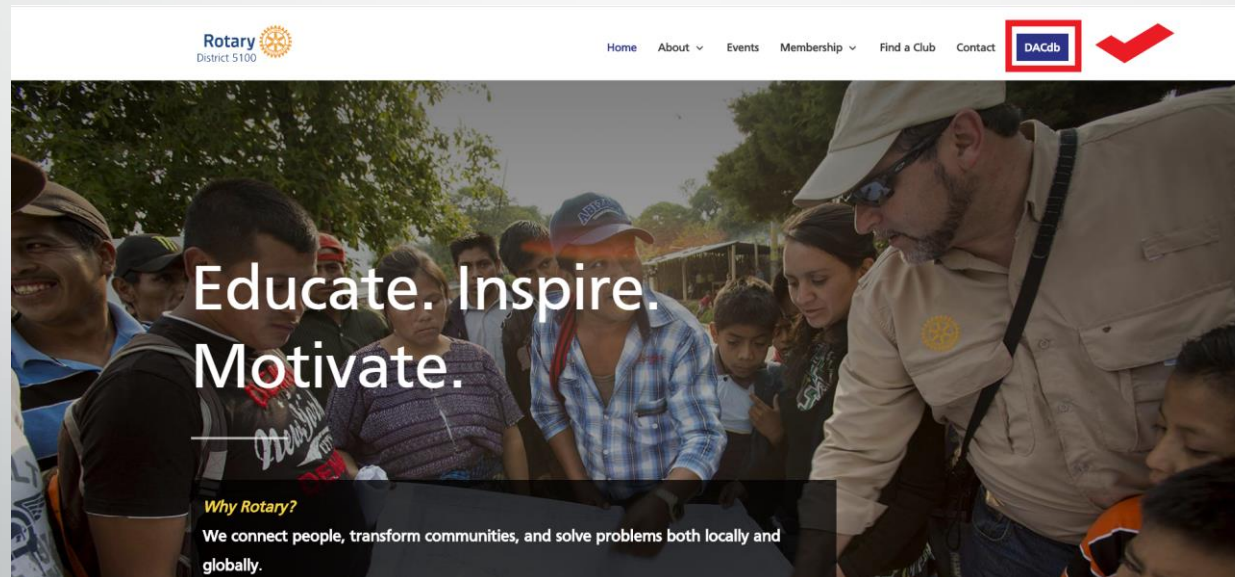


DTA 2020 DACdb for New Secretaries

Instructor: Liz Butson, D5100 Admin. Asst.

Getting started

- Logging in: www.dacdb.com
- Enter user name, password and club number (will allow expanded access)
- Can also log in through www.isrotaryforyou.com by clicking on the “DACdb” box near top right corner of page



First things first...

- Switching between interfaces (Classic vs New) - go to the top right hand corner of the page to toggle between interfaces
- Determining access level – Secretaries should be assigned access level 4 (other club officers such as President, PE and Treasurer will have same access)
- Different **security levels** provide varying access to information and the ability to use additional functions – i.e. add/delete members, post to club calendar, PMAIL, etc.
 - 1 is lowest (most members) and 8 is highest (**see handout for detailed description**)

Navigating the Homepage

The screenshot shows the Rotary District 5100 - Beaverton homepage. The top navigation bar includes tabs for Home, My DATA, My CLUB, DISTRICT, Help, Admin, and Setup. The DISTRICT tab is highlighted. The left sidebar contains a DASHBOARD NAVIGATION menu with links for Zone, District, Club, and DACdb Updates. The main content area displays the Beaverton Home Page with District Headlines, including a District Conference registration announcement and a Rotaract Networking Event. A user profile for Elizabeth Butson is visible on the right, showing a welcome message and a list of links. Annotations with red boxes and numbers 1 through 5 point to specific elements: 1. The user ID '5100-7' in the welcome message. 2. The 'ID' link in the welcome message. 3. The 'Switch to Classic Interface' link in the welcome message. 4. The DASHBOARD NAVIGATION menu. 5. The DISTRICT tab in the top navigation bar.

4. Beaverton Home Page

District Headlines

District Conference Registration is NOW OPEN! Monday, March 18, 2019

Rotaract Networking Event Monday, April 1, 2019

Looking for interesting speakers? Check out our resources!

Welcome: Butson, Elizabeth

1. 5100-7
2. ID
3. Switch to Classic Interface

Logout

1. Indicates Security/Access level - 5100 is District identifier and final # is security level
2. Members with certain access levels can click on this and assume the identity of members with a lower security level – useful if you are assisting someone with an issue and want to view the screen as it appears to them
3. Toggle between New and Classic Interface
4. Dashboard Navigation toolbar
5. Page tabs

Typical Secretary responsibilities

1. Adding/editing/terminating members (ensure info. matches RI database using integration feature)
2. Maintaining club record – meeting location & time, mailing address, weblinks, etc.
3. Editing club positions
4. Entering attendance on a weekly basis and submitting it monthly
5. Submitting/applying makeups for club members

Adding/editing/terminating members

The screenshot shows the 'Beaverton Home Page' in the DACdb system. The top navigation bar includes 'Home', 'My DATA', 'My CLUB' (highlighted with a red circle), 'DISTRICT', 'Help', 'Admin', and 'Setup'. The left sidebar lists 'DASHBOARD NAVIGATION' options like 'Zone', 'District', and 'Club'. The main content area displays 'District Headlines' with three featured items: 'District Conference Registration is NOW OPEN!', 'Rotaract Networking Event', and 'Looking for interesting speakers? Check out these resources!'.

1. Click on My Club

The screenshot shows the 'BEAVERTON CLUB FUNCTIONS (#276)' page. The top navigation bar is the same as the previous screenshot. The left sidebar now shows 'MY CLUB NAVIGATION' options, with 'My Club Members' highlighted. The main content area displays a grid of icons for various club functions: 'Club Members' (highlighted with a red circle), 'Calendar', 'Find Member', 'RI Compare', 'Area', 'PMail', 'Club Attendance', 'Club Bulletins', 'Club ezStory', 'Club ezBulletins', 'Club FILES', and 'Club Information'.

