DaCdb
Secrets of the Database Revealed

Got a Question? Then, ask your District Communications Officer (DCO)
Your DCO is: Michael Soden, ph: (804-594-7065)
E-mail: MichaelSoden@harcalfagency.com

District and Club database
www.DaCdb.com

daK-dee-bee
spoken here

DoCdb

Less TIME with Less *Stress*

A **1**-click solution: at **1/3** the cost
- EZ Weekly & Monthly Attendance
- EZ Club Bulletins & Web Sites
- EZ Club DUES & Invoicing

- Automatic Updates to: District & RI
- Custom Membership Directory
- Send PMAIL (Personalized E-Mails)
- Speakers Bureau (by topic & speaker)
- Calendar of Events: Meetings & Fundraisers
- Event Registrations (pay w/credit card)
- Over 40 Reports (custom & pre-defined)
- Got RI-CAS, then get DaCdb, with 1-click conversion
- Stringent Security and Privacy "built in"
- Instructional Videos (by function)
- Multi-media "training materials"

SIGN UP for a 30 DAY FREE TRIAL

Superior Technical SUPPORT: 24/7

E-mail: info@DaCdb.com

100% SATISFACTION GUARANTEED

Simply the Best, Inc.   Ph: (252) 257-1401

Quick Finder

SIGNING ON

If you haven't created a shortcut (which is recommended) you can always get into the database by typing in **DaCdb.com** in the URL line of your web browser.

*Hint: Generally, your district website (RotaryXXXX.com) will contain a link to **DaCdb**. Encourage your webmaster to add a link to your club website as well.*

When you get to the actual log-on screen you will need your email address, password (member number – available from your Rotarian magazine, your club secretary or various Rotary reports) and your club number. You may change your password after you log-on.

Hint: Before you Sign In, create a shortcut for your desktop by clicking on the "DaCdb Short Cut" link at the top right of your page. (See circled link above.)

NAVIGATING THROUGH DACDB

Navigation through **DaCdb** is accomplished by clicking on tabs/links at the top of the homepage.

> 1. The top line of tabs is the primary way to navigate and they will remain the same wherever you are in the database. Most of what you will need to do, you will do from the "My Club" tab.
> 2. The second row of links takes you to various district functions. (Click on them to get familiar with navigating through district information
> 3. The bottom row of links provides an overview of facts and figures about your club and your district.


> *Hint:* Scroll down through the home page. It briefly explains how DaCdb works, its security levels, and has links to other helpful information.

Navigation from Bottom to Top

Using the bottom row of navigation links is generally not essential to your functions in **DaCdb**, but they can be fun and interesting. If you learn by "doing", take a few minutes to click on all the links to see what they do and where they take you. You will find even more uses for them as you get more familiar with the system.
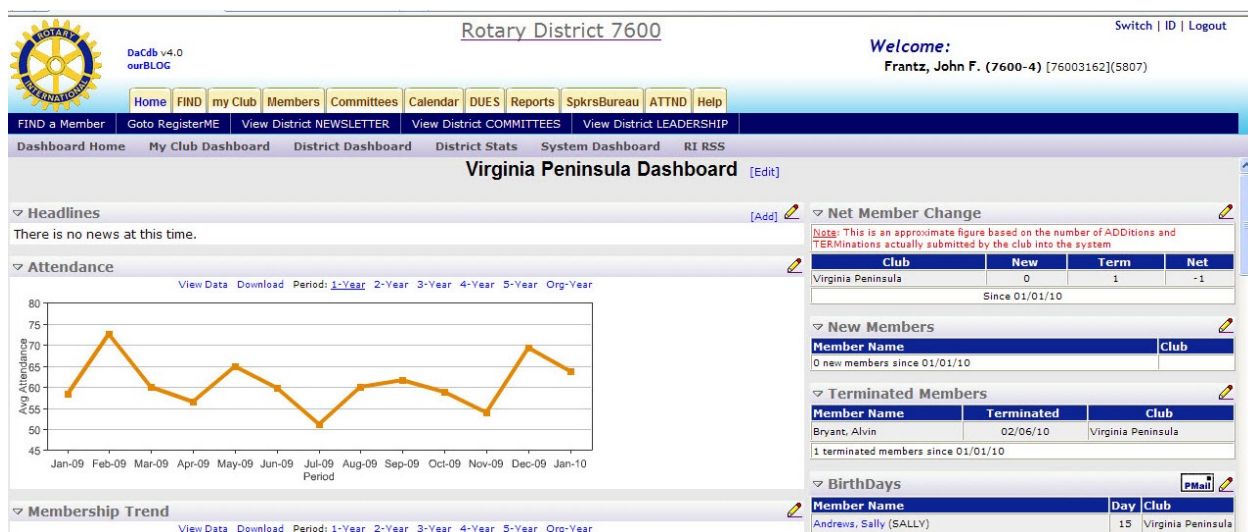
My Club Dashboard

The club dashboard provides a thumbnail sketch of your club. This shows your attendance trends, membership trends, lists birthdays and anniversaries for club members, membership anniversaries, and more.

> *Hint: The more complete and timely the information is for your club/members, the more accurate the Club Dashboard will be. It only summarizes the information that you provide.*
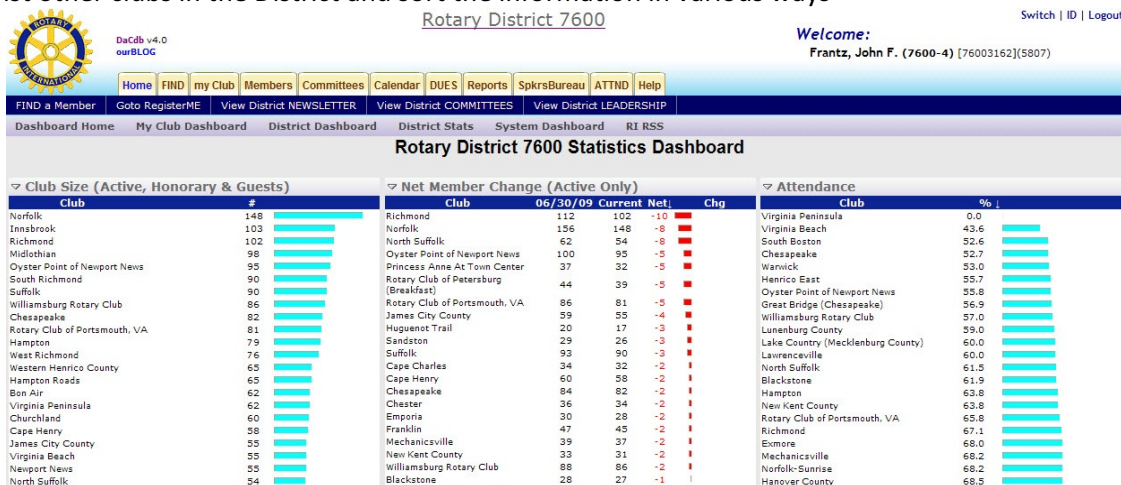
District Dashboard

