



**Data Management System (DMS) &
RIBI Template System (RIBI-T)
User Help Guide**

Gaining access to the My Rotary, DMS & RIBI Template systems

How to use the My Rotary, DMS & RIBI Template systems

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1. Introduction

This document has been created to serve as a starter guide for Club & District Administrators on how to use the **Data Management System** (hereon referred to as the **DMS**) and the **RIBI Template System** (hereon referred to as the **RIBI-T** or **Template System**) to effectively manage their club's membership records, member details and club details. It will begin by explaining the process of becoming an Administrator for your Club or for your District on the DMS & the Template, while then going into detail on how to operate the systems correctly.

It also contains reference to how a normal (non-officer or administrator) member sees the DMS and what they can interact with and use.

On the following pages you find some basic background information on My Rotary, the Template System and the DMS.

1. (a) Additional support & reporting issues

If you need support in completing or understanding any of these steps or sections featured in this guide, please get in touch via the dedicated DMS email address – dms@rotarygbi.org. This email is the primary point of contact when you require assistance with the DMS or the Template system.

It is also recommended to raise new bugs and issues via the dedicated bug report form for the DMS, found on the Rotary GB&I website [here](#).

You can also contact the Club & District Support Team, who can also assist with queries relating to these systems by emailing cds@rotarygbi.org.

If you would prefer to call, please use the office number of 01789 765411 and option 6 which will put you in touch with the Club & District Support & the DMS Teams.

Important information regarding queries or issues: when passing along issues for us to look into, please include a minimum of:

- The member in question's name
- The member in question's RI number (if recorded)
- The member in question's club
- The residing district of the member in question.

If you have any queries, suggestions, or amendments regarding this guide, please let me know on the DMS email address as mentioned above.

For further support on the Template system, Rotarian Dave Wheatley has created a [dedicated support forum](#) with over 500 members using the Template system. The experience of these members ranges from first-time Template users, all the way to experienced (and needless to say highly knowledgeable!) users. If you have any queries regarding the Template, feel free to ask on the forum and many of the members will be more than happy to help!

1. (b) Rotary Systems for Club & District Administration

Below is information regarding the different Rotary online systems used to update your club and member data.

My Rotary

To use the majority of online systems that Rotary Great Britain & Ireland and Rotary International have to offer, you will require a “My Rotary” login. My Rotary primarily refers to the members-only area on the Rotary International website, which contains facilities for updating your member details, adding officers and adding and removing members.

As this system is created and developed by Rotary International, it has no direct functionality to integrate itself with our RIBI systems. The introduction of the DMS means that these two sets of data can now work together. The login system that My Rotary uses is also used on all of our RIBI systems, hence why a My Rotary account is required.

RIBI Template System

The RIBI Template System is the name given to the system developed by Rtn. Chris Sweeney, which has allowed Rotary clubs to make use of a standardised template system for their own club websites. Due to the type of information recorded, and required access levels to amend this data, the Template System contains a database of members, with details and officer roles, similar in the way that My Rotary does.

While the DMS is the main area for members to go to in order to make changes to your club and member data, there are still features on the Template that are not yet implemented on the DMS (these will be listed further on within this guidance). This makes it crucial to have the ability to log into the Template system correctly if you are a Club or District Administrator.

- Most changes made on the Template **will** show on the DMS, but these changes **may not** be synced with My Rotary. The DMS takes data directly from the Template database, meaning both systems contain the *same* data from the *same* source, where My Rotary doesn't.

DMS

The Data Management System was designed to facilitate the synchronisation of data between My Rotary and the RIBI Template, through automatic and manual means. As the Template system has been used for many years as a standalone source to enter information, a lot of this information differs from what is recorded on My Rotary.

The DMS is primarily used by Club and District Officers, although members outside of these groups can log in and make changes to their information within their profile and use many other features the DMS has to offer.

- The current club officers that can make changes on the DMS are listed on page 34 of this guide.
- To allow the synchronisation, your club must complete the “Vendor Linking” process described further into this guide.

2. Gaining access to our Rotary Systems

2. (a) Creating a My Rotary account

Creating a My Rotary account is the first step in logging onto all of our systems and is a very simple process through the Rotary International website.

Please note - My Rotary and the Rotary member's areas can only be accessed by members of Rotary International and not by members of the public. Honorary members also have a restricted access.

1. To create a My Rotary login on the Rotary International website, please click [here](#) to go the registration page and enter your First and Last names as well as your Email Address.
 - If you click this link and are already logged in, it will take you to a page saying **"We are sorry, your account has limited access."** – this is not the case, and is an error that is easily removed by logging out (in the top right corner "Sign out") and logging in again.
 - When registering for a My Rotary account, please stick to the same name you gave when joining (e.g. don't use shortened names such as Bill instead of William or alternative names if possible). If you use a different email address to what we have on record, you may be prompted to provide more details, such as your club name or your RI number.

Please see the [Additional support](#) section of this guide if you have any issues with this.

2. You will then receive an email asking you to confirm your registration. This will contain a link asking you to create a security question and answer, as well as a password. Please retain these details for future reference.
 - If you have forgotten your password, please use the password reset page [here](#), and If you have forgotten your email, please get in touch with the [DMS Team](#) or the [Club & District Support Team](#) or call on 01789 765411, option 6.
 - **Note – at this point if you are a club officer and are recorded as such on the RI My Rotary database, you should now be able to login to the DMS correctly.**

2. (b) Setting up access on the RIBI Template System

The RIBI Template database is accessed through your club's Template website and contains membership records and details, as well as information regarding your club. Although the DMS is the primary place to update information, there are some parts of your data that can only be amended the Template currently.

1. Log into the RIBI Template system by clicking [here](#), and then clicking on the button that says [Click here to log in with your RI details](#) near the top.
 - Please **do not** use the "User Name" and "Password" boxes *while following this guide*, as this uses separate details. Feel free to explore this option for members of your club that want access to members online Template pages, but don't have a My Rotary account, and for yourself once you've completed this guide.
2. This will redirect you to the RotaryGBI website login page, asking you to login there with your My Rotary details, which will then redirect you back to your Template website, once you are successfully logged in.
3. Check the options available on your dashboard. After logging in, make sure you can see the orange "Club Admin" if you are a Club Administrator, and if you are a District Administrator you will see the blue "District Admin" option too

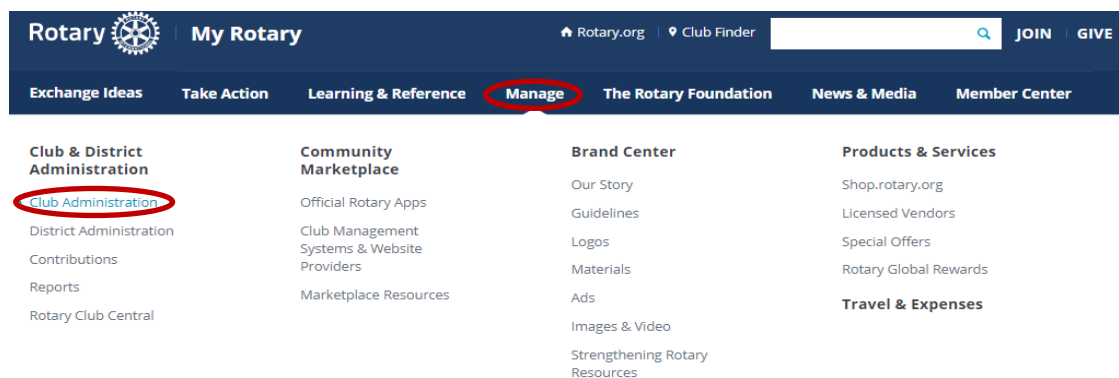
Please see the [Additional support section](#) of this guide if you have any issues.

You are now successfully registered with a My Rotary account and have the correct access to the RIBI Template System. At this stage you should ensure that your personal listed details on the Template System are correct, especially your email address.

2. (c) Setting up your Club to integrate with the DMS

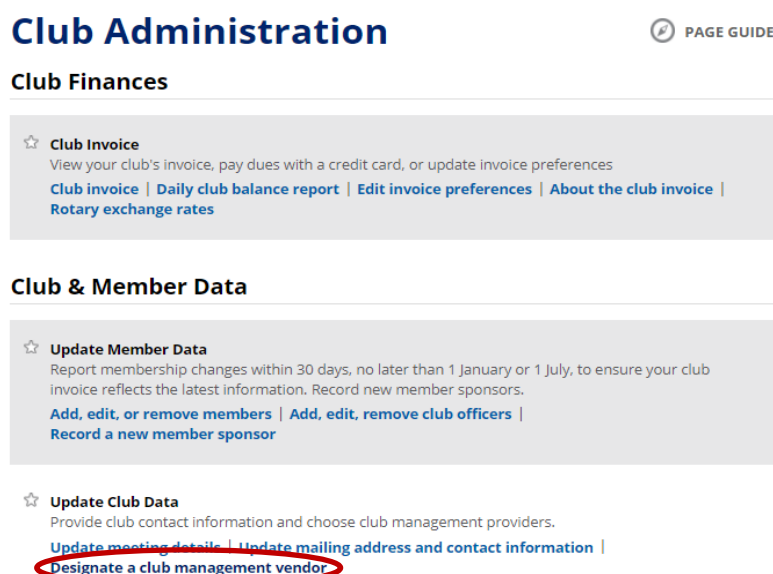
Before logging into the DMS, you will need to ensure that your club is “Vendor Linked” with “RIBI Data Integration” on My Rotary. “Vendor Linking” is a term used by Rotary International, the “Vendor” is the system or supplier that provides updates to My Rotary, in this case the DMS. The “Linking” refers to connecting the My Rotary database to the “Vendor”, thus creating the link. The steps for this are very specific and must be followed correctly to complete the link fully. **Note that the CDS Team complete this task automatically for each club, but it doesn’t hurt to check if you are having issues!**

1. Log into My Rotary [here](#).
 - District officers or administrators cannot complete this link on behalf of clubs, you need to be a club officer to complete the link.
2. Hover your mouse over “Manage” and select “Club Administration”



- On a mobile device, tap the top left corner, on the “Menu” option, then tap “Member Center” near the bottom of the list. Next, tap on the “Club & District Administration” again, near the bottom of the options. Finally, tap on “Manage my Club”. [MANAGE MY CLUB](#) This will take you to the same point as above.

