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# District and Club database

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## DaCdb Data Import Guide User Documentation

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## 1. Introduction

Welcome and thank you for considering DaCdb.

Your data is important to us. Therefore, we have prepared this document to outline our expectations and requirements for receiving data from you. You may have heard the old saying -- "garbage-in - garbage-out". Our objective here is to ensure that that data we receive is in the best form and quality that it can be before we import it into our system. Otherwise, the end result of what we import will probably not meet your expectations.

### 1.1 Why are we providing this?

Over the past years, DaCdb support has received data in many forms and with a variety of quality. Through experience, we have learned what works well and what doesn't. The bottom line is; a little bit of work on the quality of the data going in will substantially improve the quality of data that DaCdb maintains and generates reports from.

- Date fields are correct -- especially the year component. Excel does not always make the right guess as to whether the year is 19xx or 20xx.
- As many members have MemberIDs associated with them, eliminating the guess work on matching against partial member names.
- Data in Excel CSV files is properly formatted. Data with commas is enclosed in quotes. Description fields are not too long.

### 1.2 Goals

- Improve the likelihood all data will be imported. For example, a valid date in MS Access is not a valid date in MS SQL. 10-1-0999 is accepted by MS Access, but will be rejected by MS-SQL (our database server)
- Improve the name matching chances. John Smith is a common name, and there may be several John Smiths in a District or Club. There could be a John Smith Sr. and John Smith Jr. -- or there may just be two different John Smiths. How do we know?

### 1.3 Audience / Affected Groups

The target audience for this document is:

- New customers seeking to convert to DaCdb

## 2. Data Formats

DaCdb can currently import data in two formats.

- Comma Separated Value (CSV) files
- RICAS Files

Data can also be imported in other formats or from other databases. However since each situation is unique, the cost and timeframe to accomplish this import will need to be quoted separately.

## 3. Comma Separated Value (CSV)

A comma separated values file (normally produced by MS Excel), can easily be imported. A CSV is a string of values -- each value is separated by a Comma (","). Each row represents a new record (member) in the database.

There are several limitations that you need to be aware of with this approach.

- 1) The 1st row of data is the header line and the names used here must exactly match the column names we expect to import. (See list of Data Fields below)
- 2) Some fields are optional, but a few are required.

### 3.1 RICAS Files

Last year Rotary stopped supporting the RICAS program. Users that are interested in migrating off of RICAS to DaCdb can do so with our automated conversion program. The RCMail.MDB file is where the RICAS data is stored. Only send the RCMail.MDB which can either be uploaded in its native form or uploaded in a ZIP format (which will take less time to upload).

The RICAS file will need to be uploaded to DaCdb for processing. Processing takes only a few minutes, but is ***only*** performed at night during off-peak periods to minimize the impact to the system and other users.

### 3.2 Custom Formats

DaCdb Support will work with you to import your data in whatever format you have. However, there will be a \$100/hour charge to do this work. We will provide you with an estimate of the time required once we have a better understanding of the format and data you will provide us.

## 4. Import Data Algorithm

How does DaCdb import your data? Ideally, we use the MemberID to match members on our system. If this is the first time data is being loaded into DaCdb, and no previous data exists within DaCdb, MemberID is of less importance. However, based on past experience, approximately 25% of the data loads are repeated (at an additional cost) for one reason or another at a later date.

So once the member records are in DaCdb, matching new updates against the MemberID is the best way to match against new records being added to the system. Hence, one of the reasons why we highly encourage the users providing the import data to include the MemberID for each record.

MemberID -- bar none, matching on the RI Member ID is the best way to get data in to DaCdb. The RI MemberID is a unique number, thus it uniquely identifies each member. No guess work.

In cases where the MemberID is not provided, or at an individual member level where the MemberID is not known (0 is entered), the DaCdb import process will use name matching.

If the RI MemberID is not available, or not provided, DaCdb will enter a name matching algorithm.

1) Last Name, First Name, Middle Name, Name Suffix. When a MemberID of zero (ID=0) is encountered, DaCdb will attempt to find a member within the District/Account being processed that matches on all four name components -- Last, First, Middle and Suffix.