The District Dashboard is very similar to the Club Dashboard, but it summarizes information at the District level.
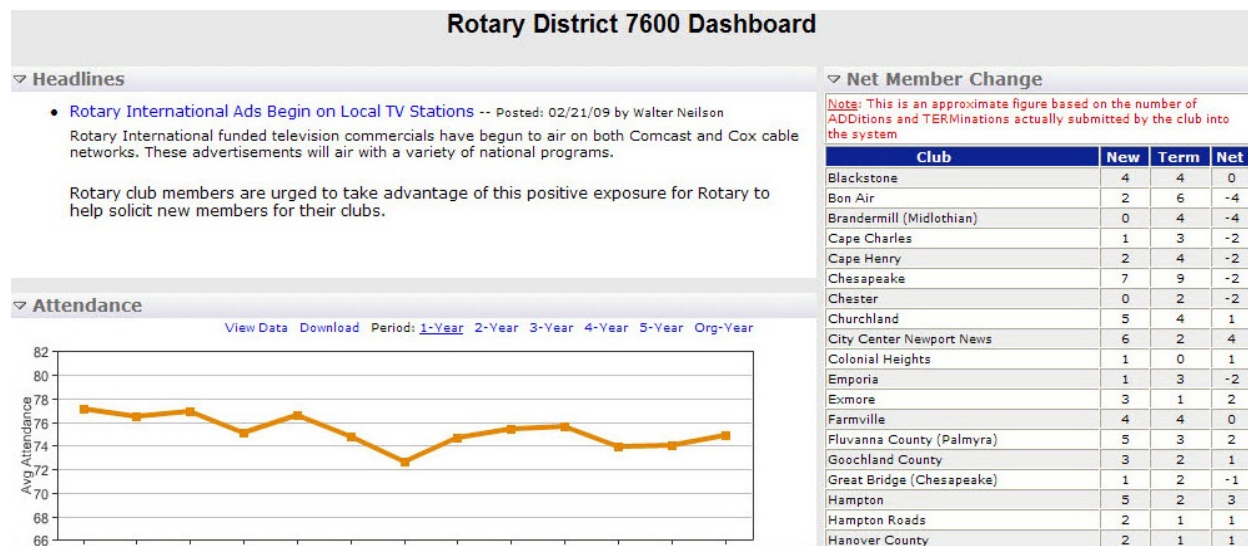
District Stats

District Stats is one of the most interesting places you can visit in **DaCdb**. You can compare your club against other clubs in the District and sort the information in various ways –

Hint: *Click on the titles (e.g., club name, #, %, etc.) to sort the data and display it in different ways.*

View District Committees and View District Leadership (Line 2)

These are quick and easy ways to identify and communicate with your district leadership.

Hint: The system provides "redundances" that allow you to move to the same place from different places in the program. Experiment around and use the ways you like best.

District Newsletter

This link lets you view District Newsletter (archives and current editions). Other items may be uploaded here as well. When you click on the newsletter you want to review, a 'popup' with the edition you selected appears.

GoTo RegisterME

This link takes you to the calendar page which lists those events for which you can register online. (PETS, District Assembly, District Conference, Charter Night, fund raisers, etc.)

> *Hint:* Click on the red "**Register Now**" link to take you to event for which you want to register.

> *Hint: This is simply the Calendar page found under the Calendar tab/link on the top row. Go here to find out the when and where of club, district and zone events. Use it to post your club events – with or without sign-up capabilities. Post cancelled meetings and other information you want your membership to have.*

FIND A Member

This may be one of the most useful link you will find in DaCdb. From this link you can find other members in your district and in anyone of 65 other districts in the US, Canada, and Carribean.

- Type in as much as you know of the members name.
- Click the gold search button
- The system will find ALL the information that matches what you input, <u>within your own district</u>

- Use the Global check box to search for people in other districts.

Hint: *Gold Buttons are always "action buttons" they are used to update records, generate a search, execute a print document, submit a report, etc.*

USING THE NAVIGATION TABS

In most cases you will be able to navigate to those places you need to be by simply using the navigation tabs/links at the top of the page.

| Home | FIND | my Club | Members | Committees | Calendar | DUES | Reports | SpkrsBureau | ATTND | Help |
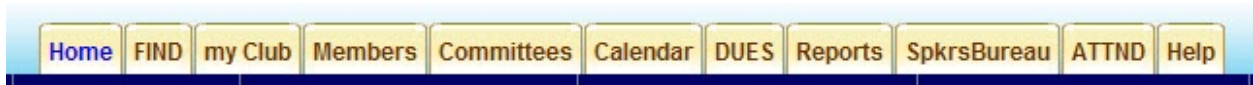
HOME: We have been here before, it is the page you see when you sign in.

FIND: Also have been here before. It works exactly like the FIND a Member link in the middle row of links.

my Club: This is the most important tab/link in the program. Over 90% of what you do in DaCdb can be done under this tab. It is so important that the functions are below in a special section.

Members: This takes you to your member page.

Committees: This takes you to a list of District and Club committees. It will show you who serves on the various district committees and can show you how other clubs are using the committee structure as well. If your club has NOT entered their committees on their club page, no information will show up here.

Calendar: This tab/link takes you to the same place as the GoTo RegisterME link. Go here to find out the when and where of club, district and zone events. Use it to post your club events – with or without sign-up capabilities.

DUES: This is an optional add-on module that can be purchased for a small fee. It allows you to bill and email member dues statements in about six easy clicks.

Reports: Use this tab (or one like it found in the **myClub** tab) to print reports, directories, mailing labels and other items.

SpkrsBureau: This section is designed to allow clubs to find speakers and to share information about good speakers who have come to their club.

ATTND: This is the attendance tab. All clubs in the district use this tab at least once monthly to report their club attendance up to the district level where it is compiled.

      (There is also another optional add-on module that allows clubs to use DaCdb to track their members weekly attendance and which automatically rolls up the figures for the monthly report to the district. It also interfaces with the dues module.)

Help: This tab takes you to training resources (including videos), frequently asked questions, and support information

Saving **myClub** for last, let's explore some of the tabs that we haven't seen.

Committees Tab

This location not only displays the committees in the District and the clubs, it also has sub-menus which help in navigation.

Five of the links "drill down" or "sorts out" and isolates various functions and information.
ADD a Committee is an action link that permits you to list your club committees.
View allows you to see the make-up of individual committees. (You may only edit your club committees, not district or other club committees.)

ADD a Committee

As easy as 1 - 2 - 3
1. Name the Committee
2. Describe the Committee
3. Add the Committee
Idea: Group your committees to communicate with them simultaneously by using the Group to Group Drop Down menu

Edit and populate your committee

After you have added your committee, go to the View My Club's Committee, click on the edit link next to your committee.

Section 2 allows you to assign roles to various committee members.
Section 3 allows you to add and delete members

Calendar

This section has two functions – to display information about upcoming events, and a registration function

Calendar events can be entered without a registration function for informational purposes only. You will have to educate your membership to check the "Club Calendar", for this to be an effective communications tool.

Calendar events may also be linked to your website to be viewed by the general public.