3. You then need to navigate to the “Designate a club management vendor” option, under “Club Administration”



4. Scroll down to the “Club Management Systems” section and note the options of “Full Access” and “View-only Access”. It is crucial you choose “Full Access”, otherwise the DMS will not be able to update or synchronise your data with My Rotary.

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?

Fournisseur pouvant mettre à jour votre base de données à partir de celle du Rotary.

Full Access

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

View-only Access

5. From here you will get the option to select your chosen Management Vendor. To allow the DMS to access your My Rotary data, you need to choose “RIBI Data Integration” from the dropdown list. Ensure you click “I Agree” after choosing the Vendor.

Identify and authorize a Club Management Vendor

Please review 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

Dropdown menu showing club management vendors:

- SEMDA Germany
- Club Collaborator
- SEMDA Sweden
- Swiss RCMS - SEMDA
- District 3131
- Roster on Wheels
- ClubRunner
- Club Communicator
- SEMDA Austria
- ezclub
- Team Forte, Inc.
- SEMDA Denmark
- SEMDA Finland
- SEMDA Netherlands
- DACdb
- SEMDA Districts 2041-2042
- Semda D2032
- District 4420
- RIBI Data Integration**

I, the undersigned, make the representations and warranties, authorize RI to complete the data integration and agree to abide by the terms and conditions set forth below:

I have the authority to act on behalf of my club (the “Club”) and to enter this Agreement that the members of my Club understand that their personal and member data will be shared with Rotary International, including its foundation, employees, subsidiaries, agents, and representatives, and the club management vendor identified above (“Club Management Vendor”).

I consent to integrate Club data, including individual member data, with the Club Management Vendor. I represent and warrants that it has granted the Club Management Vendor express consent to integrate individual member data to RI. The Club grants RI express consent to provide Club data to RI.

I 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 that RI shall not be liable to the Club or its members (existing now or in the future), individually or collectively, for any damages of any kind whatsoever 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

2. (d) Logging into the DMS

This section of the guide details the logging in process for the DMS. This becomes very straight forward if the previous steps have been completed successfully. After logging in, you will need to ensure that your data is correctly synchronised.

1. Ensure your email address recorded on the Template matched the one you used to register for a My Rotary account. **This is crucial for logging into the DMS correctly.**

- Due to the login system that the DMS uses, you must have the same email address on the RIBI Template, as the email address you use to login to My Rotary.

2. Simply log into the DMS via the login page [here](#), using your My Rotary details.

Now you have successfully logged into all of our systems that can be used to update information for your club and membership. The next section of this guide contains a list of the different functions each system can complete now that you have access.

2. (e) Logging in issues for any of the RIBI or RI systems

Although this is a short section, please note that if you are having any trouble logging into any of the My Rotary, DMS or RIBI Template systems, please [get in touch with us](#) for further support.

3. Understanding My Rotary, the DMS and the RIBI Template

Below you will find a table which displays the key differences on what can be updated, amended or changed on our Rotary systems. The differences are examined between My Rotary, the DMS and the RIBI Template System. **Wherever possible, please use the DMS to make required changes.**

Function	My Rotary	DMS	RIBI Template
<i>Adding member</i>	Yes (Not synced)	Yes (Synced)	No
<i>Removing member</i>	Yes (Not synced)	Yes (Synced)	No
<i>Transferring member</i>	Yes (Not synced)	Yes (Synced)	No
<i>Editing member details</i>	Yes (Not synced)	Yes (Synced)	Yes (Not Synced)
<i>Adding Club officers</i>	Yes (Not synced)	Yes (Synced)	Yes (Synced)*
<i>Removing Club officers</i>	Yes (Not synced)	Yes (Synced)	Yes (Not Synced)
<i>Editing member emails</i>	Yes (Not synced)	Yes (Synced)	Yes (Synced)*
<i>Changing passwords</i>	Yes (Not synced)	No	Yes (Not Synced)**
<i>Updating meeting location</i>	Yes (Not synced)	No	Yes (Not Synced)
<i>Updating Honorary member details</i>	Yes (Not synced)	Yes (Synced)	Yes (Not Synced)
<i>Synchronising members between My Rotary and RIBI Template</i>	No	Yes (Synced)	No
<i>Creating Club & District Handbooks</i>	No	Yes	No
<i>Creating Club & District Business Cards</i>	No	Yes	No
<i>Creating Club & District Membership Cards</i>	No	Yes	No
<i>Emailing of select groups of officers</i>	No	Yes	No
<i>Adding Club committees</i>	No	No	Yes (Not Synced)
<i>Adding Areas (District Only)</i>	Yes	No	Yes (Not Synced)
<i>Removing Areas (District Only)</i>	Yes	No	Yes (Not Synced)

* The DMS facilitates the automated synchronisation of the specified details that are added or amended in the Template system. Please note that for officers, only the 6 (President, Secretary, Executive Secretary, Treasurer, Foundation, Membership) recorded by Rotary International are synced.

** You can change your RIBI Template password through the RIBI Template system, however your My Rotary login details can only be amended through the My Rotary system/website.

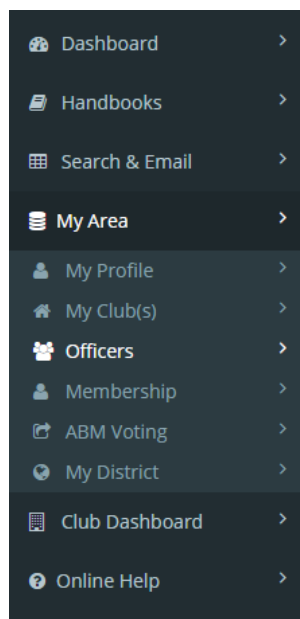
This list should cover the majority of the different adjustments club or district officers may need to make to their membership or member details. We are slowly incorporating many features from the Template system into the DMS, making it more effective in what it can do for members. The rest of this guide will detail how to use each of our RIBI systems to make changes and amendments.


4. Using our systems to update/change club and member details

4. (a) Synchronising your members on the DMS for the first time

Now you have successfully logged into the DMS and had chance to see some of the capabilities of each system, you should begin to synchronise your members from My Rotary to the DMS. You will need to manually synchronise your members for the first time, this simply makes sure that the DMS and RIBI Template system are populated with the same information as My Rotary.

1. Next, you will need to ensure your members are synchronised from My Rotary. Go to “My Area” then “My Club(s)” on the left-hand side navigation bar.



2. This will bring up all of your members that are currently on the DMS and the RIBI Template system (note that the DMS and the Template system use the same database, meaning that your member listing on both these systems will be identical).
 - You could potentially have anywhere between *one* to *all* of your members showing on the DMS. So long as your membership is close to being up to date on My Rotary, (as it should be, especially due to the requirement of Subscription fees every 6 months), you can easily synchronise your club’s members across.
3. You will shortly get a green button appear on the top left of your screen saying “Sync Members: RI Global”  which is used to view a list of all your members that are recorded on My Rotary, but not on the DMS/Template system.
 - Upon viewing this list, you may see members listed on there that are already listed on your DMS list of members, or members that have left your club at some point. For the sake of insuring your data is completely correct on all systems, it is recommended that you synchronise **all** the members that are in that list and amend any discrepancies later.

4. To synchronise the members, you need to tick the check box on the left of **each** record, until they are **all** selected. Then simply click “Push to RIBI Template” and allow the system some time to bring all the members and their details across.

