

HOW TO CHOOSE OR UPDATE A CLUB MANAGEMENT VENDOR IN MY ROTARY



1

NAVIGATE TO THE CLUB MANAGEMENT VENDOR PAGE

Go to My Rotary and select **Sign In** or **Register** for an account if you haven't already

SIGN IN

SIGN-IN EMAIL *

Forgot email? ?

PASSWORD *

Forgot password?

REMEMBER ME ?

SIGN IN

WHY CREATE AN ACCOUNT?

Signing in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Anyone can create an account and sign in. Existing Member Access users can re-register with their current user ID. For tips on registering and using the site, see our [website resources](#). For assistance, contact us.

CREATE ACCOUNT

SIGN IN TO MY ROTARY

REGISTER FOR AN ACCOUNT

Rotary Spotlight

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Go to the **Manage** tab and choose **Club Administration**

Profile Delegation Account Settings Sign Out(RIMailTest+Tai-5649376@gmail.com)

Rotary.org Club Finder

Manage

Club & District Administration

Club Administration

District Administration

Contributions

Reports

Rotary Club Central

Community Marketplace

Official Rotary Apps

Club Management Systems & Website Providers

Marketplace Resources

Brand Center

Our Story

Guidelines

Logos

Materials

Ads

Images & Video

Strengthening Rotary Resources

Products & Services

Shop.rotary.org

Licensed Vendors

Special Offers

Rotary Global Rewards

Travel & Expenses

Club & Member Data

☆ Update Member Data

Report membership changes within 30 days, no later than 1 January or 1 July, to ensure your club invoice reflects the latest information. Add and remove new member sponsors.

[Add, edit, or remove members](#) | [Add, edit, remove club officers](#) | [Record a new member sponsor](#)

☆ Update Club Data

Provide club contact information and choose club management providers.

[Update meeting details](#) | [Update mailing address and contact information](#) | [Designate a club management vendor](#)

Go to **Club & Member Data** and click on **Designate a club management vendor**

2

CHOOSE A VENDOR TO UPDATE CLUB DATA

Scroll down to **Club Management Systems** and click on **Full Access**. This button will disappear from this page until you terminate this vendor.

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more club management vendors to upload club records to Rotary International's database. A district or council may also use a vendor to view club data and access to club information. (Note that, though many vendors may be authorized to view a club's data.) First, your club must be a customer of a club management vendor. Find a list of the vendors and their services on the [Club Management System Website Providers](#) page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate button below.

What kind of access do you want to provide a data management vendor?

One who can update your club's data from RI.

Full Access

One who can only view and show you your club's data.

View-only Access

This step should be done before choosing a vendor to **view** club data.

You can only choose **one** vendor to update club data in Rotary's database on your club's behalf. You should choose **only** update vendor if your club and district are using the same provider.

Select the vendor from the drop-down menu

Identify and authorize a Club Management Vendor

Please read the Agreement below and click on "I Agree" to authorize Rotary International to complete the data integration process and submit your authorization.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

Identify the club management vendor you are authorizing from the dropdown menu below.

Club management vendor

Start Date

01/10/2018 00:00:00

By clicking the "I agree" button, I make the representations and warranties, authorize RI to complete the data integration process in [rotary.org/myrotary](https://my.rotary.org/myrotary) and agree to abide by the terms and conditions set forth below:

1. I represent and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be shared with and used by Rotary International, including its foundation, employees, subsidiaries, agents, and representatives (collectively "RI"), and the club management vendor identified above ("Club Management Vendor").
2. The Club grants RI express consent to integrate Club data, including individual member data, with the Club Management Vendor. The Club represents and warrants that it has granted the Club Management Vendor express consent to provide Club data, including individual member data to RI. The Club grants RI express consent to provide Club data to the Club Management Vendor.
3. The Club understands that it can withdraw its express consent at any time by returning to <https://my.rotary.org/manage/club-district-administration/club-administration> and following the appropriate steps or by contacting RI staff at data@rotary.org. The Club understands that such a withdrawal of consent applies on a go forward basis only and does not affect data that may have been integrated between RI and the Club Management Vendor when consent was current or not withdrawn.
4. The Club agrees to release, defend, hold harmless, and indemnify RI and its members (existing now or in the future), individually or collectively, for all claims, damages, losses, and expenses, including reasonable attorneys' fees, related to any of the data it provides to RI hereunder and the data integrated between RI and the Club Management Vendor, or any privacy or confidentiality laws or regulations, data breach or data theft.

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.



I Agree

I Disagree

Click I Agree

3

CHOOSE A VENDOR TO VIEW CLUB DATA

Once you select a vendor to update club data, go back to **Club Management Systems** and click on **View-only Access**. This button will always be present on this page.

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more club management vendors to link its own membership records to Rotary International's database. A district or zone may also use a vendor to view club data if the club allows that vendor access to club information. (Note that, though more than one vendor may be authorized to view a club's data, only one may update the data.) First, your club must be a customer of a club management vendor. Find a list of the vendors that provide database services on the [Club Management Systems & Website Providers](#) page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

What kind of access do you want to provide a data management vendor?

One who can only view and show you your club's data.