2. Click on Club Members icon

Adding members


The screenshot shows the 'Beaverton Club Members (Club# 276)' page. The top navigation bar includes 'Home', 'My DATA', 'My CLUB', 'DISTRICT', 'Help', 'Admin', and 'Setup'. The right side shows 'Rotary District 5100 - Beaverton' and the user 'Butson, Elizabeth'. The left sidebar lists 'MY CLUB NAVIGATION' options: My Club Members, Member Cards, Club Information, Club Leadership History, Club Statistics, Club Member Map, RI Integration, Admin Functions, Setup, and Help Functions. The main content area has a search bar and buttons for 'Edit PHF/SM', 'Add New Member' (circled in red), 'Edit Club', 'Bulk Email', and 'Submit Attendance'. Below this is a section for '2018-19 Club Officers' with photos and names: Bob Neubauer (President), Chris Mann (President-Elect), Jason Morrow (Secretary), Jennifer Lieb (Treasurer), Tom Freitag (Rotary Foundation Chair), Elizabeth Butson (Immediate Past President), and David Coates Noyes (Assistant Governor). At the bottom, there are tabs for 'Active/Honorary Members' and 'Terminated Members', with a table showing member details.

- Click on Add New Member

The screenshot shows the 'Member Admin: New Member' form for 'D-5100 Beaverton (#276)'. The top navigation bar is the same as the previous screenshot. The left sidebar is also the same. The main content area has a 'Cancel' button and an 'Add' button (circled in red). Below these are tabs for 'Member', 'Photo', 'Contact', 'Spouse', 'Business', 'Club', 'Login', and 'Bio/Notes'. The 'Member Information' section includes a 'Deleted' dropdown (set to 'No'), a 'Rotary ID' field (highlighted with a green box and containing '0'), and a note: 'If former Rotarian, get RI Member ID# before continuing! Also known as "MemberID"'. Other fields include 'Member Type' (set to 'Active'), 'Prefix', 'First Name', 'Middle Name', 'Last Name', 'Suffix', 'Previous Name', 'Gender' (set to '(Select)'), 'Badge/Nick Name', and 'Badge Title'.

- If transferring or former Rotarian be sure to get Rotary ID number

Adding members

1. Fill in fields (usually can find the info. on the new member's application)
2. If the new member is a transferring or former Rotarian be sure to enter their Rotary ID number (can be found by doing a search on the RI website if not provided by member). *If a new Rotary ID is created they will not receive credit for previous contributions (PH, etc.) and will lose their Rotary "history"
3. Move from tab to tab to enter relevant information
4. Club will be automatically assigned
5. Login credentials (username & password) will be generated by the system (will be used by member to login into their account)
6. Once all information is entered be sure to click on the yellow  button near top right corner of page

Adding members

Using RI Integration – Member Compare

The screenshot shows the DACdb Member Admin: New Member form. The left sidebar contains a 'MY CLUB NAVIGATION' menu with the following items: My Club Members, Member Cards, Club Information, Club Leadership History, Club Statistics, Club Member Map, RI Integration (highlighted with a red circle), Member Compare (highlighted with a red circle), Club Officer Compare, Club Info Compare, RI Transaction Log, District Compare (Lvl 6+), RI Help, Admin Functions, Setup, Help Functions, My CLUB Shortcuts, and DISTRICT Shortcuts. The main form area is titled 'Member Admin: New Member' and includes a 'D-5100 Beaverton (#276)' dropdown. The form has tabs for Member, Photo, Contact, Spouse, Business, Club, Login, and Bio/Notes. The 'Member Information' section includes fields for Deleted (No), Rotary ID (0), Member Type (Active), Prefix, First Name, Middle Name, Last Name, Suffix, Previous Name, and Gender (Select). The 'Badge Information' section includes fields for Badge/Nick Name and Badge Title.

- Can be used to upload information to the RI database
- RI will assign a member ID and it will automatically be updated in DACdb (newer feature)
- Ensures that member information is consistent across the databases

Editing/Terminating members

Rotary District 5100 - Beaverton

Butson, Elizabeth

Beaverton Club Members (club# 276)

All Club members are listed under one of the three tabs below based on their MemberTypes or Terminated status. Club Leaders can be added (or removed) to this display, by turning them on using the configure ICON at the top right and the "Show Club Officers" to Yes (or No).

2018-19 Club Officers

Bob Neubauer President

Chris Mann President-Elect

Jason Morrow Secretary

Jennifer Lieb Treasurer

Tom Freitag Rotary Foundation Chair

Elizabeth Butson Immediate Past President

David Coates Noyes Assistant Governor

Active/Honorary Members

#	Action	Member Name	Member Type	Club Position	Home Phone	Office Phone	Cell Phone	EMail
1		Adams, William B.	Active					lima31usmc@comcast.net

- Click on pencil icon beside name of member account you wish to edit or delete

Editing

- Once you are in their profile you can make any changes/corrections
- To save any changes be sure to click on the **Update** button

Editing/Terminating members

Terminating

- Once you are in their profile click on the **Terminate** button

The screenshot shows the 'Member Termination Verification' screen for Elizabeth Butson (ID: 800283386). The interface includes a top navigation bar with 'Home', 'My DATA', 'My CLUB', 'DISTRICT', 'Help', 'Admin', and 'Setup'. A left sidebar lists 'MY CLUB NAVIGATION' options like 'My Club Members', 'Member Cards', 'Club Information', etc., and 'My CLUB Shortcuts'. The main content area contains instructions to complete the termination process by entering a term date and reason. It includes a 'Cancel' button and a yellow 'Term' button. The 'Member Information' section displays details such as Member ID (8424895), Name (Butson, Elizabeth (Liz)), Gender (Female), Admission Date (Jan 11, 2012), Business Name (Rotary District 5100 Office), Club Name (Beaverton), and Address (1521 SW Joshua St., Portland, OR 97219). The 'Termination Data' section features a date field with a warning message and a list of reasons for termination, each with a radio button for selection.

Member Termination Verification: Elizabeth Butson id=800283386

Complete the member termination process by entering the term date and term reason below.
1) Termination Date cannot be more than 30 days prior or after the current date (current date +/- 30)
2) Termination Date cannot be earlier than the admission date in this club.

