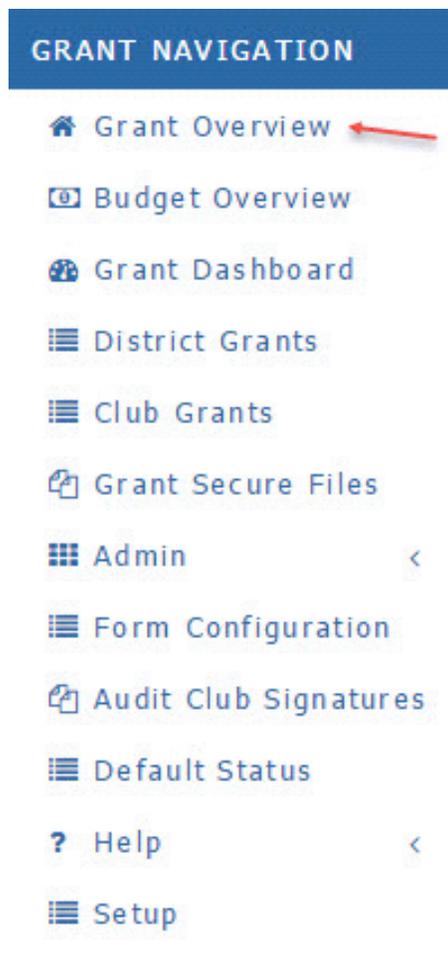


**Overview:** DACdb offers a premium module which will allow districts and clubs to manage the internal application process for district grants. The Grants module offers clubs and districts flexibility in carrying out activities supporting the Foundation Mission. We encourage all districts to explore the key features of the Grants Module which will help your district facilitate the grant management process. DACdb support is available to provide your district team a demo of the module at a time of your convenience. Most demos take less than one hour via GoToMeeting.

### District Set-Up

The District needs to set up some initial information before allowing the clubs to file for an on-line application.

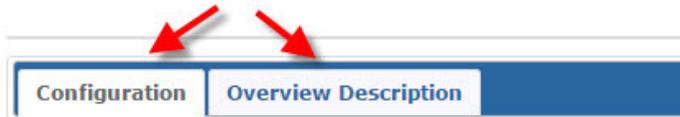
A level 7 will have access to make these changes. After you click on the Grants Tab, start with the left navigation bar.



**Setup:** There are two parts to the setup, Configuration and Overview Description. Click the Setup menu item on the left navigation bar.

## Grant Setup / Configuration

Setup the configuration parameters for Grant module.