2) Last Name, First Name, Middle Name. Failing the match on all four name components, DaCdb will then attempt to find a member within the District/Account based on three name components -- Last, First, and Middle.

3) Last Name, First Name. Failing that, DaCdb will then attempt to find a member within the District/Account based on only Last and First names.

Failing all the above, the Member being processed is added as a new record in DaCdb.

## 5. Picture Images

DaCdb can import your member pictures too.

DaCdb accepts GIF or JPG formatted pictures. We do not accept BMP, PNG, or other formats at this time. If your member pictures are in one of these formats, we can provide you with a custom quote for conversion or you can do it yourself.

DaCdb accepts member pictures of any size -- pixels height and width. However, our standard picture is 150px wide by a proportional height. We will resize (scale) all pictures received to meet this width objective.

Uploading or providing Member pictures (images) in very high res -- is probably not the best option. In fact, you may find that lower resolution pictures actually look better after they are resized to a 150px width.

Also, enough cannot be said about having a professional photographer take a consistent set of member pictures - that are all the same height and width, cropping and consistent background. Your membership directories will look so much better than a collection of random pictures taken over time.

### 5.1 Importing Images

There are several options for importing member images (pictures):

1) Once we create the member records in DaCdb, you can upload each member's picture using the picture upload under the member edit function. Yes, we agree this is slow and time consuming, but it just might be the most expedient if we are importing a small club (few number of members).

2) We can batch load the pictures. We can provide you a FTP account and/or you can upload a ZIP file to our server containing the member pictures. Depending on the number of member pictures to process -- this may mean several ZIP files will need to be created and uploaded.

In doing this method, we run a batch process against the unzipped images. Image naming must conform to:

- RIMemberID.jpg - or-
- RIMemberID.gif

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## 6. CSV Data Fields

If you provide us data in a CSV file, you will need to follow some conventions.

- 1) The first row of data is the header and each column in the header must be the field name. The field name **must** match one of the field names from the table below.
- 2) All data cells should be populated.
  - a. Date fields should contain the full date. In the case of Birthday date fields that do not contain the year - the date must be in the form mm/dd/1896.
  - b. All numeric fields cannot be left blank. The field must contain a numeric value -- like 0.
  - c. The length of data **cannot** exceed the length of the database field - listed in parentheses, in the Type column below. (e.g. LastName cannot be longer than 50 characters)
  - d. All text description fields cannot exceed 255 characters. This is an Excel limitation.

The field names can be in any order. However, the Field Name -- in the header **MUST BE identical** to one of the field names below.

Field Name	Type	Description
LastName	varchar(50)	Member first name
FirstName	varchar(32)	Member last name
MidName	varchar(32)	Member middle name or initial
Prefix	varchar(12)	Member prefix (e.g., Mr, Mrs, Miss, Dr.)
NameSfx	varchar(20)	Member suffix (e.g., I, II, Jr., Sr.)
NickName	varchar(20)	Member nick name / badge name.
AccountID	int	The Account or District ID. <b>REQUIRED</b>
dFlag	char(1)	Record is deleted
OptIn	char(1)	Y=Member will received emails, N=Member will not receive emails from DaCdb
Email	varchar(80)	Member email address. Multiple emails may be entered separated by commas
AltEmail	varchar(80)	Alternate email address
Notes	varchar(MAX)	Notes -- anything pertaining to the member, that was not entered in another field
Private	char(1)	Is the member address and phone information private (Y or N)
IM	varchar(32)	Instant message name
MemberTypeID	int	Member type ID. This is from the Member type table. If not provided will default to 0 (Active)
LoginName	varchar(64)	Member password (this is typically the member's email)
Password	varchar(50)	Member login name. (this is typically the

