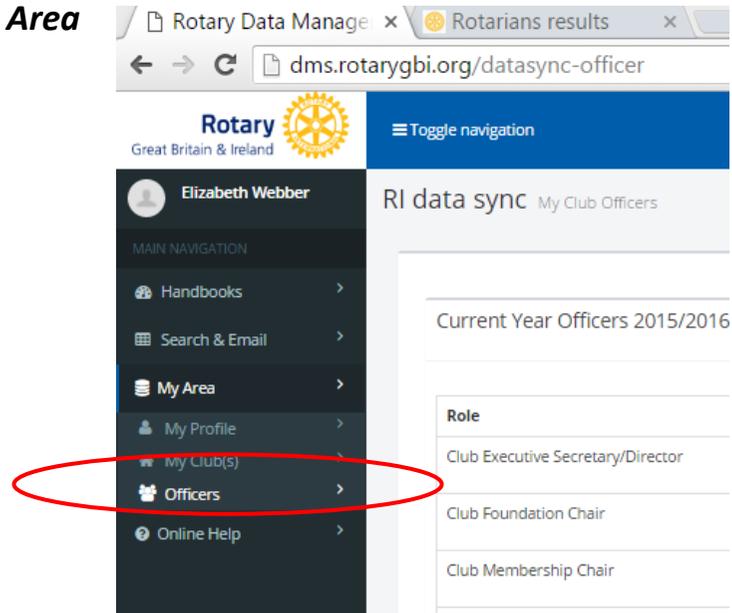


Synchronising Club Officers within the Data Management System

If the officers have already been assigned, this is a simple two click procedure from within the DMS as follows:

1. Login to the DMS either via the RIBI Template system or directly from <http://dms.rotarygbi.org/login>
2. From the left-hand vertical menu, select **My Area**
3. From the sub-menu select **Officers**



When the Officers tab has been selected, the system will retrieve data held in the RIBI Template database and the RI Global Database, populating the DMS screen with the results. If a post has been assigned to different people in each of the two databases, it is the RI Global database information that will be taken as the master data.

If the information needs to be corrected or added to, you can make changes from this screen which will lead to updates being made both databases in real-time.

Synchronising Club Officers within the Data Management System

4. Once data has been retrieved, the Officers screen will look similar to this:

The screenshot displays the 'RI data sync' page for 'My Club Officers'. The page is divided into two sections: 'Current Year Officers 2015/2016' and 'Future Officers 2016/2017'. Each section contains a table with columns for Role, Start Date, End Date, RI Number, Name, Edit, and Delete. The 'Current Year Officers' table has 7 rows, and the 'Future Officers' table has 7 rows. The 'Edit' column contains a pencil icon, and the 'Delete' column contains a trash can icon.

Role	Start Date	End Date	RI Number	Name	Edit	Delete
Club Executive Secretary/Director	07/01/2015	06/30/2016	5701712	Amanda Watkin		
Club Foundation Chair	07/01/2015	06/30/2016	8169199	Robert Rainbow		
Club Membership Chair	07/01/2015	06/30/2016	5853093	Keith Lea		
Club Treasurer	07/01/2015	06/30/2016	1968249	David Strain		
Club Secretary	07/01/2015	06/30/2016	1822316	Bryan Carpenter		
Club President	07/01/2015	06/30/2016	3157813	John Scott		

Role	Start Date	End Date	RI Number	Name	Delete
Club Executive Secretary/Director	07/01/2016	06/30/2017	5701712	Amanda Watkin	
Club Foundation Chair	07/01/2016	06/30/2017	2505564	Peter Ramage	
Club Membership Chair	07/01/2016	06/30/2017	5701712	Amanda Watkin	
Club Secretary	07/01/2016	06/30/2017	1822316	Bryan Carpenter	
Club President	07/01/2016	06/30/2017	5704899	David Saunders	
Club Treasurer	07/01/2016	06/30/2017	1968249	David Strain	