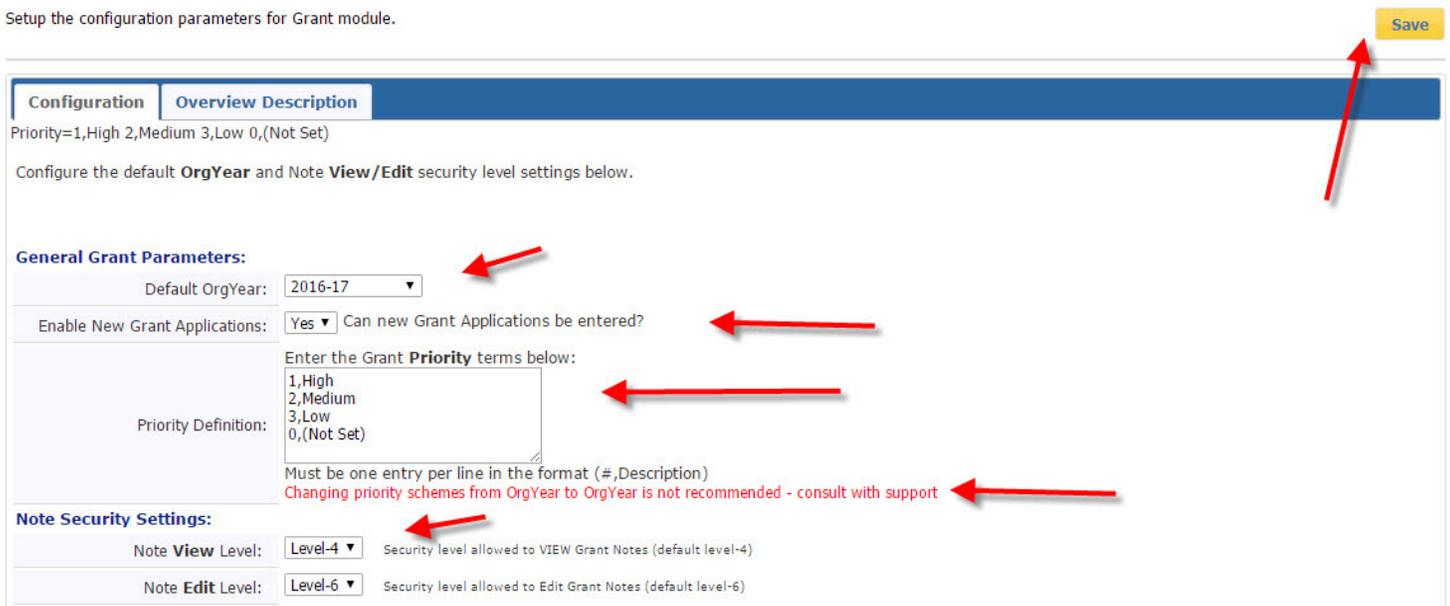


**Configuration:** On this tab you will define:

- Default Org Year
- Enable the Grant Application
- Define the priority definition that will be used on the Grant Application
- Define the Note Security Requirements
- Save your selections

## Grant Setup / Configuration

Setup the configuration parameters for Grant module.



Configuration Overview Description

Priority=1,High 2,Medium 3,Low 0,(Not Set)

Configure the default **OrgYear** and Note **View/Edit** security level settings below.

**General Grant Parameters:**

Default OrgYear: 2016-17

Enable New Grant Applications: Yes Can new Grant Applications be entered?

Priority Definition: Enter the Grant **Priority** terms below:  
1,High  
2,Medium  
3,Low  
0,(Not Set)

Must be one entry per line in the format (#,Description)  
Changing priority schemes from OrgYear to OrgYear is not recommended - consult with support

**Note Security Settings:**

Note **View** Level: Level-4 Security level allowed to VIEW Grant Notes (default level-4)

Note **Edit** Level: Level-6 Security level allowed to Edit Grant Notes (default level-6)

Save

**Overview Description:** The grants overview is the default overview. You can customize this to change the verbiage to fit your District or you can use the default. If you decide to change it, make sure you click on save after you enter your description.

### Grant Setup / Configuration

Setup the configuration parameters for Grant module.

Configuration Overview Description

Configure the Grant Overview page with the description below.

You can update this section now, but the updates will not appear anywhere yet. In the next Grant release, the description and/or logo graphics you create here will appear on the initial Grant page. This will allow each district to customize their own message on the initial screen.

Start Page Description:

Type your description here and then click on Save

**Budget Overview:** On this tab you will enter the DDF you received from RI and any administrative costs you think you will incur.

- Click on Reset Budget on right side of page
- Click on pencil in front of the DDF Funding and enter your DDF funds
- Click on pencil in front of Administrative expenses and add your estimated expenses. You can change the description of this item while in the edit mode.
- The rest of this page will automatically populate as clubs apply for grants, grants are approved and grants are completed.

GRANT NAVIGATION

- Grant Overview
- Budget Overview
- Grant Dashboard
- District Grants
- Club Grants
- Grant Secure Files
- Admin

District Budget Overview [2016-17]

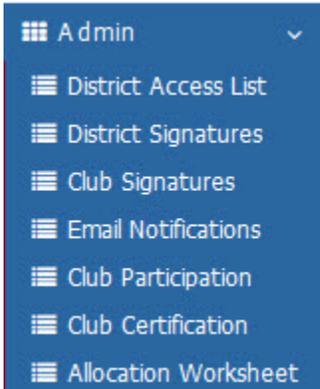
Manage the allocated budget for a given org year below.

