

Installation & Getting Started
User's Guide

RI District
Administration
Software
(RI-DAS)[®]

for Rotary Districts

by
Rotary International

Notice


Information in this document is subject to change without notice. Companies, names, and data used in examples herein are fictitious unless otherwise noted. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Rotary International.

Copyright ©2003 Rotary International

Email: distadmin.support@rotaryintl.org

<https://riweb.rotaryintl.org>

All rights reserved

Rotary International ® and  ® and RI Club Administration Software (RI-DAS) and RI Club Administration Software (RI-CAS) are trademarks of Rotary International. Microsoft, MS, and MS-DOS are registered trademarks of Microsoft Corporation, Windows, Access and VisualBasic are trademarks of Microsoft Corporation. Adobe and Acrobat are registered trademarks of Adobe Systems Incorporated. Apple and Macintosh are trademarks of Apple Corporation. Crystal Reports for Windows is a trademark of Crystal Computer Services. All other product names referenced are believed to be the registered trademarks of their respective companies.

Printed in Evanston, IL

Part No: RD100

Contents

Installation & Upgrade	5
(How to install, setup users and upgrade from previous versions)	
Getting Started Checklist	23
(Steps to setup your district information)	
Overview	34
(Description of how RI District Administration Software (RI-DAS) works)	

4 Installation & Getting Started User's Guide

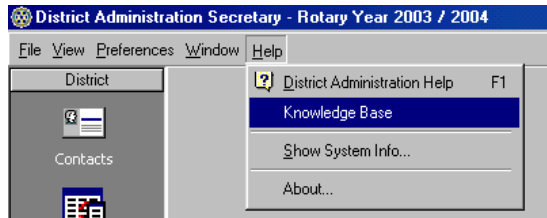
Contents

Installation & Upgrade

This **Installation & Getting Started User's Guide** provides basic information about installing and setting up RI District Administration Software (RI-DAS).

Knowledge Base

The information that you require for learning and using RI District Administration Software (RI-DAS) can be found in an extensive **Knowledge Base** that is installed at the same time as the program. The **Knowledge Base** provides a detailed explanation of the software, step-by-step instructions and examples. The **Knowledge Base** can be used as an online manual or sections can be printed to your computer printer if you require printed notes.



The Knowledge Base can be opened from the **Help** menu or from the **Knowledge Base** icon found with the other RI District Administration Software (RI-DAS) icons. The Knowledge Base requires Adobe® Acrobat Reader to be installed on your computer.

Getting Support

Rotary International provides an on-line technical support forum for users of RI-DAS. Our preferred method of communication is email which effectively eliminates the time zone problems associated with our support consultants and our customers being located all over the world.

Many of you work with RI District Administration Software (RI-DAS) at night at home. If a problem arises, the procedure would be to notify Rotary International of the problem by email (overnight) to **distadmin.support@rotaryintl.org** and generally expect a response by the next business day.

Free support can be obtained from the RI-DAS Online Support Forum located at the web site [www.https://riweb.rotaryintl.org](https://riweb.rotaryintl.org).

What Type of Computer to Use

RI District Administration Software (RI-DAS) is a Windows® program and requires Windows 95/98, Windows 2000 or Windows NT. The program will not work with Windows 3.11.

RI District Administration Software (RI-DAS) requires a Pentium level PC (Personal Computer) or higher with a minimum of 32 MB of memory and 30 MB of disk space. Network installations require each workstation to meet the minimum PC ratings but the fileserver does not need any special considerations.

RI District Administration Software (RI-DAS) will only run on an **Apple**® computer if that computer is capable of running Windows 32-bit programs.

Installing on a Single PC

RI District Administration Software (RI-DAS) will install automatically from the installation CD or file downloaded from the RI-DAS web site in the same way as other Windows programs.

Detailed step-by-step instructions for a stand-alone PC installation can be found in the installation section (see page 11).

Installing on a Network

The procedure for installing on a network is different to installing on a stand-alone PC. The installation will be carried out from each of the workstations that will use RI District Administration Software (RI-DAS). No installation will carry out at the fileserver itself.

The primary consideration for network installation is the level of permissions the user, who is installing RI District Administration Software (RI-DAS), has to write to the network drives onto which you will install the shared RI District Administration Software (RI-DAS) files and programs. You will need to have sufficient permissions to create directories and write files on the selected network drive. You will also need to be able to create icons on the workstation PC.

Once installed each user needs to have sufficient permissions to write to their local hard drive and registry. RI District Administration Software (RI-DAS) creates temporary files on the workstation computer during operation and uses the registry to save user preferences and settings.

Permission settings can be complex and incorrect setup can provide unusual error messages such as "Can't find file" or "A RI District Administration Software (RI-DAS) installation does not exist". Please consult your network administrator to assist with installation.

Detailed step-by-step instructions for network installation can be found in the installation section later in this chapter (see page 12).

After Installation

A detailed **Checklist** can be printed from the first section of the **Knowledge Base**. The **Checklist** provides a list of actions required for setting up and using RI District Administration Software (RI-DAS) for the first time.

It is important to complete the **Checklist** actions before using RI District Administration Software (RI-DAS). Some setup requirements will affect the results of reports and club profile statistics.

A sample district database, **Rotary District Demo** has been installed with your RI-District Administration Software (RI-DAS). You may find it useful to examine how this sample district has been setup as well as to try out new functions first before attempting these in your live district data.

Installation

Stand-Alone PC (Not connected to a network)

Insert the RI District Administration Software (RI-DAS) CD into your CD-ROM drive. The Installation Menu should launch automatically.

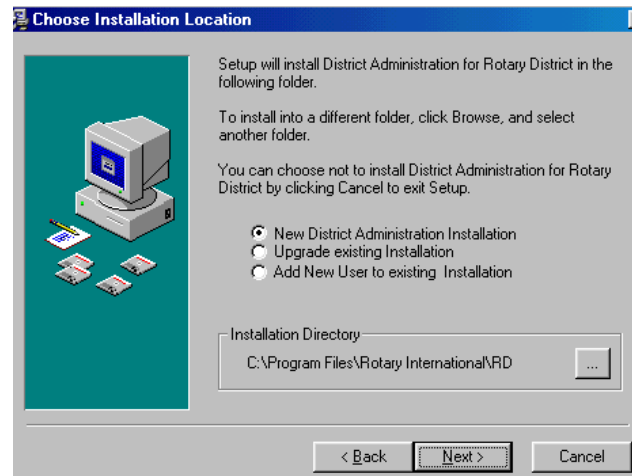
If the Installation Menu does not start, follow the steps below:

1. Click on the Windows **Start** menu and select **Run...**
2. In the Run dialog box, type the drive letter for the CD-ROM drive followed by a colon (for example **D:**)
3. Click the **Browse** button. In the Browse dialog box, click on the file named **Setup.exe** and click the **Open** button.
4. In the Run dialog box, click **OK**. The Installation Menu should appear.

Click on the **Install RI District Administration Software (RI-DAS)** button to start the installation.

Note: that the **Knowledge Base** User's Guide will be installed as an on-line document. You may need to install the Adobe Acrobat Reader to read this document. Install this after installing RI District Administration Software (RI-DAS).