RI Global member(s) missing in RIBI Template Database

	RI Membership ID	Name	Address	Tel	Email	Terminate
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	
<input type="checkbox"/>	~~~~	~~~~	~~~~~	~~~~	~~~~~	

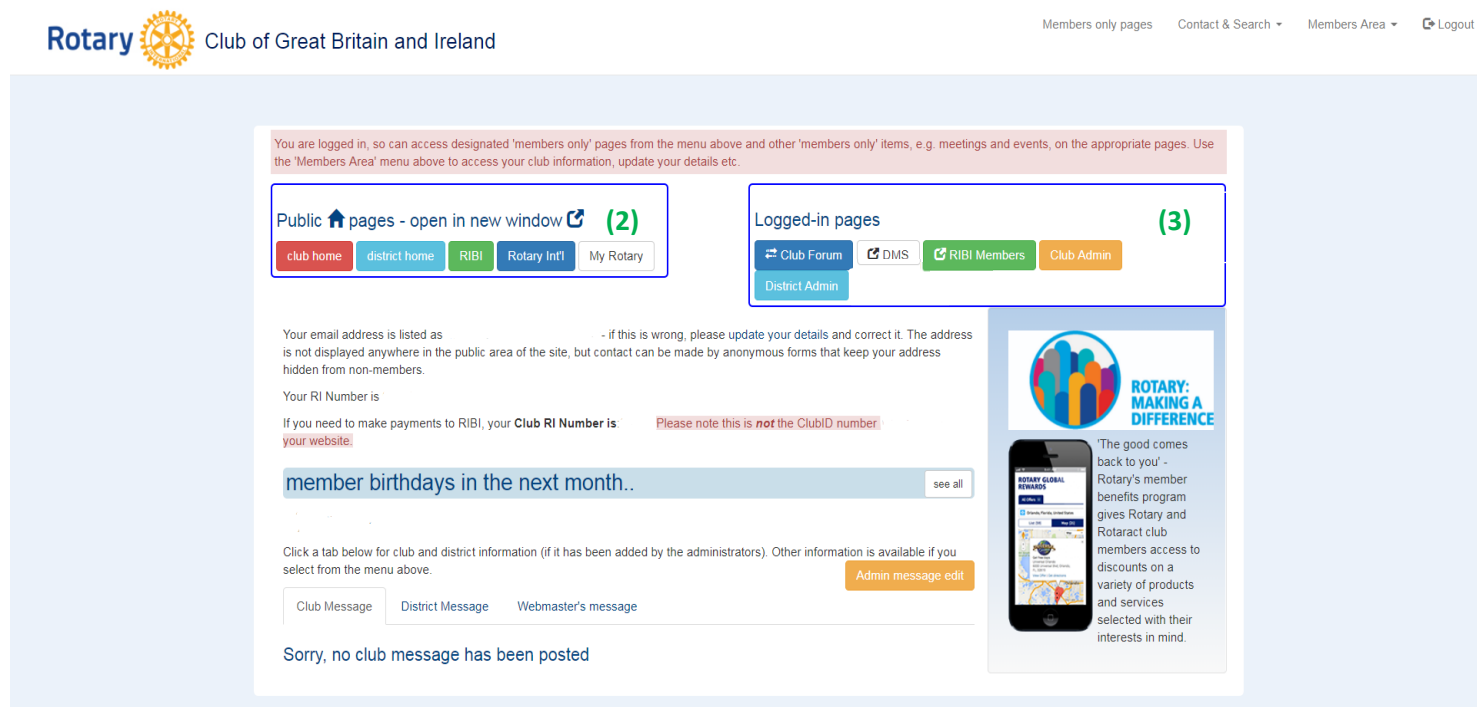
Push to RIBI Template

You are now logged into the DMS and have the correct access to My Rotary and the RIBI Template system. You have should now have also synchronised across all your members (which may be incorrect at the current time) between My Rotary and the DMS/Template system.

With the ability to use all these systems, you can easily keep all your details and information for your members and club up to date. Now that you are up and running on all these system, the next section of this guide will contain instructions on how to add, remove and amend members details. For information on resolving duplicate records (members showing twice), please see the Troubleshooting area of this guide.

4. (b) How to use the Template System

As displayed in the table above, there are many features that the RIBI Template system can do, that are still unavailable on the DMS at this current time. Below is a step by step walk-through of the different areas within the RIBI Template system that are used for member and club administration, starting from when you log in. (1)



(1a)

District Admin

Club Admin Home

Members Home

Update your details

Future programme

Other clubs' meeting in the next 7 days + all Charter Celebrations

Create a members 'ticklist' for an event

Members forum

This page is the landing page you are directed to once you have logged in to the Template system. Below is an explanation of each section that relates to club and member administration and the content that can be accessed through these different areas.

Please note that this guide **only** covers the administrative areas of the site, therefore not including information on how to set up a club Template website, or how to add or edit pages, events or meetings on the Template. If you need help on this, please look at the [Template Tutorial pages](#).

- (1) The “Members Area” will bring up a list of different administrative areas, depending on your access level on the Template system. The dropdown list is shown as (1a) and, you can see the different options available here. Under “Update your details” you can amend your own information, such as email, phone, address and name. The District Admin and Club Admin Home pages will be displayed after this section.
- (2) The Public pages section contains links to different areas that are on and off the Template website. “club home & district home” will take you to the homepage of these sites on the Template. “RIBI, Rotary Intl & My Rotary” will take you to the corresponding offsite pages, the most useful generally being My Rotary, as it can help you quickly get to the right place to amend data there.
- (3) This section contains links to the Club Admin and District Admin areas as mentioned above, and also a link to the DMS. The Club Admin area is explained below, whereas the District Admin area is explained after that.

4. (b) (i) Club admin area on the Template

Below is the main screen for the Club admin area or homepage. There is information below on how to access and use the main Club admin area. Please note that there are more features below the section of the page that is displayed below.

(4)

Rotary Great Britain and Ireland

Club Administrators PUBLIC Web Pages Club Administration

You are logged in as a 'club administrator'; select options from the menu above.

Members home / Club administrator's home page

District Admin

Club Administration

Club Admin home

Click here to open a pdf form for completion by clubs using the template system for their website. Use of the website template requires an ANNUAL payment of at least £50 to Foundation. This should be a separate payment, not 'lumped in' with other donations.

Please refer to the instructions ('Help' menu | 'When is our payment to Foundation due') about sending payments; YOU (the club administrator) need to update when the next renewal is due (after sending your cheque), or your site will not display.

As many of you are aware, technical compatibility issues have necessitated a new file manager to replace the now outdated KAE. I am pleased to say that a new, faster, file manager that enables you to create and manage your own files and folders within your club area of the new server, is now available for a small one-off charge of £20 per site.

Unfortunately, I'm having to make this charge as files need to be uploaded individually to your server-space and supplying this for all clubs would be an unreasonable burden on a volunteer, together with the fact that this apparently simple change has forced a complete redesign of the club admin area, which has taken me 3 months to complete! I hope you understand that you will now have a much more efficient and faster method of uploading files to your own club area on the new server at a very reasonable cost.

Use of the new editor is not compulsory - the existing editor is displayed on pages if you don't buy the new one - but you will obviously not get all the facilities available in the new editor.

I confirm that this is a one-off, non-refundable, payment being made to me (it will appear on your statement as 121 Technology Ltd), payable through the PayPal button below.

NB - if you do not have a credit/debit card linked to your PayPal account and there are insufficient funds in your PayPal account, payment will be made by 'e-cheque', which can take up to 10 days to process.

Once you have made the £20 payment and I have transferred the files, this message will not be displayed again and you will see the new file manager on the insert, update and 'message to members' pages.

You can see some brief videos showing how to use the editor at the bottom of this linked page.

Many thanks for your ongoing support

Chris Sweeney

RIBI Template Designer

Buy Now

(4a)

- Club details
- Meeting venue, times etc
- Club members
- Club officers
- Club committees
- Message on members homepage
- Members-only pages
- Presidents list
- 'Friends' of the club
- Club handbook notes
- Data export
- Search...
- Checklist & Membership statistics

(4) In order to access the Club Administration areas on the Template, you will need to click the “Club Administration” dropdown. The options that are on this menu are shown under (4a) – these are the main options you will be looking for when you need to make administrative changes to member details on the Template, however rare that may be.

“Club details” contains information for your club, such as your website, email address, phone number, charter date, district area and a few other options. These details are not changed on the DMS, and this feed directly to the Handbooks on the DMS, meaning if the information on these handbooks isn't correct, you will need to edit the data here.

The “Meeting venue, times etc” option will let you adjust the time, date & venue of your club meeting place. This is displayed at the bottom of your club's homepage and will also display in the handbooks on the DMS.

- **Please note** changing the details here, will **not** amend them on the RIBI Club Finder or on the My Rotary system – you will need to update these separately by using My Rotary, or by [contacting us](#).

“Club members” is the place where you can amend membership and member details in the Template. After clicking here, you will be presented with a list of your members, with relevant buttons to edit their information. The “H” symbol will allow you to edit a member's history, and the “pencil” icon will let you change their current information. **You should not need to do this within the Template and should use the DMS instead.** Note that this is where you need to go to change a member's email address within the district.

4. (b) (ii) District admin area on the Template

Next is the main homepage for the District Admin area. This page has a number of extra options on the main page, mainly for administrating the district Website. The dropdown menu has some similar options to the Club Admin dropdown, with extras for the district.

(5)

Rotary 1060 District admin Web Pages District Administration Help Logout

You are logged in as a district administrator.

Members home / Club Admin / district home page details

main page

- district message
- social network badges
- quick links
- district geography
- event highlight/countdown block

Note that districts get use of the template free - unlike club that MUST pay at least £50 p.a. to Foundation. This has NEVER been optional! If you are using the template, please indicate so - and the list displayed on the districts page is updated accordingly.

IMPORTANT! - click here to read the notes regarding use of the DMS. It contains important information about adding, terminating and transferring members using the DMS not the template.