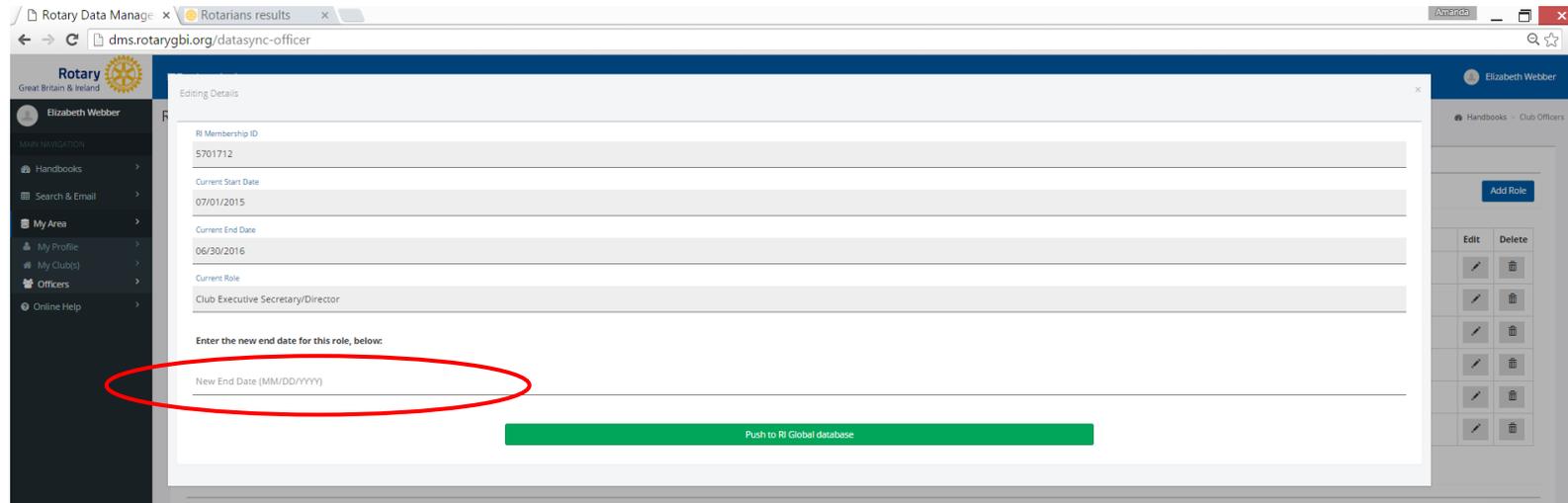
5. If all officers are correct, you can simply exit the screen at this point as synchronisation will be complete!

If you need to make changes to the listed officer, these are made as follows:

1. **To remove a person** from a role, click on the trash can icon. You will receive a confirmation prompt, select delete to remove the post, cancel to return to the record.

Synchronising Club Officers within the Data Management System

2. **To amend a current year post:** click the pencil icon to edit, the following screen will be displayed:



The screenshot shows a web browser window with the URL dms.rotarygbi.org/datasync-officer. The page title is 'Rotary Data Management System'. The user is logged in as Elizabeth Webber. The main content area is titled 'Editing Details' and contains the following information:

- RI Membership ID: 5701712
- Current Start Date: 07/01/2015
- Current End Date: 06/30/2016
- Current Role: Club Executive Secretary/Director

Below this information, there is a section titled 'Enter the new end date for this role, below:' with a text input field labeled 'New End Date (MM/DD/YYYY)'. A red circle highlights this input field. At the bottom of the form, there is a green button labeled 'Push to RI Global database'.

This function is designed to enable a post holder to be changed without removing the history of their time served. The edit function reflects a change in the end date for the post. Simply enter the date and click the green button 'Push to RI Global Database'.

3. **To add a role:** click the blue ADD button (for either current year records or future year records).