Follow the on screen install instructions. Select the **New District Administration Installation** option from the screen shown below, if you have never installed this software before. Otherwise, select the **Upgrade Existing Installation** option if you have version 3000 of the software. Use the **New District Administration Installation** option if you have version 98.



During the installation you may be asked to re-start your computer before the install is complete. Once Windows has restarted, if the RI District Administration Software (RI-DAS) installation does not automatically re-start, you may need to start the installation process again by re-inserting the RI District Administration Software (RI-DAS) CD and clicking on the **Install RI District Administration Software (RI-DAS)** button.

After installing, start RI District Administration Software (RI-DAS) from your Start menu. The first time you run RI District Administration Software (RI-DAS) you will need to setup users, which is explained later in this chapter.

Network Installation

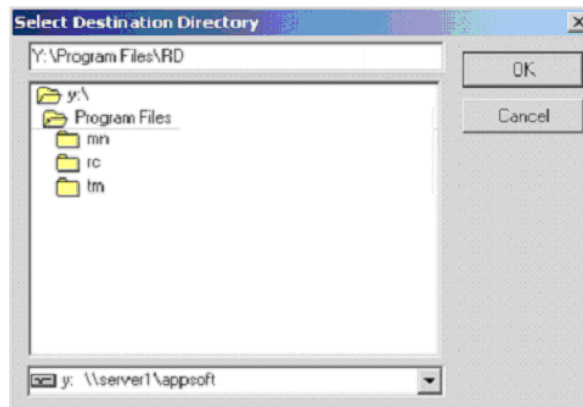
A network installation of RI District Administration Software (RI-DAS) is always completed from the workstation PC. There is no installation carried out at the fileserver.

Installation & Upgrade

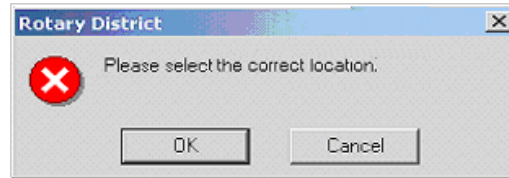
From the **first** workstation PC start the installation process as described for the stand-alone PC above. At the **Installation Location** screen (pictured above) select “**New RI District Administration Software (RI-DAS) Installation**” and use the **Installation Directory** button to select a network drive location.

If you want to install RI District Administration Software (RI-DAS) on additional PC's connected to the same network run the same installation process at each PC.

At the **Installation Location** screen select the **Add New User to Existing RI District Administration Software (RI-DAS) Installation** option. Use the Installation Directory button to point to the same network drive location that the previous RI District Administration Software (RI-DAS) PC's used. Point to the “Rotary International” directory. The install program will always add the “\rd” directory after the “Rotary International” directory.



If you have not pointed to the correct directory on the network drive, or if you have insufficient permissions to read the required directory an error message will be displayed.



Use the Installation Directory button to locate the correct directory or login as a user with administrator permissions.

Note: Unless each network workstation installation points to the same RI District Administration Software (RI-DAS) file on the same network directory, the installations will not be sharing the same district database.

Uninstalling RI District Administration (RI-DAS)

RI District Administration Software (RI-DAS) can have multiple districts installed. Districts can be added and deleted using the **District** function from the **File** menu.

To fully uninstall RI District Administration Software (RI-DAS) together with all installed districts use the Windows Add/Remove Programs function from the Control Panel.



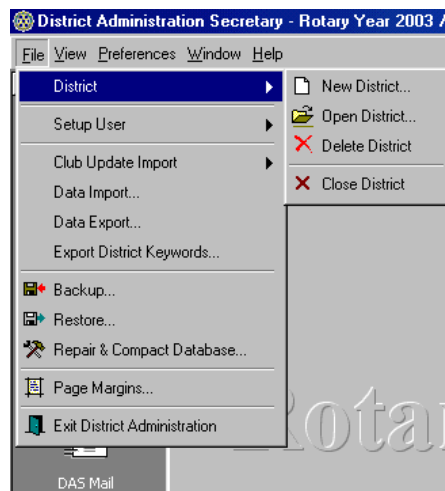
Re-Installing RI District Administration Software (RI-DAS)

Re-installing RI District Administration Software (RI-DAS) will refresh the program files (which may have become damaged by a virus or some other program installation) and replace the Demo club database.

To re-install and preserve your district registration and database use the installation instructions above and select the **Add New User to Existing RI District Administration Software (RI-DAS) Installation** option.

Adding or Upgrading Districts

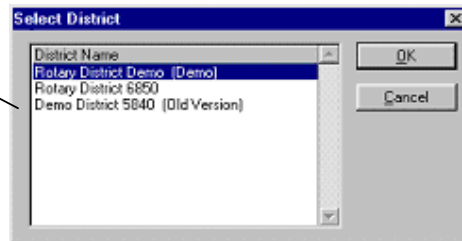
The **District** function, found in the **File** menu, allows you to add your district to the RI District Administration Software (RI-DAS) or select and upgrade an older version.

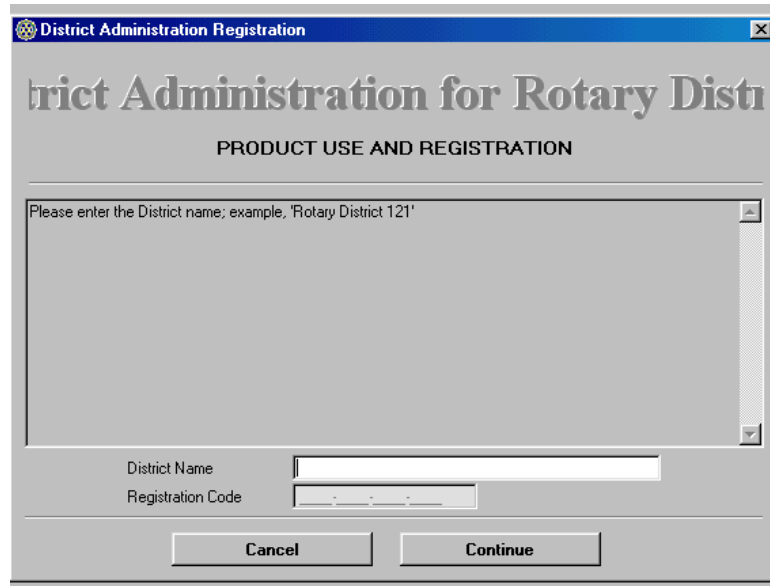


Using the **District** menu you are able to create and register a new district database as well as open and close district databases, useful for looking at the demo database or when restoring a backup.

Select the **New District** sub-menu to add your district or the **Open District** sub-menu to select the old database for upgrade.

Open the “Old Version” of your district to begin the upgrade.





Type the name of your district into the District Name field. The example shown above is Rotary District 121.

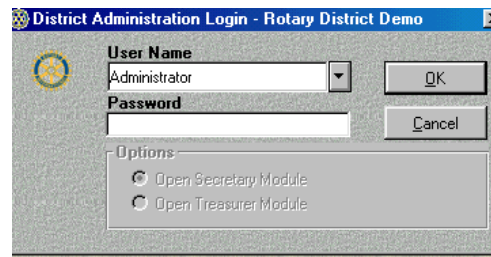
Click on the **Continue** button. You should move to the next screen in the registration process.

