Quick Start Guide

Welcome to DACdb! This simple guide is designed to give you basic information and an overview of some of our key functions. As you become comfortable with the tasks, explore our further documentation located throughout DACdb. Most importantly, we encourage your feedback and questions!

Thank you for choosing DACdb, and again, welcome!

District And Club Database

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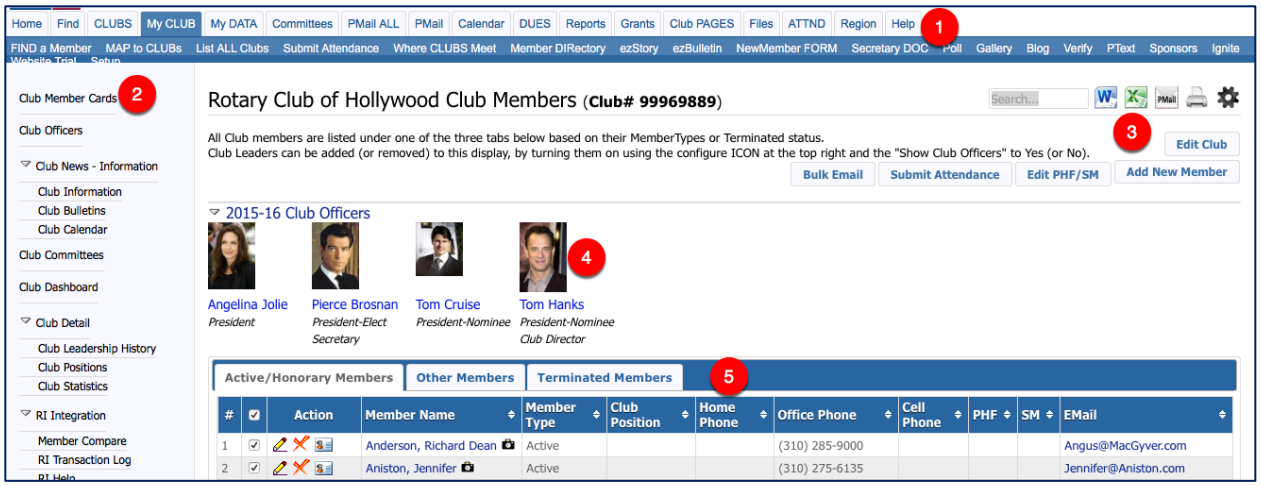
District And Club Database

My Club Tab Overview

My Club Tab Overview



1. Tabs and sub-menu
2. Side menu
3. Short-cut buttons
4. Current Club Leadership
5. Membership listing with contact and edit shortcuts

Common icons:

Settings

Export to Excel

Export to Word

View .pdf

Delete

Edit

Save

VCard

Favorite

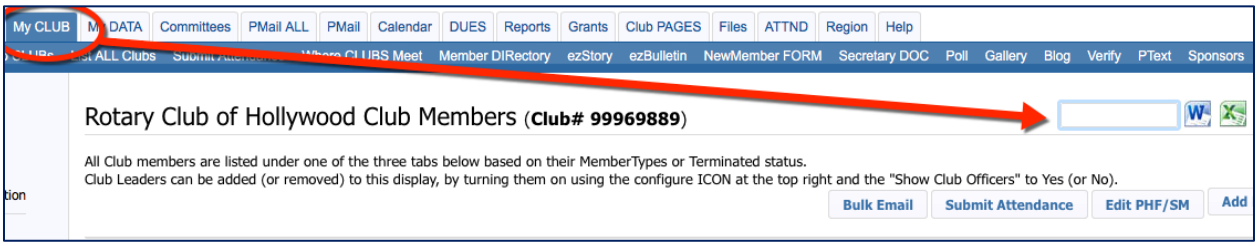
PMAIL

Tip: Don't be afraid to explore! Try clicking the Settings wheel at the top of the page and select the member information fields you want visible on the "My Club" page.

Find a Member

Browse your membership by viewing the list provided on the My Club page. You can also scan "other" types of members and terminated members. Don't have time to browse? Search using these two easy methods.

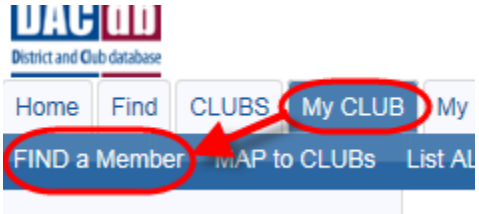
1. My Club tab --> Search box



2. As you type the member's first or last name, the member list will shrink, leaving you with search results.

To search for members outside your club:

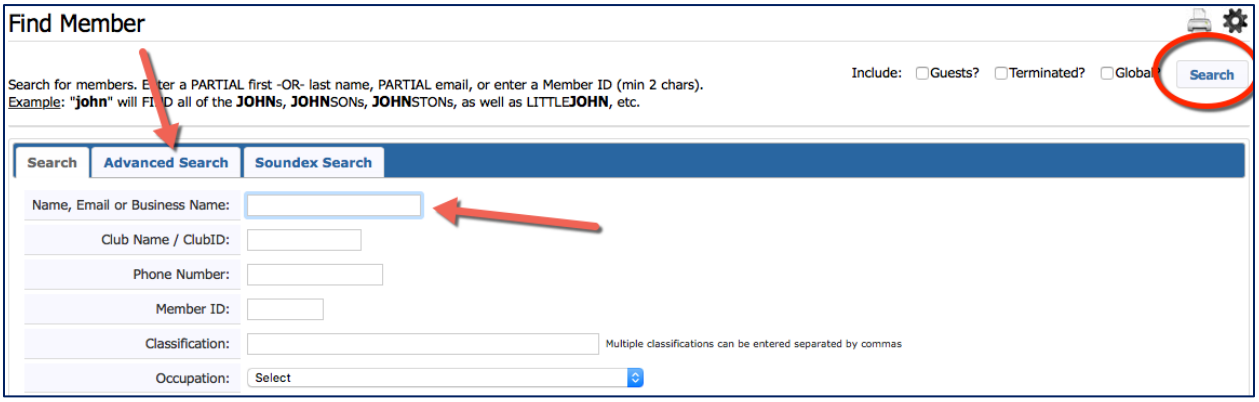
1. My Club tab --> Find A Member



2. For a general search use the *Search* tab. For a more granular search, use the *Advanced Search* tab. Enter search criteria an click the "Search" button.

District And Club Database

Find a Member

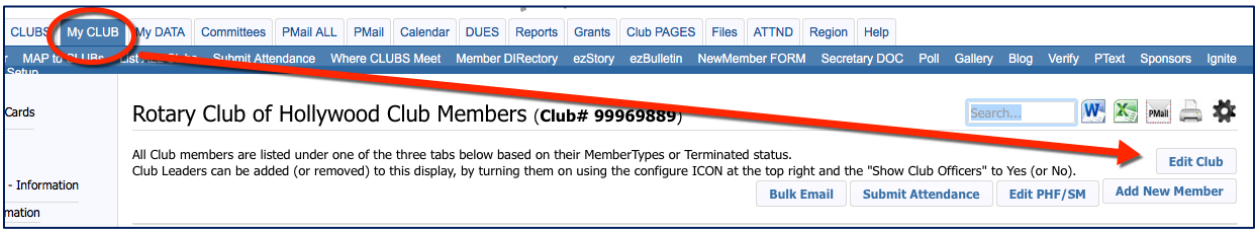


Tip: Try a Classification search to find members you could introduce to each other at your next meeting!

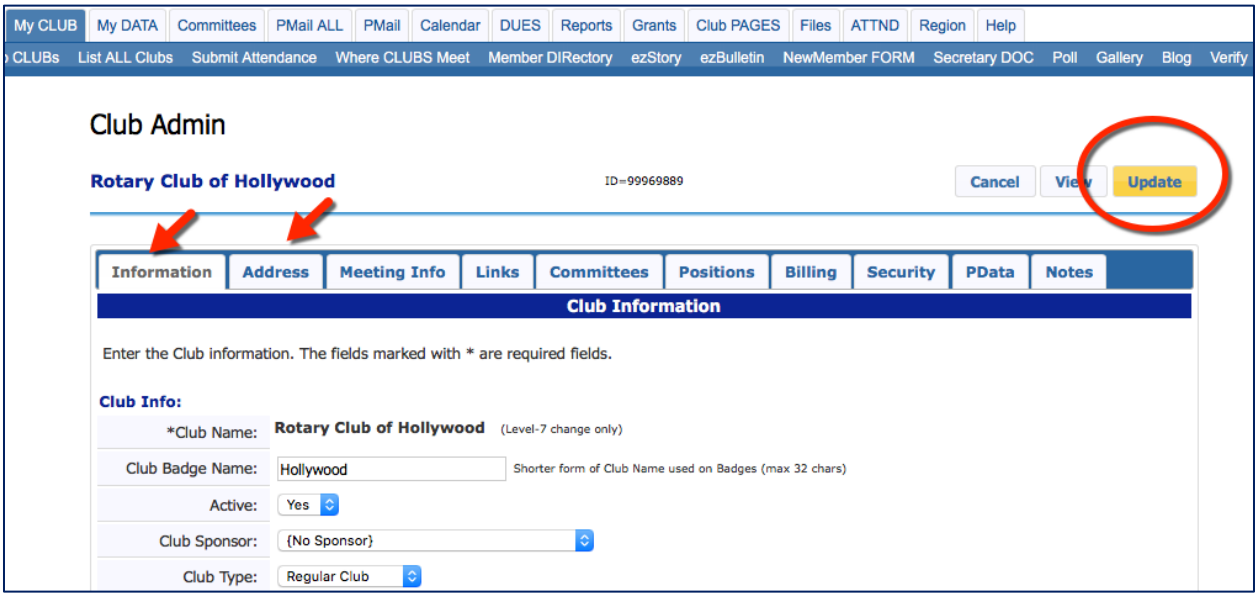
Edit Club Information

Edit club contact information, meeting location/time, and much more.

1. My Club Tab--> Edit Club



2. Click through the tabs to edit club information.



3. When finished, click the yellow “Update” button.

Tip: This information is important to your membership and district. Please keep it current!