Sat Feb 20, 10	08:30A	**RI Zone 33**	Rotary Leadership Institute RLI-Norfolk VA	Rotary Leadership Institute RLI- Norfolk VA. See **www.rli33.org** for event detail.
Sat Feb 20, 10	09:00A	Register NOW · Western Henrico County	**2010 Bowl-A-Thon**	Bowl America - Short Pump 4400 Pouncey Tract Road Glen Allen, VA 23060
Sat Feb 20, 10	07:00P	Register NOW · Bon Air	**Bon Air Rotary's Seventh Annual Casino Night** (click to view a list of registrants)	**Virginia Museum of Fine Arts, Marble Hall 200 N. Boulevard Richmond, Virginia 23220** Join us for an evening of fun, games, fine food and drink and great prizes. Tickets are $100 each. Sponsorships available! For tickets or information, contact any Bon Air Rotary member or Lee Harris mailto:lee@midlothianlegal.com **804-674-5660**

Registration Function

The registration form looks at your data to pre-complete your form. Scroll down through the form to make the needed selections. When complete, click the gold "Register Now" button. It will take you a second 'confirmation' screen. Click the gold "Confirm Registration" button. You are now registered.

> *Hint: With the establishing of a merchants account with an approved credit card company, your club can accept credit cards for event registration payments.*

Special Note: Depending on the complexity of the registration, setting it up can be very complicated. Contact your DCO or other **DaCdb** support people if you have problems.

Reports Tab

This tab takes you to the print reports section. Use the drop down menus to:

1. Select your report
2. Select (filter) what you want a report on
3. Specify what members you want to include in your report
4. Choose your layout

Selecting your Report

Hint: Use the gold Run/View on Screen button to see what your report will look like before you print it to MSWord or MSExcel

Use the drop down menu to select the report that you need. Don't be afraid to experiment. Try several different reports until you find the one you want. Use the Run/View On Screen gold button to preview your reports.

Sample Reports

The next several pages are samples of the types of reports that can be generated from this screen.

Club Directory

Aaron, Joan (Leonard)
733 Thimble Shoals Blvd.
Ste 170
Newport News, VA 23606

Home: 757-596-4516
Office: 757-881-9600
Fax: 757-873-6997
Email: jaaron@malvinriggins.com
Club: Virginia Peninsula
Member Since: 06/10/98
Classification: Public Accounting
BusPosition: CPA
BusName: Malvin Riggins & Company, PC
Website: http://

- PHF - Paul Harris Fellow
- Sustaining Member

Aaron, Leonard B. (Joan)
317 Dogwood Dr.
Newport News, VA 23606

Home: 757-596-4516
Office: 757-873-6775
Club: Virginia Peninsula
Member Since: 01/01/76
Birthday: 10/27
Classification: Public Accounting

- PHF - Paul Harris Fellow Y
- Sustaining Member Y

Adams, Stephen C. (Nancy)
4116 W. Mercury Blvd.
Pomoco Group
Hampton, VA 23666

Home: 757-723-4174
Office: 757-825-7282
Fax: 757-825-7201
Email: SAdams4003@aol.com
Club: Virginia Peninsula
Member Since: 01/01/82
Birthday: 11/23
Classification: Automotive - Financial Management
BusPosition: Financial Management
BusName: POMOCO Group

- PHF - Paul Harris Fellow Y
- Sustaining Member Y

Andrews, Ann F. (Tom)
1753 CARRIAGE DRIVE
HAMPTON, VA 23664

Home: 757-713-4026
Office: 757-723-3000
Cell: 757-713-4026
Fax: 757-728-1909
Email: AnnAndrews@remax.net
Club: Virginia Peninsula
Member Since: 03/26/09
Birthday: 5/31
Anniversary: 10/13
Classification: Real Estate - Residential Sales
BusPosition: Realtor
BusName: RE/MAX SELECT
Degrees: B.A. Sociology, ODU, 1976 M.S. Community Health Education, Health Care Admin emphasis, ODU, 1987
Hobbies: Hiking, Reading, Bible study

- PHF - Paul Harris Fellow Y
- Sustaining Member Y

Andrews, Sally (Andy)
147 Wareham's Point
Williamsburg, VA 23185

Home: 757-345-3346
Email: sallyandrews@gmail.com
Club: Virginia Peninsula
Member Since: 05/23/01
Birthday: 2/15
Classification: Law - Public Servant
BusName: City of Hampton

- PHF - Paul Harris Fellow
- Sustaining Member

Avery, Shawn (Martinee)
11820 Fountain Way
Suite 301
Newport News, VA 23606

Office: 757-826-3327
Fax: 757-826-6706
Email: savery@pcfwd.org
Club: Virginia Peninsula
Member Since: 03/26/08
Birthday: 1/18
Classification: Economic Development
BusName: Peninsula Council for Workforce Development

- PHF - Paul Harris Fellow Y
- Sustaining Member Y

Babcock, Paul B. (Susan P.)
252 Zelkova Rd.
Williamsburg, VA 23185

Home: 757-345-2229
Office: 757-896-8424
Fax: 757-896-8470
Email: pbabcock@arcvsp.org
Club: Virginia Peninsula
Member Since: 06/19/05
Birthday: 3/23
Classification: Community Service

- PHF - Paul Harris Fellow Y
- Sustaining Member Y

Bales, Keith (Debbie)
609 Briarfield Rd.
Newport News, VA 23605

Home: 757-255-0020
Office: 757-244-7881
Fax: 757-244-1652
Email: balespestcontrol@aol.com
Club: Virginia Peninsula
Member Since: 06/30/04
Birthday: 10/11
Anniversary: 10/22
Classification: Pest Control
BusPosition: president
BusName: Bales Termite and Pest Control
Website: www.balespestcontrol.com

- PHF - Paul Harris Fellow Y
- Sustaining Member Y

Club Directory Alternative Version

Club Membership
Virginia Peninsula

Aaron, Joan (Leonard)
Classification: Public Accounting

733 Thimble Shoals Blvd. Ste 170 Newport News, VA 23606
jaaron@malvinriggins.com
Home: 757-596-4516
Office: 757-881-9600
Fax: 757-873-6997

Aaron, Leonard B. (Joan)
Classification: Public Accounting

317 Dogwood Dr.   Newport News, VA 23606

Home: 757-596-4516
Office: 757-873-6775

Adams, Stephen C. (Nancy)
Classification: Automotive - Financial Management

4116 W. Mercury Blvd. Pomoco Group Hampton, VA 23666
SAdams4003@aol.com
Home: 757-723-4174
Office: 757-825-7282
Fax: 757-825-7201

Andrews, Ann F. (Tom)
Classification: Real Estate - Residential Sales

1753 CARRIAGE DRIVE   HAMPTON, VA 23664
AnnAndrews@remax.net
Home: 757-713-4026
Office: 757-723-3000
Fax: 757-728-1909
Cell: 757-713-4026

Andrews, Sally (Andy)
Classification: Law - Public Servant

147 Wareham's Point Williamsburg, VA 23185
sallyjandrews@gmail.com
Home: 757-345-3346

Attendance Sign In Sheet

Attendance Sheet
Club: Virginia Peninsula
Feb-28-2010

Member Name	Member Type	Attended
Aaron, Joan	Active	
Aaron, Leonard B.	Honorary	
Adams, Stephen C.	Active	
Andrews, Ann F.	Active	
Andrews, Sally	Active	
Avery, Shawn	Active	
Babcock, Paul B.	Active	
Bales, Keith	Active	
Barton, Michael G.	Active	
Blackwell, Richard B.	Active	
Carmines, Robert W.	Active	
Carroll, Danny L.	Active	
Clemons, Jeffrey W.	Active	
Dister, Arthur C.	Active	
Dupont, Janet L.	Active	
Edmonson, Charles D.	Active	
Feinauer, Kim E.	Active	
Felder, Katie M.	Active	