Type in a suitable name for the directory to which RI District Administration Software (RI-DAS) will install the district files. This directory will be automatically created under a directory named "RI District Administration Software (RI-DAS)" which is itself under the Programs Files directory.

Click on the **Continue** button to create the district files or start the upgrade.

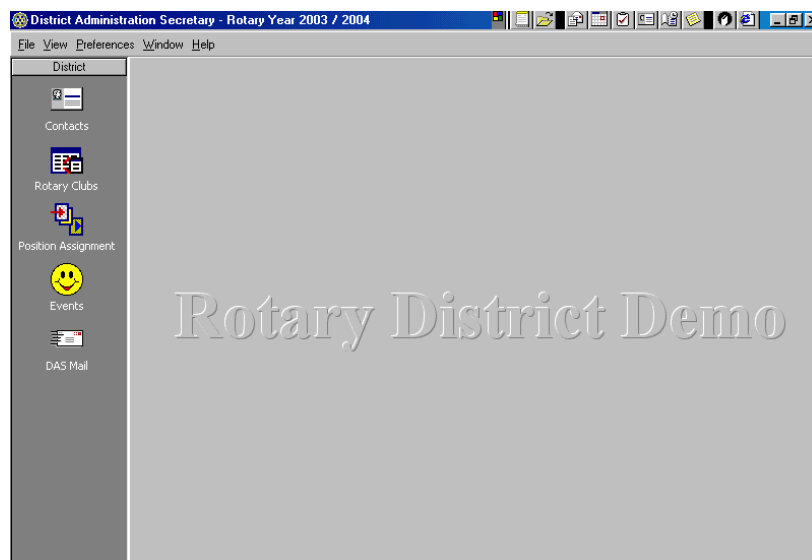
Starting RI District Administration Software (RI-DAS) the First Time

The first time you login RI District Administration Software (RI-DAS) the login User Name field will be empty. Click on the button at the end of the field and choose the “Administrator” user name.



Type the password “rotary” and click **OK**.

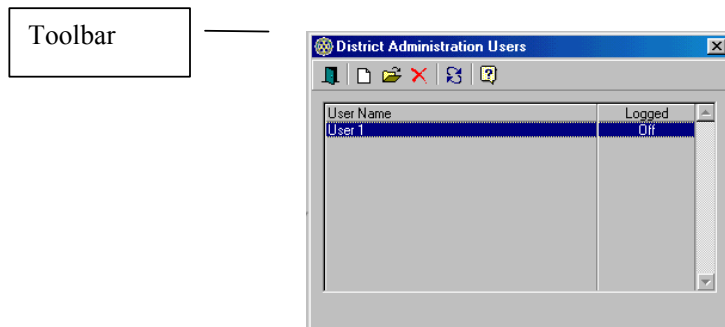
The new or upgraded district is now registered and will open with your district name displayed in the middle of the screen.



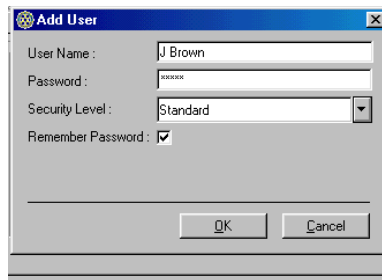
Add Users

The “Administrator” login cannot be used to operate RI District Administration Software (RI-DAS). The menu and button bar buttons will be inactive. The Administrator is only able to edit users, which should be your first job.

To add the names of the people who will use RI District Administration Software (RI-DAS) in your district, open **Define Users** from the **Setup User** menu.



The **Toolbar** contains buttons to add, save and delete users. **Click** on the **New** button to add each user name. **Click** on **Save** to add each name to the list.



Type a password and select the security level.

- | | |
|----------------------|--|
| Standard | - Normal user |
| Administrator | - Normal plus able to edit and add users. |
| Database Only | - Can use the Secretary module only. |
| Read Only | - Cannot make any changes to the database. |

If you do not wish to type your password each time you login to RI District Administration Software (RI-DAS), click the **Remember Password** checkbox.

Close the **Define Users** screen and **Close** the district. Then **Open** the district again. This time you will be able to login with one of the new user names you have created and all the RI District Administration Software (RI-DAS) functions will be active.

Administrator Login

Each time you login in to RI District Administration Software (RI-DAS) you will be presented with a list of User Names which includes those you have added as well as the **Administrator** login.

The **Administrator** login should only be used if for some reason you have forgotten the password for the other login names or cannot login because of a problem with your database.

The password for Administrator is always “**rotary**” unless changed by you.

After Upgrading

RI District Administration Software (RI-DAS) has some minor differences to the earlier versions, for example the member name is now made up of 5 fields (Title, First Name, Middle Name, Last Name and Suffix), previously there were 3 fields (Title, First Name and Last Name). The address fields now include a separate **State** field and a separate **Gender** field has been introduced.

After upgrading you may wish to open the **Contact Grid** and check to see if the names and addresses of people need adjustment.

You will need to check that the Gender field is correct for female members as Gender was set to “male” during upgrade.

The “Married” checkbox has been removed from RI District Administration Software (RI-DAS). If you still require this information on members set up a User Defined Field for marriage status.

Tracked Positions are new to RI District Administration Software (RI-DAS). Check the **Preferences** menu and add Tracked positions.

In the Treasurer Module you may need to check the names of your bank accounts in the Chart of Accounts. Previously bank accounts could have a separate name to the account name, now there is only one name for bank accounts.

Check the Chart of Accounts layout is correct. It is now possible to select between different layout formats from the **View** menu in the Treasurer Module.

Generally run reports and review information on contacts and accounts to ensure the upgrade was accurate before uninstalling your old database.

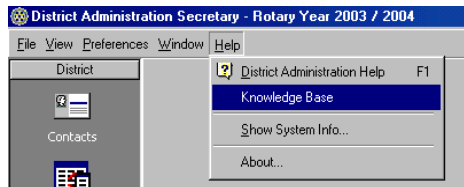
22 Installation & Getting Started User's Guide

Installation & Upgrade

Getting Started Checklist

Use this Checklist as your guide to setting up RI District Administration Software (RI-DAS). The Checklist steps will point to the appropriate sections of the Knowledge Base where detailed instructions can be found.

Knowledge Base



The Knowledge Base is a complete User's Guide and was installed when you installed RI District Administration Software (RI-DAS). It can be opened from the **Help** menu or from the **Knowledge Base** icon found with the other RI District Administration Software (RI-DAS) icons. The Knowledge Base requires Adobe® Acrobat Reader to be installed on your computer.

Be sure to email distadmin.support@rotaryintl.org if you have any questions. We are here to help you understand this software and get the full benefits it can bring to your district.

Secretary Module

The **Secretary Module** is where you keep the people and clubs that make up your district. Although named "Secretary Module" this program is not normally run by the district secretary.

Any person who has the time can maintain the district's computer records stored in your RI District Administration Software (RI-DAS)

database. The results of keeping these records up-to-date can then be shared with other district officers.