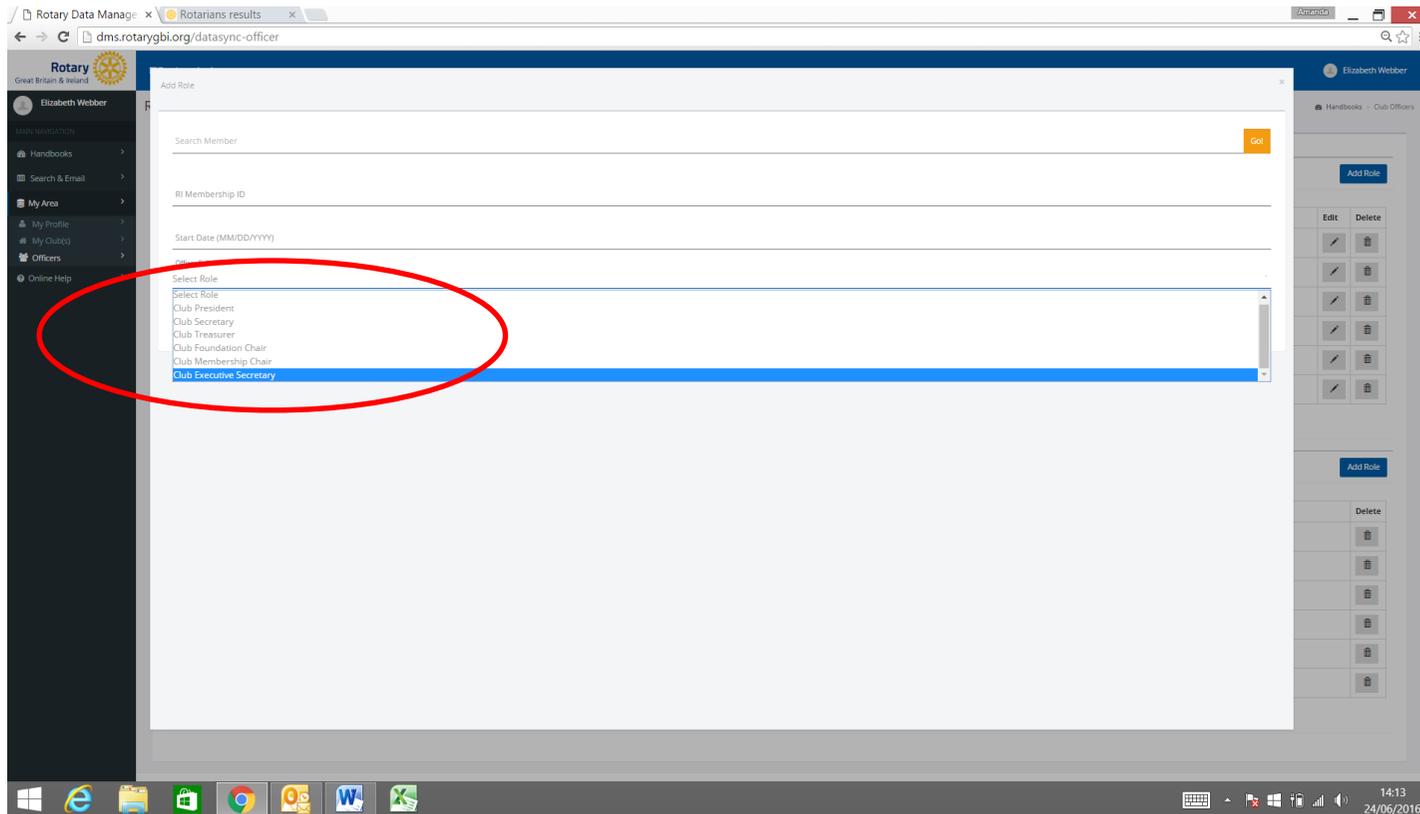
If you add a record for the current year, you will be asked to enter the start date for that role. This allows for changes part way through the year as required. When you add a role for the future year the end/start dates are assumed as 1/7 and 30/6 respectively.

The roles that can be assigned through the DMS are limited to the six roles recognised by RI, namely: Club President; Club Secretary; Club Treasurer; Club Foundation Chair; Club Membership Chair.

Generally, Club Officers should be assigned through the RIBI Template to ensure that ALL roles are correctly identified and therefore become available in Handbooks, emails and search facilities.

Synchronising Club Officers within the Data Management System

The add screen will be shown as follows:



Assigning Roles

- a. To assign a member to one of the six roles, select the member by either clicking on the orange GO! button and choose from the club member list, or type part of their name and press enter. To make the selection, click the icon. 
- b. Select the role from the drop down list (as in the screen shot in above); enter the start date if the assignment is for the current year; click the green button 'Push to RI Global Database' to complete the process.