Member Name	Member Type	Attended
Hunnicutt, Ann N.	Active	
Hunnicutt, Thomas N. III	Active	
Johnson, J. Joseph	Active	
Jones, Robert B.	Active	
Machamer, Rick F.	Active	
Marshall, J. Adrian Jr.	Active	
McCoury, Elizabeth	Active	
Mendelsohn, Jeffrey L.	Active	
Miller, Catherine E.	Active	
Miller, David L. DDS	Active	
Morris, Glenn A.	Active	
Morris, Thomas W. III	Active	
Morris, Thomas W. Jr.	Active	
Neilson, Walter Cap	Active	
Pearce, Gail	Active	
Pierce, James Russell	Active	
Richardson, Gregory M.	Active	
Richman, Louis J Jr	Active	

Mailing Labels

Joan Aaron
733 Thimble Shoals Blvd.
Ste 170
Newport News, VA 23606

Leonard B. Aaron
317 Dogwood Dr.
Newport News, VA 23606

Stephen C. Adams
4116 W. Mercury Blvd.
Pomoco Group
Hampton, VA 23666

Ann F. Andrews
1753 CARRIAGE DRIVE
HAMPTON, VA 23664

Sally Andrews

147 Wareham's Point
Williamsburg, VA 23185

Shawn Avery
11820 Fountain Way
Suite 301
Newport News, VA 23606

Paul B. Babcock
252 Zelkova Rd.
Williamsburg, VA 23185

Keith Bales
609 Briarfield Rd.
Newport News, VA 23605

Michael G. Barton
Taylored Printing
234 Redoubt Rd.
Yorktown, VA 23692-4894

Richard B. Blackwell
2210 Executive Dr., Ste. A
Hampton, VA 23666

Robert W. Carmines
11815 Rock Landing Dr.
Newport News, VA 23606-4207

Danny L. Carroll
103 Lochmere Court
Yorktown, VA 23693

Member Birthdays/Anniversaries

Rotary District 7600 Club: Virginia Peninsula
Birthdays and Anniversaries for **Mar-01-2010** to **Mar-31-2010**

Select Period: Start Date: 03/01/2010   End Date: 03/31/2010

Sort By: ⊙ Member ○ Birth Day

[Refresh] [Word] [Excel]

Member Birthday	Birthday
Babcock, Paul B. (PAUL)	23 March
Carroll, Danny L. (DANNY)	08 March
Flores, Debra A. (DEBRA)	15 March
Marshall, J. Adrian (J. ADRIAN)	28 March
Pierce, James Russell (JIM)	20 March
Shelton, Karen (KAREN)	18 March
Stolldorf, Scott W (SCOTT)	12 March

Partner Birthday	Member Name	Birthday
Carroll, Ginny	Carroll, Danny L.	29 March

Member Anniversaries	Start Date	Years as Member
Strehle, Susan (SUSAN)	17 March 1999	11
Morris, Glenn A. (GLENN)	26 March 2003	7

SpkrsBureau Tab

This is an under utilized section of the database that could make it easier for clubs to share program ideas, if properly used. Clubs may find speakers and post the name of good quality speakers who are available to speak at other clubs.

ATTND Tab

Most districts make use of DaCdb mandatory for submitting attendance data. Attendance must be submitted within 15 days of the close of the month. After 15 days, all club secretaries who have not submitted their attendance get an automatic reminder. After 18 days, more frequent reminders are sent until compliance is met. As soon as attendance is submitted, reminders end.

Click the Submit MONTHLY attendance link to take you to the next screen

Enter the following data

1. Membership data including adds and drops
2. Compute your attendance percentage and enter here
3. Indicate the number of meetings
4. Provide information about any cancelled meetings

When complete, click the gold Submit ATTENDANCE Report button

> **Hint:** An optional Attendance Module is available. This module tracks individual attendance for your members and automatically calculates the attendance for monthly submission. If your club also has the optional DUES module, the Attendance module will interface with that module to automatically bill members (based on their attendance) for meals, guests, etc. Cost is $156.00 annually ($13.00 per month). A 30 day Free Trial is available. Click the following for your trial.

Help Tab

Help is available! Click the home tab to find training resources, iVideos, Frequently Asked Questions (FAQs) and search for other help hints. For big problems, call your DCO or other **DaCdb** support staff.

Training Resources and Materials will help you become more familiar with the functions of the database and will help you become more productive. Set aside some time to access these resources.

Frequently Asked Questions (FAQs)

Scroll through the questions to find the one that applies to your situation.

Frequently Asked Questions
Quick Search by Topic
(-or- SEE our **"How To Do It"** Instructional Videos ☐) 55

Press [*CTRL*] + **F**
to **FIND** a specific word or
phrase in the FAQs

[Print Pages]

FAQ1- Got a Question not in the FAQ? Problems signing-on and Accepting Cookies What is the District's policy on usage of the "data" in the DaCdb?	Q2- My **NEW photo** (or other recently changed data) does not show in database. WHY? *The real issue is really your brower's REFRESH settings!*	Q3- Updating the RI database-timing, and getting RI ID# for new members by ADDING them first to the RI database (also **Logging ON** when their RI ID# is "0"). Also, sending CHANGE notices to the RI database; must be signed by Club Secretary.
Q4- Getting "started" checklist (for a new district)	Q5-Standard **REPORTS** and **Name Badges** Available	Q6- Editing Club Positions to recognize Club Officers, (President, President-Elect, Secretary, Foundation Chair, Club Communications Officer, etc.
Q7- How do I Copy / Clone a Committee record to another Governor's Year?	Q9- Why is **GOV** Year significant	Q10- Attendance Reporting: (Monthly, WEEKLY, and MakeUps)
Q11- Customizing district messages and using Standard "logos"	Q12- Links for your own District and Club Websites	Q13- When does a club use the "InActive-LOA" status code

Click on the blue question and the program will re-direct you to the answer.

FAQ	FAQ

Q49. HOW do we "TRANSFER" a Member from one club to another club?

A49. RI TRANSFERS: DELETING and ADDING Member Data

Thank you for your question on Rotary "transfers". Technically, there is no "transfer" between clubs...
it is a **DELETE** from the old club and (this is done FIRST)
then an **ADD** to the new club (this is done SECOND, using **their RI ID#** from their old club). This must be done to properly notify RI and update their database for the Semi-Annual Reports :).

Also, you could contact the "new" Club Secretary and pass along his information (including their **Date of Admission**).

This must be done to properly notify RI of the "transfer" for the Semi-Annual Report for BOTH clubs involved in the "transfer"..

Q50. Why does the Club's **custom web site** display *instead* of the **standard template club web site**?

A50. The "issue" is because of HOW they have listed their club web site LINK in their CLUB INFORMATION Section 1
in the **DaCdb** database (http://www.M-Irotaryclub.org).

This is a decision (and training issue) for the district...do they want ALL the clubs in the district to display THEIR custom web site for the club?,
OR do they want them to display the same, standard "look & feel" club template web site?