Homepage & options

Display 'Latest' tab: ☒ yes ☐ no

Using the template?: ☒ yes ☐ no

Display Charters: ☐ yes ☒ no

Display newsfeed?: ☐ yes ☒ no

Note if you are using the template, the District URL should be `./districts/homepage.php?DistrictNo=1060` NOT `www.rotary1060.org` - otherwise club links to the district site are redirected unnecessarily.

District URL:

Main Email:

Homepage Style:

(5a)

- ☀ District Committees
- ★ District Officers
- 🌐 Areas
- 📖 District handbook notes
- 📊 Data Export
- 📈 Membership Statistics

- 👤 Rotarians
- 👤 Clubs in this district

- ✉ Contact club administrators
- ✉ Contact club officers

RIBI DMS search and handbooks

(5) To get to the District Administration areas on the Template, you will need to select the “District Administration” dropdown (similar to the “Club Administration” option previously). The options that are on this menu are shown under (5a) – this is the main place to go when making adjustments to member details on the Template, as well as adding Clubs when required, or adding notes to the handbook.

“Clubs in this district” is the key place for making these changes. Here you will find a list of all clubs in the district, even ones that have been dissolved but have yet to be taken off the Template system. You can adjust the details for your members here, but it is recommended to **do this on the DMS**. Note that this is where you need to go to change a member’s email address within the district.

You can also use the Contact links at the bottom of the page to get in touch with members of your district, as well as getting quick access to the DMS.

This should cover the majority of the Admin areas on the Template that you will need to be familiar with to make changes to your club membership or their details. As previously mentioned, these areas won’t be used frequently, but from time to time you will find changes you need to make that cannot yet be done on the DMS.

4. (c) How to use the DMS – general details and Handbook information

The primary purpose of this guide is to help members at all levels become more familiar with using the DMS and the facilities within it. Below I will detail the different areas of the DMS and how to effectively use them.

The screenshot shows the Rotary DMS Dashboard for a user named Thomas Adams. The interface includes a top navigation bar with the Rotary logo and a 'Toggle navigation' button. A left-hand sidebar contains a 'MAIN NAVIGATION' menu with items like Dashboard, Handbooks, Search & Email, My Area, Online Help, and Finance. The main content area displays club and district information, role(s), membership type, and permission(s). It also features a 'Quick Links - public' section with links to Club Home, District Home, RotaryGBI, and Rotary International. A 'Quick Links - members' section includes links to Club Admin, Club Forum, RIBI Template site, and RIBI Members. A small analytical box on the right shows member statistics: Club Members (Active: 21) and District Members (Active: 1412, Hon: 131, Assoc: 6, Corp: 19). The footer contains copyright information and the version number 5.02.

- (1) When first opening the DMS, you will be greeted with the Dashboard page. This page has a few details regarding your club and district (this is visible depending on the type of member signing in (member, club or district officer)). You will see your permission level – it is important to check this as it will show whether you have correct access to use the DMS to make updates. The Roles box will also show any office roles you hold within the club and/or district. You will also see a small analytical box detailing the members in your district sorted with member types (Active, Honorary, Corporate, Associate)

On this page, there is a “Quick Links” section with links to different websites and user areas. This is separated into Public areas and Member areas. When clicking on a members area link, you should retain your logged in status with My Rotary, meaning you won’t need to log in again when clicking these.

You can also see the main navigation pane on the left-hand side (2) with all the pages that are available on the DMS. The “My Area” option opens a dropdown rather than opening a page directly, but these will be covered later on in the guide.

The personal details contained within the Handbooks and shown in the Search & Email area is subject to each member's personal privacy settings. Note that the default setting for all members is set to Privacy Level 5. The aforementioned areas will restrict details displayed according to the members updated privacy level if they choose to change this. Members who had previously used the RIBI Template System to exclude themselves from searches will have their default setting set to Level 1 in recognition of their previous choice. District Officers are excluded from having their contact details hidden due to the nature of the role they are holding, and will be set to Level 4.

(3a) Club Handbook

(3b) District Handbook

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The Handbooks page allows you to generate Handbooks at a club level **(3a)** and at a district level **(3b)**. The club handbook has options depending on the level of access you hold in the system, for example a member or club officer will only have access to generate a handbook for their own club, where as a district officer can generate a handbook for any club within the district, while the district handbook can be generated by anyone in the district.

There are a number of types of handbooks you can produce (compact, standard, detailed and photographic), each are detailed further below. You can produce these handbooks in 3 different **formats**:

1. Online. This format is ideal for whilst you are using the DMS on your computer, laptop or mobile device. It produces the data in a logical format that can be printed and folded into a handbook and can be saved to your device for paper-less access to it from time to time (remember it is version controlled by the date it was last produced though!).

2. Print. This PDF format is ideal for home printing so that you can produce a physical handbook. It is not meant for online viewing as it will need to be folded into shape to produce a physical book.

Printing

In order to print the PDF files, you will need to have appropriate software installed on your computer. Most computers will already have a copy of Adobe Reader installed for this purpose and will open PDF files automatically. If your computer does not have suitable software installed, or if you wish to make sure you have the latest version, please visit www.adobe.com for more information. Adobe Reader is free software and is easily available from the front page of their site. If you are already using Adobe Reader, then we suggest that you upgrade to the latest version.

You can also produce handbooks for two different Rotary years based upon the data you have entered into the system. The **current** Rotary year, and the **forthcoming** Rotary year. This will automatically update on the 1st of July every year to be the latest year and the incoming.

Club Handbook types

Compact – 3 fold / 4 fold

This is normally printed on a single sheet of A4 with the club information, Four-way test, Objects of Rotary, past presidents and club officers on one side and a full list of member contact details and classification on the rear. The 4-fold version includes a notes page.

Standard

This produces an A5 handbook containing club information, RI and RIBI President details, club officers, club committees, past presidents and a full list of member contact details and classification. It also includes the club programme.

District Handbook:

This is a one-type handbook that produces an A4 handbook containing the district officers, all club secretaries in the district, Four-way test, district committees, Objects of Rotary and a list of clubs including their meeting information and club officers. The handbook also contains information of each club of all members, their email address, telephone number and classification.

Please note that the content and details generated in the handbooks are restricted based on a members Privacy Level set through the DMS or Template – more information on this is included further in the guide.

4. (c) (i) Search & Email

The next section on the navigation list is the Search & Email area. The below screenshot is of the Search & Email area as a District Administrator would see it. More is explained below.

The screenshot shows the Rotary DMS Search & Email interface. The top navigation bar includes the Rotary logo, 'Great Britain & Ireland', a 'Toggle navigation' menu, and the user's name 'Thomas Adams'. The left sidebar shows the 'MAIN NAVIGATION' with options: 'Handbooks', 'Search & Email' (highlighted), 'My Area', 'Online Help', and 'Finance'. The main content area is titled 'Search for Rotarians' and includes a search tip: 'Text searches can be comma separated for multiple terms e.g. "Tom, Dick, Harry" to search for either "Tom", "Dick", or "Harry". To select multiple options, hold **ctrl** whilst clicking your options.'

The search filters are organized into two columns:

- Left Column:**
 - District:** D1060
 - Name:** Input field with a person icon.
 - E-Mail Address:** Input field with an email icon.
 - Classification:** Input field with a document icon.
 - Membership Type:** Dropdown menu with options: Active, Associate Member, Corporate member, Honorary Member. Below the dropdown is a 'View options' link.
 - Order By:** Last Name
 - Order:** Ascending
 - New Members Only:** No
- Right Column:**
 - Club Name:** List box with options: Alcester & Bliford, Arbury, Aston, Altherstone.
 - Club Area:** List box with options: Area 1, Area 2, Area 3, Area 4.
 - Club Post:** List box with options: Executive Secretary, President, Secretary, Administration.
 - District Post Held:** List box with options: District Governor, Alumni Officer, Assistant District Secretary, Assistant District Treasurer.
 - Year:** 2017/2018

At the bottom of the filters are two buttons: 'Search' (blue) and 'Clear' (orange). A note at the bottom states: 'Note: Maximum quantity for printing and viewing Business cards and Membership cards is limited to 1500 at one time. To view and print more than 1500 cards please do this in batches by selecting the users in the tick box to the left'. The footer includes 'Copyright © 2014-2018 Rotary Great Britain & Ireland. All rights reserved.' and 'Version 5.00'.

Here you can see the main filters and fields for running a search on the DMS. If you are a **standard member of a club**, you will be able to search for your members of your own club, as well as all district officers. **Club and District officers** are able to search across the district to find officers of all clubs, as well as all district offices again. Finally, **District Secretaries/Website Administrators** are able to search for anyone within the District. A member's details that are displayed in the search and email is based upon their privacy level – more on this is explained later.

As you can see, the different selection boxes are used to refine your search, and you can use the Control key on your keyboard to select multiple options in fields that allow it. For example, you could select all clubs in your district by clicking the very first club and pressing Control + Shift + End. Pressing the clear button will clear any selected filters – by default your own club is selected. The visible District Posts are based upon the specific district officers that have been implemented in each district – meaning that one district might have a different list options here compared to another.