Setup RI Direct

Connecting DACdb and Rotary International will allow you to upload and sync data easily between the two databases faster than the 'email' method. This eliminates the need for duplicate data entry, and speeds up the process of integration. Rotary International also prefers to have this method enabled as it reduces errors and manual labor at their end. *We highly recommend you enable RI Direct.*

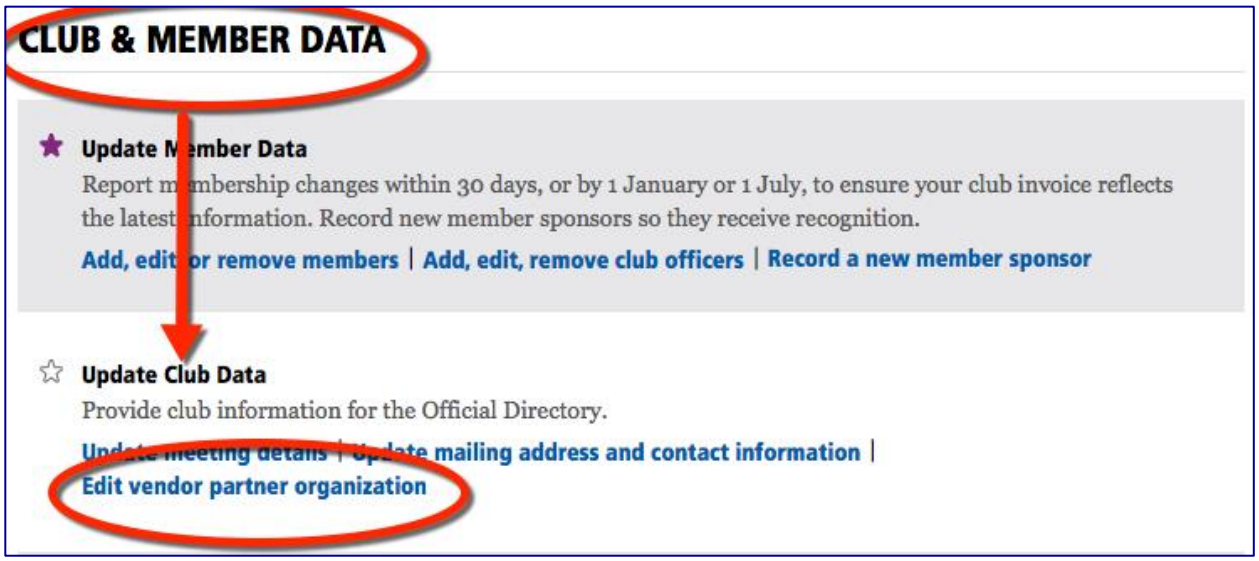
Turning this feature on also gives you access to Member Compare. (Compare data between RI and DACdb on one easy screen.)

RI Direct must be enabled in *two places*: **DACdb** and **Rotary International**.

Note: Once configured in both DACdb and RI, it can take 24-48 hours for RI to enable the system.

Enable at RI

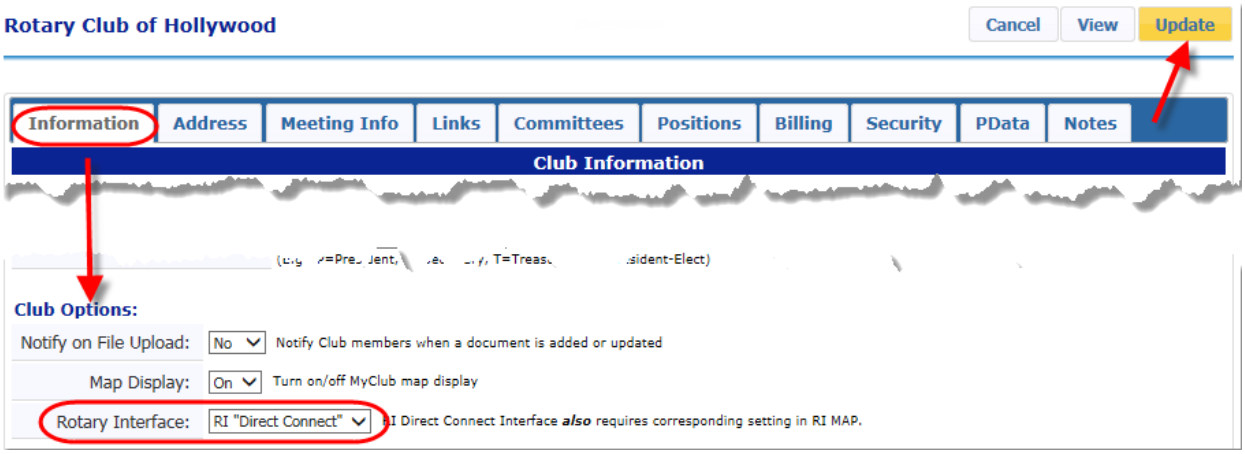
1. Log into (or create an account at) My Rotary: https://www.rotary.org/myrotary
2. Go to: Manage --> Club Administration
3. Under "Club & Member Data" look for "Update Club Data" and click the blue "Edit Vendor Partner Organization"



4. Scroll to the bottom of the page, find the “Partner Organization” section and select “DACdb”.

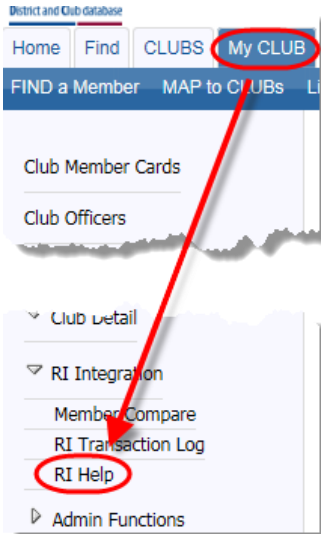
Enable in DACdb

1. Log into DACdb at: https://www.directory-online.com
2. Go to: My Club tab --> Edit Club button
3. On the Information tab, scroll down to “Club Options”
4. Under “Club Options” find “Rotary Interface” and choose “RI Direct Connect”.



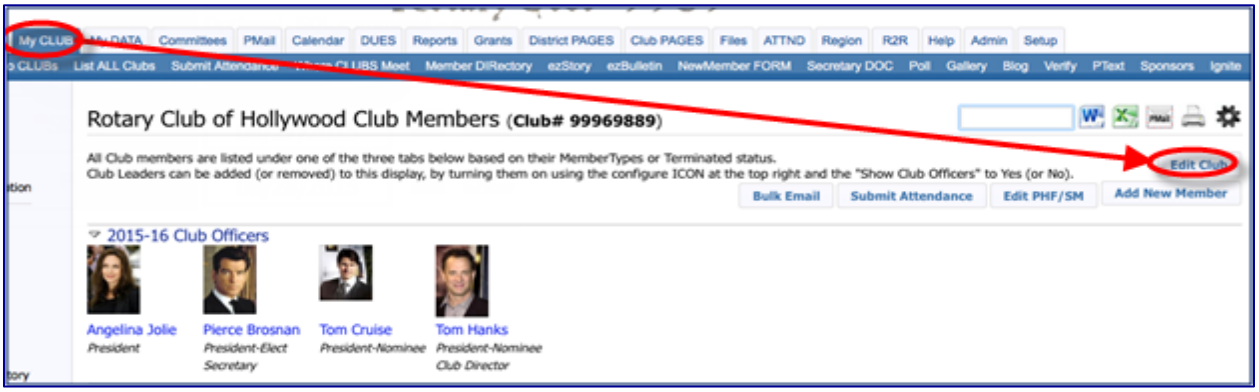
5. When finished, click the yellow “Update” button.

Tip: For detailed instructions see My Club tab --> “RI help” in the side menu.



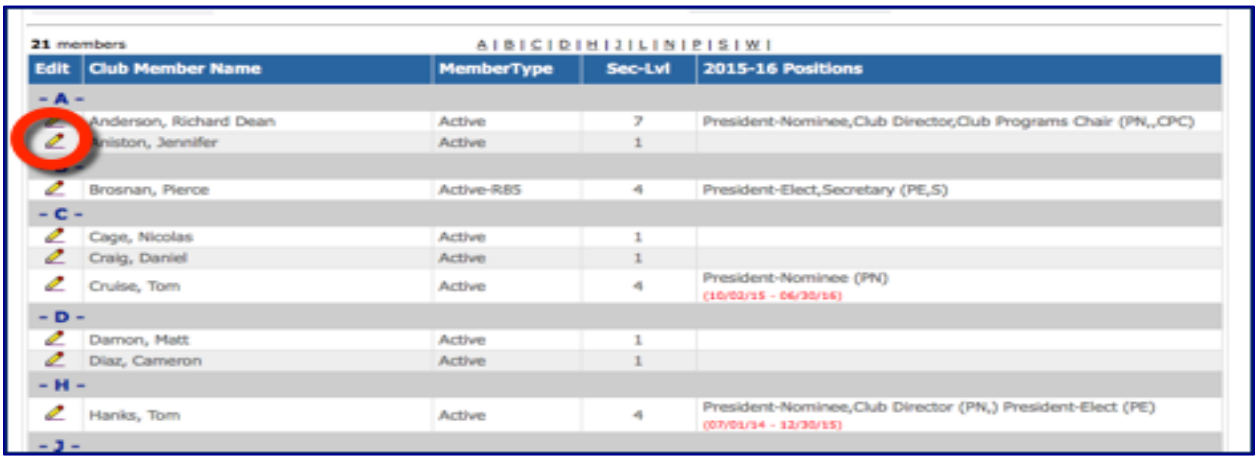
Edit Club Officers

1. My Club Tab--> Edit Club

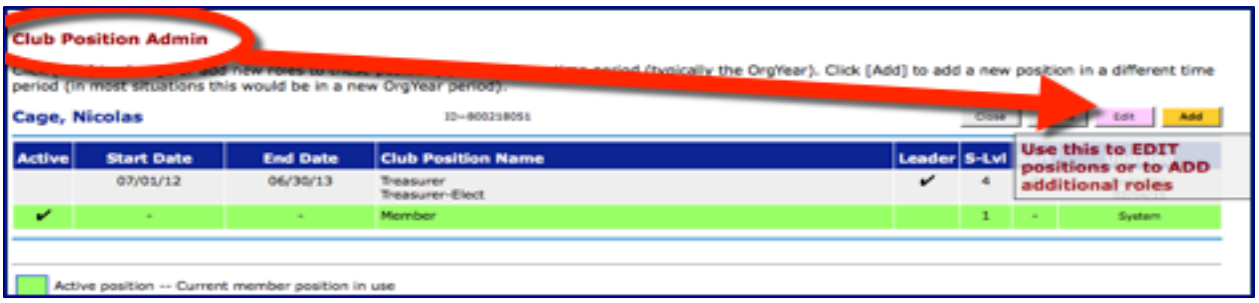


2. Click the Positions tab.

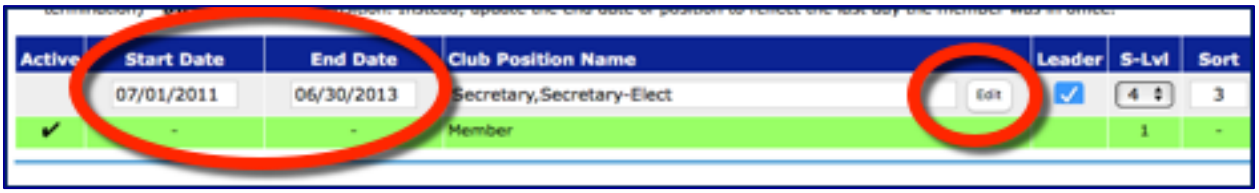
3. Click the pencil edit button next to the Member name.