Reset Budget Change OrgYear

Grant Funding Allocation - 2016-17				
Action	Description	Received	Spent	Balance
	Total Grant DDF Funding for 2016-17	\$85,000.00	\$0.00	\$85,000.00
	Administration Costs for 2016-17	\$0.00	\$550.00	\$84,450.00
Net Funding To District:				\$84,450.00

# Administrative Functions

**Admin:** Next you will set up the admin functions but clicking on Admin on left navigation menu. The following menu will appear:



**District Access List:** This list gives editing access to all the grants and the grants database. This should be for the District Team who is responsible for approving the grants and changing an approved grant if necessary. Simply click on District Access List and move the names of the team members from the left list over to the right list.

## District Grant Access List

District Grant Access List determines who has access to to viewing and editing the grant information.  
**All Level 6+ District Administrator users automatically have access** to the District Grant Module!  
You may identify below the **other users who also** need access to the grants module at the District-level below **and/or** include individuals that are included on a District notification list when a Grant state changes.

To **Grant access**, move members from the left to the right. To **Remove access**, move members from the right to the left. Then click the [Save] button (above-right) to save your changes.

The interface shows two columns of lists. The left column is titled 'District User List' and contains names and counts of users. The right column is titled 'District Access List' and contains a list of users with counts. Between the columns are three buttons: '>>', '<<', and '<< All'. A 'Save' button is located in the top right corner. Red arrows point from the '>>' button to the 'Landmann, Mark R Test (Bank Masters - Test) [3]' entry in the left list, and from the 'Save' button to the top right of the page.

District User List	District Access List
Landmann, Mark R (Bank Masters - Test) [1]	Aaa000, Aaa000 (zGUEST of District) [1]
Landmann, Fred (Butter Ball - Test) [6]	Aaa13, Aaatester B Mr (Flank Steak - Test) [1]
Landmann, Mark R (Flank Steak - Test) [1]	Level6, Level6 (Level Testers) [1]
Landmann, Mark R (Flank Steak - Test) [1]	
Landmann, Mark R Test (Bank Masters - Test) [3]	
Lauper, Cynthia (Hollywood) [1]	
lazyboy, ralph D Jr (Cambio - Test) [1]	
Level1, Level1 (Level Testers) [1]	
Level2, Level2 (Level Testers) [2]	
Level3, Level3 (Level Testers) [3]	
Level4, Level4 (Level Testers) [4]	
Level5, Level5 (Level Testers) [5]	
Level5Tester51, Tester51 (Bank Masters - Test) [5]	

**District Signatures:** Most Districts require two signatures to approve grants and final reports. Of course if your District has another requirement you can change it here. Just like the District Access List, select the names of those individuals who must sign on a District Level.

District Grant Signatures: [2016-17]

A summary of the Club Signatures approvals is shown below.

Change OrgYear Save

**District Signatures Configuration:**

Number of District Signatures Required: 2  
 Minimum number of Club Signatures Required: 2  
 Other Club Signatures Required: Yes

**Authorized District Signatures for 2016-17:**

This is the list of members that have access to edit (Club Level) and approve the Grant. To **Grant access**, move members from the left to the right. To **Remove access**, move members from the right to the left. Then click the [Save] button (above-right) to save your changes.

District User List	District Signature Permission
Landmann, Mark (Bank Masters - Test)	Landmann, Mark R Test (Bank Masters - Test)
Landmann, Mark (zGUEST of District)	Robinson, Smokey (Bank Masters - Test)
Landmann, Mark R (Flank Steak - Test)	
Landmann, Mark R (Flank Steak - Test)	
Lastname, Newtester (zGUEST of District)	
Lasttestasdf, Testasdf (zGUEST of District)	
Lasttestasdf, Testasdf (zGUEST of District)	
Lasttestasdf, Testasdf (zGUEST of District)	

**Email Notifications:** Districts can set up automated emails depending on the status of the grant. When you save a grant for the first time it becomes a “draft”. You can set up an automated email to go to the contacts listed on a grant when the status changes to draft. These automated emails save you time and you can convey what next steps the club needs to take. The email will be sent to those you check off.

