

How to resolve synchronization failures with RI Integration

Omar S. - 2021-04-12 - Overview

You may receive an email with one of the following subjects:

- **Action Needed: Rotary Database Outstanding Membership Updates**
- **Action Needed: Rotary Database Outstanding Club Updates**

If you have received one of these emails it means that there are one or more issues with your Club or Member information causing the data to be unable to synchronize with RI.

To resolve these issues please follow the steps below:

1. Review the issues from the email you received from us.
2. Access the **Compare and Synchronize** function in ClubRunner to track down and resolve the issues that are affecting your Club/Membership data. **Ideally you should have just one list in the Compare and Synchronize section called "Members in Sync" . If you have any other lists on this page, it means that there are issues with your data.** You may also click on the direct link in your email to view the individual error logs in your [Member & Club Update Archive](#). To learn how to use the **Compare and Synchronize** function page, please read one of the articles below:
 - If you access ClubRunner through your **Club** - [Compare and Synchronize](#)
 - If you access ClubRunner through the **District** - [Compare & Synchronize Function on the District](#)
3. Once you are finished correcting the issue you will need to [mark it as resolved within ClubRunner's Member or Club Update Archive](#) to clear it from future emails.

Why did these updates fail?

The most common issue is **RI Member ID Mismatch**. This issue will appear if the member does not have the correct RI ID in his/her profile, or has a blank (missing) ID. To resolve this issue, you must access that user's profile and update their Rotary ID from within the "Rotary" tab of their profile. You can find out the correct RI ID of the member by using the **Compare and Synchronize** function in ClubRunner. **Many times the ID appears in the "Members Missing in ClubRunner section".**

Members Missing in RI

These members are active and 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 ▾	CR Member Type ▾	RI Member Type ▾	Date Added ▾	Actions
Hairs, Janeva		Active	-	Aug 21, 2020	Add Member To RI

Members Missing in ClubRunner

These members are active and 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 ▾	CR Member Type ▾	RI Member Type ▾	Date Joined ▾	Actions
Hairs, Janeva	10974492	-	Member	Dec 17, 2020	Add Member To ClubRunner

The other most common issue is that the member's name in ClubRunner does not match that of RI's database. *ie. John Smith in ClubRunner vs Jonathan Smith in RI.* This name discrepancy can trigger many different types of failures with synchronizing your data. Click the blue "Compare" button beside that member to consolidate the member information between ClubRunner and RI.

Member Name Mismatches

These members are listed both in ClubRunner and Rotary International, but with different first and or last names. Click on the Compare Link to choose to update their name in Rotary or ClubRunner.

Name in ClubRunner ▾	Name in Rotary ▾	ID ▾	Actions
Hairs, Jan	Hairs, Janeva	10974492	Compare

Additional Information

This message, if any is shown, is the real message ClubRunner received from Rotary International while trying to process the request. In many cases it can help you to better understand why the change did not go through.

How to access the Member & Club update archive

The email you received contains a direct link to these areas to mark the issues as resolved.

You can review the following links to learn how to access these areas if you cannot click on the links in the email.

If the Club has ClubRunner:

- [Member Archive](#)
- [Club Information Archive](#)

If the Club uses ClubRunner at the District:

- [Member Archive](#)

- [Club Information Archive](#)

If you are a District Administrator assisting a Club:

- [Member Archive](#)
- [Club Information Archive](#)

How to mark items as resolved

Each issue in the email you receive from us needs to be marked as resolved so it will be dismissed from the weekly RI integration issue emails.

Now that you are in the Members or Club Update Archive, you can view all of the issues that are outstanding. **The page defaults to showing you the last 90 days of Rotary Integration archives.** If you are not on the Members or Club Update Archive page, please refer to the links above to learn how.

Locating issues to be resolved in the Member Archive

You can search for individual issues in several ways for Member Updates:

1. By Member.
2. By Integration Type.
3. By Date.
4. Filter Specific Results via Search.

Note: If you have additional permissions on the District you can also filter by specific clubs.

RI Member Integration Archive

The screenshot shows a web interface for the RI Member Integration Archive. At the top, there are filter options: 'Member' set to '-- All Members --', 'RI Integration Type' set to '-- All Event Types --', and a 'Date Range' from 'Jan 12, 2021' to 'Apr 12, 2021'. A 'Show' button is on the right. Below the filters is a search bar labeled 'Filter records:' with a magnifying glass icon, a 'Display' dropdown set to '25 records', and an 'Export to Excel' button. The main content is a table with the following data:

Name	Change Type	Archived	Status	Notified
Sansum, Annabelle	Executive Change <i>New Executive</i>	Apr 12, 2021 at 10:07 AM	No Executive Position Match <i>Executive Position Not Supported in RI Integration</i>	No
Broom, Peter	Gender Change	Mar 09, 2021 at 2:16 PM	Skipped Due to Club Privacy Settings <i>Update/Add skipped based on club's privacy settings for this field</i>	No

Locating issues to be resolved in the Club Archive

You can search for individual issues several ways for Member Updates:

1. By Integration Type
2. By Date
3. Filter Specific Results via Search

Note: If you have additional permissions on the District you can also filter by a specific club.

RI Club Integration Archive

RI Integration Type: -- All Event Types -- Show

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

Filter records: Export to Excel

Change Type	Archived	Status	Notified	Initiated By	Actions
Club Mailing Address	Feb 25, 2021 at 3:33 PM	Complete <small>Update completed successfully</small>	No	Bradley, Bill	Details

How to mark issues as resolved

Locate the individual record you need to mark as resolved.

1. Click on the **Mark as Resolved** link located under the **RI Notified Column**.

Smith, John	New Member <small>Home</small>	Feb 25, 2021 at 1:58 PM	Cannot add new member <small>Unable to add new member (unknown reason) {'Message': 'Individual doesn't have historical relationship with Club or Individual is an active Member.'}</small>	No Mark as Resolved	Bradley, Bill
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2. Enter any comments regarding how you resolved this issue in the comment box.

RI Integration Archive Comment

Comments:

* Total characters: 0/480

Cancel Save

3. Click **Save**.

RI Integration Archive Comment

Comments:

Total characters: 0/480

Cancel Save

4. Clicking save will finalize the process and you will not receive additional notifications from ClubRunner regarding this issue. You will see a date with a comment icon beside the issue:

Notified ▾
Apr 12, 2021 🗨

5. Clicking on **Details** in the **Actions** column will allow you to view the resolution recorded.

RI Integration Archive Detail ×

Member Name	Smith, John
Update Type	Terminate Member
Archived	Feb 25, 2021 at 2:58 PM
Status	Terminate Member Failed
Commented On	Apr 12, 2021 at 3:43 PM
Commented By	Zig Zigler
Comments:	Fixed using Compare and Synchronize tool in ClubRunner

Data

Name	John Smith
Termination Date	Feb 25, 2021
Termination	Moved

[Close](#)

Related Content

- [How to use the Compare & Synchronize tool on the District](#)
- [How do I use the Compare & Synchronize tool?](#)