

What is the RI member update archive?

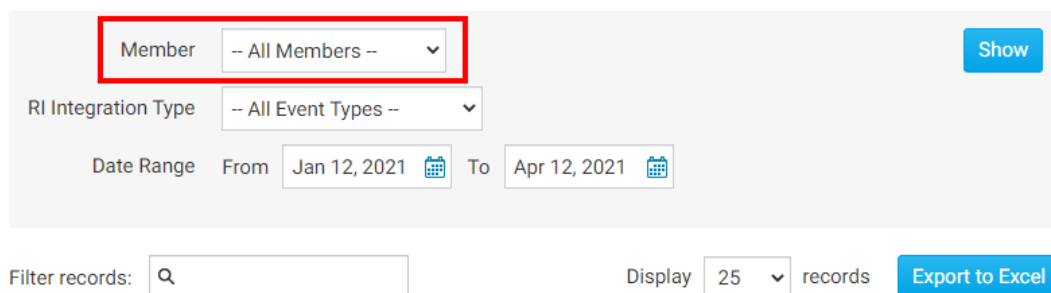
Omar S. - 2021-04-12 - Club Integration

With the **Member Updates Archive** tool in ClubRunner, it's easy to track any and all changes made to members of your Club in one convenient location! To learn how to best make use of this function, please follow the directions below.

1. To access this function, first login to your **Member Area**, click the **RI Integration** tab at the top, and select **Member Updates Archive**.
2. This will take you to the **RI Member Integration Archive**. From here, in the **Member** field, you may select an individual member in your Club or display data relating to all members.

Note: When you first access the Archive Page, all member updates made within the **past 90 days** will be displayed by default until a date range is specified.

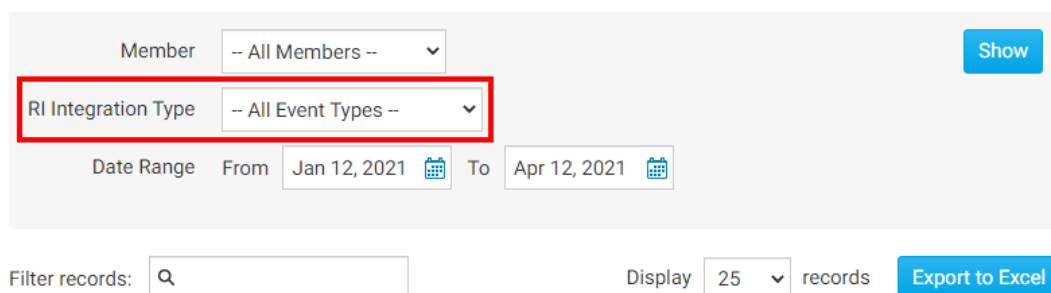
RI Member Integration Archive



The screenshot shows the 'RI Member Integration Archive' form. The 'Member' dropdown menu is highlighted with a red box. Below it, the 'RI Integration Type' dropdown is set to '-- All Event Types --'. The 'Date Range' section shows 'From Jan 12, 2021' and 'To Apr 12, 2021'. At the bottom, there is a search bar, a 'Display 25 records' dropdown, and an 'Export to Excel' button.

3. Below the **Member** field, in the **RI Integration Type** field, you may specify a specific account change for the specified member(s) or all of the below.

RI Member Integration Archive



The screenshot shows the 'RI Member Integration Archive' form. The 'RI Integration Type' dropdown menu is highlighted with a red box. The 'Member' dropdown is set to '-- All Members --'. The 'Date Range' section shows 'From Jan 12, 2021' and 'To Apr 12, 2021'. At the bottom, there is a search bar, a 'Display 25 records' dropdown, and an 'Export to Excel' button.

4. Finally, you may select a **Date** range to display results for a certain date, or leave it blank to display all changes made in the past.

RI Member Integration Archive

Member Show

RI Integration Type

Date Range From To

Filter records: Display records Export to Excel

5. After selecting the desired parameters, you may either click **Show** to have the results displayed directly on the page, or **Export to Excel** to generate an Excel spreadsheet of the data.

RI Member Integration Archive

Member Show

RI Integration Type

Date Range From To

Filter records: Display records Export to Excel

6. There will be 7 columns of data that will be generated based on the above options:

- The **Name** column indicates the member whose account settings were updated.
- The **Change Type** column displays the nature of the change that was made to the member.
- The **Archived** column indicates the date the change was archived.
- The **Status** column indicates the status of the change.
- The **RI Notified** column indicates the date that RI was notified of the change. If you would like to notify RI manually of this change, you may indicate this by clicking on the **Mark as Resolved** link and entering a comment in the provided section.
- The **Initiated By** column indicates who made the change.
- Clicking **Details** under the **Actions** column will show you the exact change that was made so you can compare the new and old values.

RI Member Integration Archive

Member: -- All Members -- [Show](#)

RI Integration Type: -- All Event Types --

Date Range: From Jan 12, 2021 To Apr 12, 2021

Filter records: Display 25 records [Export to Excel](#)

Name	Change Type	Archived	Status	Notified	Initiated By	Actions
Hairs, Janeva	Name Change	Apr 12, 2021 at 3:46 PM	RI Member ID Mismatch Failed to match RI Member ID with ClubRunner Member ID, found in Rotary tab	Apr 12, 2021	Zigler, Zig	Details

7. If you click the **Details** link it will display information about the change.

RI Member Integration Archive

Member: -- All Members -- [Show](#)

RI Integration Type: -- All Event Types --

Date Range: From Jan 12, 2021 To Apr 12, 2021

Filter records: Display 25 records [Export to Excel](#)

Name	Change Type	Archived	Status	Notified	Initiated By	Actions
Hairs, Janeva	Name Change	Apr 12, 2021 at 3:46 PM	RI Member ID Mismatch Failed to match RI Member ID with ClubRunner Member ID, found in Rotary tab	Apr 12, 2021	Zigler, Zig	Details

8. If you clicked **Details**, a window will appear with information about the change.

RI Integration Archive Detail

Member Name

Hairs, Janeva

Update Type

Name Change

Archived

Apr 12, 2021 at 3:46 PM

Status

RI Member ID Mismatch [Compare and Sync](#)

Commented On

Apr 12, 2021 at 3:50 PM

Commented By

Zig Zigler

Comments:

a

Old Data

New Data

Prefix

First Name

Janeva

Jan

Middle Name

Close

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