



DACdb to RI “Direct Connect” Selection Process



Choose DACdb as Your Partner Organization

Summary: Updating the Rotary Database automatically from DACdb

DACdb now has the ability to automatically update Club and Member data *directly* into the Rotary (RI) database. . . this is called “**RI Direct Connect**” (this significantly speeds up the updating process). In the past, changes were sent via email. Rotary International no longer accepts email changes. The updates occur in the RI database within a few minutes after the user clicks the UPDATE button in **DACdb** (versus a few days using the former Email notification procedures). This is a 2-step process, which **MUST** be done in this sequence.

Step 1: Choose DACdb as the Partner Organization in the RI database.

A current club officer of record accesses the Rotary website at www.rotary.org. Then, click on **My Rotary** link to get to the screen with the **SIGN IN** (or **Register**) buttons. Click **SIGN IN** (or **Register**) button, and the following screen is displayed. If you do NOT have an account at Rotary, then first use the **CREATE ACCOUNT** functions.

The screenshot shows the 'SIGN IN' page of the Rotary website. On the left, there is a 'SIGN IN' heading followed by a 'SIGN-IN EMAIL *' field with a red arrow pointing to it. Below this is a 'Forgot email?' link with a question mark icon. Then is a 'PASSWORD *' field, followed by a 'Forgot password?' link. At the bottom left is a 'REMEMBER ME' checkbox with a question mark icon, and a yellow 'SIGN IN' button. On the right, under the heading 'WHY CREATE AN ACCOUNT?', there is explanatory text. At the bottom right is a blue 'CREATE ACCOUNT' button. A red speech bubble containing the word 'OR' is positioned between the 'SIGN IN' and 'CREATE ACCOUNT' buttons, with red arrows pointing to both buttons.

If this is the first time you are logging into the RI database, then you must register by clicking on the **CREATE ACCOUNT** button. Then, RI will send you an email within a few hours, so you can log in. **NOTE:** If you have any problems logging into the RI database, you must contact RI for assistance, as we have no capability to help you log into the RI database.

Once you are logged into **RI**, click on **Manage**, then **Club Administration** link. Once you are on the **Club Administration** page. Scroll down to **CLUB & MEMBER DATA** then scroll down to Update **Club Data**, **Edit** vendor partner organization.



CLUB & MEMBER DATA

☆ **Update Member Data**
Report membership changes within 30 days, or by 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors so they receive recognition.

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

☆ **Update Club Data**
Provide club information for the Official Directory.

[Update meeting details](#) | [Update mailing address and contact information](#) | [Edit vendor partner organization](#)

Select **DACdb** from the list in the dropdown box. Save your choice.

Partner Organization

	Name	Start Date	End Date
Terminate	DaCdb	27-Mar-2011	

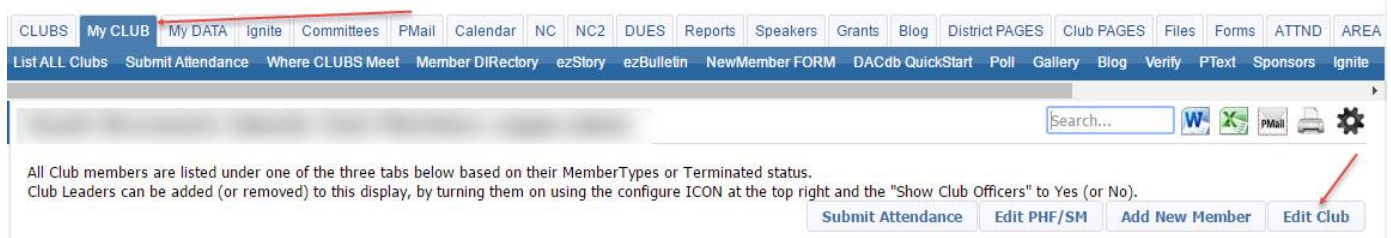
If you had previously selected another organization, then you must **TERMINATE** that selection before you can choose **DACdb** as your new partner organization.



That's it. . . you have completed the first step of the **RI DIRECT CONNECT** processing for your club. Now for **STEP 2**.

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

A current club officer logs into **DACdb** database, then clicks on the **My Club** tab. Click on the **Edit Club** link to update the interface method.



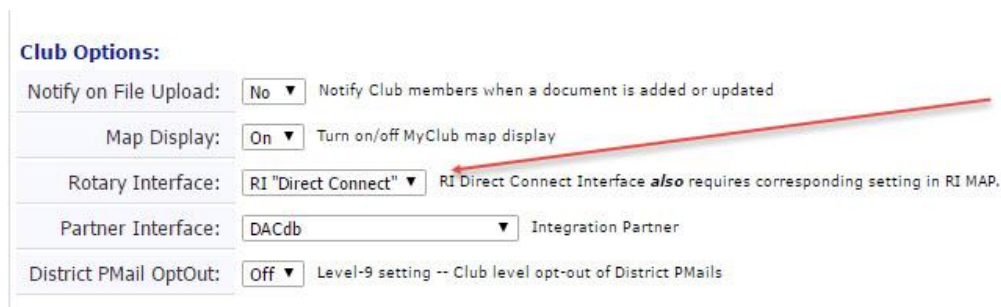
The screenshot shows the DACdb database interface. The 'My CLUB' tab is selected. Below the navigation bar, there is a search bar and a row of buttons: 'Submit Attendance', 'Edit PHF/SM', 'Add New Member', and 'Edit Club'. The 'Edit Club' button is highlighted with a red arrow.

On the **Information** page (near the bottom of the page), click on the **Rotary Interface** drop down selection and choose **RI "Direct Connect"**. Then click on the **Update** button to complete your selection.

Club Admin



The screenshot shows the Club Admin page for Charlotte (ID=2920). The 'Update' button is highlighted with a red arrow. Below the club name, there is a row of tabs: 'Information', 'Address', 'Meeting Info', 'Links', 'Positions', 'Billing', 'Security', 'PData', and 'Notes'. The 'Information' tab is selected.



The screenshot shows the Club Options page. The 'Rotary Interface' dropdown is set to 'RI Direct Connect' and is highlighted with a red arrow. The 'Update' button is also highlighted with a red arrow. The 'Partner Interface' is set to 'DACdb' and the 'District PMail OptOut' is set to 'Off'.

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