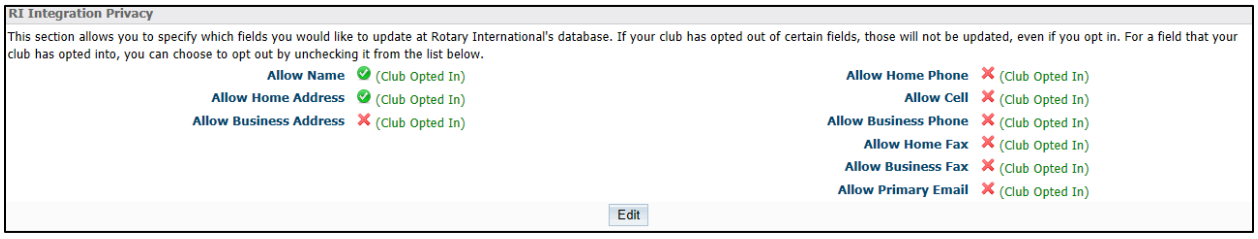
Answer: From the Administration screen; Under the Administrator section click on the Edit Club Info & Settings link. In the Club Information section verify that the Club ID is set to your Club ID.



Issue: I went to Updates Archive and can see that the status says "Skipped Due to Club Privacy Settings", why is that?



Answer: The member has decided to opt out of certain fields forcing the system to skip integrating those fields. Go to the members profile Privacy tab to see which options the member has opted out of.



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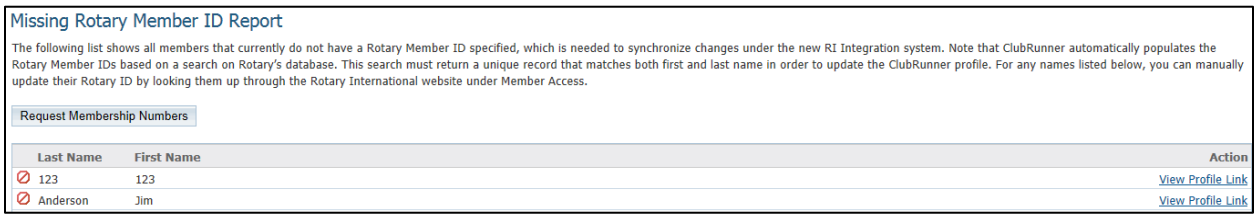
Issue: We have a member who recently got married. Her maiden name was Jane Doe. Her name now is Jane Johnson. How do I go about changing her name with Rotary International, and on all website and other communications?

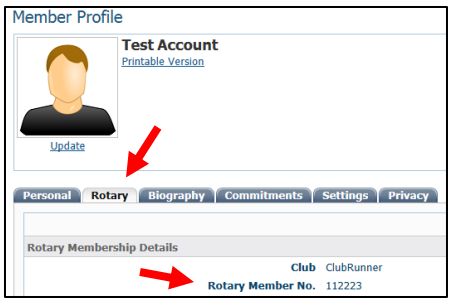
Answer: In ClubRunner, go to the members profile and change their last name. Once the information is updated through ClubRunner, it will automatically synchronize with Rotary International. To modify the member's profile, please follow the steps below:

-Login to the admin page
-Under Membership Manager, click on "Active Member List"
-Click on the name of your choice
-Click on "Edit".
-Once completed, click on 'Save"

Issue: We ran the Missing Rotary Member ID Report and it shows 29 of our members without an ID. Could you tell us why the ID integration is not working for these members and what can be done to get them integrated, and have this work reliably for future members?



Answer: The Member's ID retrieved from Rotary International searches for the First name, Last Name and the Club. However, if a member's name is spelt incorrectly, or his profile only contains his or her nickname or the short form of their name, the information will not sync with RI. For an example, if Robert is listed as Robert on RI and Bob in ClubRunner or if James is listed as Jim on ClubRunner and James on RI, the member ID cannot be located, as the information isn't the same between the two systems. You can also manually enter the member's ID through their ClubRunner profile by going to the Rotary tab on their profile:



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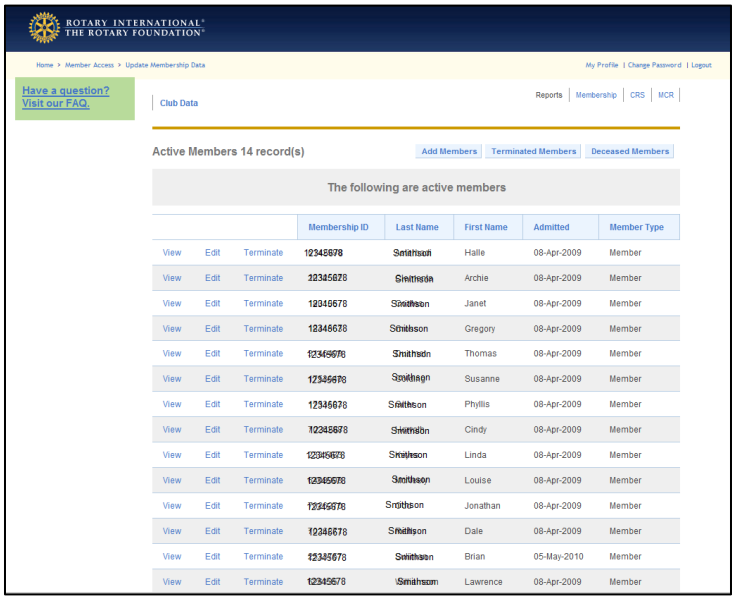
Issue: I am the secretary for club 1111, District 1111. How do I change and update the member list? I thought this would pull from the RI list, which is correct, but we show to have 102 members and we only have 75. Lots of corrections to be made. Can you help me on this?