Avery labels, business and membership cards

Avery labels are available to print in the DMS within the Search & Email area and uses the Avery code **L7163 only**

Business and membership cards have been customised to an **85mm x 54mm** size and **10** per page. This matches four different Avery codes: **C32026, C32025, C32050, and C32016**

4. (c) (ii) My Area, Online Help, Finance and the available options within

When clicking the “My Area” option in the DMS, you will be presented with 4 dropdown options. As My Profile and My Club(s) are relatively similar, they will be merged into one section below, and Officers and Membership will also be covered.

The screenshot shows the 'RIBI & RI data sync' interface for 'Great Britain and Ireland'. At the top, there's a 'Toggle navigation' button and a user profile for 'Thomas Adams'. Below the header, there's a 'Sync report for district' button. The main area contains a table of club members. The table has columns for 'Sync', 'ClubName', 'Name', 'Address', 'Tel', 'Email', 'Privacy Level', and 'Edit'. The 'Edit' column contains two icons: a pencil (labeled (6)) and a circular arrow (labeled (7)). The table lists 8 members, all with the same test data: '1 Test Road, Town, E99 9EE', '00000 000000', and 'email@fakeemail.test'. The 'Privacy Level' varies between 'Level 1' and 'Level 5'. Above the table, there are filters for 'District' (D1060) and 'Club Name' (Great Britain and Ireland). A legend indicates member types: Honorary Member (grey), Associate Member (blue), and Corporate member (green).

Above you can see an example filled out list of club members, with falsified details due to data protection. If you are a club officer, you will see all the details for your members in order to be able to edit them. You can do this through clicking the “edit” icon next to the record (6), this will then bring up the edit screen detailed on the next page.

The “sync” or “rotation” icon (7) is the place to go to complete changes on a member’s membership status. This is explained below with an example of the screen that is displayed.

The screenshot shows a dialog box titled 'Rotarian's membership management'. It displays the club name 'Great Britain and Ireland', the RI Number, and the member's name 'Thomas Adams'. Below this, there are four buttons: 'Terminate Member' (labeled (7a)), 'Transfer Member' (labeled (7b)), 'Change Membership' (labeled (7c)), and 'Cancel' (labeled (7d)).

Here you are presented with a list of options to help manage a member’s membership of their club. (7a) The Terminate Member button will allow you to take a member off your membership. This requires a termination date within the last 30 days due to RI board rulings. If you need to use a date older than 30

days, please use a date *within* 30 days, then [contact us](#) to amend this afterwards. (7a) The Transfer Member button will take you to the membership page where you can make changes directly to the member’s membership. (7c) will also take you to the membership area, where you can change a member’s membership type. Finally (7d) cancel will simply take you back to your member listing.

Editing Details

Details

RIBI Template

RI Membership ID (Read Only)

FirstName

Surname

Common Name

Add1

Add2

Add3

Town

County

PostCode

Country

Address type

Tel Work

Tel Home

Mobile

DOB (dd/mm/yyyy)

Gender

Primary Email address

Save & Push to RI Global d

RI Global

RI Membership ID

✓ FirstName

✓ Surname

✓ Common Name

✓ Add1

✓ Add2

✓ Add3

✓ Town

✓ County

✓ PostCode

✓ Country

✓ Address type

✓ Tel Work

✓ Tel Home

✓ Mobile

✓ DOB (dd/mm/yyyy)

✓ Gender

Primary Email address

Push to RIBI Template

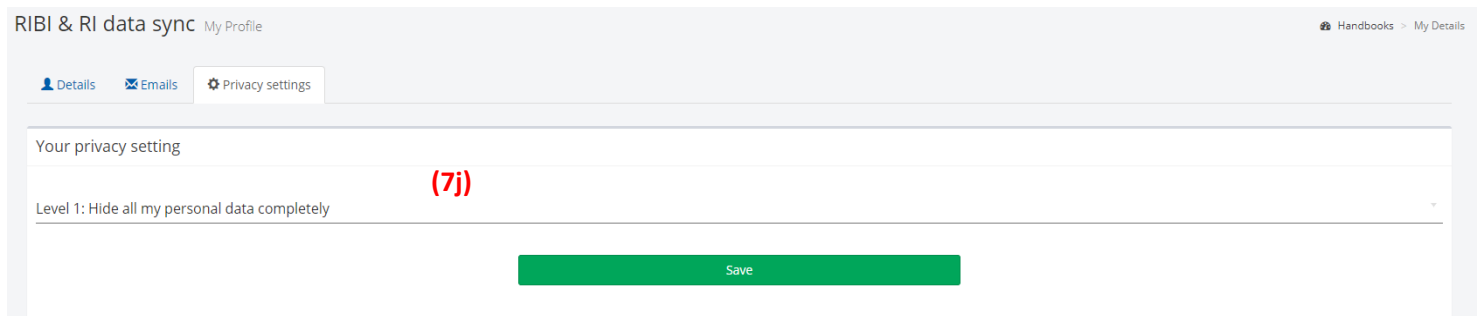
Next is the “Editing Details” box which stores details for each specific member. You will note the two different sides of the form (7e) and (7f). It is very important to note differences between these two sections – the blue left-hand side is the data that is currently stored on the RIBI Template system. This data can be seen and is used on the Template site, and on the DMS Search & Email area, as well as in the Handbooks. This is also the place you can directly edit data if you need to make changes. You would then “Save & Push to RI Global Database” (7g) in order to make these changes appear on the right-hand side.

This red side is where the data stored on the RI Global Database is shown. You cannot directly edit this data; however, it is updated when data is pushed to it using the button at (7g). This data is shown and used for report using the My Rotary system but has no usage on data in the DMS. When using the button at the bottom here (7h) you will transfer all the data from the right-hand side to the left. Please note: when transferring data using these button, you will also copy blank fields over – so for example if the Template side had data in the Tel Work box, but the RI Global side didn’t, and you were to use the Push to RIBI Template button, the blank field will overwrite the data there.

This area is also what is seen when going to “My Area” then “My Profile”, with the exception of the “Privacy settings”, which will be discussed after this section.

Within this section, the members email address can also be edited, and subsequently pushed to the RI system to add the email address as a new primary address. This can be overtyped whenever needed to ensure the member’s correct email is recorded on the both systems.

In line with the General Data Protection Regulation (GDPR) that was introduced on May 25th, 2018 we have made changes to the DMS to ensure members are using a GDPR compliant system. This has included the option of setting a privacy level within the DMS and RIBI Template systems to ensure your data is controlled and hidden to certain levels of people. These changes are then reflected in the DMS generated handbooks, and in the Search & Email areas.



To change your privacy level, you simply need to click the box that has your current level in it **(7j)** to get the list of available options. These are as follows:

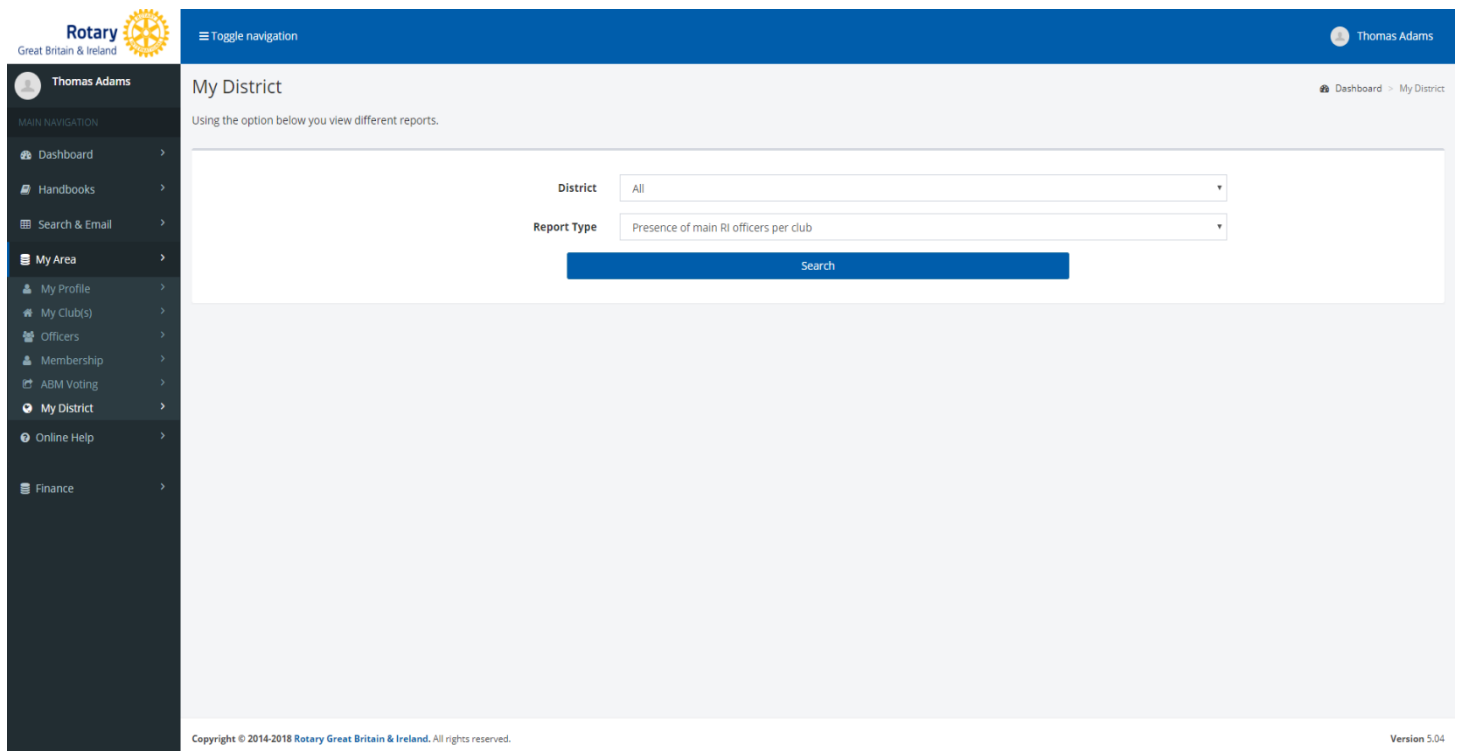
- Level 1: Hide all my personal data completely
- Level 2: Display only my telephone/email in my club and hide all across the district
- Level 3: Display all – telephone/email/address in my club and hide across the district
- Level 4: Display only my telephone/email in my own club and display only my telephone\email across the district
- Level 5: Display all – telephone/email/address in my club, and display only my telephone\email across the district

The privacy level can only be set by the member in question due to GDPR. Meaning a club secretary cannot set these for someone manually themselves, however there is nothing to stop them aiding the member in doing this themselves.