Member Information:

Member ID:	8424895	Gender:	Female
Name:	Butson, Elizabeth (Liz)	Admission Date:	Jan 11, 2012
Business Name:	Rotary District 5100 Office	Club Name:	Beaverton
Address:	1521 SW Joshua St. Portland OR 97219		

Termination Data:

* Date of Termination: mm/dd/yyyy - required field - please make sure this is correct!
Term dates **MUST BE** +/- 30 days of today, per RI termination rules.

* Reason for Termination:

<input type="radio"/> Health	<input type="radio"/> Personal
<input type="radio"/> By club for cause	<input type="radio"/> Non-attendance
<input type="radio"/> Lack of participation	<input type="radio"/> Business Obligations (Term Letter Sent)
<input type="radio"/> Relocation (Term Letter Sent)	<input type="radio"/> Deceased
<input type="radio"/> Joining New Club (Term Letter Sent)	<input type="radio"/> Non-payment of club dues
<input type="radio"/> Family Obligations (Term Letter Sent)	<input type="radio"/> Duplicate Member in DACdb

- A new screen will open
- Enter the termination date and reason for termination
- Click on the **Term** box
- A warning box will appear asking you to verify that you want to terminate account. If you select **yes** the termination will be complete and difficult to reverse.

Maintaining a club record

The screenshot shows the 'Beaverton Club Members (Club# 276)' page. The top navigation bar includes 'Home', 'My DATA', 'My CLUB', 'DISTRICT', 'Help', 'Admin', and 'Setup'. The left sidebar lists 'MY CLUB NAVIGATION' options: My Club Members, Member Cards, Club Information, Club Leadership History, Club Statistics, Club Member Map, RI Integration, Admin Functions, Setup, and Help Functions. The main content area displays club officers for the 2018-19 term: Bob Neubauer (President), Chris Mann (President-Elect), Jason Morrow (Secretary), Jennifer Lieb (Treasurer), Tom Freitag (Rotary Foundation Chair), Elizabeth Butson (Immediate Past President), and David Coates Noyes (Assistant Governor). Below the officers, there are tabs for 'Active/Honorary Members' and 'Terminated Members'. The 'Active/Honorary Members' tab is selected, showing a table with columns: #, Action, Member Name, Member Type, Club Position, Home Phone, Office Phone, Cell Phone, and EMail. The first member listed is Adams, William B., with an active status.

The screenshot shows the 'Club Admin' page for Beaverton (ID=276). The top navigation bar is the same as the previous screenshot. The left sidebar shows 'My CLUB Shortcuts' and 'DISTRICT Shortcuts'. The main content area has a tabbed interface with tabs: Information, Address, Meeting Info, Links, Positions, Billing, Security, PData, and Notes. The 'Information' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Club Information' with a note: 'Enter the Club information. The fields marked with * are required fields.' The form contains the following fields: *Club Name (Beaverton), Club Badge Name (Beaverton), Active (Yes), Club Parent (No Parent), Club Type (Rotary Club), *Club Number (276), *Area (14), Charter Number, Charter Date (10/15/1959), EIN, and Alt EIN.

- Enter changes/corrections
- Click on individual tabs to open new screens
- Click on **Update** to save changes

Editing club positions

- Used to identify club officers and record their term of service
- Click on the “Edit Club” button to access the club information page
- Information entered will be displayed on the banner near the top of the club page

The screenshot shows the 'Beaverton Club Members (Club# 276)' page. The 'Edit Club' button is circled in red. The page displays a list of 2018-19 Club Officers: Bob Neubauer (President), Chris Mann (President-Elect), Jason Morrow (Secretary), Jennifer Lieb (Treasurer), Tom Freitag (Rotary Foundation Chair), Elizabeth Butson (Immediate Past President), and David Coates Noyes (Assistant Governor). Below the officers, there is a table for 'Active/Honorary Members' and 'Terminated Members'.

#	Action	Member Name	Member Type	Club Position	Home Phone	Office Phone	Cell Phone	Email
1		Adams, William B.	Active					lima31usmc@comcast.net

The screenshot shows the same 'Beaverton Club Members (Club# 276)' page, but with the 'Edit Club' button circled in yellow. The 2018-19 Club Officers are listed: Bob Neubauer (President), Chris Mann (President-Elect), Jason Morrow (Secretary), Jennifer Lieb (Treasurer), Tom Freitag (Rotary Foundation Chair), Elizabeth Butson (Immediate Past President), and David Coates Noyes (Assistant Governor). The table for 'Active/Honorary Members' and 'Terminated Members' is also visible.

#	Action	Member Name	Member Type	Club Position	Home Phone	Office Phone	Cell Phone	Email
1		Adams, William B.	Active					lima31usmc@comcast.net

➤ Club banner
(in yellow)

Editing club positions

The screenshot shows the Rotary Club Admin interface for Beaverton (ID=276). The 'Positions' tab is selected and highlighted with a red circle. The interface includes a top navigation bar with links like Home, My DATA, My CLUB, DISTRICT, Help, Admin, and Setup. A sidebar on the left contains 'My CLUB Shortcuts' and 'DISTRICT Shortcuts'. The main content area shows the 'Club Positions' section with a list of members and their positions. The 'OrgYear' is set to 2018-19. The table lists 81 members, with the first few rows showing Adams, Appel, Beighley, Bera, and Blevins. Blevins, John R. is highlighted with a green box, and his position 'Treasurer (T)' is circled in red.

Rotary District 5100 - Beaverton Butson, Elizabeth

Home My DATA My CLUB DISTRICT Help Admin Setup

My CLUB Shortcuts

DISTRICT Shortcuts

Club Admin

Beaverton ID=276 Cancel View Update

Information Address Meeting Info Links **Positions** Billing Security PData Notes

Club Positions

This is a list of Club members and their position(s) in this Club. Members get added to this list by being a member of the Club (there is no add link here). Member positions within the Club can be edited from this screen, just click on the PENCIL icon. Only Active and Staff Position members can hold office. Others (e.g., Honorary) are not on the list below.