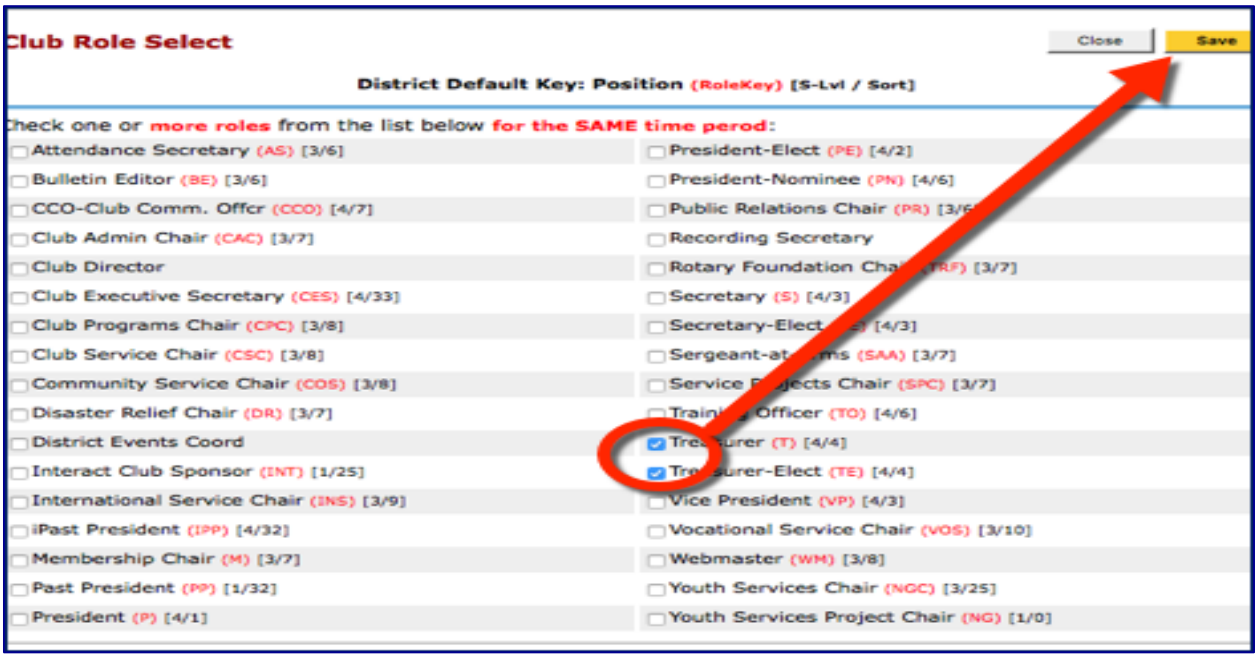
4. Club Position Admin screen --> Edit



5. Enter start and end dates.
6. Next to Position title, click 'edit' and a list of positions will appear.



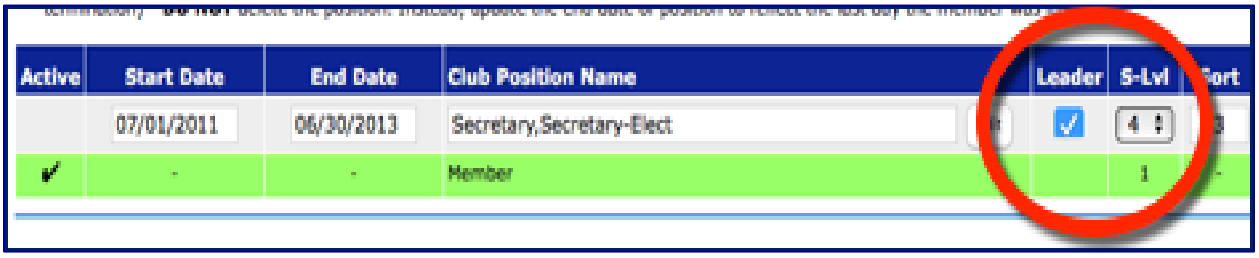
7. Check the box(es) next to the desired role(s) and click "Save".



* ***If you add a position that has a known progression - such as a President-Nominee (PN) DACdb will automatically populate the rest of the progression for you in each subsequent Org Year! PN, PE, P, iPP, PP***

8. Check the "Leader" box to enable position visibility at the top of your club's page.

9. You can assign leadership positions different security levels in DACdb. Level 4 is Club officer.

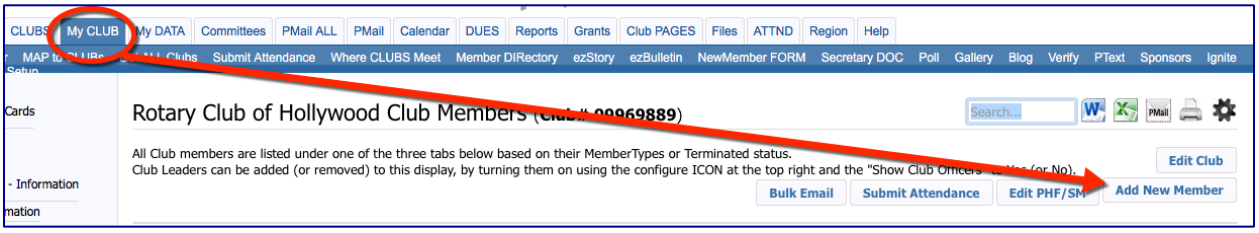


When finished, click "Update".

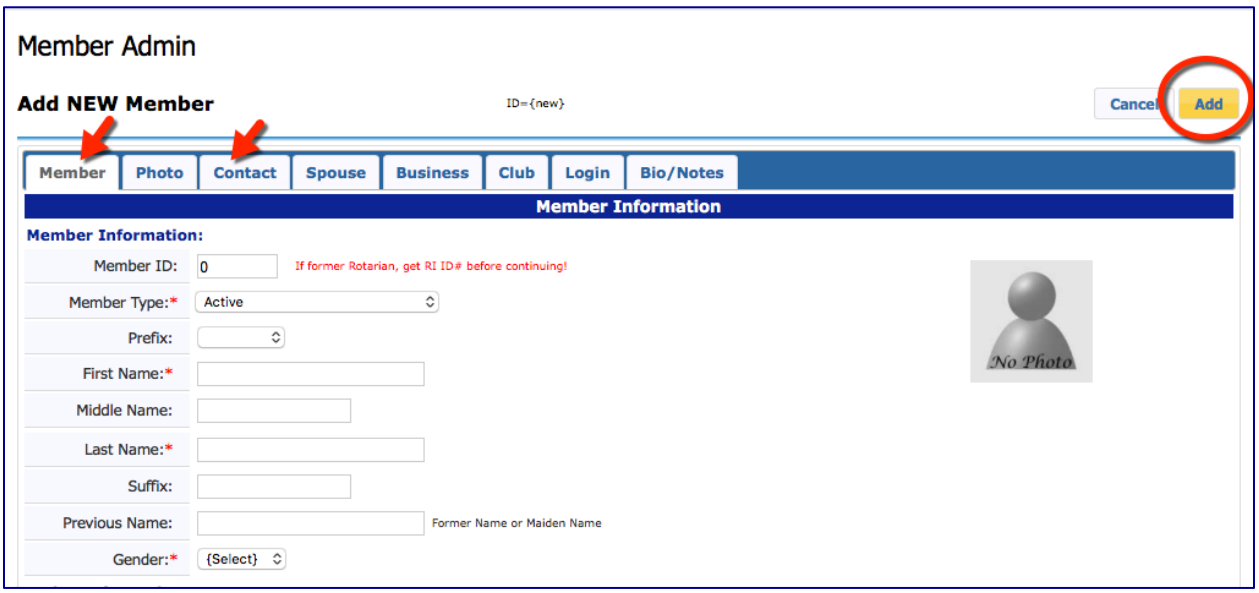
Tip: Encourage your members to provide profile photos so everyone can 'see' club leaders and fellow Rotarians.

Add a New Member

1. My Club Tab --> Add New Member



2. Fill in the member's information. Note: * is required
3. If you do not already have an RI member ID, leave this blank (0) for now.
4. When finished, click the yellow "Add" button.



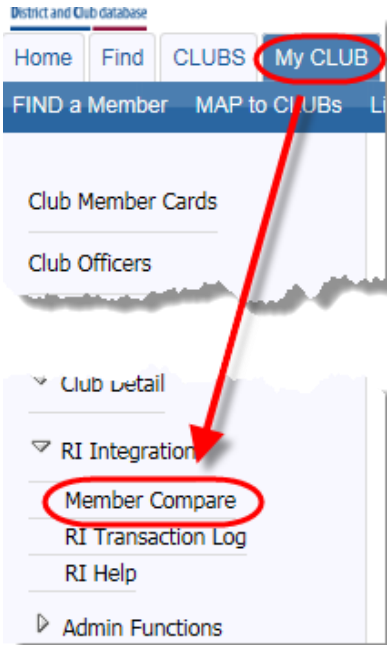
5. That's it! Rotary International receives an automatic message to add the new member, eliminating the need for you to enter the data twice! The new member's RI member ID should be issued 3-5 days in Member Compare.

