

ClubRunner

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What is the Club Updates Archive? (District Executive)

Omar S. - 2021-04-14 - District Integration

With the **Club Updates Archive** tool in ClubRunner, it's easy to track all changes made to the Clubs 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 the District and access the **Member Area**, click the **Membership** tab at the top.
2. Select **RI Club Updates Archive** on the blue menu bar.
3. This will take you to the **RI Club Integration Archive**. From here, in the **RI Integration Type** field, you may choose to display Club **E-mail, Fax, Mailing Address, Meeting Info, Phone,** or **Website** changes from the list.

Note: When you first access the Archive Page, the default view displays all of the Clubs updates made within the **past 90 days** until a date range is specified.

RI Club Integration Archive

The screenshot shows the 'RI Club Integration Archive' interface. At the top, there are dropdown menus for 'Club' (set to '-- All Clubs --') and 'RI Integration Type' (set to '-- All Event Types --'). Below these is a 'Date Range' section with a 'From' field (empty) and a 'To' field (set to 'Apr 14, 2021'). A search bar labeled 'Filter records:' is also present. The 'RI Integration Type' dropdown menu is open, showing a list of options: 'Club Email', 'Club Fax', 'Club Mailing Address', 'Club Meeting Info', 'Club Phone', and 'Club Website'. Below the form, a table displays a record for 'Tavistock' with a 'Club Website' update on 'Apr 14, 2021 at 8:33 PM' with a status of 'Complete' and a note 'Update completed successfully'.

4. Below the **RI Integration Type**, you may specify the **Date Range** of the targeted Club changes, or leave it blank to display all changes made in the past.

RI Club Integration Archive

Club: -- All Clubs -- Show

RI Integration Type: -- All Event Types --

Date Range: From Jan 14, 2021 To Apr 14, 2021

Filter records:

Export to Excel

5. After setting the above 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 Club Integration Archive

Club: -- All Clubs -- Show

RI Integration Type: -- All Event Types --

Date Range: From Jan 14, 2021 To Apr 14, 2021

Filter records:

Export to Excel

6. There will be 6 columns of data that will be generated:

- **Change Type** - This column indicates the value that was changed.
- **Archived** - This column indicates the date the change was archived.
- **Status** - This column indicates the status of the change.
- **RI Notified** - This 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 **Manually Fix** link and entering a comment in the provided section.
- **Initiated By** - This column indicates who made the change.
- **Actions** - This column displays the **Details** link. By clicking on **Details** it will show you the exact change that was made so you can compare the new and old values.

Filter records:

Export to Excel

Club	Change Type	Archived	Status	Notified	Initiated By	Actions
Tavistock	Club Mailing Address	Feb 25, 2021 at 8:33 PM	Complete <small>Update completed successfully</small>	No	Bradley, Bill	Details
Tavistock	Club Website	Feb 25, 2021 at 8:32 PM	Complete <small>Update completed successfully</small>	No	Bradley, Bill	Details

7. If you click on **Details**, a window will appear with information about the change.

RI Integration Archive Detail
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Update Type	Club Mailing Address	
Archived	Feb 25, 2021 at 8:33 PM	
Status	Complete	

	Old Data	New Data
Address1		2060 Winston Park Drive
Address2		
Address3		
City		Oakville
State/Province		ON
Zip Code		l6h 5r7
Country		Canada

Close

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