Listing Options: Show: ☐ Only members with Club positions? OrgYear: 2018-19 Show positions for this OrgYear

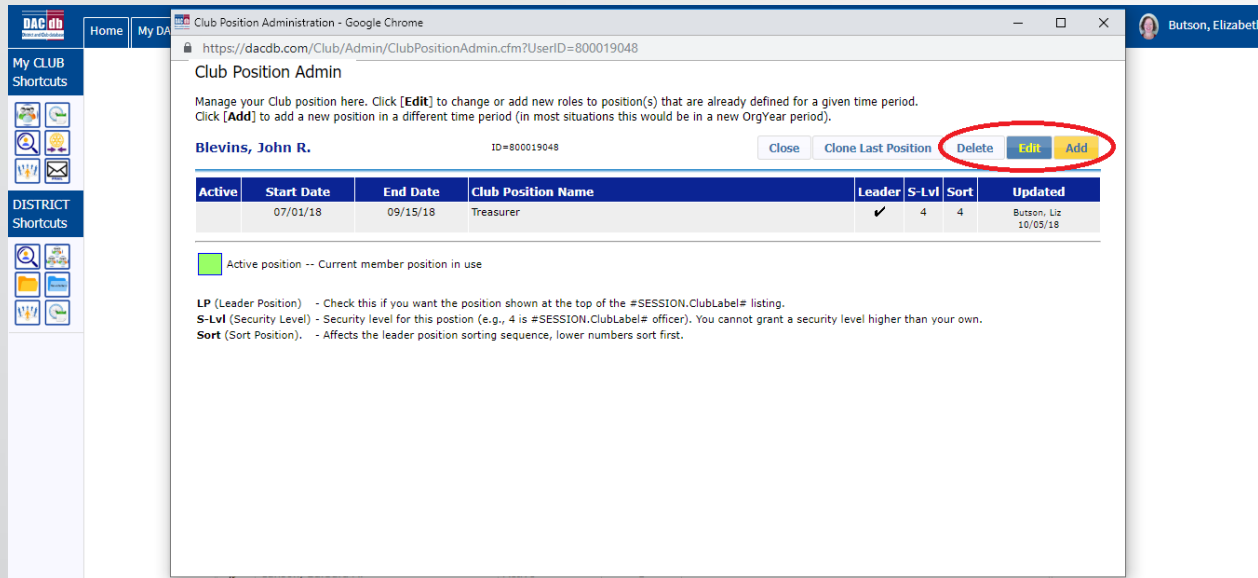
Listing Reports: (Pop-Up blockers must be disabled) Leadership History: [Click Here](#) Position Summary: [Click Here](#)

81 members A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | R | S | T | V | W |

Edit	Club Member Name	MemberType	Sec-Lvl	2018-19 Positions
- A -				
	Adams, William B.	Active	1	
	Appel, Frank B.	Active	7	
- B -				
	Beighley, Harold S.	Active	1	
	Bera, Bill	Active	1	
	Blevins, John R.	Active	1	Treasurer (T) (07/01/18 - 09/15/19)

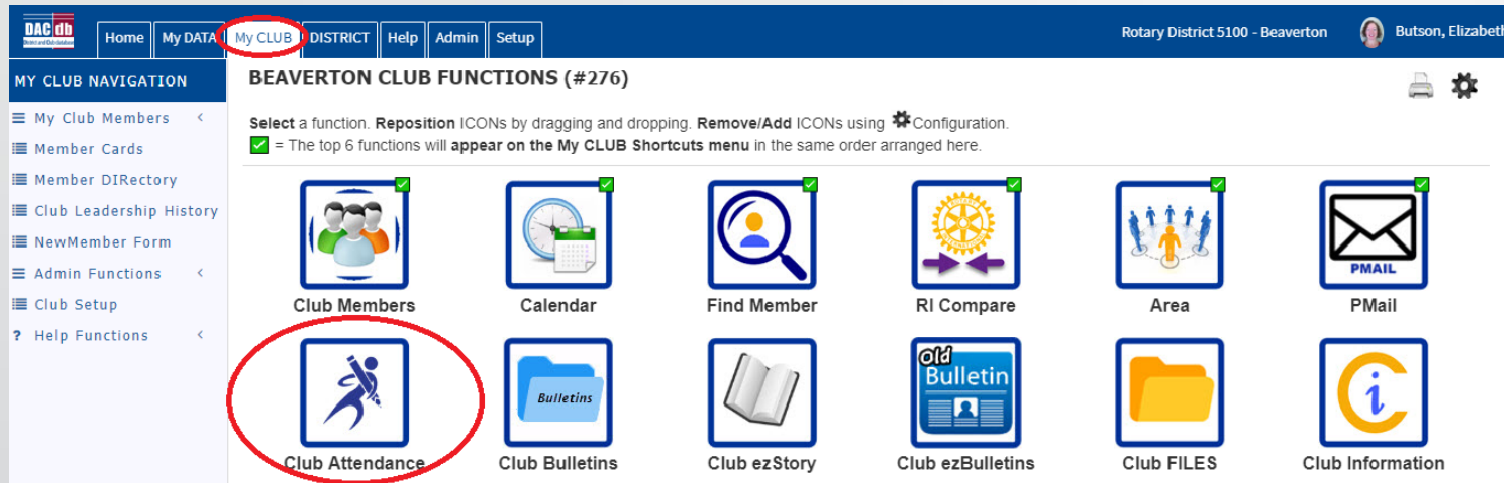
- Click on the “Positions” tab to bring up the club roster and a listing of members holding officer positions in the club
- You can change the **Org Year** to show info. for previous/future years
- Click on the pencil icon beside the name of the member record you wish to edit