Copies of your RI District Administration Software (RI-DAS) database can be regularly sent to other district officers as an email attachment. In this case you would send a backup file which would be restored by the receiver.

Reports can be exported from RI District Administration Software (RI-DAS) in a number of formats and sent as an email attachment or even published on your district web site.

Internet Option

The best way to share your RI District Administration Software information is by using the RI District Administration Software ASP option. This allows the program to be run via the Internet and any district officer (with the appropriate password) can login to the RI District Administration Software database from anywhere at any time.

For example, any assistant district governor (ADG) can login to your district database from any computer with an Internet connection and complete a club visit memo. At the same time, the district attendance officer can be entering the club Member & Attendance information received from clubs and the district treasurer can be entering financial transactions, each from their own separate locations. Meanwhile the district governor can access this collaboratively produced district information at any time and make use of the club profiles or contacts data to manage the district. Even the incoming district governor can share these files from any location and start creating the district structure for the next year taking advantage of the valuable information that already exists.

Setup Steps for RI District Administration Software (RI-DAS)

Once you have installed RI District Administration Software (RI-DAS), completed the registration of your district name and created users, all explained in the Installation section of the **Getting Started User's Guide**, you should follow the following steps to set your district up:

Upgrade from version 5.0 or 6.0

If you have a version 5.0 or 6.0 database to upgrade then the upgrade should be done now as the first step to setting up RI District Administration Software (RI-DAS). Upgrade instructions are provided in the Installation section of the **Getting Started User's Guide**. After upgrading complete the Checklist steps which follow:

Step 1 – Setup District



In **District Setup**, found under the **View** menu, the first tab **District Details** enter your district mailing address. Refer Chapter 2 **Setup District & Preferences**.

Step 2 – Setup Positions & Committees

In **District Setup**, found under the **View** menu, the second tab **Descriptions** add district positions, district committees, club positions, affiliate positions and other positions. Also connect positions to committees where appropriate. Refer Chapter 2 **Setup District & Preferences**.

Step 3 – Create Other Club Types

In **District Setup**, found under the **View** menu, the second tab **Descriptions** add Other Club Types in preparation to adding Other Clubs. Refer Chapter 2 **Setup District & Preferences**.

Step 4 – Create Other Clubs



In **Other Clubs** found under the **View** menu create the **Other Clubs**.

Other Clubs are the Rotaract, Inner Wheel and other similar organizations that can be connected to people (Contacts). This step can be skipped as **Other Clubs** can be added directly and as needed, while adding a contact. Refer Chapter 2 **Setup District & Preferences**.

Step 5 – Import Data

If you have no data to import go directly to **Step 6**.

Your district information, people and Rotary clubs, can be imported into RI District Administration Software (RI-DAS) from other software (including an extract of your district data available from the RI database, check with RI).

Your district information can also be created by importing each database from any Rotary club in your district that uses RI Club Administration Software (RI-CAS).

It is also possible to firstly import from other software then at a later time import the same club and member information from the club's RI Club Administration Software (RI-CAS) database without creating duplicate records. RI District Administration Software (RI-DAS) will attempt to match a member from the two different sources by

comparing the Last Name, Date of Birth and Date Joined fields for each person.

Once you have successfully used a club's RI Club Administration Software (RI-CAS) database to update or create your district information a special reference is created which links a member in the club's database and the same person in the RI District Administration Software (RI-DAS) records.

When importing data from a non-RI District Administration Software (RI-DAS) source the import file should include the Rotary club name as part of each record. RI District Administration Software (RI-DAS) will attempt to match the imported Rotary club name to one that already exists in RI District Administration Software (RI-DAS). If the import process does not find the Rotary club in RI District Administration Software (RI-DAS) it will create a new club. This may be a rapid way to add clubs to your RI District Administration Software (RI-DAS) records.

Import from a non-RI District Administration Software (RI-DAS) source is discussed in Chapter 28 **Import Export**. The Club Update Import from a club that uses RI Club Administration Software (RI-CAS) is found in Chapter 27 **Club Update Import**.

Step 6 – Setup Rotary Clubs

The screenshot shows the 'Rotary Clubs' window in the District Administration Secretary software. The window title is 'District Administration Secretary - Rotary Year 2003 / 2004'. The interface includes a menu bar (File, View, Preferences, Window, Help), a toolbar, and a sidebar with navigation options (District, Contacts, Rotary Clubs, Position Assignment). The main area displays a table of clubs with columns for Club Name, Zone/Area, Charter Number, Meeting Day, Meeting Time, and President. A 'Select:' dropdown is set to 'All Clubs'. Below the table, there is a note: 'Drag a column header here to group by that column.'

Club Name	Zone/Area	Charter Number	Meeting Day	Meeting Time	President
Avalon	Area 02	12345	Wednesday	7:00am	Browndale Carl M.
Avalon Host	Area 03	56432	Thursday	12 noon	Gothoff Paul Mir
Beaver Hills	Area 06	43543	Monday	7:30pm	Dawber Judith Lion

Click on the **Rotary Clubs** button on the button bar to open the **Club Grid** and add the Rotary clubs for your district. Adding Rotary clubs is discussed in Chapter 3 **Setup Clubs & Contacts**.

Step 7 – Setup Zones/Areas



If your district is split into zones or areas these can be added using the **Zones/Areas** function found under the **View** menu. Refer to Chapter 2 **Setup District & Preferences**.

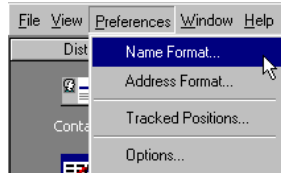
Step 8 – Add Contact Records



Now that all the clubs and other components have been setup in RI District Administration Software (RI-DAS) you can finally add the people.

If you have imported contact records or are adding them manually it is recommended that you read the section on how RI District Administration Software (RI-DAS) works using the **Member Type** field, connections to clubs and assignments of positions, which found in Chapter 3 **Setup Clubs & Contacts**.

Step 9 – Edit Name Format Preferences



Name Formats are where you establish how RI District Administration Software (RI-DAS) will display people's names for the different situations where names are used. Refer Chapter 2 **Setup District & Preferences**.

Step 11 – Edit Contact Records

The **Contacts Grid** discussed in Chapter 7 **Contacts Database** describes how you can create views and edit contact information directly in the grid. This is more important if you have imported your contact records.

Step 12 – Opening Club Statistics

The image shows a window titled 'Club Statistics - 2003 / 2004'. It contains a table with the following data:

	Start	Jul	Aug	Sep	Oct
Attendance *		83.40	81.90	81.70	84.30
Meetings Held		4	5	4	4
Meetings Required		4	5	4	4
Date Report Received		8/3/03	9/5/03	10/6/03	11/4/03
Membership (excl. Honorary)	36	37	36	35	37
Active	30	31	30	29	31
Senior Active	6	6	6	6	6
Honorary	2	2	2	2	2
New Members		1	0	0	2
Terminating Members		0	1	1	0
Average Age	59.40	59.80	59.20	58.00	58.50
Paul Harris Fellowship	14	14	14	14	14

At the bottom of the window are 'OK' and 'Cancel' buttons.