Answer: The RI integration is only one way - from ClubRunner to Rotary International. So none of the changes from RI will flow to ClubRunner, it only works the other way around. So what you will have to do is, login to ClubRunner and manually manage your members. Below are the steps to make changes to the active members:

1. Login to your ClubRunner site
2. Under the membership manager section click on the Active Members list link
3. Here you will see all of the active members. To terminate a member simply click on the Mark Ex link, enter a termination date, select a reason, and then click the terminate button.

To change members details click on the members name, then click the edit button to make changes to the members profile. Then click the save button to save the changes.

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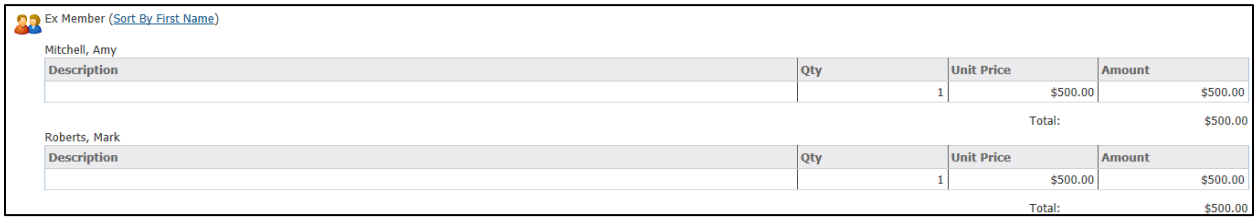
Issue: When I go into dues and billing, I have so many names that I have to scroll through, even though they are in the inactive field, I can hardly read them. Can I somehow hide or get rid of those names from the screen so I don't have to deal with them every time I go to make an entry?

Does it impact their RI permanent records if we delete them from the dues & billing section of our Clubrunner??


Ex Member (Sort By First Name)

Mitchell, Amy

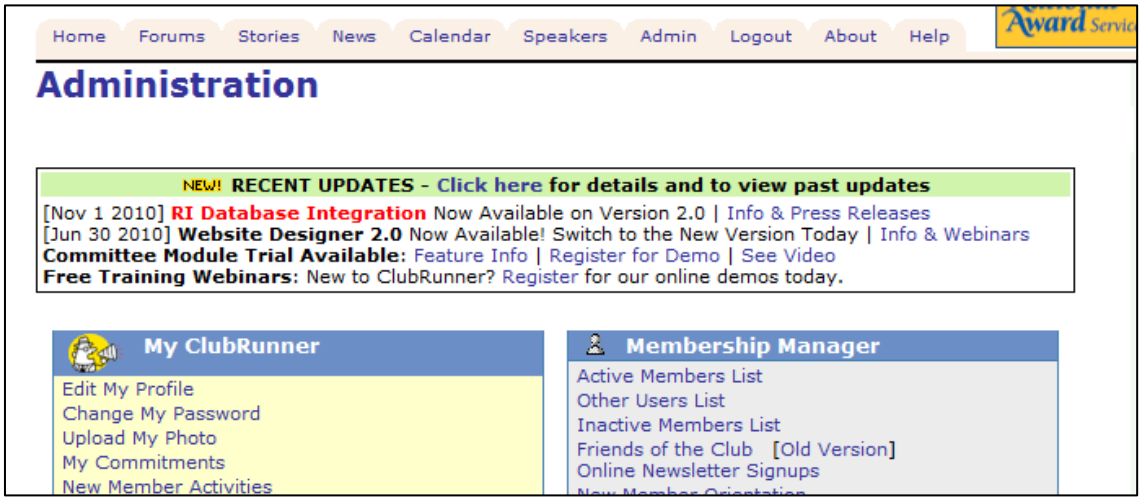
Description	Qty	Unit Price	Amount
	1	$500.00	$500.00
		Total:	$500.00

Roberts, Mark

Description	Qty	Unit Price	Amount
	1	$500.00	$500.00
		Total:	$500.00

Answer: Once an account has been sent to Ex-member the account is no longer active. The account can be deleted after that without affecting RI.

Issue: I opted in at RI. I went to ClubRunner. I do not have a "membership tab" nor do I see the "Switch on Data Integration with RI (Automatic)" link; can you help me with this?