Tip: A word of caution: Avoid changing the new member record until the RI ID number is in the DACdb system.

Retrieve Member ID

A few days after you've added a new member, check Member Compare to see if the RI Member ID has been issued.

1. My Club Tab--> Member Compare
2. Located in the side menu under RI Integration

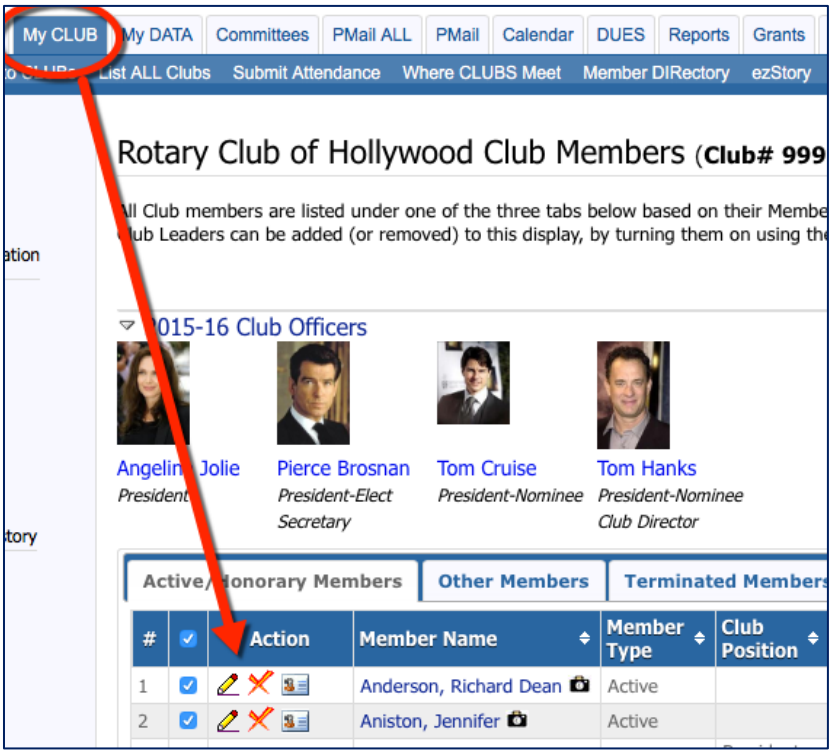


3. A list of your members will appear. Next to the new member's name, click "Get Member ID" and the RI Member ID will be added to the member record. Don't see "Get Member ID" yet? Keep checking back.

Tip: After your new member has an RI ID, send a "Welcome" PMail with login credentials and a copy of the Quick Start Guide for Members. Encourage your members to login and explore DACdb!

Edit, delete, or download a Member record

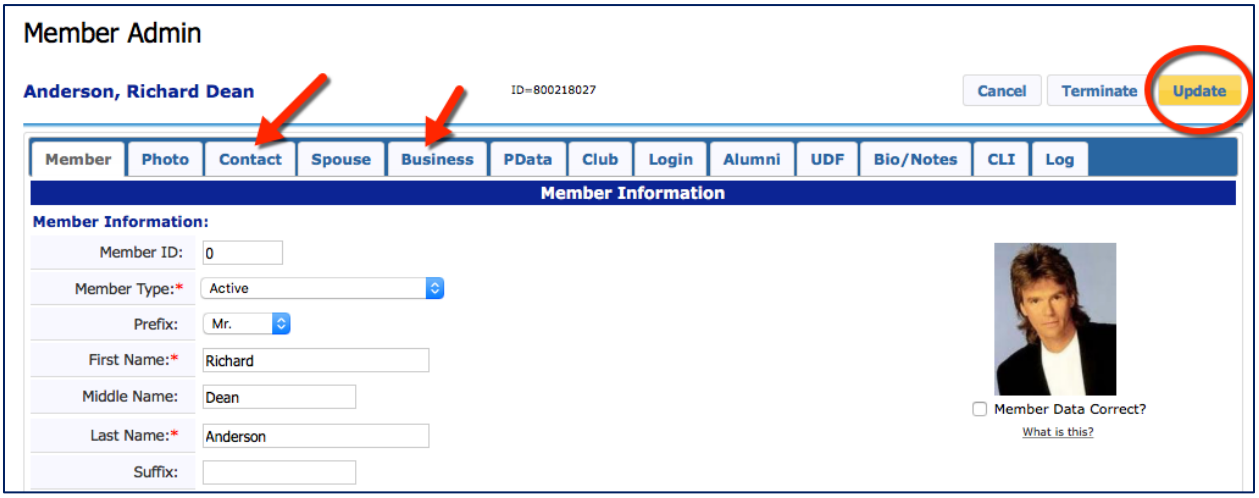
1. My Club Tab --> Member List



2. In the Action column of your current member list, you will see the pencil 'edit' button, a red "X" for terminate, and a shortcut to download the member into your Outlook address book.

Edit:

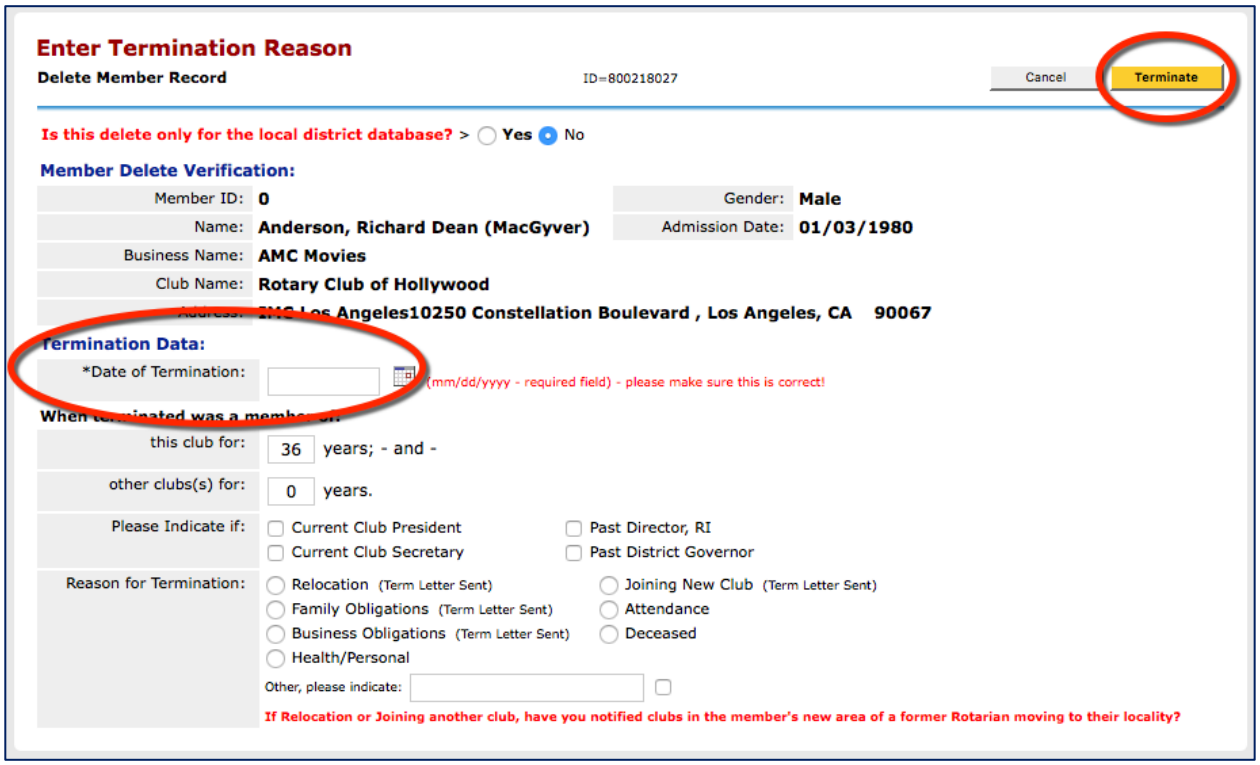
1. Click the pencil in the Action column to open the Member Admin screen and edit a member's record.



2. Click through the tabs and correct the member's information.
3. When finished, click the yellow "Update" button.

Terminate

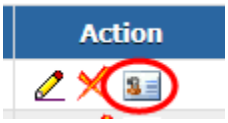
1. Click the red "X" in the Action column to open the Termination Screen.



2. Enter the termination date and reason- these are required by RI.
3. Click the yellow “Terminate” button.

Download member contact information to your address book:

1. Click the contact card in the Action column, and follow the prompts on your computer.

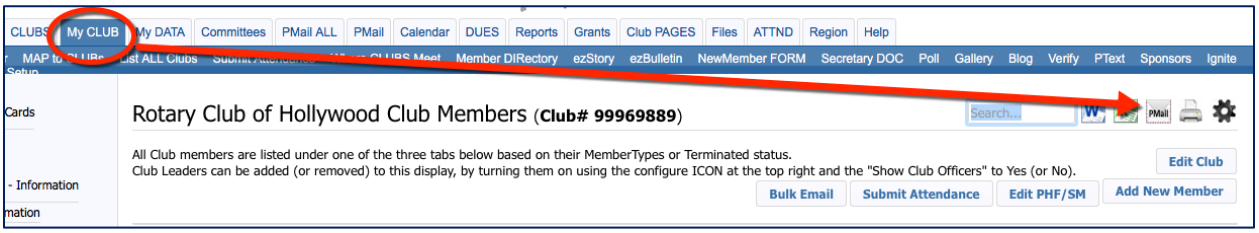


Tip: For a quick look at member contact data and photo, hover your mouse over the member name. Click the name to view the member’s details.