Club statistics found in each club's **Club Profile** are compared to the **Start** numbers. These are normally transferred from the June close numbers from the previous year, but if this is the first time you are using RI District Administration Software (RI-DAS) you may need to add these opening statistics.

Adding club statistics is discussed in Chapter 8 **Club Profiles**.

Treasurer Module

The **Treasurer Module** is designed to manage the income and expenses for a district governor or a district committee. This is a full accounting system that is normally run “stand-alone” on a separate computer to the Secretary Module. Very little of the information contained in the Secretary Module is needed in the Treasurer Module.

Install RI District Administration Software (RI-DAS) on the computer used by the treasurer and follow these setup steps:

Step 1 - Starting date

RI District Administration Software (RI-DAS) will look at your computer's date and set the starting date for your accounts as July 1st of the current Rotary year (July 1st to June 30th). If you would like to load balances and transactions into the previous year, you must change your computer's date to June 30 or before of the previous Rotary year before creating your district database.

If you have already created your district database and wish to change to an earlier start date, you must delete the district and create it again with the computer date set as outlined above.

Step 3 - Accounting format

Accounting Format, found under the **View** menu, defines the layout of your Chart of Accounts. There are two options one with Income accounts first and one with Asset accounts first. Select the option you wish to use. This selection can be changed at any time.

Step 4 - Setup Chart of Accounts

Add and change the accounts you wish to use for your district's accounting system. New accounts can be added at any time however it is a good idea to decide on an accounting structure as early as possible. Refer to Chapter 24 **Chart of Accounts**.

Step 5 - Setup additional Entities

If your district runs a separate trust or foundation then you can setup a new entity and Chart of Accounts for this. Refer to Chapter 4 **Setup Accounting**.

Step 6 - Setup taxes

If your districts needs to account for either sales tax or GST/VAT style of tax use **Tax Code Setup** found under the **View** menu.

Step 7 - Setup projects

Projects is how RI District Administration Software (RI-DAS) takes care of fundraising activities and charitable donations. Create a separate project for each activity. Refer to Chapter 20 **District Projects**.

Step 8 – Setup Clubs & Other Clubs

RI District Administration Software (RI-DAS) uses the Rotary clubs and Other Clubs setup in the **Rotary Club Grid** and **Other Club Setup** for billing and accounts receivable.

If the district treasurer operates from a separate computer, the Rotary clubs and Other Clubs can be obtained from a separate Secretary Module database by restoring a backup file, however it is probably just as quick to re-enter the clubs in the Treasurer Module copy.

Step 8 - Load opening balances

Opening balances are the closing Balance Sheet balances from your last set of (non RI District Administration Software (RI-DAS)) accounts. Read the Load Opening Balances chapter in the **Knowledge Base** for detailed instructions. Loading opening balances requires some double-entry accounting skills and we recommend you obtain assistance to ensure this important setup phase is correct.

Getting Started Checklist

Overview

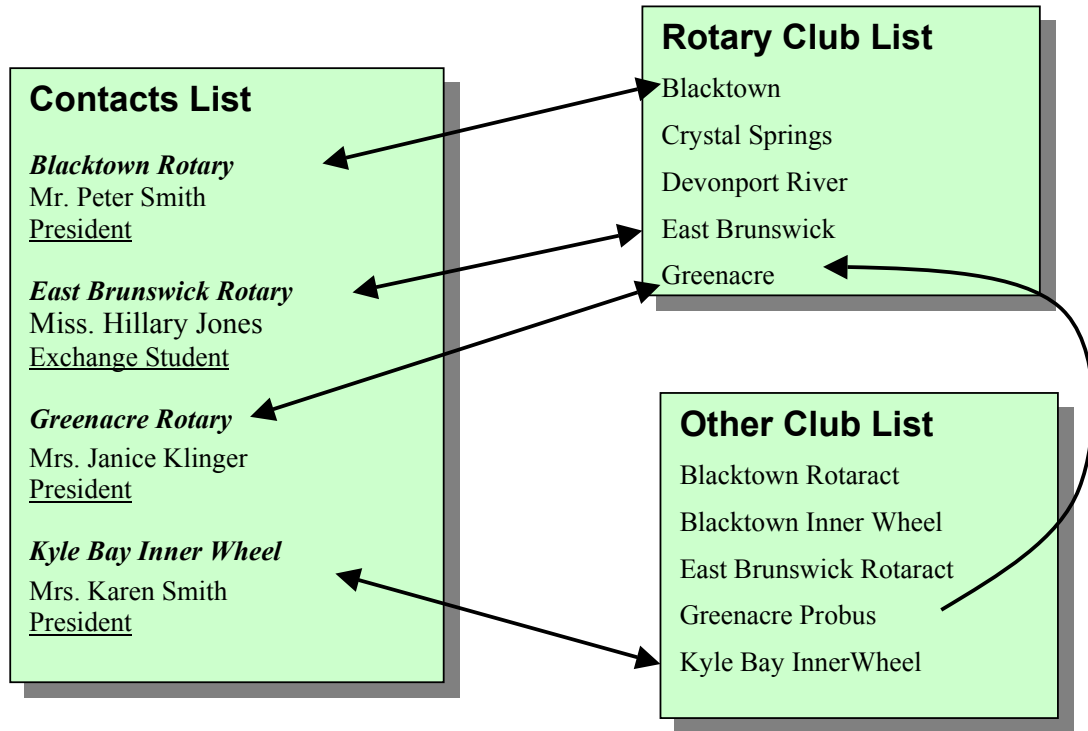
RI District Administration Software (RI-DAS) is a product designed so that a computer beginner can manage a district with ease and style. Getting started is uncomplicated and the way it works is easy to understand.

How does RI District Administration Software (RI-DAS) work?

The information you need is held in three lists – Contacts (people), Clubs (Rotary Clubs) and Other Clubs (Rotaract, Inner Wheel, etc.). The lists fit together and form your district. Using the lists you can establish the jobs people do (positions), such as district chairs and committees, club presidents or exchange students, and you can collect information about your clubs – statistics on member numbers and attendance, projects, events and correspondence.

Above all you can easily communicate with people using email, fax or letter and coordinate your district activities.

Connections Between the Lists



The information in the lists can be imported from another program, typed in manually or gathered electronically from the Rotary clubs in your district.

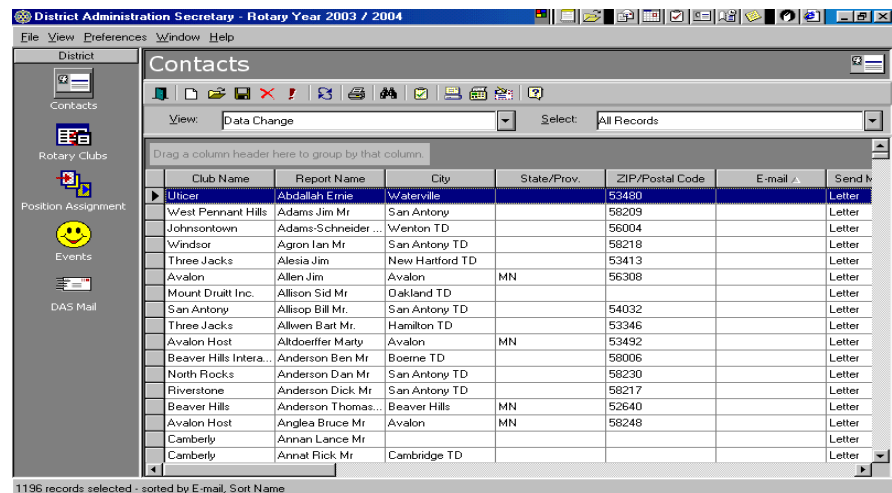
Contacts

The Contacts List contains three groups of people:

1. **Rotary club members (listed by Member Type – Active, Senior Active etc.)**

2. People “Sponsored by” a Rotary club e.g. exchange student, ambassadorial scholar
3. People who are “Non Members” of a Rotary club e.g. Inner Wheel president.