Within the DMS, we also have also introduced an area where certain reports can be run, which feature details of:

- Age groups of members in the district
- Presence of the 6 RI officers within clubs
- Length of service
- Member Leave Report

These reports are all found in the “My District” area of the DMS seen below:



When running these reports, you will see that they come out in slightly different formats. The Presence of main RI officers per club report is a list of all clubs within your district, with each office role listed, and are highlighted if they have the officer in place or not. The Avg Age/ Age Group/Gender splits report is displayed as a pie chart, with different segments for each age. The gender split and average age of the district is featured in boxes on the right-hand side of the page.

The Length of service report comes off the DMS as a CSV report which can be opened in Microsoft Excel or similar spreadsheet software. This shows each member in the district and lists their:

- Name
- Club
- Length of service
- Joining date

The member leave report contains similar details, but also includes a leaving date, RI number, and the leaving reason, and is available only to District Secretaries, Website Administrators and Membership Officers.

Below is another one of our latest reports, the Comparison Report. This allows you to run through the data for your club (or for District Admins, the data for all clubs in the district) and see the members listed on the RI database against the members listed on the DMS/RIBI Template. You can also export these results as a spreadsheet using the “Export Results” button.

The screenshot displays the Rotary Club Dashboard for Thomas Adams. The interface includes a top navigation bar with the Rotary logo and a toggle navigation menu. The main navigation sidebar on the left lists options like Admin Settings, Dashboard, Handbooks, Search & Email, My Area, Club Dashboard (selected), and Online Help. The main content area is titled 'Club Dashboard' and features two prominent buttons: 'Comparison Report' and 'Club Members Report'. Below these is a blue 'Helper!' message box stating: 'Click on the Club Name to view stats. Rotary Blue progress bars are the DMS figures and the Rotary Yellow progress bars are RI figures'. The dashboard is divided into two main sections. The left section, 'Your available Clubs:', includes an 'Export Results' button and a list of club initial letters (A, B, C, D, E, G, H, K, L, M, N, O, R, S, T, W, Y). A tooltip explains that each letter represents the first letter of available clubs. The right section, 'District - Total Members: 1582', shows membership breakdowns with progress bars: Active (1425), Honorary (130), Associate (7), and Corporate (20).

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Featured here too is the Club Members Report, which comes off as a CSV report of all the members of your club, their membership type, and their leave date if one has been forward dated within the system.

Another one of our newer pages is the ABM Voting section. This area allows every club to list their primary and deputy voting delegates for the Annual Business Meeting. It also specifies if they are voting in person at the Business meeting, or online. This area is also shown below:

The screenshot shows the Rotary ABM Voting section. At the top, there is a blue header with the Rotary logo and 'Great Britain & Ireland' on the left, a 'Toggle navigation' button in the center, and a user profile 'Thomas Adams' on the right. Below the header is a dark sidebar with a 'Thomas Adams' profile and a 'MAIN NAVIGATION' menu containing: Dashboard, Handbooks, Search & Email, My Area (highlighted), My Profile, My Club(s), Officers, Membership, ABM Voting, My District, Online Help, and Finance. The main content area has a blue banner with a note: 'Please note, any increase or decrease in the total members of your club will not impact the number of voting delegates your club has until next subscriptions collection point. As required by constitution, a clubs number of voting delegates is set at the previous subscription point.' Below this is the 'Voting' section, which states 'Your club is entitled to 2 voting delegates.' It features an 'Add delegate' form with three dropdown menus: 'Select delegate' (showing 'select'), 'Deputy delegate' (showing 'select'), and 'Voting' (showing 'select'). A blue 'Add Delegate' button is at the bottom of the form. To the right of the form is a box titled 'Current club nominated voting delegates' containing one entry: 'Thomas Adams James Bolton Voting via: Online' with a red bin icon to its right. The footer contains copyright information 'Copyright © 2014-2018 Rotary Great Britain & Ireland. All rights reserved.' and the version 'Version 5.04'.

As seen on the page, you simply select the delegate from the drop “Select delegate” dropdown, and their method of voting by choosing either “Online” or “In Person” from the “Voting” dropdown. You can also register the voting deputy under the “Deputy delegate” dropdown.

You can remove a delegate if they are incorrect by clicking the bin icon next to the name on the right-hand side. You are also informed of how many delegates you can input in the top left corner of the page. Once you have selected a Primary and Deputy Delegate, these cannot then be re-added as your next voting delegates (if your club is entitled to more than one)

The next section of the DMS is the “My Area” then “Officers” section, this page is quite self-explanatory, as it lists your club officers. The important thing to note about this, is that the officers shown on this list are only the officers that can be synchronised with My Rotary these are: Club President, Club Secretary, Club Treasurer, Club Executive Secretary, Club Membership Chair and Club Foundation Chair.

RI data sync My Club Officers Handbooks > Club Officers

District

Club Name

(7k) (7l)

Current Year Officers 2018/2019
Sync Officer: RI Global
Add Role

Role	Start Date	End Date	RI Number	Name	Edit	Delete
Club Treasurer	01/07/2018	30/06/2019				
Club Secretary	01/07/2018	30/06/2019				
Club President	01/07/2018	30/06/2019				
Club Foundation Chair	01/07/2018	30/06/2019				
Club Membership Chair	01/07/2018	30/06/2019				

The Template system allows for entering custom officers and even more standard officer positions, however these are not synchronised onto the DMS. You can add a new officer by clicking the “Add Role” (7l) button. This then brings up the below menu (7m) which has space for entering the members name or RI number to search for, and then boxes to select the office role they are holding and the date they began the role. This then adds the officer to the Template database and the RI Global system.

Add Role (7m) ×

Search Member Go!

RI Membership ID

Start Date (MM/DD/YYYY)

Officer Role Select Role

Push to RI Global database

You can also edit current officers, which allows you to add a new end date for the officer, which is used if you have a new member taking over that role. The “Sync Officer: RI Global” (7k) button is used to push or pull officers between the RIBI Template/DMS & RI Global system. There may be cases where an officer has been added to the RI Global System, and this synchronisation can be used to bring them down into the Template, or if they are not present on the RI Global system, you can push them up manually from the Template database.

The final section to go through is the “My Area” “Membership” page. This area is used to transfer a member or add a fully new member to your club. This is done by filling out their RI number if it is known, or simply their name to search the system for a matching record. If the member is entirely new to Rotary, please enter a name only. Click continue to proceed to the next screen which is included below.

RIBI & RI data sync Great Britain and Ireland Handbooks > Membership

Add/Change Rotarian's membership

Please fill in the fields below , to begin this process

RI Number (if known) (7n)

Firstname

Surname

Continue

RIBI & RI data sync Great Britain and Ireland Handbooks > Membership

Add/Change Rotarian's membership

Please fill in the fields below , to begin this process

Following member(s) were found with matching data.

RI NUMBER HERE	NAME HERE	CLUB EXAMPLE	No Membership	Add Membership
RI NUMBER HERE	NAME HERE	CLUB EXAMPLE	Member - Terminated	Add Membership
RI NUMBER HERE	NAME HERE	CLUB EXAMPLE	Member - Active	Transfer Club Change Membership
RI NUMBER HERE	NAME HERE	CLUB EXAMPLE	Member - Terminated	Add Membership

Back

Continue, adding as new member

Here you can see the results of searching for a member by name, it presents a list of different records (some of which may be the same depending on the recorded history of the individual) for example – the first and third person may be the same, and have the same RI number, but the first result may be a previous membership they had, whereas the third is their current active membership. You can only “Transfer Club” if you are a district administrator, as their current membership needs to be terminated first. The member’s current club can also do this, but the club they are joining cannot.

The same applies for the “Change Membership” button – this is done only by the member’s current club, or by a district administrator. This button would take you to the previously mentioned screen referenced at (7c) which is shown below.