Editing club positions

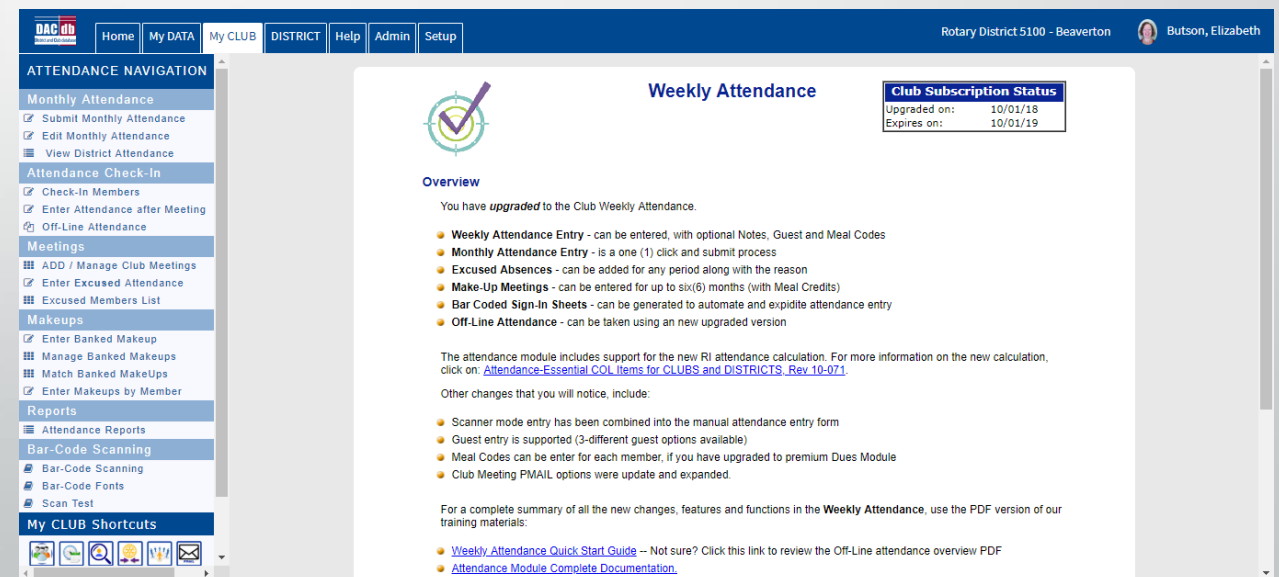


- Pop-up screen where you can add/modify/delete a members position record
- If you click on **Edit** you can change dates and use the drop down menu to select a position (i.e. President Elect, Treasurer, etc.)
- To record a new appointment click on the **Add** button
- Once you've made the desired changes close the box to reveal the previous page. Click on the and click on the **Update** button to save the changes

Attendance



- Click on **My CLUB** tab and then the **Club Attendance** icon
- A new page will open
- Use the sub-menu items under the **ATTENDANCE NAVIGATION** column to complete different tasks



Attendance

Recording weekly attendance

Weekly Attendance

Club Subscription Status
Upgraded on: 10/01/18
Expires on: 10/01/19

Overview

You have upgraded to the Club Weekly Attendance.

- Weekly Attendance Entry - can be entered, with optional Notes, Guest and Meal Codes
- Monthly Attendance Entry - is a one (1) click and submit process
- Excused Absences - can be added for any period along with the reason
- Make-Up Meetings - can be entered for up to six(6) months (with Meal Credits)
- Bar Coded Sign-In Sheets - can be generated to automate and expedite attendance entry
- Off-Line Attendance - can be taken using a new upgraded version

The attendance module includes support for the new RI attendance calculation. For more information on the new calculation, click on: [Attendance-Essential COL Items for CLUBS and DISTRICTS, Rev 10-071](#)

Other changes that you will notice, include:

- Scanner mode entry has been combined into the manual attendance entry form
- Guest entry is supported (3-different guest options available)
- Meal Codes can be enter for each member, if you have upgraded to premium Dues Module
- Club Meeting PMAIL options were update and expanded.

For a complete summary of all the new changes, features and functions in the **Weekly Attendance**, use the PDF version of our training materials:

- [Weekly Attendance Quick Start Guide](#) -- Not sure? Click this link to review the Off-Line attendance overview PDF
- [Attendance Module Complete Documentation](#)

Add weekly meetings by clicking on the yellow box

Beaverton Club Meetings

Club Subscription Status
Upgraded on: 10/01/18
Expires on: 10/01/19

Club Meeting Parameters:

Status: ☒ Open for Attendance Entry ☐ Closed Meetings

Note: Meetings are closed after the monthly attendance is submitted. Meetings are closed primarily to remove them from the current working set of meetings below.

There are 1 open meeting found.

Badges Add Make-Up Add Excused Absence **Add Meeting**

Meeting Date	Meeting / Check-In	Attendance	%	MkUp	Excu	Excl	Stat	Actions
April 2019								
Wed Apr 03, 2019	Club Meeting	60 of 78	76.9%	0	2		Open	Edit Report PMail

- To Enter/Edit attendance values, click on the Club Name link above and then click the Edit button
- To View meeting summary, click on attendance values
- Rule of 85 attendance is now part of the calculation

A calendar will appear – click on the dates you want to record attendance for and then click on **Add** to save

Attendance

You will return to this screen. Click on the meeting date (link).

The screenshot shows the 'Beaverton Club Meetings' screen in the DAC db application. The top navigation bar includes links for Home, My DATA, My CLUB, DISTRICT, Help, Admin, and Setup. The user is logged in as Butson, Elizabeth. The left sidebar contains an 'ATTENDANCE NAVIGATION' menu with options for Monthly Attendance, Attendance Check-In, Meetings, and Makeups. The main content area displays 'Beaverton Club Meetings' with a 'Club Subscription Status' box indicating an upgrade on 10/01/18 and expiration on 10/01/19. Below this, 'Club Meeting Parameters' show the status as 'Open for Attendance Entry'. A table lists meetings, with the first entry 'Wed Apr 03, 2019 Club Meeting' highlighted in red and a red arrow pointing to it. The table columns are Meeting Date, Meeting / Check-In, Attendance, %, MkUp, Excu, Exd, Stat, and Actions. The attendance for the highlighted meeting is 60 of 78 (76.9%).