Customize this email notification below.

Send Pmail Test Cancel Save

\* Status: Draft This email will be sent when the grant status is changed to this state.

\* Enabled: Yes Enable or disable sending this email on the state change

Send this EMail Notification to the following groups:

- Club Signees
- Club Contacts

\* Notification Scope:

- District Signees
- District Access List
- Add TO CC list to PMail

\* Message Subject: DACdb Grants - Draft Grant

Dear %FName%,

A new grant titled "%GrantName%" has been created as a draft on DACdb! You have been included in this email because you are listed as a contact for this grant or you are on the grant club signature list.

In order to submit the grant to the District for approval, two individuals from your club must sign the grant. You must complete the budget tab and if you have any supporting documents you should add them to the Document Tab.

Please log in to DACdb and view the GRANTS module tab, Club Grants to view your grant. If you have any questions please contact me.85

Sincerely,

%RandomName%

**Club Participation:** Some Districts track the club's contribution and base the amount of their grants on this contribution. If your District does this, you can track that information here.

### Club Participation Listing [2016-17]

Search...     

Update grant related Club participation data below.  
 9/8/16 - Club Certification was moved to a new Club Certification page.  
 9/8/16 - This page is being replaced by the Allocation Worksheet and will be removed in a future release.

[Change OrgYear](#) [Refresh Club List](#) [Edit Participation](#)

Action	Club Name	Per Capita Given	Max Funding	Active Members
 	Bank Masters - Test	\$ 0.00	\$ 0.00	67
 	Butter Ball - Test	\$ 0.00	\$ 0.00	21
 	Cambio - Test	\$ 0.00	\$ 0.00	7

**Club Certification:** Some Districts track when they receive MOU's and when a club takes Grants Training. Your District can use Club Certification to track that information.

### Club Certification Listing [2016-17]

Search...     

Club certification status is shown below. Click [Edit Certification] to update.

[Change OrgYear](#) [Edit Certification](#)

Club Name	Mou Signed	Training	Taxes	Certified	Modified By	Created By
Bank Masters - Test (9999)						
Butter Ball - Test (99012205)						
Cambio - Test (99012207)						
Cant Delete these people (999703501)						
d6710 Jefferson copy for holding dup dues (999703472)						
DaCdb Development Test (99012208)						
Flank Steak - Test (99012204)						
Frankenstein (99691)						
Frankenstein Satellite (999703635)						

## Form Configuration

Under Form Configuration you can edit the initial grant application, interim report and final report before you start the grant application process.

Click on Form Configuration on left navigation menu. Click each form and make appropriate changes if needed. If something more elaborate is needed, please contact support.

-  Form Configuration
-  Application Form
-  Interim Report
-  Final Report

Many Districts do not use an interim report. When you click on the Interim Report you will have the option to turn that off.

**Audit Club Signatures:** Districts will click this on to monitor which clubs assigned their individuals to sign their club grants. You can assist them by adding the members to the list for them. Simply click on the club name to add members to the signature list.

Grant Signature Audit: [2016-17]