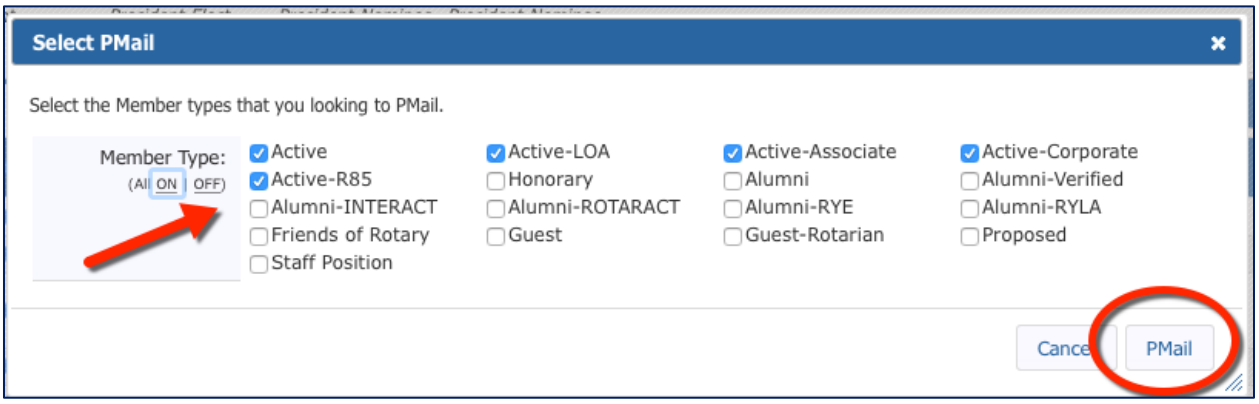
Compose, Save, and Send a PMail

The quickest and easiest way to communicate with your club is through our internal email system, called Personal Mail, or PMail. Look for the PMail icon in member records and throughout DACdb for access. Check out the complete guide to PMail in the Help/Documentation section of the PMail window.

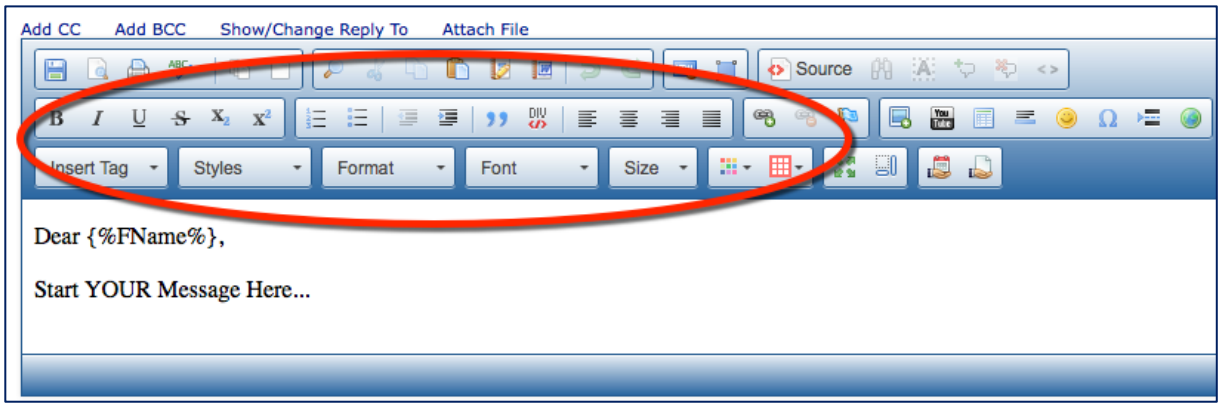
1. My Club Tab --> PMail



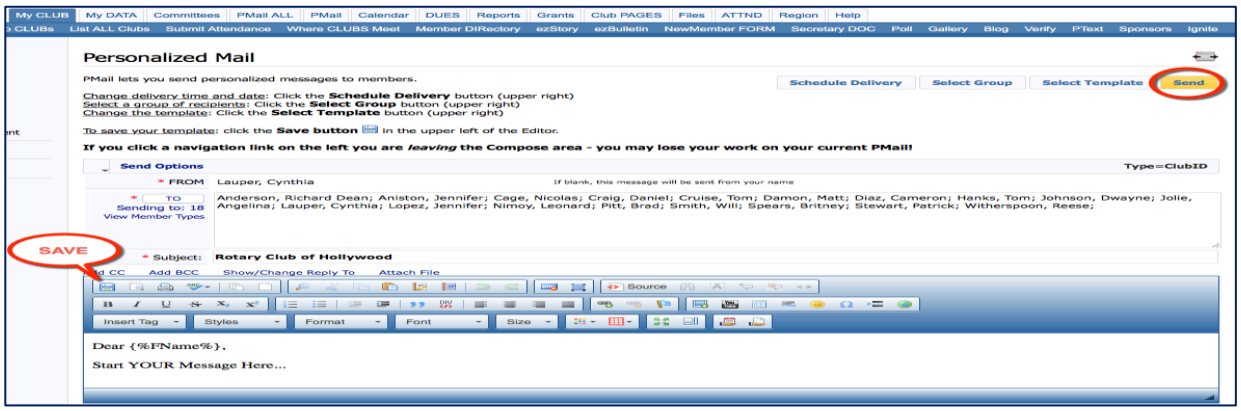
2. Select the type of member to email, and click the "PMail" button.



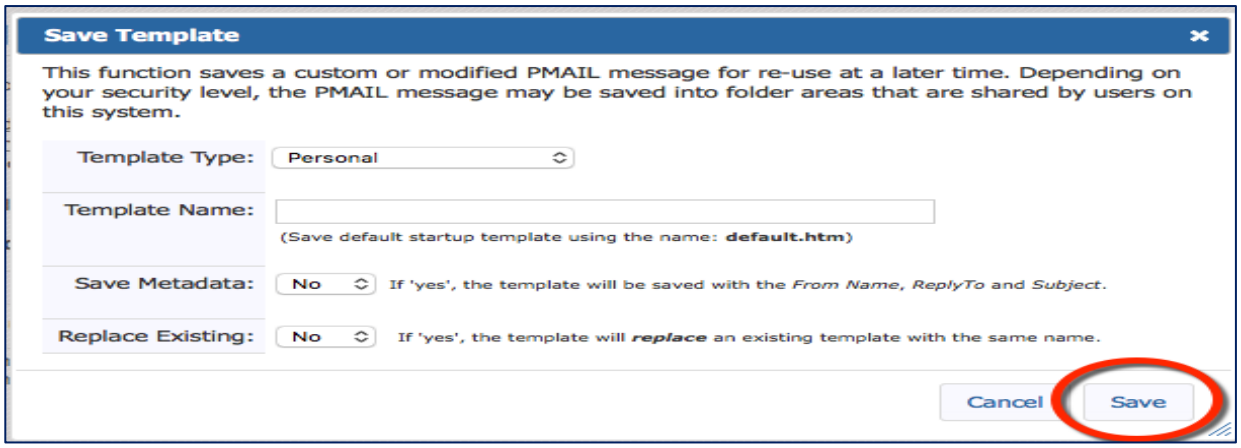
3. Type your message in the box. The default email inserts the first name of the recipient.
4. Format the colors, fonts, paragraph styles, etc. using the Editor toolbar.



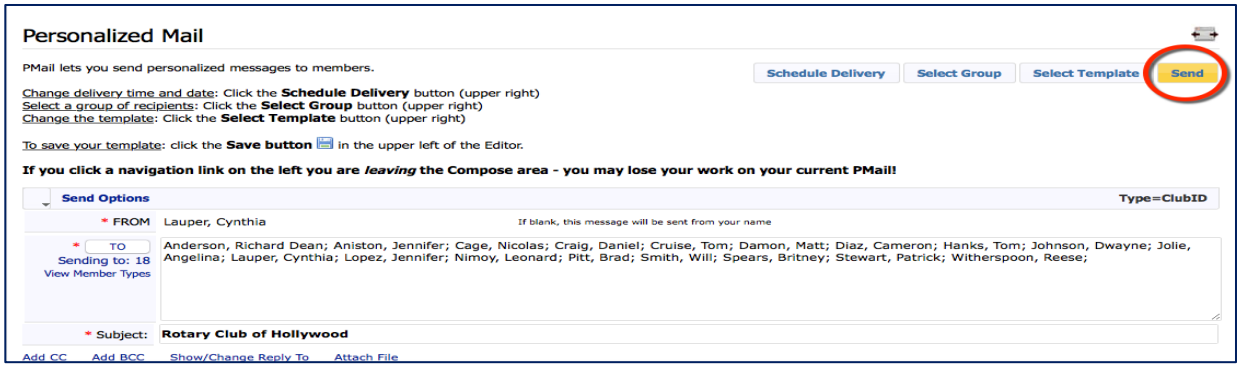
5. To save your message, click the "disk" button in the upper right of the Editor. It is recommended to save your progress every few minutes as you compose the message.



6. The Save Template screen will appear. Choose to save your message in a Personal or Club folder (other officers may access). Give the message a name, and decide if this replaces a previous version. Click "Save" when finished.



7. After your message is composed and ready for delivery, click “Send”.



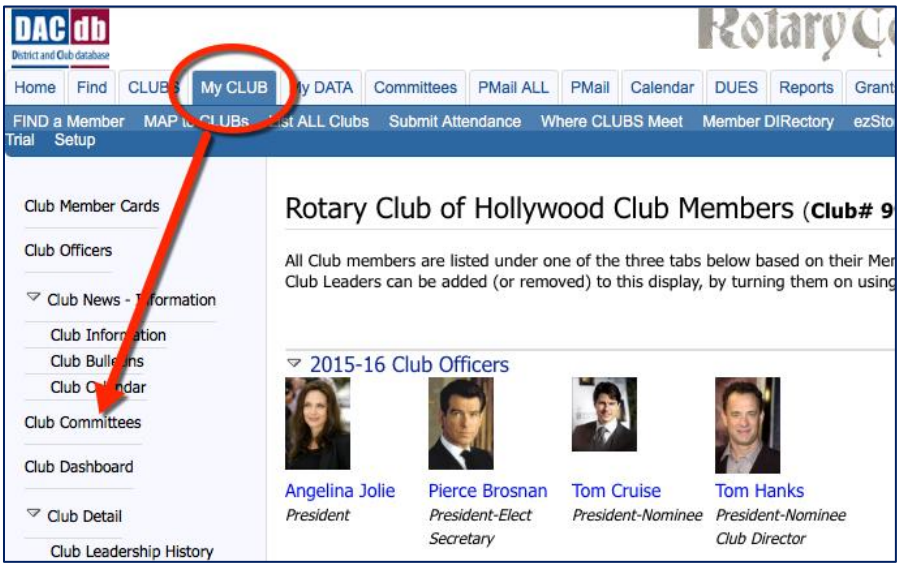
Tip: To PMail an individual, click the member’s name to open the member record and find the PMail button in the top right corner.