This is controlled by the presence or absence of the "http://" prefix in the LINK to their club web site.
IF it is present, such as it is for M-I club's link above, then it tells the system to display their CUSTOM club web site.
IF it is NOT present, and the link just starts with "www." prefix in the LINK, then the system displays the STANDARD club web site.
However, when the standard club web site is displayed, the User can click on the LINK to the custom web site, and
their custom club web site is displayed.

my CLUB Tab

About 90% of what needs to be done in **DaCdb** can be accomplished from this tab. You can

- • View Club Leadership
- • Add Members
- • Edit Member information
- • Designate Officers
- • Create Club Information
- • Add and Edit Committees
- • Submit Attendance
- • Email individual members
- • PMail all members and selected groups of members
- • View and post Club Bulletins
- • View and add to Club Calendars
- • Edit PHF/SM
- • Generate Club Reports
- • Look up contact information for members

Clicking the my Club tab takes you to the Club Page which is divided into Club Leadership and three individual sections. (Club Leadership pictured below.)

A sub-menu appears under the normal tabs. Use these links as shortcuts to other functions related to your club.

> **Hint:** Members can use the Where CLUBS Meet link to find out when and where they can make-up meetings anywhere in the District.

Section 1 – Club Information:

This is the public access section of this page. It should be as complete as possible so that visitors and guests will be able to call, email or simply find your club. (Click the Edit Club button to update this information.)

> **Hint:** Use MapQuest, Google Maps, or Bing Maps to map your club location. Click "link" or "embed" and copy the link. Paste it into 'Link to Map/Directions" above to add an interactive map to this page.

Section 2: Club Committees:

Use this section to add, edit, delete, report upon and communicate with committees.

Section 3: Club Members and Positions

Use this section to manage members and their positions. It allows the updating of individual records, club positions, PHF status, and the generating of reports. Note the sub-menu that appears just to the top right of the individual member information.

- To email an individual member, click on their name or email address
- To edit an individual record, click Edit
- To view an individual record, click View
- To perform other functions, use the sub-menu buttons

Editing Members and Adding New Members

The same screen is used for Adding New Members and for Editing the information for existing members. When the edit link is clicked, a form pops up with all the data previously entered for the individual member. When Add Member is clicked, the same form pops up, but it is blank.

Regardless of whether an existing member's record is being edited, or a new member is being added, complete as much information as possible. Remember, the system can only draw on information that has been entered to produce reports, directories, etc.

> **Hint:** Always use the gold buttons (Update/Add Member) to ensure that your changes and additions are recorded!

View Link

This link simply displays all the information available for an individual member. It is a good way to check whose information is incomplete.

> **Hint:** Hold your right mouse button down and drag your cursor offer all or part of this information. Once highlighted, right click your mouse, select copy, and then information can be pasted into emails, and other documents.

Edit Club Positions

It is very important that club positions be kept up to date. **DaCdb** automatically updates these positions at the start of every Rotary Year. Use the drop down menu for this function.

Edit PHF/SM

Use this screen to update your PH Sustaining Members. (PHF status is recorded in the record of individual members).

Adding Members

DaCdb is not the only way to add new members, but it may be the easiest way!

Only four fields are required to add a new member, but there is room for a comprehensive amount of data. When a new member is added, complete as much information as possible. (Nothing makes a new member feel more welcome that being added to the Club Directory.) Most fields simply require data input. (In some instances, a drop down screen is used.)

Once data has been entered, click the Add Member button and an email will be sent to Rotary International and the new member will added at RI. (Some delay will be incurred.) A Rotary number will not be assigned to the new member until RI adds them to the rolls. Within a few weeks of recording the new member, the Club Secretary should edit the record and add the RI number. (The member number can be obtained from one of several reports available to club secretaries at www.rotary.org).

After the new member record has been added, the new member can access **DaCdb** to update their own record.

> **Hint:** Rotary International does not recognize transfers between Rotary Club. The procedure is to drop (terminate) the member from one club and add them as a new member to the other club. However, the member can retain their original member number. The club secretary of the new club should enter the member number when entering the new member.

Add Member

Member Type: [Active ▼]   (ID=new)   [Cancel] [Add]

Section 1 - Member Information:

Member ID: [____]

Prefix: [____ ▼]   Gender:* [Select ▼]

First Name:* [_____]   Middle Name: [_____]

Last Name:* [_____]   Suffix: [_____]

Badge Name: [_____]
(Only put in a Nick Name IF different from First Name)   Badge Number: [_____]

Badge Title: [_____]

Start Date:* [_____] (mm/dd/yyyy)   Birthdate: [_____]
                                          (mm/dd/yyyy - year optional)

Sponsor Name: [_____] [..] (Lookup Sponsor, or enter FirstName, LastName)

Language Skills: [_____] (e.g., **SP**anish,**R**ead,**W**rite,**S**peak)

Classification: [_____]

Occupational Code: [Select ▼]

Primary Contact: [ ]

Business Name: [_____]

Business Position: [_____]

Number of Employees: [____]

Business Web: [_____]

Picture: [_____] [Browse...]
Click **BROWSE** to select an image on your computer to upload. You may upload a JPG or GIF image.

S/P Designation: [Spouse ▼]

Partner First Name: [_____]   Partner Badge Name: [_____]
                                          (If different from First Name)

Partner Last Name: [_____]   [ ] IF Partner is Member?
(IF different from Member)

Anniversary Date: [_____] (mm/dd/yyyy)   Partner Birthdate: [_____] (mm/dd/yyyy)

Section 2 - Contact Information: [Show as active: ⦿ Primary ◯ Secondary]

Primary Address: [____] (e.g., Home, Office)   Secondary Address: [____] (e.g., Home, Office)

Address Line 1:* [_____]   Address Line 1: [_____]

Address Line 2: [_____]   Address Line 2: [_____]

City:* [_____]   City: [_____]

State:* [Select ▼] Zip/Postal Code:* [____]   State: [Select ▼] Zip/Postal Code: [____]

County: [_____]   County: [_____]

Province: [_____]   Province: [_____]

Country: [UNITED STATES ▼]   Country: [UNITED STATES ▼]

---- Please include Area Code below ----

Home Phone: [_____] (e.g., xxx-xxx-xxxx)

Office Phone: [_____] (e.g., xxx-xxx-xxxx)

Cell Phone: [_____] (e.g., xxx-xxx-xxxx)

Fax Number: [_____] (e.g., xxx-xxx-xxxx)

Toll Free: [_____] (e.g., xxx-xxx-xxxx)

Email: [_____] (enter multiple emails separated by a comma)

Private Info: [Public - list in directory ▼]   [ ] (Opt-Out of PMAIL blast Communications)

Section 3 - Participation Data:

[ ] PHF - Paul Harris Fellow   [ ] Spouse is also a Paul Harris Fellow   [ ] Paul Harris Society

[ ] Charter Member   [ ] Sustaining Member   [ ] Double Sustaining Member

[ ] ALUMNUS of a Rotary Program   [ ] Benefactor   [ ] Bequest Society

[ ] Past RI Director   [ ] Major Donor   [ ] Past President

[ ] Meritorious Service Award   [ ] Distinguished Service Award   [ ] Service Above Self Award

[ ] Past District Gov / District Served: [____]

Perfect Attendance Since: [____] (ex: 1992)

Rotarian of the Year: [____] (ex: 1997, 2001)

Previous Rotary Years in other Clubs: [____]

if TRANSFERING, Last Rotary Club: [____]

Section 4 - Club Information:

Club: Virginia Peninsula   Club Position: [Member ▼]

Section 5 - Login Information:

User Name: [_____]   Password: [_____]

Club Reports

See pages 12 through 15 for information about club reports.