The screenshot shows a web interface for 'RIBI & RI data sync' with a breadcrumb trail 'Great Britain and Ireland' and 'Handbooks > Membership'. The main heading is 'Change Membership type'. Below it, a message states 'You are updating membership for:'. The form contains several input fields: 'RI Number:', 'Name:', and 'Club:'. There are two sections for membership type: 'Current Membership' with a dropdown menu currently showing 'Member', and 'New Membership' with a dropdown menu currently showing 'Select'. At the bottom of the form is a date field labeled 'Admission/Change Date (dd/mm/yyyy)'. A blue 'Update' button is positioned at the bottom right of the form area.

Here as you can see, you can change a member’s membership type under the “New Membership” box. You can choose from Member, Honorary, Associate and Corporate, and then add a date to make the change effective from.

The options displayed on the membership results screen (7n) are “Add Membership”, “Change Membership” & “Continue, adding as new member”. These options will all take you to the same screen which is discussed further below next. **Please only use the “Continue, adding as new member” option when adding a brand-new Rotarian. Using an existing ID number with the same name will cause lots of problems with the member’s Rotary history.** The next screen for adding a member is below.

Details

Emails

Privacy settings

RIBI Template

RI Membership ID (Read Only)

FirstName

Surname

Common Name

Add1

Add2

Add3

Town

County

PostCode

Country

Address type

Tel Work

Tel Home

DOB (dd/mm/yyyy)

Gender

Primary Email address (Read Only)

Save & Push to RI Global d

RI Global (Read Only)

RI Membership ID

FirstName

Surname

Common Name

Add1

Add2

Add3

Town

County

PostCode

Country

Address type

Tel Work

Tel Home

Mobile

DOB (dd/mm/yyyy)

Gender

Primary Email address

Push to RIBI Template

This screen is displayed after the aforementioned buttons that advance the adding of a membership type is pressed. Here you will need to select the members Membership Type and fill out relevant address details at a minimum. You don't need an email or date of birth as a requirement. **Please note this screen will look slightly different for adding a brand-new member as they won't have a current Membership Type or RI Membership ID. Also note there is not an option for "Switch District".**

Once you have finished filling out the details, you can click "Add Member" or "Transfer Member" depending on whichever you have selected prior to this.

The **Online Help** area of the DMS links back to this guidance on our website.

Club Finance

Club President:	Overall Balance:	
Email:	Status:	Payment Outstanding
District No:	Club Members:	20
Club No:	Previous Statement	Current: July 2018 ▼
Club:	Statement	View Statement
Address:		
Club Tel:		

The final section of the DMS is the **Finance** area. This page is used to show your Club Invoice and the amount of money to be paid for Subscriptions. You simply use the drop down on the right-hand side of the page next to “Previous Statement” to select the statement you would like to view, you then click “View Statement”. The one for the current subs period is marked with “Current:” next to it.

The status at the top will show if we still require your club’s payment or not too, this is marked as “Payment Outstanding” if it is still required.

This concludes the main areas of the DMS that will be used to make change to member, details and membership. This area is updated with new features from time to time, and this guide will be kept up to date in tandem. Please [Contact Us](#) if you notice any incorrect or out of date information in this guide.

4. (d) Automatic forwarding addresses & Club Web Domains

Through the DMS and Template, there is a system setup to automatically direct emails sent to specific address, to the officer that holds the corresponding role. For example, emailing the District Governor forwarding address, will redirect the email to the District Governor's email address, without exposing it to the person who sent it, making it a good tool to use on public facing areas.

Below is a list of the District Emailing forwards that are available to use:

Email Forward	Recipients
ag	Assistant Governor
alumni	Alumni Officer
assistantsecretary	Assistant District Secretary
assistanttreasurer	Assistant District Treasurer
communications	Public Image Chairman
community	Community Chairman
conference	Conference
dg	District Governor
dge	District Governor Elect (DGE)
dgn	District Governor Nominee (DGN)
dgnn	District Governor Nominee Nominee
districtgovernor	District Governor
districtsecretary	District Secretary
districttreasurer	District Treasurer
editor	Editor
environment	Environment Officer
extension	Extension
foundation	Rotary Foundation Chairman
governor	District Governor
grants	Grants
interact	Interact Officer
international	International Service Chairman

Email Forward	Recipients
ipdg	Immediate Past District Governor (IPDG)
ldt	Leadership Development & Training
marketing	Marketing Officer
membership	Membership Chairman
mprc	Public Image Chairman
polio	End Polio Now
pro	Public Relations
projects	Projects Chairman
protection	Safeguarding Officer
rotaract	Rotaract Officer
ryla	RYLA
safety	Health & Safety
secretary	District Secretary
sports	Sports Officer
trainer	District Trainer
training	District Trainer
treasurer	District Treasurer
vocational	Vocational Chairman
webmaster	Primary Webmaster
youth	Youth Service Chairman
youth-exchange	Youth Exchange Officer

To use the email forwards, simply append "@rotaryXXXX.org" to the end. The XXXX denotes your 4-digit district number (for example 1010, 1020, 1030). If was attempting to email the Sports officer in district 1220, you would use sport@rotary1220.org.

We also have a list of all club forward addresses, as these are slightly different to the ones featured on for districts. These forwards are listed below:

Email Forward	Recipients
admin	Administration
assistantsecretary	Assistant Secretary
assistanttreasurer	Assistant Treasurer
attendance	Attendance
clubservice	Club Service
communications	MPRC (Marketing, PR & Comms)
community	Community
editor	Editor
environment	Environment
fellowship	Fellowship
foundation	Rotary Foundation
fundraising	Fundraising
interact	Interact
international	International
internet	Internet Communications
ippresident	Immediate Past President
it	IT
membership	Membership
president	President
presidentelect	President Elect
presidentnominee	President Nominee
pro	Public Relations

Email Forward	Recipients
projects	Service Projects
protection	Safeguarding
rotaract	Rotaract
safety	Health and Safety
secretary	Secretary
speaker	Speaker Secretary
sports	Sports
treasurer	Treasurer
vocational	Vocational
webmaster	Primary Webmaster
youth	Youth Service

Again, these forwards work in a similar fashion to the one above, you need to append the club and district to the end to create the email. This is formatted as such “@testclub.rotaryXXXX.org”. The text to replace “testclub” is generated on the RIBI Template system, and you will need to [contact us](#) to find this out. Oftentimes this is the same as your Club Website shortened URL. Also, as per above, the XXXX is replaced by your 4-digit district number – an example email address following the above might be president@testclub.rotary1060.org.

In regard to Club Web Domains, they are retained in our records and are available on request. These are needed when emailing the generic club forwards and can be used as a shorted web address. As an example, the Rotary Club of Aberaeron A'r Cylch's website can be reached by going to “<https://aberaeroncylch.rotary1150.org>” as “aberaeroncylch” is their forwarding address. This is the same address that could then be used for generic forwarding.

4. (e) Club & District officer access levels

Below you will find further information on who has access to what on the DMS depending on their level of access. The first table explains the two levels of access for club officers and table two explains the access levels within the district officer structure. Below is the table for **club access** with the next page featuring **district access**:

Template Club Role	Handbooks	Search & Email	My Area
- Standard Member	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Administration	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Assistant Secretary	Member's Club	All members of their own club & all club officers within the district	Full Club Admin
- Assistant Treasurer	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Attendance	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Club Service	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Community	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- District Council Rep.	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Environment	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Equality & Diversity	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Executive Secretary	Member's Club	All members of their own club & all club officers within the district	Full Club Admin
- Fellowship	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Fundraising	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Health and Safety	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Immediate Past President	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Interact	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- International	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- IT	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Membership	Member's Club	All members of their own club & all club officers within the district	Full Club Admin
- President	Member's Club	All members of their own club & all club officers within the district	Full Club Admin
- President Elect	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- President Nominee	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Primary Webmaster	Member's Club	All members of their own club & all club officers within the district	Full Club Admin
- Public Image	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Public Relations	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Rotaract	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Rotary Foundation	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Safeguarding	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Secretary	Member's Club	All members of their own club & all club officers within the district	Full Club Admin
- Service Projects	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Speaker Secretary	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Sports	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Treasurer	Member's Club	All members of their own club & all club officers within the district	Full Club Admin
- Vocational	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Youth Service	Member's Club	All members of their own club & all district officers within the district	"My Profile" only
- Club Admin	Member's Club	All members of their own club & all club officers within the district	Full Club Admin

Understanding these Levels:

- Member's Club:
 - o The logged in member can only generate a handbook for their own club.
- All Clubs in District:
 - o The member can search for anyone on the DMS within the bounds of their own district.
- "My Profile" only:
 - o The member can only see their own details within the "My Area", "My Profile" section.
- Full Club Admin:
 - o The member can access every member in their club's details under "My Area", "My Club(s)".
 - o They can facilitate transfers of members to their Club through the "Membership" area.
 - o They can add and adjust officers through the "Officers" section.