Answer: In order to use the RI integration, your site has to be updated to Version 2.0.In order to switch your site, once logged in and on your admin page, under the Website Manger Module, click on the link "Website Designer 2.0". You must have an access level of 30 to do this.

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Issue: I am worried about how I will be notified of changes when members update their own data once the manual Email submissions to Rotary is discontinued. I need to know changes - will I (or the Club Secretary) be cc'd on the Rotary submission, or is something else going to happen so I can update the non-CR contact manager?

Answer: To fully automate this project with Rotary International no emails will be sent for notification of changes being made. However, there is a featured called RI Integration archive that you can use to see the changes that are being made and reported.

Last Name	First Name	Archived (GMT)	Status
Harold F	**Rotary Member No.: 64**	**)**	
Type: Phone Change Cell			
Harold	F	Oct 15, 2012 05:01 PM	
Harold	F	Oct 15, 2012 05:01 PM	
Type: Fax Change Work			
Harold	F	Oct 15, 2012 05:01 PM	Skipped Due to Club Privacy Settings
Dave H	**(Rotary Member No.: 54**	**)**	
Type: Email Change			
Dave	H	Aug 23, 2012 05:45 AM	
Harold F	**Rotary Member No.: 64**	**)**	
Type: Phone Change Work			
Harold	F	Oct 15, 2012 05:01 PM	

Issue: I have entered a new member, how do I find out what his membership # is?

Answer: Once the information is entered, and if your club is using RI Integration, the information is automatically submitted to RI via e-mail and a number is assigned in approximately a week. If RI Integration is not set, then please contact Rotary International directly for the information to be processed and a number will be assigned.

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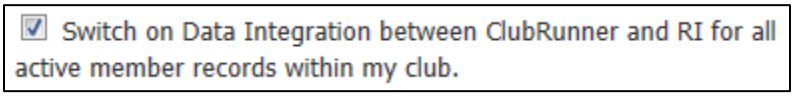
Issue: What are the requirements to be able to use RI Compare?

Answer: Your club needs to set up RI Integration, authorizing ClubRunner to make updates to your membership information on Rotary International on your behalf. It is easy and only needs to be done once on Rotary's Member Access Portal.



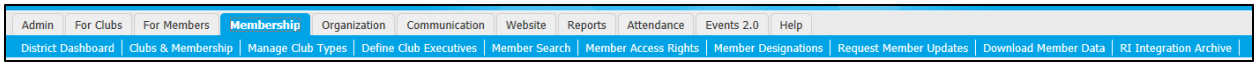
Issue: How does the RI Compare feature work if my District is not on ClubRunner?

Answer: RI Integration is a link established between the club and Rotary International, as Rotary does not recognize Districts as a legal entity as far as authorizing database updates. The authorization must come from the club.

As a club using CR in a non-CR district, you have a choice whether to synchronize your club data through your club's CR site, or through the district website. Our suggestion is to set it up between the club and Rotary, as Rotary requires far more information while Districts are mostly interested in officer information, email addresses, and basic member info. You will still need to continue to update the District site in parallel, as Rotary does not currently offer the ability to pull data down from Rotary to the District.

In a nutshell, in order to use the RI Compare feature, your club needs to have ClubRunner selected as the software vendor authorized to make changes on your behalf.

Issue: Is the RI Compare feature available for District sites?



Answer: No, the RI Compare feature is currently available only for club sites.

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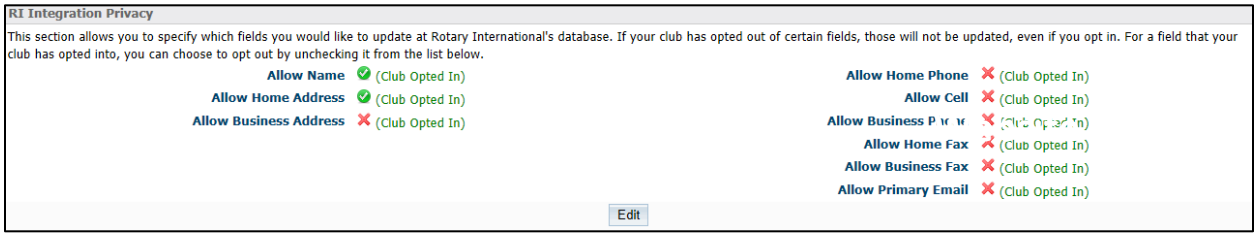
Issue: Why are some fields not synchronizing?

Answer: Some fields will not synchronize because of privacy settings set by the club or the member.



v. Support & Training

Visit our **Support Center** at http: www.ClubRunnerSupport.com to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful "how-to" documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

Knowledgebase This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.	**Downloads** This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.
On-Demand Videos For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.	**Webinar Training** We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend.
Submit a Ticket For technical support, use our Support Center to submit a ticket, or send an email to support@clubrunner.ca. Our turnaround time for email tickets is 2 business days.	**Community** Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.

For the latest ClubRunner updates, follow us on:

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