Meeting Date	Meeting / Check-In	Attendance	%	MkUp	Excu	Exd	Stat	Actions
April 2019								
Wed Apr 03, 2019	Club Meeting	60 of 78	76.9%	0	2		Open	Edit Report PMail

- A new screen will open showing the club roster with check boxes beside each member name
- 1. Click on boxes beside names of members who attended
- 2. Click on the **Add Guest** icon to record any guests (can be categorized by type – Rotarian, spouse, other, etc.)
- 3. Click on **Done** to save
- 4. Follow this procedure for every meeting

Attendance

Submitting Monthly Attendance

Beaverton Club Meetings

Club Subscription Status
Upgraded on: 10/01/18
Expires on: 10/01/19

Club Meeting Parameters:

Status: ☒ Open for Attendance Entry ☐ Closed Meetings

Note: Meetings are closed after the monthly attendance is submitted. Meetings are closed primarily to remove them from the current working set of meetings below.

There are 1 open meeting found.

Meeting Date	Meeting / Check-In	Attendance	%	MkUp	Excu	Excl	Stat	Actions
April 2019								
Wed Apr 03, 2019	Club Meeting	60 of 78	76.9%	0	2		Open	Edit Report PMail

- To Enter/Edit attendance values, click on the Club Name link above and then click the Edit button
- To View meeting summary, click on attendance values
- Rule of 85 attendance is now part of the calculation

Click on **Submit Monthly Attendance** under ATTENDANCE NAVIGATION column

1. Make sure correct reporting month is selected
2. Ensure **No. of Meetings held** field is correct
3. Click on **Submit ATTENDANCE Report** button

Attendance Reporting for Beaverton id=276

You must press the **SUBMIT ATTENDANCE REPORT** button to enter your club's attendance data. When you submit your attend, all of the weekly meetings for this period will be **closed**.
Attendance was already entered for this Month!!!

Select Club: Beaverton

Reporting Month: March 2019 ☒ Correcting DATA for this Month?

Membership:

Active=68	81	"Active" Members (at end of reporting Month)	Review
Honorary=2	2	NEW "Active" Members (reporting month)	Review
Active-LOA=2	1	TERMINATED "Active" Members (reporting month)	Review
Active-RBS=11			

Average Attendance: 58.86 % [Review](#) (does not include excluded meetings)
Specify percentage as xx.xx (ie. 87.12% = 87.12 or 100% = 100.0)
In other words, DO include the DECIMAL Point.

No. of Meeting Held: 4 [Review](#)

Meeting Cancelled / Reason:

Submitted By: Butson, Elizabeth

Attendance Reports

DAC db Home My DATA My CLUB DISTRICT Help Admin Setup Rotary District 5100 - Beaverton Butson, Elizabeth

ATTENDANCE NAVIGATION

- Monthly Attendance
 - Submit Monthly Attendance
 - Edit Monthly Attendance
 - View District Attendance
- Attendance Check-In
 - Check-In Members
 - Enter Attendance after Meeting
 - Off-Line Attendance
- Meetings
 - ADD / Manage Club Meetings
 - Enter Excused Attendance
 - Excused Members List
- Makeups
 - Enter Banked Makeup
 - Manage Banked Makeups
 - Match Banked MakeUps
 - Enter Makeups by Member
- Reports**
 - Attendance Reports
- Bar-Code Scanning
 - Bar-Code Scanning
 - Bar-Code Fonts
 - Scan Test
- My CLUB Shortcuts

Club Attendance Reports

Click on the report name to run the selected report

District Reports

- [District Monthly Attendance](#) View *updated* District Monthly Attendance by Club Available Formats:
- [Monthly Attendance Summary](#) View Club Monthly Attendance History Available Formats:

Club-Level Reports

- [Weekly Attendance Summary](#) View Weekly Club Attendance Summary (by month) Available Formats:
- [Monthly Attendance Detail](#) View Monthly Attendance Detail (by Week and Member) Available Formats:
- [Meeting Guests](#) ^{NEW} View a summary of meeting guests over a period of time. This report includes all Guest types. Available Formats:
- [Club Meal Charges](#) ^{NEW} View a summary of all meal charges for the club over a period of time. This report summarizes the data by Meal Code then Guest Code over the reporting period. Available Formats:

Member-Level Reports

- [Member Summary](#) View the guests attending a meeting over a period of time Available Formats:
- [Member Detail](#) View Member's Attendance Details (by Week and Month for the ORG Year) Available Formats:
- [Member Make-Ups](#) ^{NEW} View a summary of the Make-Ups meetings filed by each member over a period of time. This report also includes any MealCodes that may be assigned to the Make-Up. Available Formats:

- A variety of reports are available and can be downloaded using either Word or Excel

Makeups

Rotary District 5100 - Beaverton Butson, Elizabeth

Home My DATA **My CLUB** DISTRICT Help Admin Setup

ATTENDANCE NAVIGATION

- Monthly Attendance
 - Submit Monthly Attendance
 - Edit Monthly Attendance
 - View District Attendance
- Attendance Check-In
 - Check-In Members
 - Enter Attendance after Meeting
 - Off-Line Attendance
- Meetings
 - ADD / Manage Club Meetings
 - Enter Excused Attendance
 - Excused Members List
- Makeups**
 - Enter Banked Makeup
 - Manage Banked Makeups
 - Match Banked MakeUps
 - Enter Makeups by Member
- Reports

Weekly Attendance

Club Subscription Status

Upgraded on:	10/01/18
Expires on:	10/01/19

Overview

You have *upgraded* to the Club Weekly Attendance.

- Weekly Attendance Entry - can be entered, with optional Notes, Guest and Meal Codes
- Monthly Attendance Entry - is a one (1) click and submit process
- Excused Absences - can be added for any period along with the reason
- Make-Up Meetings - can be entered for up to six(6) months (with Meal Credits)
- Bar Coded Sign-In Sheets - can be generated to automate and expedite attendance entry
- Off-Line Attendance - can be taken using an new upgraded version

The attendance module includes support for the new RI attendance calculation. For more information on the new calculation, click on: [Attendance-Essential COL Items for CLUBS and DISTRICTS, Rev 10-071](#).

Other changes that you will notice, include:

***It is advisable to record make-ups to help members achieve perfect attendance and improve your club attendance percentage.**

What are makeups?

