## ClubRunner

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## Opting In & Out of RI Integration & RI Integration settings on the District

Omar S. - 2023-07-27 - Club Executives on the District

If a Club Executive has already opted you into Rotary International database integration using the RI website, you can 'fine tune' the settings.

Alternatively, your club has the option at any time to discontinue integration and opt out. To do either, follow these steps on ClubRunner.

- 1. Login to the District's website site.
- 2. Click on the **For Clubs** tab.
- 3. Next, click on **RI Integration** settings.
- 4. You will now see a check mark on the new page. Check or uncheck the box labelled **Switch on Data Integration**.

If opting out, you will see a confirmation message in red indicating the date and time that you have rejected integration. At that point in time, all future changes made to your club database will no longer be sent to RI. If you had any pending changes in the queue, those will also be cancelled, however note that if an email was already sent to RI, this cannot be recalled and that change will still be processed

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 2021-03-09 2:16:53 PM by Zig Zigler

1. After integration has been turned on, in the Choose Club RI Integration Privacy

section you will see several check-box options that control exactly which data fields get sent to RI, e.g., *Allow Birthday*, *Allow Home Phone*, etc. You can also assign an **RI Notification Contact**, or the main contact person who gets notified if there are issues with the RI Compare & Sync. The current year secretary is the RI integration contact by default.

Choose Club RI Integra	tion Privacy	
衝 Data Sent to Rotary		
Name	Home Phone	Home Fax
Birthday	Cell Phone	Business Fax
Home Address	Business Phone	Primary Email
Business Address		
🐠 Data Received from F	Rotary	
Receive Data From Rotary?		
Update Privacy		
Rotary Integration Notif	Ication Contact	
The notification contact person lis issues. If the member responds to	ted below will be emailed up to two notifica the email, this will get sent to ClubRunner	ations per week, one for each RI Integration archive. This email lists only RI integration conflicts or support.
By default if no contact is specifie followed by the previous year secr	d below, our system will email your club's <b>c</b> etary, followed by presidents in the same o	urrent year secretary. If one is not specified the system will then look to the next year club secretary, rder. If none of those positions are defined, it will use the Club's website contact.
Select RI Notification Contact	Select Automatically - Restore t	o default contact
		Save

Once the integration is active, you can opt into Rotary 2-Way True Sync, to allow ClubRunner to update it's membership information, with the information entered at My.Rotary.org, automatically. Learn more about the Rotary 2-Way True Sync.

## Turning on 2-Way True Sync:

1. On the RI Database Integration page, scroll to the Choose Club RI Integration Privacy section, then check the **Receive Data From Rotary?** checkbox.

## Choose Club RI Integration Privacy

🚯 Data Sent to Rotary				
Name	Home Phone	🖌 Home Fax		
✓ Birthday	Cell Phone	🗸 Business Fax		
V Home Address	🛃 Business Phone	🔽 Primary Email		
✓ Business Address				
🕭 Data Received from Rotary				
Receive Data From Rotary?				

Update Privacy

1. Next, check the **Membership Updates**, and **Member Information Updates** checkboxes, to allow ClubRunner to update with member additions, terminations, and membership type changes, as well as member profile information updates, entered in My.Rotary.org.

Data Received from Rotar	/
Receive Data From Rotary?	
Membership Updates	Membership Information Updates
Member Addition	Member Home Address
Member Termination	Member Business Address
Member Type Change	Member Email
	Member Home Phone
	Member Business Phone
	Member Cell Phone
	Member Name
	Member Gender
	Member Birthday

1. Click the orange **Update Privacy** button.

Data Received from Rotary	
Receive Data From Rotary?	
Membership Updates	Membership Information Updates
Member Addition	Member Home Address
Member Termination	Member Business Address
Member Type Change	✓ Member Email
	Member Home Phone
	Member Business Phone
	Member Cell Phone
	Member Name
	Member Gender
	🗹 Member Birthday



For further information about Rotary Integration using the District website as a Club Executive, <u>click here to go to the Club Executives on the District RI Integration section</u> of our Knowledgebase.

Related Content

- What is the RI Updates Archive? (District Executive)
- What is the RI Updates Archive on the District?
- How to use the RI Integration Member Updates Archive on the District
- What is the club updates archive on the District?
- How do I set up automatic integration with Rotary International (District)