Template District Role	Handbooks	Search & Email	My Area
- Website Administrator	All District Clubs	All Clubs in District	Full District Admin
- District Governor	All District Clubs	All Clubs in District	Full Club Admin
- District Secretary	All District Clubs	All Clubs in District	Full District Admin
- District Treasurer	All District Clubs	All Clubs in District	Full Club Admin
- Assistant Governor	All District Clubs	All Clubs in District	Full Club Admin
- Immediate Past District Governor (IPDG)	All District Clubs	All Clubs in District	Full Club Admin
- District Governor Elect (DGE)	All District Clubs	All Clubs in District	Full Club Admin
- District Governor Nominee (DGN)	All District Clubs	All Clubs in District	Full Club Admin
- Rotary Foundation Chairman	All District Clubs	All Clubs in District	Full Club Admin
- Public Image Chairman	All District Clubs	All Clubs in District	Full Club Admin
- Projects Chairman	All District Clubs	All Clubs in District	Full Club Admin
- Community Chairman	All District Clubs	All Clubs in District	Full Club Admin
- Vocational Chairman	All District Clubs	All Clubs in District	Full Club Admin
- Membership Chairman	All District Clubs	All Clubs in District	Full Club Admin
- International Service Chairman	All District Clubs	All Clubs in District	Full Club Admin
- Youth Exchange Officer	All District Clubs	All Clubs in District	Full Club Admin
- Youth Service Chairman	All District Clubs	All Clubs in District	Full Club Admin
- Assistant District Secretary	All District Clubs	All Clubs in District	Full Club Admin
- Assistant District Treasurer	All District Clubs	All Clubs in District	Full Club Admin
- District Governor Nominee Nominee	All District Clubs	All Clubs in District	Full Club Admin
- District Trainer	All District Clubs	All Clubs in District	Full Club Admin
- End Polio Now	All District Clubs	All Clubs in District	Full Club Admin
- Leadership Development & Training	All District Clubs	All Clubs in District	Full Club Admin
- Primary Webmaster	All District Clubs	All Clubs in District	Full Club Admin
- Safeguarding Officer	All District Clubs	All Clubs in District	Full Club Admin
- Marketing Officer	All District Clubs	All Clubs in District	Full Club Admin
- Environment Officer	All District Clubs	All Clubs in District	Full Club Admin
- Conference	All District Clubs	All Clubs in District	Full Club Admin
- Editor	All District Clubs	All Clubs in District	Full Club Admin
- Extension	All District Clubs	All Clubs in District	Full Club Admin
- Grants	All District Clubs	All Clubs in District	Full Club Admin
- Interact Officer	All District Clubs	All Clubs in District	Full Club Admin
- Public Relations	All District Clubs	All Clubs in District	Full Club Admin
- Rotaract Officer	All District Clubs	All Clubs in District	Full Club Admin
- RYLA	All District Clubs	All Clubs in District	Full Club Admin
- Alumni Officer	All District Clubs	All Clubs in District	Full Club Admin
- Equality & Diversity	All District Clubs	All Clubs in District	Full Club Admin
- Health & Safety	All District Clubs	All Clubs in District	Full Club Admin
- Information Technology	All District Clubs	All Clubs in District	Full Club Admin
- Membership Database Officer	All District Clubs	All Clubs in District	Full Club Admin
- Sports Officer	All District Clubs	All Clubs in District	Full Club Admin

Understanding these Levels:

- All District Clubs:
 - o The member can generate handbooks for all clubs within their district.
- All Clubs in District:
 - o The member can search for anyone on the DMS within the bounds of their own district.
- Full District Admin:
 - o The member can access every member in their district's details under "My Area", "My Club(s)" and switching to other clubs using the dropdown selection.
 - o They can facilitate transfers of members to and from Clubs within their district through the "Membership" area.
 - o They can add and adjust officers for clubs in their district through the "Officers" section.
- Full Club Admin:
 - o Same as Full Club Admin on the Template Club Roles table.

5. Common issues and frequently asked questions

As we near the end of this document, I have included a section that answers questions commonly received by myself and the CDS team in the support centre regarding using the Template or the DMS. Along with the rest of the guide, this will be kept up to date based upon the different questions we get in and what becomes more common. Please try running through the solutions here, but if you are still having issues, or are unsure of what to do, please do [contact us](#). I also recommend reviewing our outstanding bugs [here](#) and also utilising the bug report form [here](#) where possible.

Q1. “I have added a new member to my club, but they aren’t appearing on the DMS/in my handbook.”

A1. The member has more than likely been added through RI’s My Rotary system. Although this can be fixed simply, we do recommend that member transfers or additions are completed through the DMS system. The solution is simply to go to the “My Area”, “My Club(s)” section of the DMS and sync the member down from RI using the green “Sync Members: RI Global” button.

Q2. “I have tried to remove a member, but they still show on the DMS”

A2. Although these issues sound different, they both usually stem from the same issue – the member has been terminated on the RI system rather than the RIBI system. To remedy this, you simply need to terminate the record on the DMS too.

Q3. “We have been charged for ‘x+1’ members on our subs invoice when it should be ‘x’” (usually around June or January)

A3. This question comes up when a club has received their invoice for their members, and they believe they have been charged too much or too little, citing incorrect numbers on the invoice. At this current time, we take our membership numbers for subscription statements directly from the RI system, as this is the system that every club has access to use and should always be up to date if they DMS is being used correctly. Usually the solution lies with terminating or adding members to the RI system as needed to correct the invoice. You will need to contact our Finance Team to get the invoice numbers corrected but note that this will only be done at the discretion of the Finance Team – they will not simply charge you for the updated amount if the issue lies with user error.

Q4. “I can’t log into the DMS/The Template/My Rotary”.

A4. There are many reasons why a member may not be able to access these systems, please pass along the information of the [issue to us](#) and we will help the member to login.

Q5. “x’ number of members seem to be duplicated on the DMS”

A5. This one is quite a common occurrence but can also manifest itself in many different forms.

1. A **Template side duplicate** is created when a record is entered at some point without an RI number. This is now not possible; however, these records are still shown from a time when it was possible in rare cases. To solve these duplicates simply terminate the record that does not have an RI number attached to. Removing the one with the RI number will reflect the change on the RI side causing a larger problem.
2. An **RI duplicate** is slightly more difficult and unfortunately more common. This is where a member has been created as a new record on the RI database, when they already have an ID number from previous membership. As a general rule of thumb, the higher the RI number, the newer the record, however in this instance, please [contact us](#) and we will resolve these duplicates for you, as they need to be merged together on RI side.
3. You might also find the other type of duplicate, which is also very common, the **Dual RI number duplicate**. These appear as a two records for the same person with identical RI numbers. This can happen when a member is added with the correct number, and also synced from RI when they have been added on My Rotary. Please [contact us](#) again to resolve these.

Q6. “I have tried to make a member an Honorary member, but they still show on the DMS as a normal member”

A6. This tends to be another case of changes being made on the RI system only. You should note that changes made on RI do not automatically sync to the DMS, rather the it is one way in that changes made on the DMS are synced to RI. To resolve this, you should terminate the record on the DMS, which will present you with an error saying:

**“Error in RI Global Database , No active relationships for Member ID.
Terminated in RIBI Template Database”.**

This error appears due to the fact that they are not flagged as “active” (as Honorary membership is not an active membership type) on the RI system. All this means is that the RI record has not been altered. The second part means the record has been taken off the DMS successfully. You will then need to re-sync the member as Honorary from the RI system, by using the green “Sync Members: RI Global” button. This should then show the member in that list, with a grey highlighting, which indicates you are syncing them as an Honorary member.

Q7. “I have tried sending an email to one/many members in the DMS, but they/some of the intended recipients are reporting they have not received it”.

A7. This is a very difficult issue for us to look into, as the issue can lie anywhere between the users service provider, or with individual settings on their mail client and our system. We recommend the following steps to increase the likelihood of receiving these mailings:

- Add “dmsmail@rotarygbi.org” to your contacts or your “safe-senders” list. Sometimes a service provider might detect that this is a potential spam address and will automatically block it before it hits the recipients inbox.
- Check your Spam and Junk folders to see if the email has automatically been sent here.
- If you have tried sending a bulk email to multiple people, and one recipient is saying there is an issue, try sending them an individual email through the DMS system. If they receive this, then it will be down to the automatic filters of the email provider.
- Finally, as a last resort you can try setting up a secondary email address to receive DMS mailings. Google Mail (Gmail) generally has good results, especially for bulk mailings through the DMS.
- Many service providers have specific rules that must be abided by in order to have recipients receive bulk mailing. We are working on ensure these are set for as many providers as possible, but we cannot cover every single variant.

Q8. “When looking at a certain member, their details aren’t correct even though I amended them”.

A8. Generally, this is an indication of someone who has amended details on the RI system and not on the DMS. This is easily solved by going into the DMS and syncing the details from the RI Global side to the RIBI Template side by clicking “Push to RIBI Template” on the right-hand side.

Q9. “I get an error when trying to push details to the RI system, or the “RI Global” side shows as ‘Access Denied’”.

A9. Usually this points to the member being listed as “inactive” on the RI database. This could be due to the member being terminated or listed as an Honorary member on the RI system. Please [get in touch](#) with us, and we can ensure that the record is set correctly, with the correct dates on the back end of the RI system.

This guide has been developed for the purpose of being a “catch-all” in terms of setting members up on the DMS, My Rotary and the Template systems. It features information on how to use these systems and the features within them, as well as troubleshooting tips for common issues. If you have an queries in relation to this document, please [get in touch with us](#).

Also, if you have any improvements or modifications you believe would improve this guide, please again [let us know](#). This document will be kept up to date in line with DMS developments as they are released.