- Individual clubs can determine what will qualify as a makeup
- Usually include visits to other clubs (a makeup slip may be required as proof of attendance), attending board meetings or District committee meetings, participating in a club related event (i.e. a social gathering or service project), completing an online makeup (i.e. reading a *Rotary eClub One* article or watching a video)

Makeups

Entering makeup by Member

The screenshot shows the DAC db web application interface. The top navigation bar includes links for Home, My DATA, My CLUB, DISTRICT, Help, Admin, and Setup. The user is logged in as Butson, Elizabeth, and the location is Rotary District 5100 - Beaverton. The left sidebar, titled 'ATTENDANCE NAVIGATION', contains several sections: 'Monthly Attendance' (Submit, Edit, View), 'Attendance Check-In' (Check-In Members, Enter Attendance after Meeting, Off-Line Attendance), 'Meetings' (ADD / Manage Club Meetings, Enter Excused Attendance, Excused Members List), and 'Makeups' (Enter Banked Makeup, Manage Banked Makeups, Match Banked MakeUps, and Enter Makeups by Member, which is highlighted with a red box). The main content area is titled 'Beaverton - Makeup Meeting Entry' and contains instructions for adding member makeups, a list of rules, and a 'Select Member' dropdown menu.

Beaverton - Makeup Meeting Entry

Add Member Make-up

Enter a Member's **Make-Up** meeting below by selecting from club meeting and members listed below. Make-Ups can be entered for **open** or **closed** meetings for the past **6 months** back. An optional note/comment can be entered for each make-up, which will be annotated on attendance reports.

- A Make-Up can only be entered for a meeting where the attendance was not already recorded.
- Make-up meetings can be applied to meetings within the past **6-months**.
- The attendance statistics will be recalculated and updated for the meeting selected.
- District statistics **WILL NOT** be updated if the monthly attendance was already submitted.
- Only meetings within the last **6-months** that a make-up can be applied to will be shown.

Select Member: { Select Member }

This screenshot shows the same DAC db web application interface, but with the 'Add Member Make-up' form expanded. The left sidebar is identical, with 'Enter Makeups by Member' highlighted. The main content area shows the form fields for entering a member's makeup. The 'Select Member' dropdown is now populated with a member's name. The 'Date of Make-Up' field is set to 10/08/2018. The 'Meal Code' is set to None. The 'Make-Up Note' field is empty. The 'Meeting(s)' field is set to 10/08/2018. The 'Send Email' section is checked, and the 'Send MakeUp Applied CC Email' option is also checked. A yellow box highlights the message: 'No meetings found to make-up. If meetings were missed the dates would appear here You can click on the date to apply a banked makeup'.

Beaverton - Makeup Meeting Entry

Add Member Make-up

Enter a Member's **Make-Up** meeting below by selecting from club meeting and members listed below. Make-Ups can be entered for **open** or **closed** meetings for the past **6 months** back. An optional note/comment can be entered for each make-up, which will be annotated on attendance reports.

- A Make-Up can only be entered for a meeting where the attendance was not already recorded.
- Make-up meetings can be applied to meetings within the past **6-months**.
- The attendance statistics will be recalculated and updated for the meeting selected.
- District statistics **WILL NOT** be updated if the monthly attendance was already submitted.
- Only meetings within the last **6-months** that a make-up can be applied to will be shown.

Select Member: [Member Name]

Date of Make-Up: 10/08/2018 Use banked makeups? (There are 120 banked makeup(s) available)

Meal Code: None Selection applies to all meetings checked below

Make-Up Note: Notes/comments apply to all meetings checked below

Meeting(s): 10/08/2018 Select from the meetings since 10/08/2018 below to apply **Make-Up**. (Select meeting closest to the make-up date):

No meetings found to make-up. If meetings were missed the dates would appear here You can click on the date to apply a banked makeup

Send Email: ☒ Send PMail to member that makeup was applied (configurable for each club) Currently, makeup applied email option is: **Enabled**

☒ Send MakeUp Applied CC Email to AS, CES or S (configurable for each club) Currently, CC makeup applied email option is: **Enabled**, with CC going to: [AS,CES,S] Note: To change -- see Club Setup or submit a support ticket.

Makeups

Entering a Banked Makeup

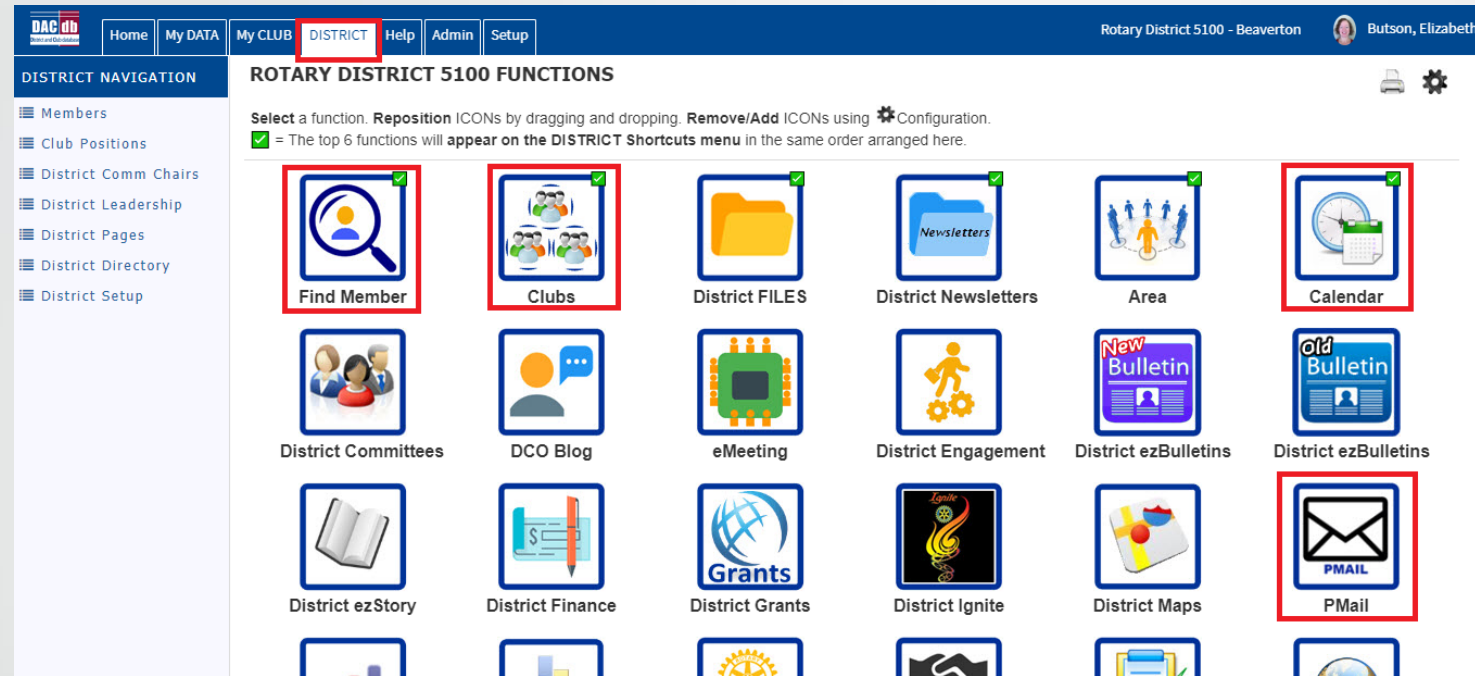
The screenshot shows the Rotary District 5100 - Beaverton web application. The top navigation bar includes links for Home, My DATA, My CLUB, DISTRICT, Help, Admin, and Setup. The user is logged in as Butson, Elizabeth. The left sidebar contains various navigation options, with 'Enter Banked Makeup' highlighted under the 'Makeups' section. The main content area is titled 'Enter Banked Makeup' and contains the following form fields:

