

ClubRunner

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What is the RI member update archive?

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

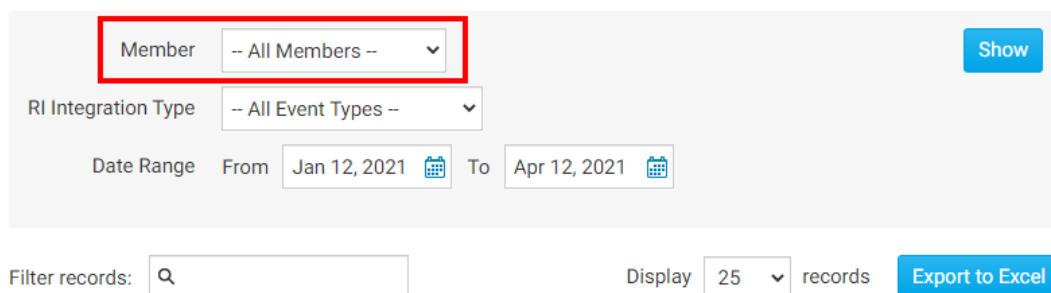
With the **Member Updates Archive** tool in ClubRunner, it's easy to track any and all changes made to members of your Club in one convenient location! To learn how to best make use of this function, please follow the directions below.

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.

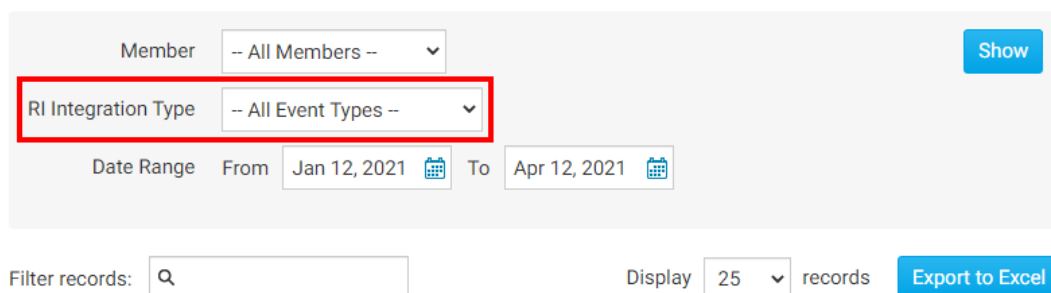
RI Member Integration Archive



The screenshot shows the 'RI Member Integration Archive' interface. At the top, there is a 'Member' dropdown menu with '-- All Members --' selected, highlighted by a red box. To its right is a blue 'Show' button. Below this is the 'RI Integration Type' dropdown menu with '-- All Event Types --' selected. Underneath is a 'Date Range' section with 'From' and 'To' date pickers, both set to 'Jan 12, 2021' and 'Apr 12, 2021' respectively. At the bottom, there is a search bar labeled 'Filter records:', a 'Display' dropdown set to '25 records', and a blue '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



This screenshot is identical to the previous one, but the 'RI Integration Type' dropdown menu, which currently shows '-- All Event Types --', is highlighted with a red box.

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

RI Integration Type

Date Range From

Filter records: Display records

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

RI Integration Type

Date Range From

Filter records: Display records

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 the 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 it was that 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 <small>Failed to match RI Member ID with ClubRunner Member ID, found in Rotary tab</small>	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 <small>Failed to match RI Member ID with ClubRunner Member ID, found in Rotary tab</small>	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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