Did you know… Tags are fields that auto-populate with information. To add ‘tags’ to your message, click the ‘insert tag’ button in the message editor. Even though your template looks funny at first, the final product will be a personalized email to each recipient.

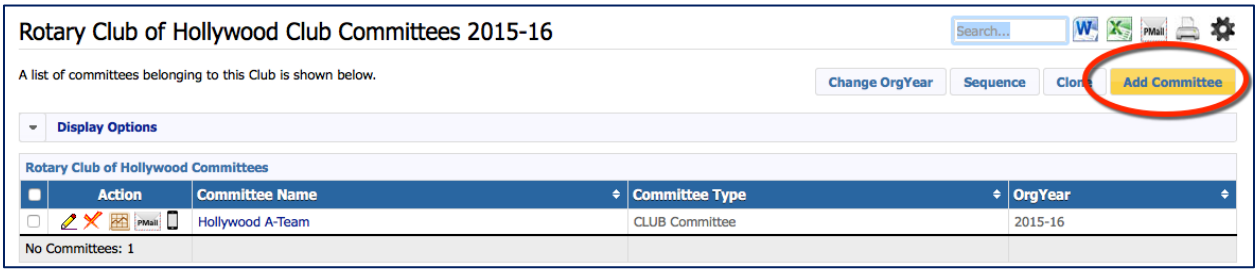
Create, Edit, and PMail a Committee

Create a committee to communicate and share information with a select group of members.

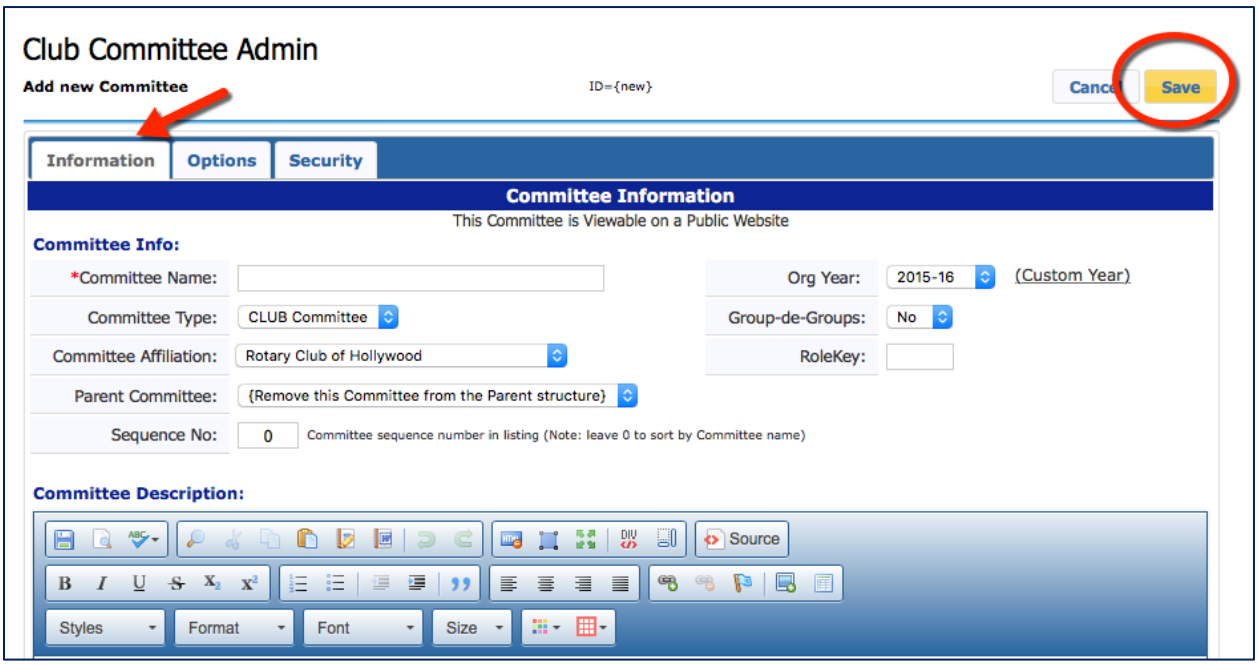
1. My Club Tab --> Club Committees (side menu)



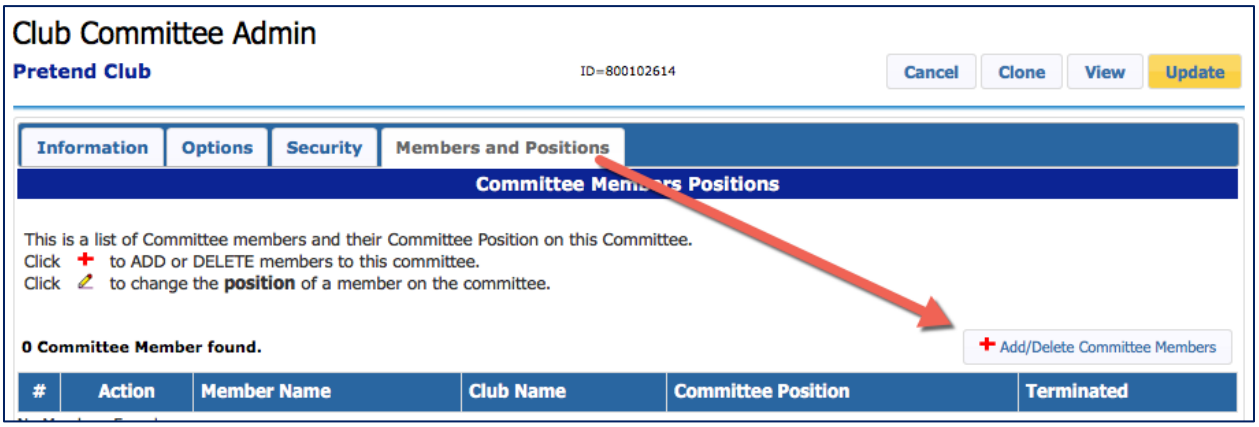
2. The Committee page will open, and display current committees. Click the yellow "Add Committee" button.



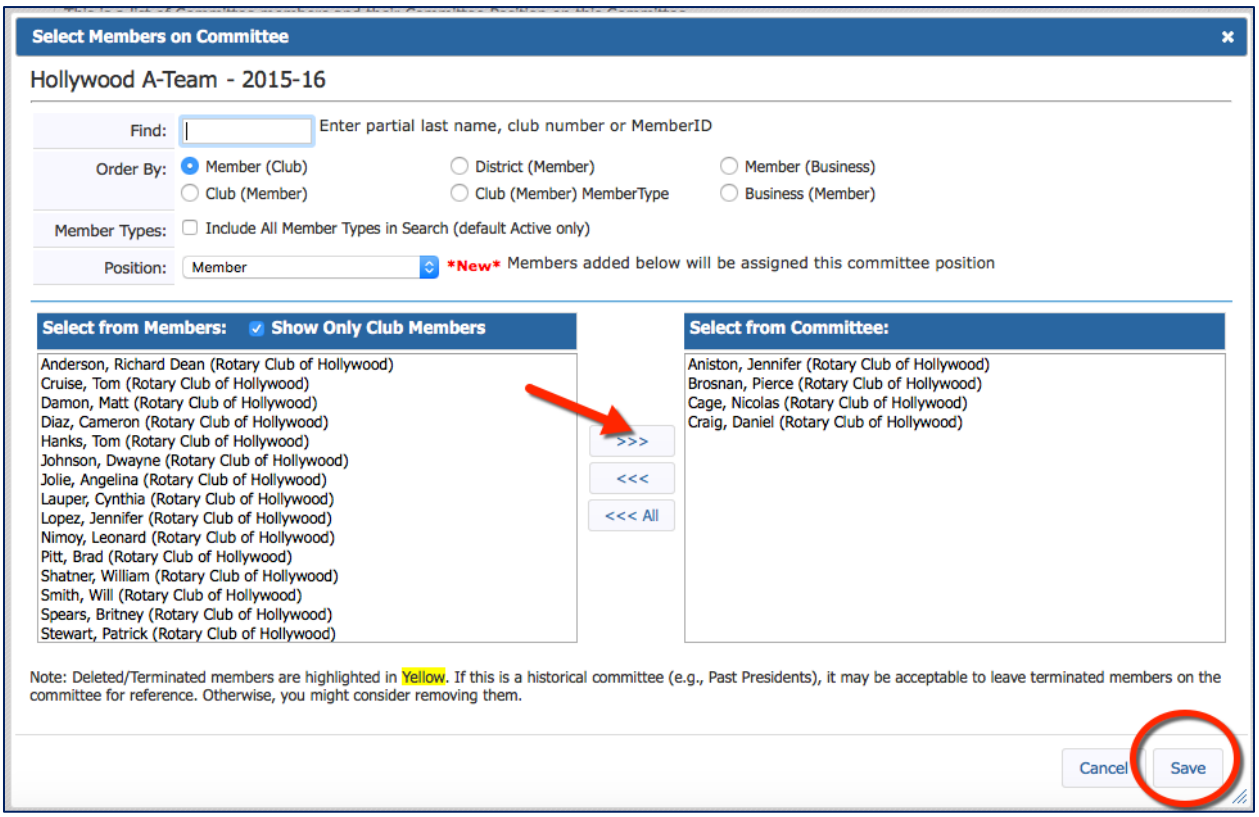
3. Add committee name and details, then click "Save".



4. After saving the committee, the “Members & Positions” tab will appear.
5. Members and Positions tab --> “Add/Delete Committee Members”.



6. Select members from the left column and use the right arrow button to add them to the committee. To remove members, select the name on the right, and use the left arrow.

