

Installation & Getting Started
User's Guide

RI Club
Administration
Software
(RI-CAS)[®]

for Rotary Clubs

by
Rotary International

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Printed in Evanston, IL

Part No: RC100

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Installation & Upgrade

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

Knowledge Base

The information that you require for learning and using RI Club Administration Software (RI-CAS) 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 Club Administration Software (RI-CAS) icons. The Knowledge Base requires Adobe® Acrobat Reader to be installed on your computer.

Getting Support

RI Club Administration Software (RI-CAS) provides technical support for users of its products. Our preferred method of communication is email which effectively eliminates the time zone problems associated with our support and our customers being located all over the world.

Many of you work with RI Club Administration Software (RI-CAS) at night at home. If a problem arises, the procedure would be to notify RI Club Administration Software (RI-CAS) of the problem by email (overnight) to clubadmin.support@rotaryintl.org and generally expect a response by the next business day. RI Club Administration Software (RI-CAS) support will respond quickly by emailing you.

Support is provided free. Continued free support can be obtained from the RI Club Administration Software (RI-CAS) web site <https://riweb.rotaryintl.org>.

What Type of Computer to Use

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

RI Club Administration Software (RI-CAS) requires a Pentium level PC (Personal Computer) or higher with a minimum of 64 MB of memory and 50 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 Club Administration Software (RI-CAS) will only run on an **Apple®** computer if that computer is capable of running Windows 32-bit programs.

Installing on a Single PC

RI Club Administration Software (RI-CAS) will install automatically from the installation CD or file downloaded from the RI Club Administration Software (RI-CAS) 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 10).

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 Club Administration Software (RI-CAS). No installation will be carried out at the fileserver itself.

The primary consideration for network installation is the level of permissions the user, who is installing RI Club Administration Software (RI-CAS), has to write to the network drives onto which you will install the shared RI Club Administration Software (RI-CAS) 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 Club Administration Software (RI-CAS) 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 Club Administration Software (RI-CAS) 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 11).

Upgrade Preparation

The **Version 1.0** version of RI Club Administration Software (RI-CAS) will automatically replace your Version 4.0, 5.0, and 6.0 version and upgrade your database the first time you use the program after installation.

Make sure you have made a backup of your database before installing RI-CAS 1.0

Separate Secretary and Treasurer

Version 1.0 can only work with Version 1.0 files. If your club runs separate installations of RI Club Administration Software (RI-CAS) because of a separate secretary and treasurer then all installations must be upgraded before they can continue to share files.

The version 1.0 upgrade can take place at any time. There is no need to wait for a period end in the Treasurer module or for any functions to be completed in the Secretary module.

Our recommendation is to wait until all installations of RI Club Administration Software (RI-CAS) can be upgraded before upgrading any. The primary consideration is that each user has an adequate computer to run this software (see page 6).

Each RI Club Administration Software (RI-CAS) installation can be upgraded independently using the same CD.

After Installation

A detailed **Getting Started Checklist** is available in the next section of this User's Guide and a copy is included in the **Knowledge Base**. The **Checklist** provides a list of actions required for setting up and using RI Club Administration Software (RI-CAS) for the first time.

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

A sample club database, **The Rotary Club of Anytown** has been installed with your RI Club Administration Software (RI-CAS) program. You may find it useful to examine how this sample club has been setup as well as to try out new functions first before attempting these in your live club data.

After Upgrading

See page 20 for what to do after upgrading.

Installation

Stand-Alone PC (Not connected to a network)

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

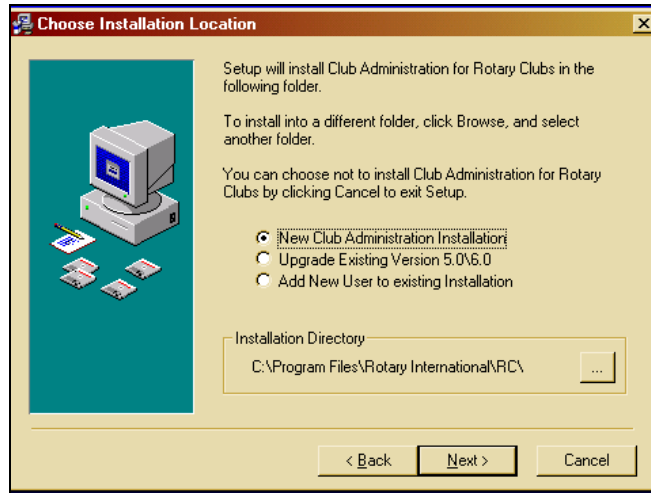
If the Installation Menu does not start, follow the steps below:

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 Club Administration Software (RI-CAS)** 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 Club Administration Software (RI-CAS).