Bulk Email

This function uses your system's default email program (MicroSoft Outlook, Lotus, etc.) to send an <u>identical</u> email to every member of your club. It does not allow you to select individual recipients or to personalize your message.

PMAIL

This is one of the most unique and popular features in DaCdb. Pmail is short for "personalized" email. It allows you to select individual recipients for an email, and to individualize the email with member information found in the database (e.g., birth date, company name, spouse name, etc.).

> NOTE: Pmails are security level protected. Level 4 and above can Pmail the entire club. Level 3 can Pmail only to their own committee. Level 6 and above can Pmail to the entire District. Individual members (Level 1) do not have access to PMail

To initiate a Pmail, use the check box(es) on the left to select what members you wish to mail to, then click the Pmail button.

> **Hint:** Clicking the box next to the Member Name title, turns all the check boxes off or on. Click next to individual names to add or delete names to receive (or not receive) the PMail

Pre-designed templates can be used for a variety of purposes and users can create and store their own templates.

- System Templates are for general use and cannot be modified by individual users. Template titles indicate their intended use. When modified, they can be saved as a district, club, or personal template
- District Templates have been designed for specific purposes within the District.
- Club Templates are established by individual user clubs (meeting notices, etc.
- Personal templates are appropriate for specific club rolls (secretaries, treasurers, etc.)

EZ-Link

Cancel

Select the EZ Link template below. You **MUST** click on the radio button to select the template. To pre-**View** the template, click on the template name.

System Templates	Action
○ 01- Dear Rotarian - then your message.htm	
○ 02- Dear Rotary Alumnus - then your message.htm	
○ 05- EZ LogOn for Members.htm	
○ 06- EZ LogOn for ClubOfficers.htm	
○ 07- EZ LogOn for ClubSecretarys-for Attendance.htm	
○ 09.0- I need HELP inserting IMAGES into PMAIL	
○ 09.1- I need HELP Saving a PMAIL template	
○ 09.2- I need HELP clearing the IMAGES CACHE in the Firefox browser	

Editing your Pmail
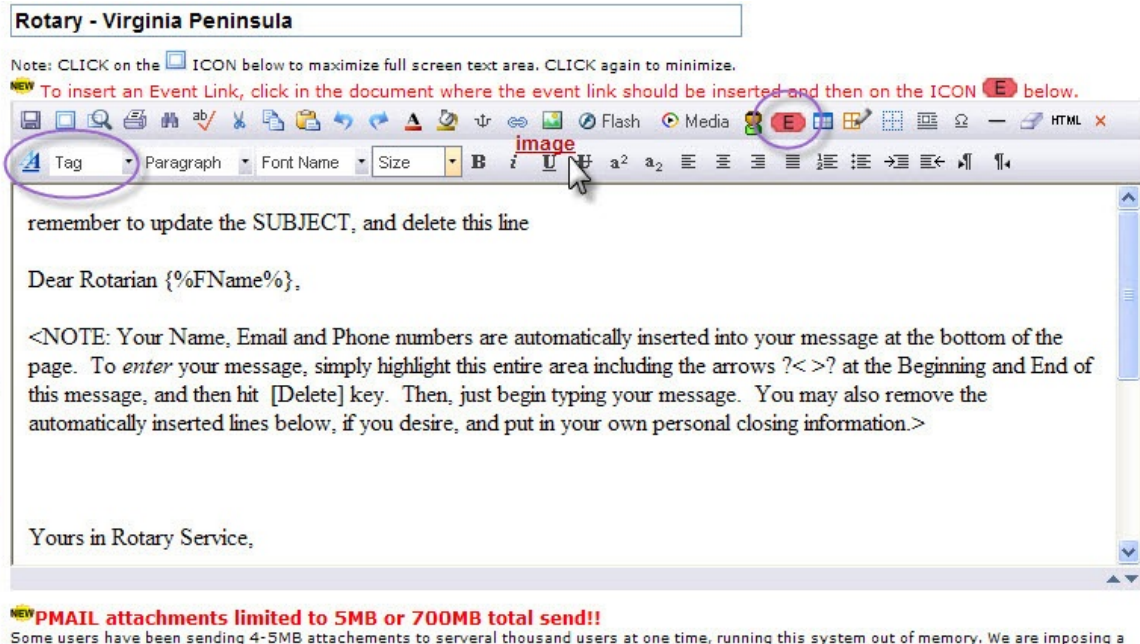
Pmail uses a simple "WYSIWYG" editing format. It is not a word processing editor, but with some practice, users should be able to produce attractive 'personalized' emails. Hovering your mouse over the icons at the top of the edit area will reveal the function of the icons.

Some popular editing features are 't ags' {%FName%} which permit you to personalize your Pmail, Event Link which provides an easy link to registrations, and hovering the mouse to display icon functions.

Rotary - Virginia Peninsula

Note: CLICK on the ☐ ICON below to maximize full screen text area. CLICK again to minimize.
NEW To insert an Event Link, click in the document where the event link should be inserted and then on the ICON E below.

image

remember to update the SUBJECT, and delete this line

Dear Rotarian {%FName%},

<NOTE: Your Name, Email and Phone numbers are automatically inserted into your message at the bottom of the page. To *enter* your message, simply highlight this entire area including the arrows ?< >? at the Beginning and End of this message, and then hit [Delete] key. Then, just begin typing your message. You may also remove the automatically inserted lines below, if you desire, and put in your own personal closing information.>

Yours in Rotary Service,

NEW **PMAIL attachments limited to 5MB or 700MB total send!!**
Some users have been sending 4-5MB attachements to serveral thousand users at one time, running this system out of memory. We are imposing a

Using Tags

Tags are the way emails are personalized. Depending on where your are emailing from (club, committee, event) these tags offer a variety of information that can simple be inserted into your email. For Example:

> {%Fname}, we all hope that you and {%Partner First Name%} will enjoy your anniversary on {%Anniversary Date%} and that you don't spend all your time playing {%member hobbies%}!

Could become...

> John we hope that you and Linda will enjoy your anniversary on April 11 and that you don't spend all your time playing golf!

Using Event Links

Use these links to speed the registration process. Adding the link will allow recipients to move directly to the registration page of the event.

Hint: Effective Pmailing takes practice. Even the most experienced user will make mistakes if they don't carefully proof read and edit their Pmail. When possible, make a copy of your text and Pmail yourself first. After you have received and read over the Pmail to ensure that there are no errors, then re-send it to the intended recipients. As always, a little experimentation helps you learn and helps you be more effective.

Posting Club Bulletins and PHF Reporting

Two final "secrets" to be revealed actually apply to club secretaries and club treasurers.

If your club has a weekly/monthly bulletin or newsletter, it can be posted from the my Club page by clicking the Club BULLETINS sub-menu tab

Click on the Add Bulletins File and upload your PDF file and it will be available for members to view whenever they are ready.

Use the Add URL to post URLs to websites that you support or want to promote.

> **Hint:** A limited amount of storage is available for club photos and other club archives. Use the Add Folder button to create a storage file.

Your Treasurer or Foundation Chair can use **DaCdb** to quickly submit contributions to the Rotary Foundation. Click the Club Reports button, from the Reports Screen drop down menu (See Page 12), select report # 2 The Rotary Foundation Transmittal (TRF) report. Click on the Run Screen.

Fill out the typical <mark>amount</mark> per person. And the form automatically fills in.