People are listed in a “spreadsheet” like grid which is able to be changed by you to list any group and any information you need to use.



The grid above includes all club presidents and shows their name, the club they belong to, their partner's first name and contact phone numbers. The information shown (name, phone etc.) is called a “View” and can be changed by you and saved.

The group included here is the club presidents for the current year. The group is selected by a “Select Filter” and these can also be changed and saved. For example you could create a Select Filter to show all exchange students or all committee chairs or everyone on a particular committee. Each time you the select a new group, you see the information from the “View”, their names, partner's names, phone numbers etc. The number of groups you can create is unlimited.

Behind each row in the grid are the details stored on each person. To add a new person or change the details, just pop-up the Contact Details card.

Contact Details

Information on each person is clearly laid out. The connection between a Contact and a Rotary Club is noted as well as the positions they hold. If this person was a “Non Member” then the connection would be to an Other Club or there may be no connection at all.

The screenshot shows a software window titled "Contact Details - Mr Anthony Cooney". The window has a menu bar with icons for file operations and a toolbar. Below the toolbar are four tabs: "Contact", "Personal", "All Fields", and "Notes / History". The "Contact" tab is active and contains several sections:

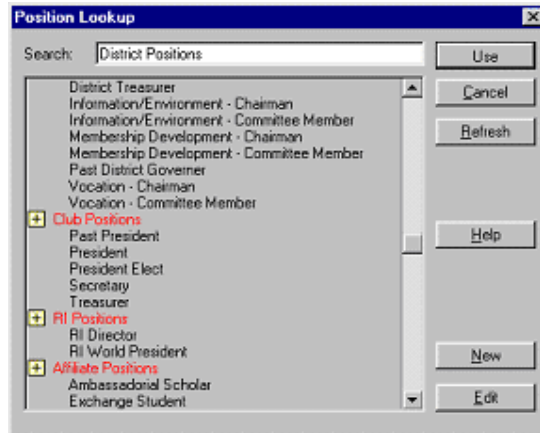
- Contact:** Name (Mr Anthony Cooney), Address (843 Buffalo Hall Road, Cambridge, MN, 50535), and a "Send message by" dropdown menu set to "E-mail".
- Personal:** Radio buttons for "Male" (selected) and "Female".
- Contact Details:** Fields for Home Phone, Business Phone, Mobile, Fax, E-mail, and WWW.
- Club Details:** Member Type (Active - Ordinary), Club (Camberly), Date Joined (08/01/1989), Date Resigned, Time In Rotary (14 years, 0 months), and Classification (Internet Services).
- Positions:** A table with columns "Position" and "Year". It lists "District Positions" (Community - Committee Member for 2002/2003 and 2001/2002) and "Club Positions" (President for 2002/2004).

Two callout boxes provide additional context:

- A box on the left points to the "Send message by" dropdown, stating: "This is where a person is connected to a club."
- A box on the right points to the "Positions" table, stating: "This is where the positions held are added."

Notice the circled “Send Message By” information. Here you can set the preference this person has for receiving messages from district. Later you will see how you can email, fax or mail messages directly from RI District Administration Software (RI-DAS) using each person’s preferred method.

Adding positions to a Contact is a snap. Click on the Add button and a list of the positions you have created is displayed. Select one and you are done.



Rotary Clubs

The Rotary Clubs are also listed in a “spreadsheet” like grid which can be changed by you. The clubs listed can be grouped and selected in the same way as the contacts can and messages sent to the officers of selected clubs in seconds.

<input type="checkbox"/>	Report Received	Club Name	Club Categories	Meeting Day	Meeting Time	President	Secretary
<input checked="" type="checkbox"/>		Avalon	Club Growing	Wednesday	7:00pm	Mr Carlton Brown..	Montague Holzh...
<input checked="" type="checkbox"/>		Avalon Downtoan	Club in Danger	Monday	12:00 Noon	Mr Paul Goforth	Christopher Mathis
<input type="checkbox"/>		Beaver Hills	Club Shrinking	Monday	7:00pm for 7:30pm	Mrs. Judith Dawber	Mr Jack Hoare
<input checked="" type="checkbox"/>		Beverly Hills	Club Growing	Wednesday	6:30pm	Mr Richard Dent	Mr John Jeffers
<input checked="" type="checkbox"/>		Blacktown	Club Growing	Tuesday	7:00pm for 7:30pm	Mr William Johnston	Craig Miano
<input type="checkbox"/>		Blacktown City	Club Growing	Thursday	7:00pm	Clyde Leay	
<input type="checkbox"/>		Blacktown Sunrise	Club Growing	Tuesday	7:00am		Mr Horace Hardin.
<input type="checkbox"/>		Camberly	Club Shrinking	Thursday	7:15pm	Mr Anthony Cooney	Mr Stephen Gomin.
<input checked="" type="checkbox"/>		Como-Sylvania	Club in Danger	Wednesday	7:30pm	Mr Robert Ghawi	Mr Don Littleton
<input type="checkbox"/>		Crestwood	Club Shrinking	Thursday	12:30pm	Mr Roger Huntress	Mrs Joanne New...
<input checked="" type="checkbox"/>		Crestwood Sunrise	Club Growing	Tuesday	7:00am	Mr Richard Mirer	Mr Robert Gwindie
<input type="checkbox"/>		Crystal East	Club Shrinking	Wednesday	6:30pm	Mr. Andrew Dela...	Mr. Ian Burns
<input checked="" type="checkbox"/>		Eastwood	Club Shrinking	Thursday	6:00pm	Mr Antony McClure	Mr Palmer Salkeld.
<input type="checkbox"/>		Eastwood Forest	Club in Danger	Thursday	12:00 Noon	Mr Stephen Huay	Mr Franklin Marsha
<input checked="" type="checkbox"/>		Greensacre	Club Growing	Monday	6:00pm	Gen Neil Gates	John Hilton
<input type="checkbox"/>		Johnsontown	Club in Danger	Thursday	6:00pm	Mr John Hellesland	Mrs Amanda Butler

29 records selected - sorted by Club Name.

You can setup checklists which are useful if you need to note when a club has done something such as send a report or respond to a request. The checklists can be used to send a message to those clubs who have not sent the report or responded. It is very quick and efficient.