Follow the on screen install instructions. Select the **New Club Administration Installation** option from the screen shown below, if you have never installed this software before. Otherwise, select the **Upgrade Existing Version 5.0\6.0** option if you have version 5.0 or 6.0 of the software. Use the **New Club Administration Installation** if you are running version 4.0.



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

Network Installation

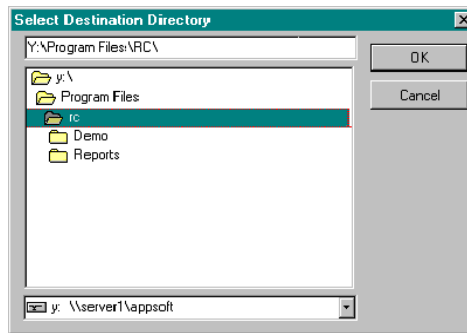
A network installation or upgrade of RI Club Administration Software (RI-CAS) is always completed from the workstation PC. There is no installation carried out at the fileserver.

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 Club Administration Software (RI-CAS) Installation**” if you have never installed this software before (or **Upgrade** if you have versions 5.0 or 6.0) and use the **Installation Directory** button to select a network drive location.

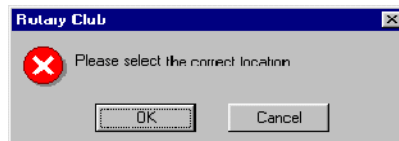
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If you want to install RI Club Administration Software (RI-CAS) on additional PC's connected to the same network run the same installation process at each PC.

At the **Installation Location** screen select the **Add New User to Existing RI Club Administration Software (RI-CAS) Installation** option. Use the Installation Directory button to point to the same network drive location that the previous RI Club Administration Software (RI-CAS) PC's used. Point to the Rotary International directory. The install program will always add the “\rc” 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 Club Administration Software (RI-CAS) file on the same network directory, the installations will not be sharing the same database.

Uninstalling Version 1.0

RI Club Administration Software (RI-CAS) Version 1.0 can have multiple clubs installed. Clubs can be added and deleted using the **Club** function from the **File** menu (you will need the Administrator login to delete a club).

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



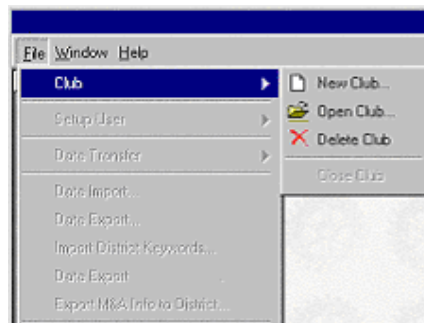
Re-Installing RI Club Administration Software (RI-CAS)

Re-installing RI Club Administration Software (RI-CAS) 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 club registration and database use the installation instructions above and select the **Add New User to Existing RI Club Administration Software (RI-CAS) Installation** option.

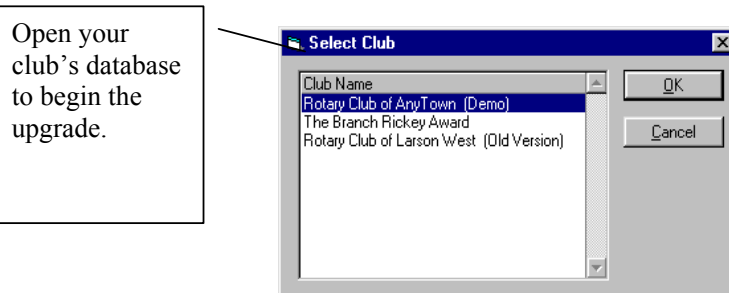
Adding or Upgrading Clubs

The **Club** function, found in the **File** menu, is where you will register your club in RI Club Administration Software (RI-CAS) or select and upgrade a Version 1.0 club.



Using the **Club** menu you are able to open and close clubs as well as create a new club or delete a club.

Select the **New Club** sub-menu to add a new club or the **Open Club** sub-menu to select a club for upgrade.





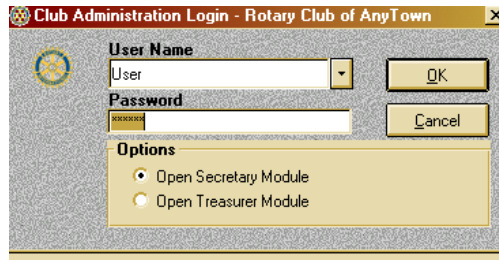
Type the name of the new club. Do not add any spaces or punctuation to the name.

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 Club Administration Software (RI-CAS) will install the new club. This directory will be automatically created under the RI Club Administration Software (RI-CAS) directory in the location of your RI Club Administration Software (RI-CAS) programs and files.

Click on the **Continue** button to create a club or start the upgrade.

Starting RI Club Administration Software (RI-CAS) the First Time

The first time you login to RI Club Administration Software (RI-CAS) after registration, the login User Name field will be set to "User 1" and "rotary" as the password .