(Top of TRF Transmittal Form)

Fill the amounts for specific individuals (if different) and when complete the form automatically calculates the totals. (Note that individual member ID's are automatically entered. No mistakes or mis-entries!) Click the Process Page and E-mail to Foundation Chairs and the form will automatically be set to your club Foundation Chair and the District Foundation Chair.

Bottom of TRF Transmittal Form

	0.00	Wolf, Dwight S.	✔
	100.00	Wolfe, R. Roger R.	✔
	25.00	Yeargin, Kevin	✔
Club #580		Contribution By **Virginia Peninsula** Club	
		62 Active Members	62 / 100.0%
TOTAL AMT:	$ 1650.00	Process Page and E-mail to FOUNDATION Chairs	

Please make your check payable to: *The Rotary Foundation*
And, *TRF*, please send a contribution receipt to all donors.

Contributions Designation (only check one):

☐ Annual Fund   ☐ World Fund   ☐ for Grant#: [   ]

☐ PolioPlus

Please mail check and this document to:
The ROTARY FOUNDATION
14280 Collections Center Drive
Chicago, IL 60693

Summary

By going through this booklet, you have learned

- How to Sign On (P-1)
- Navigating Through DaCdb (P-2)
- About Dashboards (P-3)
- Viewing District Stats, Leadership and Newsletter (P- 4 & 5)
- How to register for events (P-6)
- Find a Member (P 6 & 7)
- Using the Navigation Tabs (P-8)
- Committees (P 9 & 10)
- Calendars (P - 10)
- Registration Functions (P-11)
- Reports (P 12 thru 15)
- Speakers Bureau (P-16)
- Attendance Reporting (P-16 & 17)
- Finding Help (P 18 - 19)
- Your Club (my Club Tab) (P- 20)
    - Section 1 - Club Information (P- 21)
    - Section 2: Club Committees (P - 21)
    - Section 3: Club Members and Positions (P - 22)
    - View Member (P - 23)
    - Edit Club Positions (P - 23)
    - Edit PHF/SM (P - 24)
    - Adding Members (P 24 & 25)
    - Club Reports (P - 26 with reference to P - 12 thru 15)
    - PMail (P 26 thru 29)
    - Posting Club Bulletins and PHF Report (P 29, 30 & 31)

If you need additional help, contact your District Communications Officer or other **DaCdb** support personnel.

That's it, I hope this helps!

Attendance Overview

Enhance your club's attendance management by upgrading to the new the **Weekly Attendance** functionality. This is an *optional* premium solution offering available to all clubs (and can be combined with other optional club offerings, for an overall lower-cost solution).

The new attendance functions focus on Weekly Attendance tracking at the club and member level. It also, generates weekly meeting sign-in sheets (with barcode option), Name badge inserts, detailed and summary reports by club and member. All you do is "check" the people who attended. The system does all the weekly and monthly calculations.

Excused Attendance/Exemptions

To support accurate attendance reporting, the new Weekly Attendance functions now include adding exemptions for each member. Exemptions can be added for any period, along with the reason, which are then included in the Weekly Attendance reports as references.

Monthly Attendance Entry

Submitting your Monthly attendance is a one (1) click process. Your Weekly Attendance data is **automatically** rolled-up at the end of the month. And, the Monthly entry form automatically calculates New and Terminated members, based on entries to the database.

Meeting Make-Ups

Make-up meetings can be entered for any missed meetings up to 6-months in the past. After selecting the Club Member, the system displays the *missed meetings* where make-ups can be applied. Just click to select…

Barcode Sign-In Sheets

Using 3of9 barcodes, Weekly Attendance sign-in sheets can now be generated. And, with low-cost scanners (<$150), attendance entry can be fast and accurate.

Also, barcoded Name badges are supported for checking IN at the meeting (in either a LIVE mode or our Off-line recording mode).

Reports

Seven (7) new reports to meet your attendance requirements. Drill-down into multiple levels of attendance detail with smart hyperlinks.

- **Monthly District Summary**
- **Club's Monthly and Weekly Summary**
- **Club Meeting Attendance Detail**
- **Member Summary and Detail by Week**
- **Member Summary by Year**
- **Member's 100% Attendance**

Club Dues
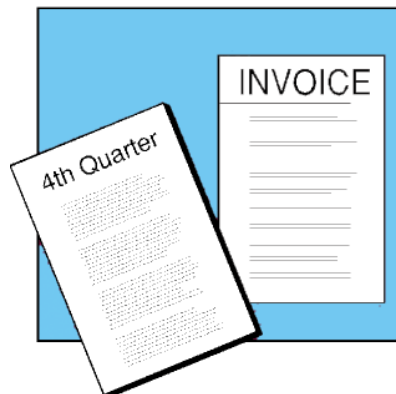
Club Dues Overview

Enhance your club's dues management by upgrading to the new the **Club Dues** module. This is an *optional* premium solution offering available to all clubs. The new dues-accounting module, focuses on generating dues-invoices for the club membership and then tracking payments at the member level.

- ✓ Create multiple invoices
- ✓ PMAIL member invoices
- ✓ On-line payment via credit card
- ✓ Create Proforma Invoices (cash-basis)
- ✓ User defined Invoice templates
- ✓ Apply/track sales tax to table items
- ✓ User defined billing periods (e.g., Monthly, Quarterly, Semi-annually or Annually).

Once the charge items have been defined, member dues can be generated, printed and emailed to members in less than 10-mouse clicks. And, you can put in the "additional items" on an individual member (such as guest meals) before generating the invoice batch.

Chart of Accounts

Start by creating the Chart of Accounts for your club. Just pick one of the three pre-defined chart of accounts available to select from, ranging from a simple to complex. Each one can then be tailored to an individual club's needs by adding or deleting accounts. One or more accounts can be identified to export to Quicken, QuickBooks or Peachtree systems.

📝 Note: We are not trying to duplicate the functionality or sophistication of a packaged accounting system (like a QuickBooks system).

Invoicing Overview

 The process of invoicing members is a simple multi-step process.   The steps include:

1. **Create the Invoice Group**. The invoice group is a simply a group of invoices. The Invoice Group defines summary information such as Invoice Description, Invoice Date, the Due Date, and the invoice message sent to all members receiving an Invoice in this group.

2. **Defined the Charge Items.** A Charge Item is a means to apply something like 'Club Dues' to all members with one-click. Each charge is assigned an amount, which can vary based on the Member Type, Meetings Attended, and Meetings Missed. Multiple charge items can be defined for different items being billed to the Members. The amount associated with each Charge Item should be reflective of the *billing period* the Club is using.

Charge Items can be defined as:

- ✓ Per Member
- ✓ Per Member Type
- ✓ Per Member Recurring
- ✓ Per Meetings Attended
- ✓ Per Meetings Missed

Meetings attended/missed are date period sensitive which can be defined as:
- ✓ Last month
- ✓ Last quarter
- ✓ Last year
- ✓ Last invoicing period
- ✓ Or a custom date period, that user defines

3. **Select the Members to be invoiced.** This is typically all the members within a Club, but can be any number of members. By default the system will list all active members within the club; and terminated members can be included based on a date selection.