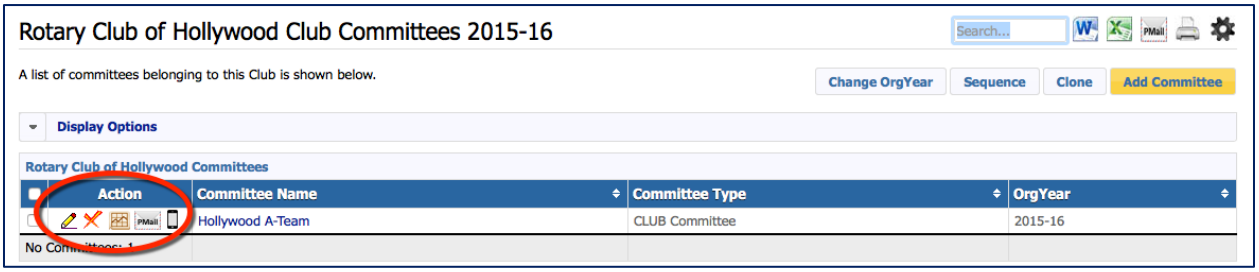


7. When finished, click “Save”.
8. To assign committee chair or other leadership roles, click the pencil edit button next to the member name, and and enter the member’s position in the popup window.

9. Using the icons in the Action column, easily delete, view reports, PMail or text the committee.

District And Club Database

Create, Edit and PMail a Committee

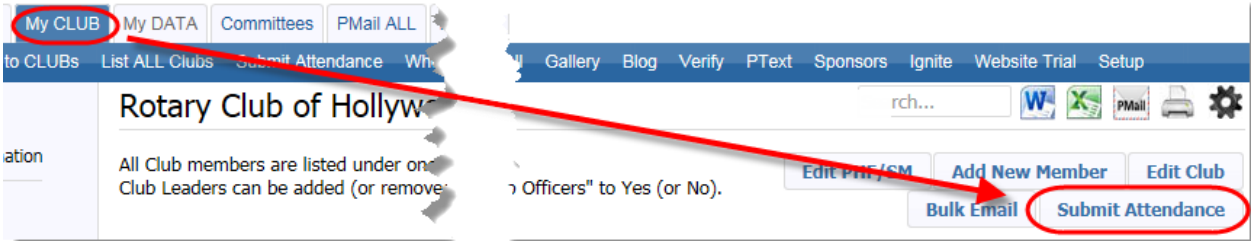


Tip: Think outside the committee box- create a committee to reach out to specific groups, such as young leaders, the current Board of Directors, Past Presidents, or club members who share a common interest. You can have as many committees as you like!

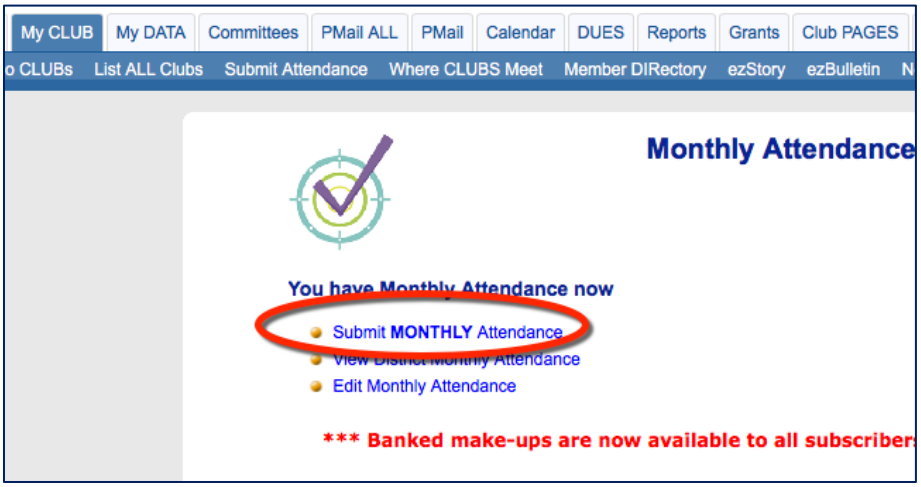
Submit Monthly Attendance

The upgraded Attendance module allows you to track weekly and individual member attendance. Without the subscription, you can still submit monthly attendance reports to your district through DACdb. Let's take a closer look.

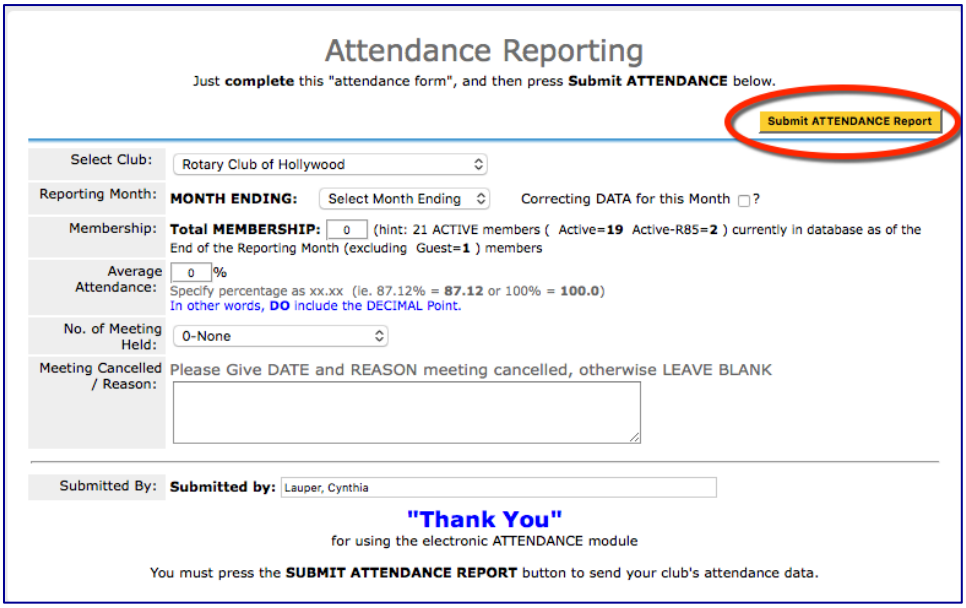
1. My Club tab --> Submit Attendance



2. Click "Submit Monthly Attendance".



3. Choose the report month, then edit the form with your club's information.



4. When finished, click the yellow “Submit Attendance Report”.

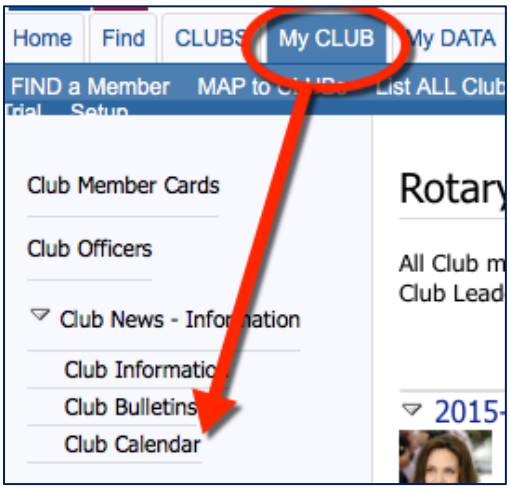
Tip: Learn more about monthly attendance reporting, and our upgraded weekly attendance module from the Monthly Attendance home screen.

Did you know… DACdb also offers a **Weekly Attendance** module that allows clubs to track meetings, makeups, excused absences, check-in users with barcode scanners and RFID tags and more! Click on the “ATTND” tab for more information.

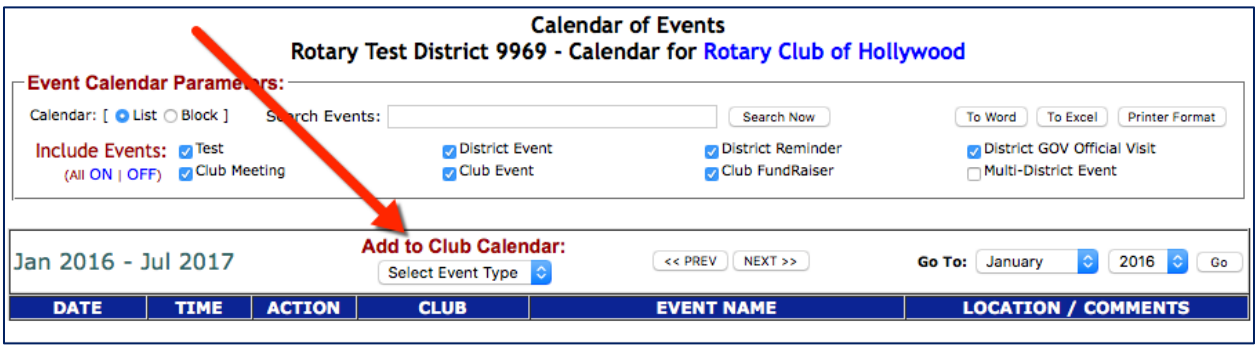
Add a Meeting to the Calendar

The DACdb calendar tool offers many options, ranging from recurring meetings to events that require registration. Start by simply adding weekly meeting information, then, as you become more comfortable, explore additional features.