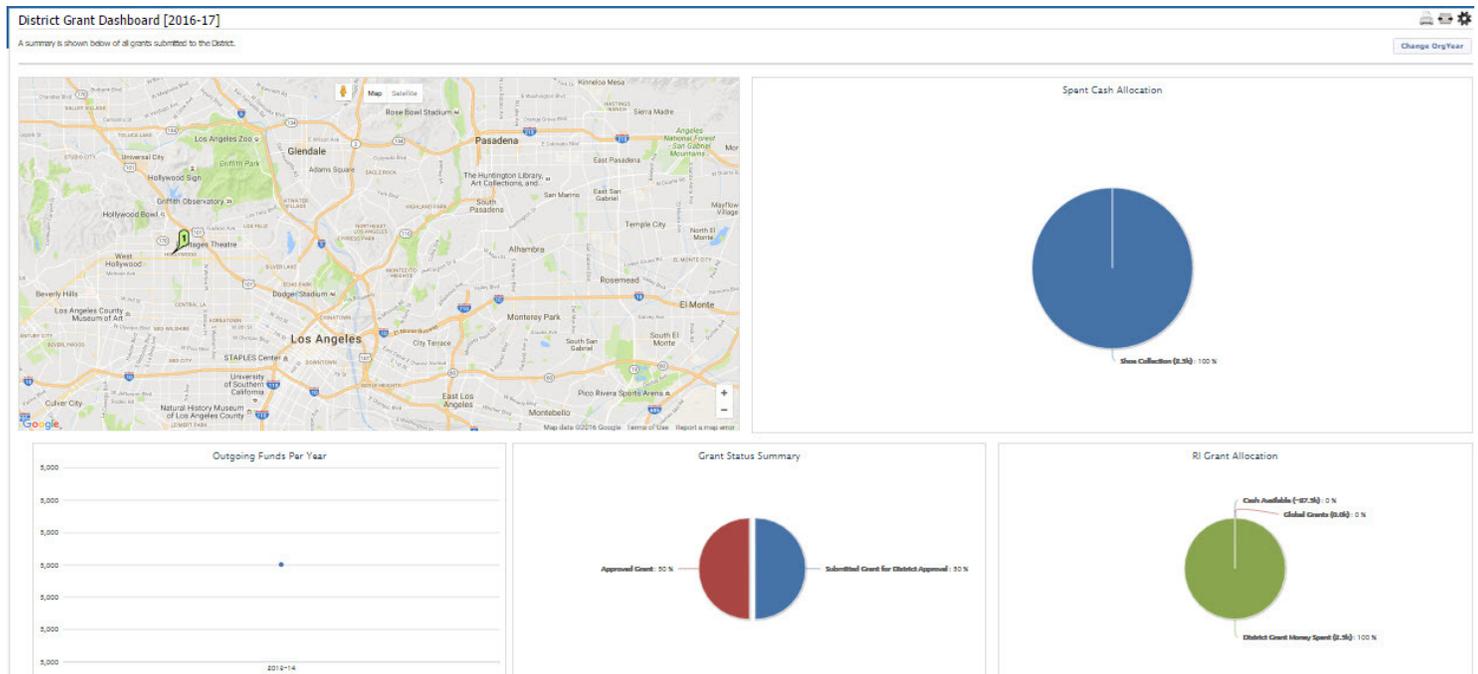
A summary of the Club Signatures approvals for 2016-17 is shown below.

[Clone Signatures](#) [Change OrgYear](#)

Club Signatures					
Club Name	Club Certified	Name	Position	Email	S-Lvl
<a href="#">Bank Masters - Test (9999)</a>		Bunny, Rabbit	Member		1
<a href="#">Butter Ball - Test (99012205)</a>		Robinson, Smokey	Member	ssoden@harcalfagency.com	9
<a href="#">Cambio - Test (99012207)</a>		<b>(No Signatures Defined)</b>			
<a href="#">Cant Delete these people (999703501)</a>		<b>(No Signatures Defined)</b>			
<a href="#">d6710 Jefferson copy for holding dup</a>		<b>(No Signatures Defined)</b>			

**Other Items on left navigation menu:**

**Grant Dashboard:** This is a graphical page summarizing the District Grants. Has various charts that will give you an overview of the grants in your district.



**District Grants:** This is a summary of all the grants submitted by clubs district wide and their various stages in the grant process. Those who have District Access will be able to view this summary and have edit access to it. This will assist you in identifying which grants need attention and where you stand as far as monies being spent. Other clubs can view the information but cannot edit anything other than their own grants.

District Grants [2016-17]

Switch Identity Search...