- * Select Member:** A dropdown menu with 'Butson, Elizabeth' selected.
- * Date of Makeup:** A date picker field with a calendar icon. A note indicates 'MakeUp Date - is Required'.
- Meal Code:** A dropdown menu with 'None' selected. A note indicates 'Selection applies to this banked makeup entry'.
- * No. of Makeups:** A text input field with '1' entered. A note indicates 'Number of Makeups (Max 52)'.
- * Makeup Venue/Note:** A text input field with the placeholder text 'Club, Committee Meeting, Event or Project where makeup was made'.
- Other Members present:** A text input field with the placeholder text '- or - comments (optional)'.

A yellow 'Submit' button is located at the bottom of the form.

- Useful to save for future use
- Can be applied against missed meetings

Brief overview of some other useful features



Click on the **District** tab at the top of the page

- Find Member – searchable fields which allow you to find the profile for other members in the District
- Clubs – allows you to pull up a list of all the clubs in the District. You can click on the link to view club rosters and see club information (meeting location & time, etc.)
- Calendar – pulls up the District calendar so you can view and register for upcoming events
- *PMail – allows you to send bulk email to your fellow club or committee members (*will be covered in Experienced Secretaries session)

Need assistance?

DACdb Home My DATA My CLUB **DISTRICT** **Help** Admin Setup Rotary District 5100 - Beaverton Butson, Elizabeth

HELP NAVIGATION

- DACdb QuickStart Guides <
- User Conference 2019
- Policy
- RI Theme
- Suggestions
- Support Tickets
- System Changes
- WHO-SecLVL?
- DACdb Training <
- FAQ

Help Topics

- New Calendar
- New User Interface
- Overview
- Attendance
- Calendar, Events & Meetings
- Club
- Committee
- e-Meeting
- Engagement
- Files
- Finance

DACdb Help for Rotary District 5100

Use the "Search" field at the top right to search for a help topic.

If you need further assistance with DACdb, there are numerous ways to get help and/or reach your local support person or DACdb support:

- FAQ** - Review the documentation under the Frequently Asked Questions (FAQ) link
- Help Topics** - On the left side of this page there are lots of help articles about many areas in DACdb. Use the "Search" field above to search for articles too.
- Designated District Help** - This person, listed in the box on the right, is your district's local support person.
- Email** - Click on one of the email links below and send us an email describing your problem.
- Phone** - Call during normal business hours.
- Support Request** - Submit a support request. Opening a support ticket will immediately email us your request and enable you to track the progress of the issue.

Submit a Support Ticket

[Click here to View and Submit Support Tickets](#)

DACdb Email and Telephone Support

Call during normal business hours or send us an email at any time.

General DACdb Support: support@dacdb.com
Easy & Beautiful, WordPress Support: websites@dacdb.com

Call during normal business hours. If you know your party's extension you can dial it at

District 5100 Help
Designated District Help

Liz Butson
Phone: 503-605-5100
Email: office@district5100.org

DACdb Product Brochures

- [DACdb-Club_Choice.pdf](#)
- [DACdb_Attendance.pdf](#)

- Click on the **Help** tab on DACdb for a list of resources or
- Contact **Liz Butson** at the District 5100 office
Email: office@district5100.org
Phone: 503-605-5100

Additional resources

The screenshot shows the DACdb Help for Rotary District 5100 website. The top navigation bar includes links for Home, My DATA, My CLUB, DISTRICT, Help (circled in red), Admin, and Setup. The user is logged in as Butson, Elizabeth. The left sidebar shows the HELP NAVIGATION menu, with 'DACdb QuickStart Guides' expanded to show 'QuickStart Classic UI' and 'QuickStart New UI' (highlighted with a red arrow). The main content area provides instructions on using the search field and lists various support resources. A 'Submit a Support Ticket' section includes a link to view and submit tickets. A 'DACdb Email and Telephone Support' section provides contact information for Liz Butson. A 'District 5100 Help' sidebar contains links to designated district help and product brochures.

HELP NAVIGATION

- DACdb QuickStart Guides
 - QuickStart Classic UI
 - QuickStart New UI
- User Conference 2019
- Policy
- RI Theme
- Suggestions
- Support Tickets
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District 5100 Help

Designated District Help

Liz Butson
Phone: 503-605-5100
Email: office@district5100.org

DACdb Product Brochures

- [DACdb-Club_Choice.pdf](#)
- [DACdb_Attendance.pdf](#)

https://dacdb.com/Help2/download.cfm?sFileName=A. Overview\DACdb_QuickStart_New_UI.pdf If you know your party's extension you can dial it at

* Under Help Navigation menu you can download "Quick Start" Guides which are handy user manuals.



Questions?

Functions you'd like to learn more about?
Tips to share?