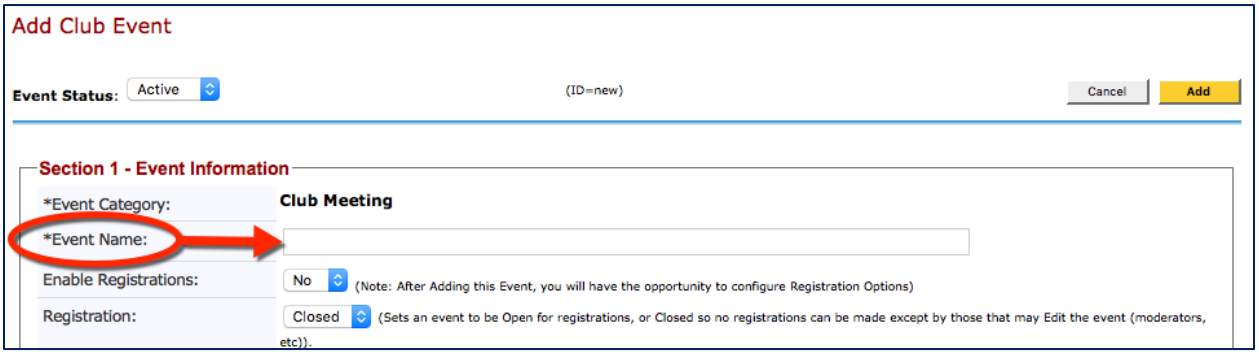
1. My Club tab --> Club Calendar (side menu)



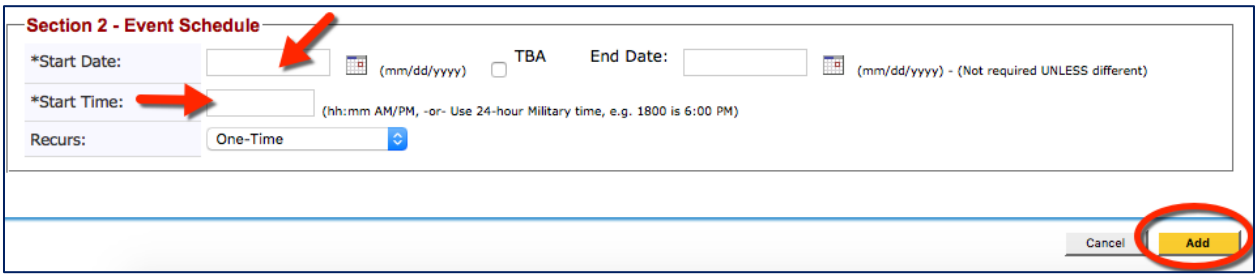
2. Look for the red "Add to Club Calendar" and select the event type. (meeting, event, fundraiser)



3. Name the event and add details.



4. Scroll down the page and find Section 2. Enter the start date and time.



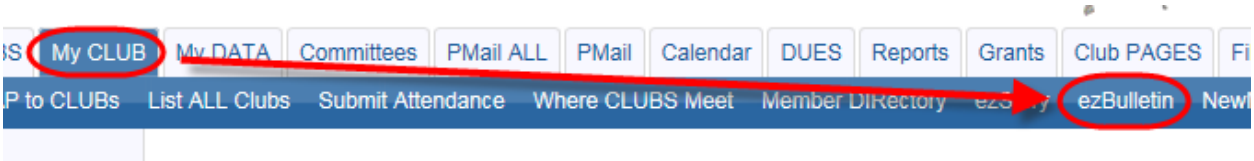
5. When finished, click the yellow "Add" button.

Tip: Create a recurring weekly club meeting. It's simple! Just select 'weekly' next to 'Recurs' in Section 2. Remember- this will duplicate your meeting, so title the event something simple, like "Weekly Club Meeting".

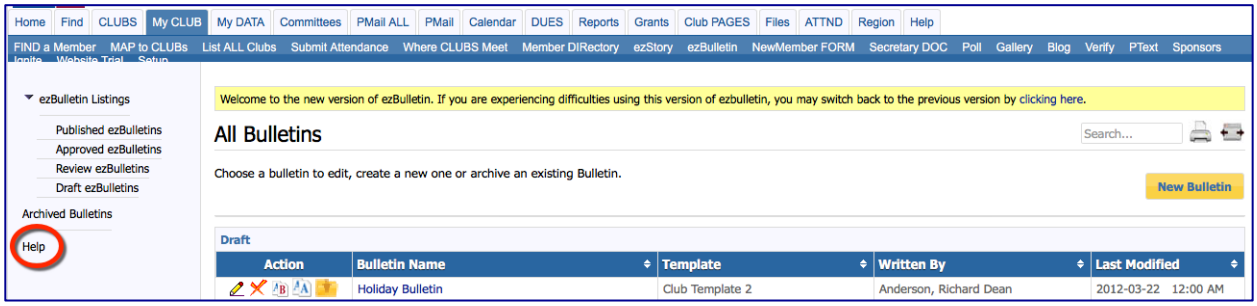
Create a Newsletter/Bulletin

If you're like most Rotary clubs, you write, print, mail, and email a newsletter to your membership. ezBulletin provides professional designs you can customize and save for future use. To start creating your new newsletter, check out our complete guide to ezBulletin!

1. My Club --> ezBulletin



2. Find "Help" at the bottom of the side menu.

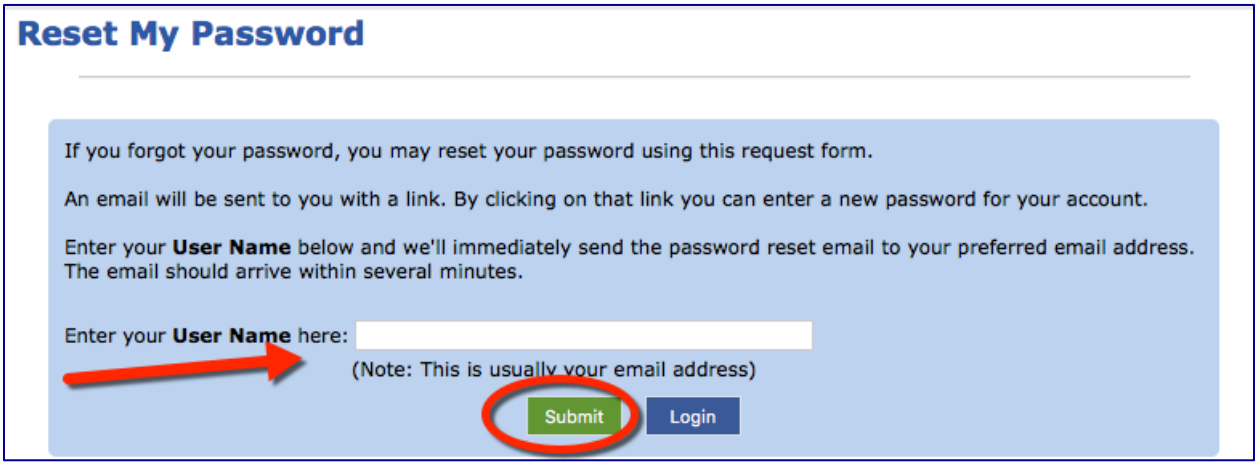


Tip: If you're creating a 'separate' newsletter for members without email, try this shortcut: After you complete the ezBulletin, click the "View PDF" button, and you will have a printable version of your newsletter. Print it, fold it, and mail it-voila!

Reset a Password

1. Go to the DACdb login screen https://www.directory-online.com
2. Click "Forgot Password?"

3. Enter your Username (probably your email address)



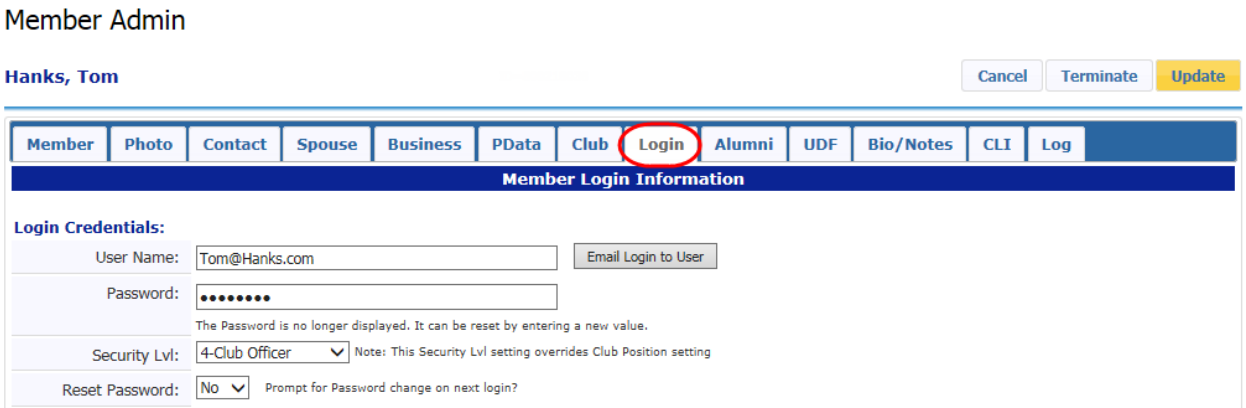
4. Click the green "Submit" and check your email. You will receive an email with reset instructions.

Tip: Remember, you do not need to enter your club number to log in!

Edit User/Login Credentials

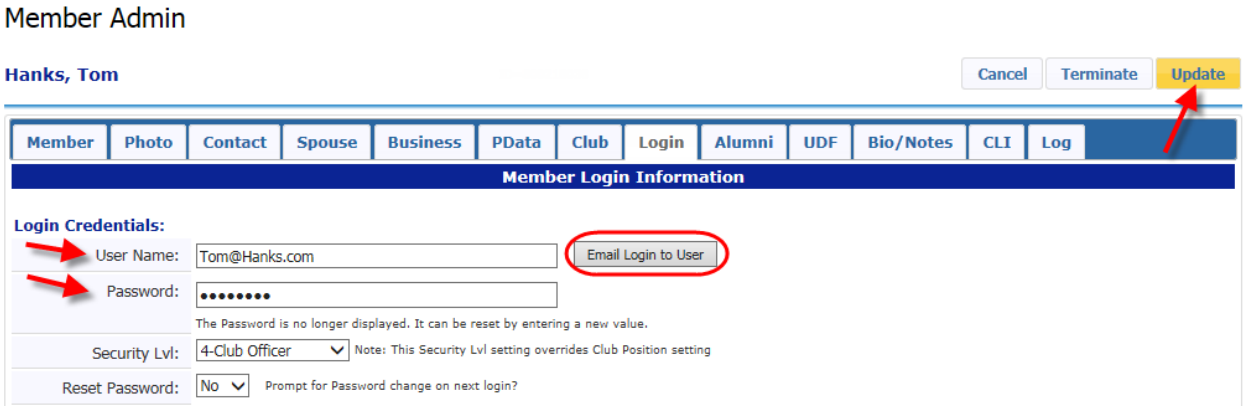
Assist a member by reviewing and updating their login credentials.

1. Find the member in DACdb, and click to edit the record.
2. In the Member Admin screen, click the "Login" tab.



3. Verify the Username (email address) and edit if necessary. Click the yellow "Update" button.

   Note: changing a contact email address (on the "Contact" tab) does not by default change a *login* email address.



4. Send the member an email with both username and password details by clicking "Email Login to User". Verify the member's email address in the "Contact" tab before sending.

   If you make changes to either the User Name or Password, **save your changes before** sending the email!

5. Or, type in a new password for the member, click the yellow “Update” button, and direct them to the DACdb login screen.

Tip: Until it is replaced, the default password is the member’s RI Member number. Encourage members to edit their password details to something more ‘memorable’.