A summary is shown below of all grants submitted to the District. **Click on the Project Name to view below.**  
 When more than one club is working on together on a Grant, the sponsor club is designated (\*) below.  
 Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

Show Deleted? [Apply Block Grant No](#) [Change OrgYear](#)

Approved									
<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>		Shoe Collection	3275	Hollywood	Approved Grant	\$0.00	\$2,500.00	\$2,500.00	\$5,000.00
No Grants: 1						<b>\$0.00</b>	<b>\$2,500.00</b>	<b>\$2,500.00</b>	<b>\$5,000.00</b>

Club Process									
<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>		Test 2	3244	Hollywood	Draft	\$0.00	\$500.00	\$500.00	\$1,000.00
No Grants: 1						<b>\$0.00</b>	<b>\$500.00</b>	<b>\$500.00</b>	<b>\$1,000.00</b>

District Review and Approval									
<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>		test	3196	Bank Masters - Test	Submitted Grant for District Approval	\$0.00	\$500.00	\$500.00	\$1,000.00
No Grants: 1						<b>\$0.00</b>	<b>\$500.00</b>	<b>\$500.00</b>	<b>\$1,000.00</b>

**Club Grants:** This is a summary of an individual's club grants. The contacts of the individual club grants can go in and update their grant information, apply for a grant, submit a grant for district approval, complete the final report on the project. They access this by clicking on the grants tab, selecting Club Grants on left navigation bar.

Club Hollywood Grants [2016-17]

Switch Identity Search...

A summary is shown below of all grants submitted to the District from this Club.  
 When more than one club is working on together on a Grant, the sponsor club is designated (\*) below.  
 Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

[Change OrgYear](#) [New Club Grant Request - Click Here to Create Grant](#)

[Apply Block Grant No](#)

Approved									
<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>		Shoe Collection	3275	Hollywood	Approved Grant	\$0.00	\$2,500.00	\$2,500.00	\$5,000.00
No Grants: 1						<b>\$0.00</b>	<b>\$2,500.00</b>	<b>\$2,500.00</b>	<b>\$5,000.00</b>

Club Process									
<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>		Test 2	3244	Hollywood	Draft	\$0.00	\$500.00	\$500.00	\$1,000.00
No Grants: 1						<b>\$0.00</b>	<b>\$500.00</b>	<b>\$500.00</b>	<b>\$1,000.00</b>

**Grant Secured Files:** This works the same way as District or Club Secured Files. You can store MOU's here, Grant Instructions or anything else pertinent to the Grant Process.

Grants File Listing Search...     

[Who can see Secure Files?](#) [Add Secure File](#) [Add Folder](#)

Store files here that you would **ONLY** like DACdb members to be able to see. Members **MUST login** to see these files.

The files stored here are **ONLY** accessible to users that have logged in to *Rotary Test District 9969*. They are **NOT** accessible to users on the internet, nor are they able to be linked to as webpages on other websites. Because of this, don't upload html files, url links, or other web content to these directories, as they may not be useable.

If you want your file to be accessible to the general public, have it linked on your website, etc. - use the *Public Files* tab.

If you want to allow direct access to your file, you can click on the "Link" hyperlink in the *Link* column to get a link to the file that will allow a user to authenticate (login) before they gain access to the file.

**The maximum allowed size of a single file is: 20 MB**

Secure Files

[Home](#) <<- click links here to navigate

Action	Type	File Name	Link	Modified	Size
		<b>0</b>		04/22/14 12:20 AM	
		<b>Grant folder</b>		01/14/15 04:32 PM	
		<b>Some other very useful folder</b>		01/14/15 04:37 PM	
		<a href="#">jijitest.txt</a>	<a href="#">Link</a>	06/25/14 11:23 AM	0 KB
		<a href="#">lv4.jpg</a>	<a href="#">Link</a>	06/25/14 11:29 AM	49 KB
		<a href="#">zzz.txt</a>	<a href="#">Link</a>	12/22/14 11:31 AM	0 KB

3 Files found Total space used in this directory: 49 KB

You are ready to start the grant application process.