Item Description	Account	Qty	Rate	Amount
District Dues (semi annual)	Dues Payable to District	1	14.00	14.00
RI Dues (sem annual)	Dues Payable to RI	1	36.00	36.00
Club Dues (monthly)	Club Dues Payable	1	50.00	50.00
Club Meeting Meals (monthl	Club Dues Payable	0	0.00	0.00
Rotary Foundation Giving	Rotary Foundation Giving	1	50.00	50.00
GS Cookies	Club Dues Payable	10	3.75	37.50

6. **Preview the Invoices**. Print Preview or Print the invoices, reviewing each for completeness and any errors. Apply necessary corrections.

Rotary Club of Warrenton
Club Accounts

Warrenton NC 27589

Michael W Thacker
USA

INVOICE
Invoice Number: INV-t1
Invoice Date: Aug-05-2008
Due Date: Jul-31-2008

#	Item Description	Qty	Rate	Tax	Amount
1	District Dues (semi annual)	1	$14.00	$0.00	$14.00
2	RI Dues (sem annual)	1	$36.00	$0.00	$36.00
3	Club Dues (monthly)	1	$50.00	$0.00	$50.00
4	Club Meeting Meals (monthly)	0	$0.00	$0.00	$0.00
5	Rotary Foundation Giving	1	$50.00	$0.00	$50.00
6	GS Cookies	55	$3.75	$0.00	$206.25

SubTotal: $356.25
Tax: $0.00

TOTAL: $356.25

4. **Apply the Charge Items**. Choose the charges to be applied to the members selected. One or more Charge Items can be applied.

Charge Item
✔ RI Dues (sem annual)
✔ District Dues (semi annual)
✔ Club Dues (monthly)
✔ Club Meeting Meals (monthly)
✔ Rotary Foundation Giving

7. **Post the Invoices**. The system will "Post" the invoices to each members account and to the designated account in the chart of accounts. Note: Proforma invoices will not be posted until they are paid.

8. **Print/PMAIL the Invoices**. All member invoices can be printed for handouts or snail mailing and/or kept as part of the club treasurer's records. Optionally, the member invoices can be sent via PMAIL to each member with an e-mail address. And then optionally, members can pay their invoice on-line with a credit card (note: a secure payment gateway is required to process credit card payments on-line).

5. **Enter one-off invoice items**. Any one-off invoice items that apply to an individual member should be added, prior to generating the Invoice group. For example, if a member purchased raffle tickets or had guest meals, the quantity and cost can be entered on the member's invoice.

Accounting Overview

The accounting section of the Dues module displays the account details for each chart of account or member.

Chart of Account

Each item in the chart of accounts is listed in the account tree on the left side of the screen. The accounts can be navigated by expanding or collapsing the account tree.

Accounts
- ▶ BANK ACCOUNT
- ▼ LIABILITY ACCOUNTS
  - Dues Payable to RI
  - Dues Payable to District
  - Club Dues Payable
  - Sales Tax Collected
  - GS Cookie Collections
  - Foundation Giving Payable
- ▼ ACCOUNTS RECEIVABLE
  - ▼ Membership Dues
    - Allen, Jeff S.
    - Allen, Kathryn Richardson
    - Atkinson, Robert I.
    - Austin, VIctor Jr.

Then, when clicking on the lowest level account item, the register details are displayed on the right side of the screen.

Reports

Several new reports are available to support the accounting functions.

- ✔ Chart of Accounts
- ✔ Balance Sheet
- ✔ Aged Trial Balance (member dues)
- ✔ Club Accounts Register Summary
- ✔ Club Accounts Register Detail

Standardized and Customized Club Web Sites: www.Rotary-Clubs.org

Enhance your club's visibility with its own web site. You can choose the standard format, which is almost totally self-maintaining, or a more customized look that meets the needs of your Club. Either option uses the District and Club database to populate many of the pages in your club web site; PLUS you can add your OWN customized *User Content* via our proprietary **uPAGES** on-line editor. We host your club web site on our server, with either your *own* domain name, or *hosted* on your district's domain name.

hosted Club Web Sites using Database and some uPAGES

(cost: $100/setup, plus $100/per uPAGE; $15/mo; plus $5/mo per uPAGE)

kingsport.Rotary-Clubs.org
(Standard w/ uPAGES)

venice.Rotary-Clubs.org
(Standard w/ uPAGES)

own Club Web Sites using Database, Customized & uPAGES

(cost: $225/setup, plus $100/per uPAGE; $28-38/mo; plus $5/mo per uPAGE)

www.CoralGablesRotary.org
(Very custom w/ uPAGES)

www.JacksonvilleRotaryClubNC.org
(Custom w/ uPAGES)

*For more information on the Weekly Attendance, the DUES module, or a Club Web Sites, please contact:*   *- Mike Thacker   252-257-2563*
                                          - Mark Landmann 303-470-1928

Club Leadership Roles

P	President
T	Treasure
PE	President - Elect
S	Secretary
SE	Secretary Elect
VP	Vice President
TRF	Foundation Chair
CCO	Club Communications Officer
M	Member
SAA	Sgt. At Arms
SE	Secretary Elect
TE	Treasurer Elect
PN	President Nominee
TO	Training Officer
CD	Club Director
BE	Bulletin Editor
AS	Attendance Secretary
PR	Public Relations
SP	Service Projects Chair
CA	Club Administration Chair
WM	Webmaster
COS	Community Service Chair
CLS	Club Service Chair
INS	International Service Chair
VOS	Vocational Service Chair
EXT	Next Generations Chair
YP	Youth Projects
DM	District Membership
iPP	Immediate Past President
CES	Clue Executive Secretary

R2 Tab

D-7600 is participating in a "test program" to try out some of the new features of DaCdb. We have been selected to "Beta Test" the new Reports Module. This module appears as the new R2 tab found next to the Reports tab in the navigation tabs/links at the top of your page.
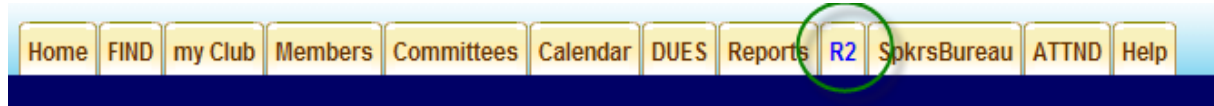
Click on the tab and it will take you to a new Reports Menu that has three sub menu tabs and looks like this

On the R2 page, there are three new tabs that you would select depending on whether you are generating a report for your club, committee or for a particular event. Before sure and check the tabs settings each time you visit this report page as the default tab is _always_ the club tab!

> Hint: While many of the reports are already found under the drop down menu in the Reports Tab, there are some new reports and there are many new report formats. Experiment to see which report best fits your needs.

Click on the icon of the right of your selected report to begin generating the report.

> After you click on the icon, it will take you to a new screen where you will have a number of choices.

- • First, select which member groups you wish to display (see yellow highlight below) You may select all on, all off, or select each group individually

- • Then select which report format you want to use by clicking on the appropriate radio button on the lower portion of the screen (see arrow). Again, do not be afraid to experiment!

- • Finally, select how you wish to preview or print the report from the icon on the top right of the screen. This selection may change from report to report, so check them out before you decide how you want to print your report. (See circled area above.)

> Hint: Use the view screen to review your report and selected format before you send it to print.

Try printing the report in several modes until you find out what works best with your printer.

Hint: On some report formats, hovering the mouse over the report will cause a preview to 'pop-up' so you can get an idea of what the report will look like when printed.