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Field Name	Type	Description
		MemberID)
PswdReset	char(1)	Should password be reset on next login (Y or N)
PolicyAccept	char(1)	Was DaCdb usage policy accepted (Y or N)
UserStatusCode	char(1)	A=Active, T=Terminated
ClubID	int	Internal ClubID (club number) within DaCdb if club already exists. <b>REQUIRED</b>
ClubCode	varchar(8)	Club Number
ClubName	varchar(50)	Club Name
ClubPositionID	varchar(10)	ID value from Club Position Admin
BadgeNumber	varchar(8)	Badge Number. (may be blank)
BadgeTitle	varchar(32)	Title to appear on event badges
Image	varchar(32)	Name of Member's image.
StartDate	datetime	Admission or start date with Club or organization. mm/dd/yyyy
ClubStartDate	datetime	In Rotary, not used. Must be mm/dd/yyyy
TermDate	datetime	Termination date (mm/dd/yyyy)
Gender	char(1)	Member's sex/gender ( <b>M</b> or <b>F</b> ). Leave blank if unknown
PrimeContact	char(1)	Not used in Rotary
Birthdate	varchar(12)	Valid date mm/dd/yyyy, where yyyy > 1900 Partial birthdays (mm/dd) cannot be entered
MemberID	int	RI Member ID or other Member ID information
SponsorName	varchar(50)	Sponsors Name
BusName	varchar(64)	Business name
BusPosition	varchar(64)	Business position (President, Partner,)
BusWeb	varchar(64)	Business website URL address
Employees	int	Number of employees in Members place of business. Must be 0 if non known
MemberCategory	varchar(64)	Not used in Rotary. Optional professional field member is associated with (Finance, Legal)
AnniversaryDate	datetime	Anniversary Date (mm/dd/yyyy)
PartnerFirstName	varchar(32)	Partner First Name
PartnerLastName	varchar(50)	Partner Last Name
PartnerNickName	varchar(20)	Partner Nick Name
IsPartnerMember	char(1)	Is Member's spouse/partner (Y or N only)

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Field Name	Type	Description
PartnerBirthdate	datetime	Partner birth date (mm/dd/yyyy)
OccupationCode	char(5)	4-digit occupation code
Classification	varchar(64)	Member classification
LangAbbr	varchar(50)	Member languages read or spoken
Degree	varchar(128)	Member degrees (may be blank)
Hobbies	varchar(128)	Member hobbies (may be blank)
PrevYears	int	Previous Years of Perfect Attendance
AttYrsPerfect	int	Number of years of perfect attendance
AddressSelect	char(1)	1=Home or 2=Business
Address1	varchar(50)	Home Address 1 (may be blank)
Address2	varchar(50)	Home Address 2 (may be blank)
City	varchar(50)	Home City (may be blank)
StateCode	char(2)	Home State code or Providence (e.g., NJ)
County	varchar(32)	Home State County (may be blank)
ProvOrOther	varchar(32)	Home Providence
PostalZip	varchar(12)	Zip code or Postal Code
CountryCode	char(3)	Country code (e.g., USA, CAN)
HomePhone	varchar(20)	Home Phone (may be blank)
OfficePhone	varchar(20)	Office Phone (may be blank)
FaxNumber	varchar(20)	Fax Number (may be blank)
CellPhone	varchar(20)	Cell or Mobile Phone (may be blank)
TollFreeNumber	varchar(20)	Toll Free Number (may be blank)
AltAddress1	varchar(50)	Business/Office Address 1 (may be blank)
AltAddress2	varchar(50)	Business/Office Address 2 (may be blank)
AltCity	varchar(50)	Business/Office City (may be blank)
AltStateCode	char(2)	Business/Office State Code (may be blank) (e.g., CO, NJ, LA)
AltCounty	varchar(32)	Business/Office County (may be blank)
AltProvOrOther	varchar(20)	Business/Office Providence (may be blank)
AltPostalZip	varchar(12)	Business/Office ZipCode or Postal Code (may be blank)
AltCountryCode	char(3)	Business/Office County Code (may be blank) (e.g., USA, MEX, CAN)
Assignments	varchar(MAX)	Optional data field for RLI Alumni assignments

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Field Name	Type	Description
Description	varchar(255)	Member description/bio