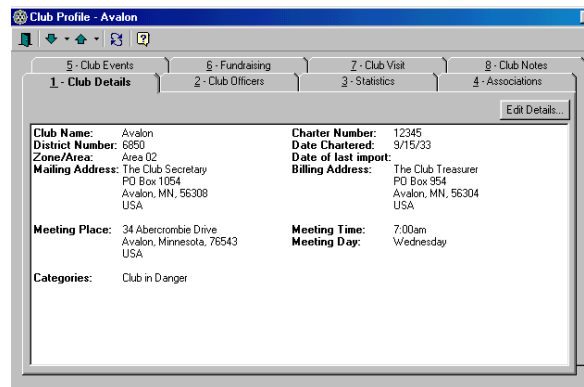
You can create “Club Categories” which can include any useful club characteristic you wish to note such as the club status - growing, shrinking in danger, or a fact like – “has exchange student”. You can then sort and select clubs using these categories to produce very useful management information.

The clubs displayed on the grid can be grouped by the information displayed so that you can quickly group or sort clubs by the days or times they meet, zones or areas, number of members or even the average age of the members.

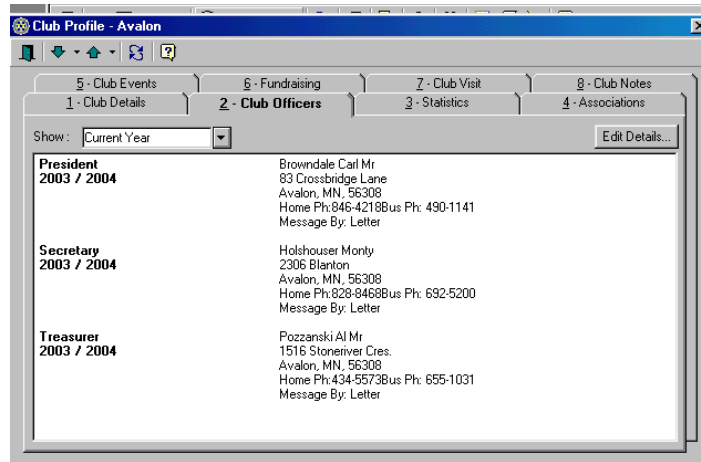
Behind each row of the club grid is a comprehensive Club Profile which contains a wealth of information and facts on each club.

Club Profile

The key to effective club management is the ability to collect information on each club. The Club Profile lists all the relevant information you will need to know on a club.



Club Details are the basic details on each club such as the club's name, contact address information, meeting place and the particular club categories you have assigned.

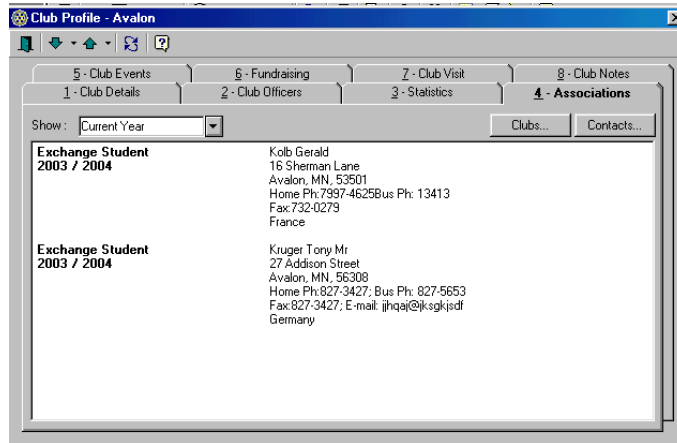


Club Officers lists all the people with relevant club officer positions for the Rotary year you have selected. RI District Administration Software (RI-DAS) “knows” who the clubs officers are and these lists are filed “automatically”.

42 Installation & Getting Started User's Guide

	Month	To Date		
Attendance %	81.90%	82.65%		
Meetings Held	5	-		
Meetings Required	5	-		
Date Report Received	9/5/03	-		
	Start	To Date	Change	Goals
Membership (excl. Honorary)	36	36	0	-
Active	30	30	0	-
Senior Active	6	6	0	-
Honorary	2	2	0	-
New Members	0	1	1	-
Terminating Members	0	1	1	-
Average Age	59.40	59.20	-0.20	-
Paul Harris Fellowship	14	14	0	-

Statistics lists the attendance and membership information and displays trends and comparison to the club's goals. This information can be gathered electronically each month from your clubs.



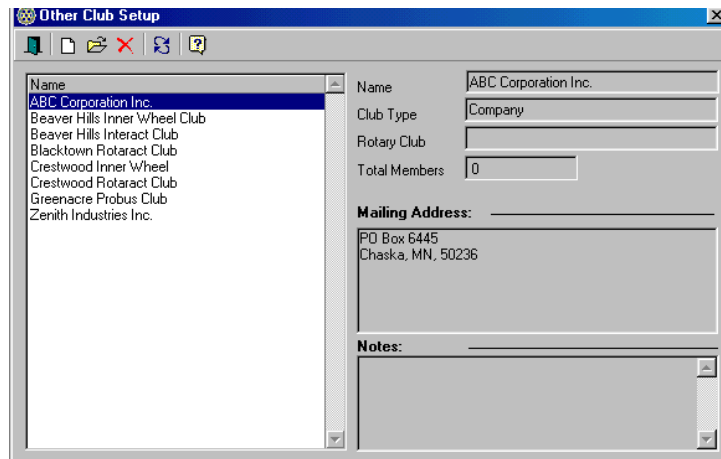
Associations are the people and Other Clubs who have an association with this club. This group is created “automatically” by RI District Administration Software (RI-DAS) identifying the connections between the lists of people and clubs in your district information.

The other sections of RI District Administration Software (RI-DAS) Profile list Club Events, Fundraising activities, Club Visit memos and General Notes.

Other Clubs

Besides Rotary clubs your district will also need to keep track of other clubs, often associated to the Rotary clubs themselves.

The Other Club setup creates these clubs and allows a connection to be made from the Other Club to a particular Rotary club in the same way as the Contact records are connected to clubs as mentioned earlier.



Details of Other Club mailing address and numbers of members can be used in the communications and Treasurer sections of RI District Administration Software (RI-DAS).

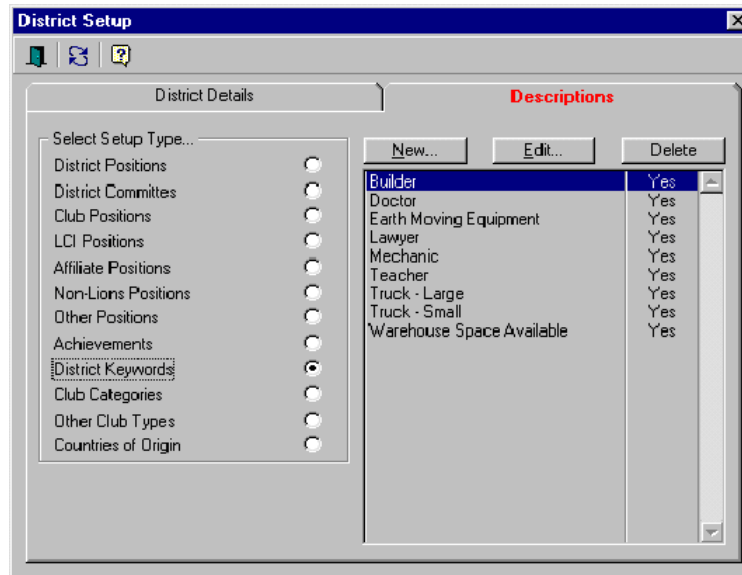
Other Club “types” can be established by you and can include organizations such as companies, charities or any group you wish to track in your district. As the Other Clubs can be billed in the Treasurer module, this is an excellent place to setup district conference sponsors or other interested parties.

