

To synchronise data between the RIBI Template and RI Global Database Systems, you will need to login to the RIBI Data Management System (DMS) at [dms.rotarygbi.org](https://dms.rotarygbi.org) using your RI login information as if you were accessing MyRotary or the Members Area of the RIBI website.

Data synchronisation functions are in three parts and can be found under a section in the DMS called 'My Area' they are as follows:

### 1) My Profile

- a. An area for an individual member to check their personal data held in both the RI and RIBI databases, to make changes and then synchronise from one system to the other. This is all part of our compliance under the Data Protection Act and also ensures the individual takes some responsibility for accurate personal information.

### 2) My Club(s)

- a. From here, Club Admins/Secretaries can update member data and synchronise individual club member records (on the RIBI side), draw down members from the RI system into the RIBI system, and create new records in the RI system from the RIBI system.
- b. District Admins/Secretaries can do the above actions for any club in their district.

### 3) Officers

- a. A system that automatically draws information from RI and RIBI together in relation to Club Officers. It shows the data on a single screen and the club administrator can amend current year officers and add/delete officers for the next Rotary year. Please note that this is only to update the RI officer data and you will therefore need to ensure that your other club officers are added and up to date through the normal club admin process in the RIBI Template system.

The first job for the Club Secretaries/Executive Secretaries is to accept the 'third-party' link in the Club Administration Area on MyRotary. Please see help sheet Data Integration Preparation. Until this step completed, club records **will not** synchronise.

Once the link between the two systems has been setup, the Club/District Admins/Secretaries will be able to look at the records and decide whether they wish to push updates to RI or download records from RI.

Having made sure your club member records are accessible, an important task that needs to be completed without too much delay is that of setting Club Officer information for 2016/17. This is achieved in the DMS under the 'Officers' section. When this area is accessed, the system checks information in both the RIBI and RI databases, merging details which you can then amend as required.

On page 2, you will find more information on the functionality of the Data Synchronisation elements of the DMS.

Any questions or concerns you may have on the Data Management System should be emailed to [dms@rotarygbi.org](mailto:dms@rotarygbi.org) – this is a specific email account for support purposes to ensure we don't lose questions/queries in the everyday activities of the Rotary Support Centre.

Finally, we have been writing an online help system for the DMS and you can access this at <http://www.rotarygbi.org/dms-help/> - do take a look, it's shaping up nicely!

## My Area – Data Synchronisation, Why we are doing this?

Data synchronisation in the DMS has been developed to enable Club Secretaries/Club Admins to update Club Member and Club Officer data in a single place rather than needing to maintain two database as has previously been the case.

## My Profile:

These areas of the system present **Personal** user information. This page shows you template information alongside RI global information. The RI Global account is found based on membership ID, and once on this page you are given the ability to make changes to template data which can then be pushed to replace current RI data, or if RI data is correct you can pull this information in to overwrite the template information.

## Notes:

- The fields shown are the only fields which are editable within the RI Global database.
- Within the data synchronisation are, the e-mail address is not editable as it is used for primary login purposes in both databases; incorrect updates could invalidate a user's login.
- The option Push to RIBI Template will download data from RI and overwrite data in the RIBI Template.
- The option Save and Push to RI will save information you have changed in the RIBI data fields and then overwrite the data held in the RI record.

## My Clubs:

The My Clubs page allows for Club Admins to see people within their clubs and District Admins to see clubs within their district and the people attached to these clubs. This page allows for club/district admins to make changes to user data. For example a Club Admin can go within their club and make changes to other users information within that club. District Admins however can do that to any person within a club in their district.

If there are any discrepancies between the template DB and RI then this button will appear: **Sync**

**Members From RI Global**. This system is built so that if there are new members or any members within the RI database that are not in the template DB they can then be pulled in from RI.

## Notes:

- Only club admins and district admins have access to this page. Club admins can see club, district admins are able to see clubs within their district.
- At a glance you will be able to see whether the user has confirmed their data or not.
- You can go into individual users, see their data and make amendments.
- Sync Members From RI Global DB: If there are discrepancies between the template DB and RI then this button will appear. Allows you to copy across members from RI Database into template.

## Officers:

Automatically draws information from RI and RIBI together for Club Officer records. It shows the data on a single screen and the club administrator can amend current year officers and add/delete officers for the next Rotary year

**Limit of 40 characters within the address field:** Unfortunately like most things we are working around RI's system. The reason we are limited to 40 characters is because RI has that limit. I will speak to RI and see what we can do to change this. As pointed out some country addresses need a much higher word count.

**Which User can do what within the DB:** This will be clearly defined when you log in to the system. It is built around permissions so that whatever you see is what you have access to. An example would be that District Admins have the capability to edit information for any club members within their district. But members would never see the option to do this.

## Access Levels:

Club Secretaries will have the same access rights as Club Admins, District Secretaries will have the same access rights as District Admins