View-only Access

	Vendor	Start Date
Terminate	Roster on Wheels	03-Apr-2018

You can let **multiple** vendors **view** club data. You should do it only if your club and district are using different vendors. However, because these vendors can't update club data, changes you make through their software will not be made in Rotary's database.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration

Identify the club management vendor you are authorized to use.

Select the vendor from the drop-down menu

Club management vendor

If you are allowing this vendor to view or to view and update your club data on behalf of your club, under the dropdown menu "Access granted to" below, please select "Club".

If you are allowing this vendor view-only access to your club data for viewing by your district or zone, under the dropdown menu "Access granted to" below, please select "District" or "Zone," as applicable.

Access granted to

Select the party that has access to view club data (Rotary club, district, or zone) from the drop-down menu

You can allow multiple vendors view-only access to your club data, but only one vendor can update your data. Repeat this process as many times as necessary if you are allowing multiple vendors to update your club data.

Start Date
01/10/2018 00:00:00

By clicking the "I agree" button, I make the representation and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be shared with and used by Rotary International, including its foundation, employees, subsidiaries, agents, and representatives (collectively "RI"), and the club management vendor identified above ("Club Management Vendor").

1. I represent and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be shared with and used by Rotary International, including its foundation, employees, subsidiaries, agents, and representatives (collectively "RI"), and the club management vendor identified above ("Club Management Vendor").
2. The Club grants RI express consent to integrate Club data, including individual member data, with the Club Management Vendor. The Club represents and warrants that it has granted the Club Management Vendor express consent to provide Club data, including individual member data to RI. The Club grants RI express consent to provide Club data to the Club Management Vendor.
3. The Club understands that it can withdraw its express consent at any time by returning to <https://my.rotary.org/manage/club-district-administration/club-administration> and following the appropriate steps or by contacting RI staff at data@rotary.org. The Club understands that such a withdrawal of consent applies on a go forward basis only and does not affect data that may have been integrated between RI and the Club Management Vendor when consent was current or not withdrawn.
4. The Club understands that it may be required to disclose information related to any of the data it provides to RI hereunder and the data integrated between RI and the Club Management Vendor or any privacy or confidentiality laws or regulations, data breach or data theft.

Click I Agree

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.

4 CORRECT OR CHANGE VENDORS FOR UPDATING CLUB DATA

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more vendors to upload membership records to Rotary International's database. A district or zone may also allow a club to have access to club information. (Note that, though more than one vendor may be used, only one may update the data.) First, your club must be a customer of a club management system. Find a list of the vendors that provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

Go to Club Management Systems and click Terminate

What kind of access do you want to provide a data management vendor?

One who can only view and show you your club's data.

View-only Access

	Vendor	Start Date	Access Level	Access Granted To
Terminate	Roster on Wheels	03-Apr-2018	Read	Taipei An Ho

Terminate Partner Organization

The partner organization can be terminated by one day prior to today.

Enter the end date and click Submit

Partner Organization: Club Communicator

StartDate
10-Jan-2018

EndDate
09-JAN-2018

Submit

Cancel

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more vendors to upload membership records to Rotary International's database. A district or zone may also allow a club to have access to club information. (Note that, though more than one vendor may be used, only one may update the data.) First, your club must be a customer of a club management system. Find a list of the vendors that provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

Scroll down to Club Management Systems and click on Full Access to enter a different vendor

What kind of access do you want to provide a data management vendor?

One who can update your club's data from RI.

Full Access

One who can only view and show you your club's data.

View-only Access



DACdb to RI “Direct Connect” Selection Process

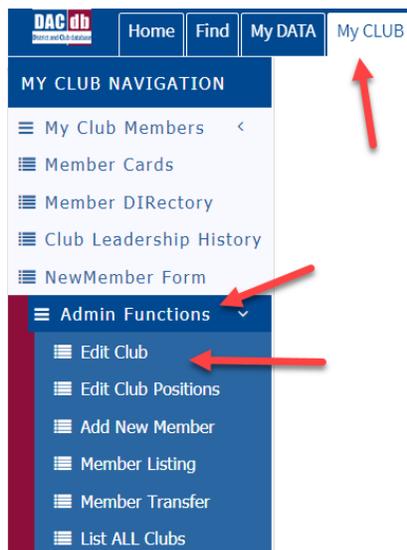


Choose DACdb as Your Club System Management Partner Organization

You have completed the first step of the **RI DIRECT CONNECT** processing for your club. Now for **STEP 2**.

Step 2: Choose “RI Direct Connect” in the DACdb database.

A current club officer logs into **DACdb** database, then clicks on the **My Club** tab. Left side click on Admin Functions then Edit Club



On the **Information** page (near the bottom of the page), click on the **Rotary Interface** drop down selection and choose **RI “Direct Connect”**. Then click on the **Partner Interface** and select **“DACdb”**.

Club Options:

Notify on File Upload: Notify Club members when a document is added or updated

Map Display: Turn on/off MyClub map display

RI Direct Connect Interface *also* requires corresponding setting change in RI Partner Option of My Rotary.

Integration Partner

District PMail OptOut: Level-9 setting -- Club level opt-out of District PMails

Click on Update

That's it! Congratulations! You have now completed the 2 steps necessary to activate the interface to update club and member changes entered into **DACdb** directly into the RI database (usually takes about 24 hours to activate at RI). You will now have the **RI Compare** functions available for your club.