People in your Contacts lists can be connected to Other Clubs in the same way as they would be to a Rotary club. You are now able to extend your district information to include a wide range of organizations and the people associated with these.

District Keywords

An exciting concept for your district would be the ability to create a resource database to allow a more effective coordination of projects and activities.

District Keywords are created by your district and “published” to your Rotary clubs via email or via the Internet. The clubs can apply the key words to their members and the assignments are automatically included in the monthly club electronic reporting to district.



In the district Contacts list you now have the ability to select and communicate with people based on their District Keyword assignments.

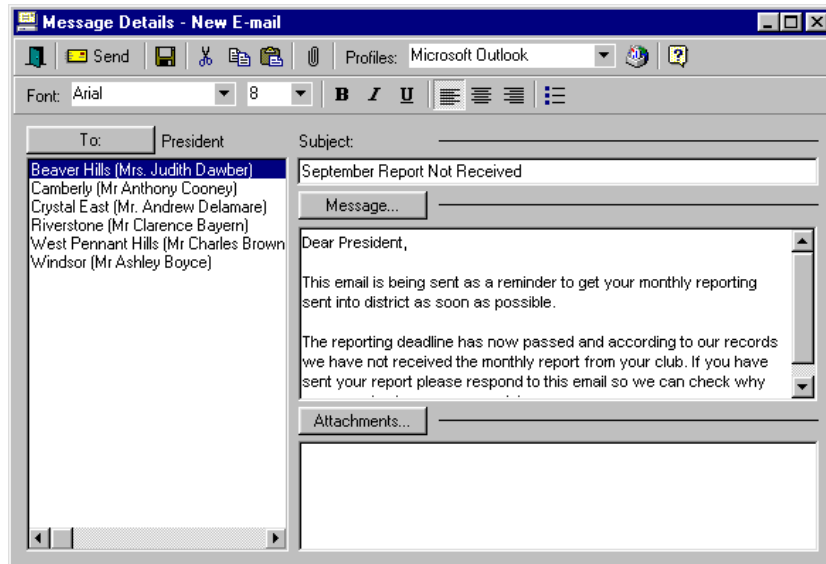
Imagine you had a project that called for the use of a small truck for a weekend. Using the key word assignments you could pull up the list of people who had offered the use of a small truck and send them all an email requesting availability.

Properly coordinated the district keyword functions can create enormous value for your district.

Communications

Select a group of Contacts or clubs and send them a message directly from RI District Administration Software (RI-DAS). For example, you want to send a reminder to all your clubs who have not sent their monthly report to district. Most of your club officers prefer email but some still want a fax and one or two prefer to receive a letter.

From the Club Grid select the clubs without a check mark in Report Checklist you created. Then click on the **Email** button. The RI District Administration Software (RI-DAS) message screen will pop up and contain the names of all the club officers who have a preferred “message by” of email. Write your message and click **Send**. RI District Administration Software (RI-DAS) works with your computer’s email profile and sends the message to each person in the list.



With the same group still selected from the Club Grid, click on the **Fax** button. Only those club officers who want to receive a fax will be included in the list. You can re-use the text from the message you just sent by email by clicking the **Message** button. With the message already written (using the email text) just click the **Send** button. RI District Administration Software (RI-DAS) will use the MAPI compliant fax software available to your computer to send a fax to each of the people in the list.

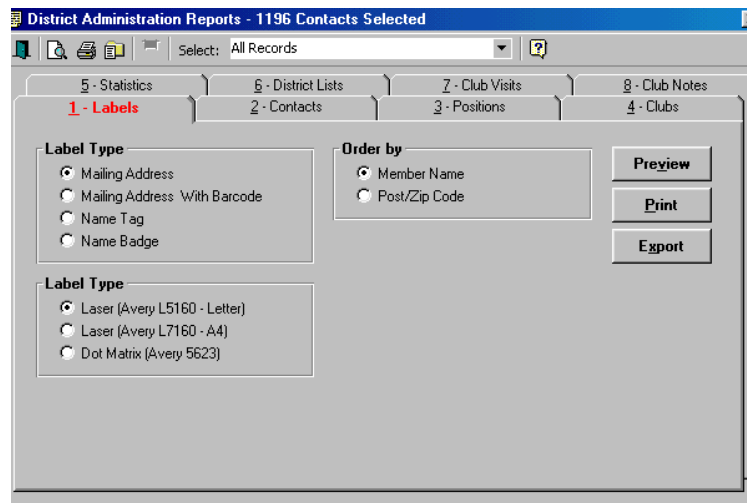
Finally, still with the same group selected, click the **Letter** button. Only those people who prefer a letter will be included in this list. Re-use the text from the email message then click the **Print** button. Fully formed letters properly merged with the club officer's and addresses will be printed to your printer.

The same method of sending messages can be used to distribute monthly newsletters, invitations to functions, notifications of meetings etc. and can include any group, club officers, district committee chairs, exchange students or anyone you have setup.

Reporting

The information contained in your district lists is only as good as your ability to create useful management reports and rosters.

The reports available in RI District Administration Software (RI-DAS) are extensive and useful.



From mailing labels to roster lists the RI District Administration Software (RI-DAS) reports cover everything you should need to manage your district.

For example, the **Positions** reports allow all your district and club officer positions, for any Rotary year, to be accumulated and printed, exported or published on your web site. This is in effect an instant district roster and is constantly kept up-to-date and can be reprinted and re-published as often as you need.

The **Statistics** reports show the trends of attendance, membership and fundraising efforts for your district and for each club.

The **Contact** reports provide useful telephone lists, email lists or event attendance lists for any group in your district.

The **District** reports list your district structure broken down into zones or areas, the zone/area officers and the clubs they are responsible for. There are also reports to list past district officers, other clubs, import dates to manage electronic reporting and mailing labels for your clubs.

All this information can be printed or can be sent directly to a web site. You will be surprised at the power and simplicity of the RI District Administration Software (RI-DAS) program.

Treasurer

In addition to the club and people management, RI District Administration Software (RI-DAS) has a complete accounting system for district.

The Treasurer module can be run on a separate computer and is designed to manage a district governor's expenses. The module can also be run independently by any district committee that requires accounting control at no extra cost.

The Treasurer module includes:

- Invoicing and receivables management based around the Rotary clubs and Other clubs in the district. District dues can be calculated on the number of members in a club as well as incremental dues for new members added during the year.
- Cashbook for multi bank accounts to manage the cash received and expenses for the district.
- General Ledger and chart of accounts to create useful district level financial reports, budgets and complete control over charitable activities.

RI District Administration Software (RI-DAS) has been created for you. Please enjoy.