Click **OK**.

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

Add Users

If you want to record the names of the people who will operate RI Club Administration Software (RI-CAS) you will need to add Users. RI Club Administration Software (RI-CAS) logs the changes made to the database by each User, which may be useful for checking errors. You can also skip adding Users and continue to use the “User 1” login each time you use RI Club Administration Software (RI-CAS).

Administrator Login

Each time you login in to RI Club Administration Software (RI-CAS) 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.

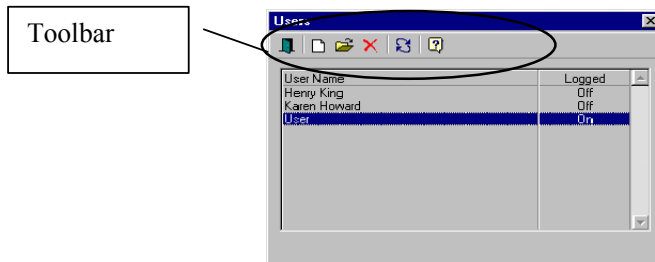
The “Administrator” login can not be used to operate RI Club Administration Software (RI-CAS). The menu and button bar buttons will be inactive. The Administrator is only able to edit Users.

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



From the list of Users shown, click the buttons on the **Toolbar** to add, save and delete users.



Click on the **New** button to add each user name.

The Return Email Address is used in RI-CAS Online. It is inactive in the desktop version.

Type a password and select the security level.

- Standard** -Normal user – can use both Secretary & Treasurer modules.
- Database Only** -Can use the Secretary module only.
- Administrator** -“Standard” plus able to edit and add users.
- Read Only Both** -Can “see” but not change both modules.
- Read Only** -Can “see” Secretary module only.

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

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

After Upgrading

RI Club Administration Software (RI-CAS) Version 1.0 has some new options not available in earlier versions. You may wish to update your database to be able to use these.

Club Structure

Club Structure saves a layout of the positions and committees for your club for each Rotary year. The layout makes it easier when assigning members into positions and for reporting. Setup the Club Structure for the current year, then as each past or future year is opened for the first time the structure you have built can be copied. You will find Club Structure in **Club Setup**, found under the **View** menu or in the **Position Assignment** function.

Photo Database

Version 1.0 stores member photos inside a separate Archive & Photo database. Member's photos are automatically copied to this database during the upgrade. It is now possible to transfer the Archive & Photo database to the treasurer and any other copies of RI Club Administration Software (RI-CAS) run by your club using the **Backup** and **Restore** functions. Due to the size of the photo database file it may be necessary to use a CD burner to complete the transfer.

Newsletter Preferences

Each member (and non-member) now can have a preference setup for how they would like to receive the club's newsletter. The preference is setup in the **Club** section of each member's record. To use the preference for sending newsletters you will need to create **Filters** that select members based on the newsletter preference fields. The filters will use the new options found within the **Club** fields of the Filter setup.

Partner's Salutation

A new field for partner's salutation can be used when sending emails. This field needs to be completed before it can be used.

RI Languages

The "official" RI Languages codes have been added to **Club Setup**. These language codes need to be added to each member in the **Personal** section of a member's record under the **Other Details** button.

RI Occupation Codes

The "official" RI Occupation codes have been added to **Club Setup**. These occupation codes need to be added to each member in the **Personal** section of a member's record under the **Other Details** button.

Auto Makeups Preference

Version 1.0 includes the automatic assignment of makeups to missed meetings. This works for the makeups you enter (click an **Automatic** button) or for the makeups created by the **Events** function. The way RI Club Administration Software (RI-CAS) assigns makeups can be controlled in the **Auto Makeup** section found under the **Preferences** menu.

Attendance Worksheet Preference

There are new options for the printed worksheet used for checking attendance at the door of your meetings. The options can be changed using the **Attendance Worksheet** section found under the **Preferences** menu. Note, if the Honorary Members option is unchecked, Honorary members will not be included in the list of members included with each meeting.

Filter Folders

New **Filter Folders** allow filters to be collected into useful groups rather than in one long list. You may wish to add Filter Folders and re-organize your filters.

Getting Started Checklist

Use this Checklist as your guide to setting up RI Club Administration Software (RI-CAS). 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 Club Administration Software (RI-CAS). It can be opened from the **Help** menu or from the **Knowledge Base** icon found with the other RI Club Administration Software (RI-CAS) icons. The Knowledge Base requires Adobe® Acrobat Reader to be installed on your computer.

Be sure to contact the RI Club Administration Software (RI-CAS) support clubadmin.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 club.

Secretary Module

The **Secretary Module** is a database of people that includes your members, past members, potential members and others. Although named "Secretary Module" the club secretary does not normally run this program.

Any person who has the time can maintain the club's records stored in RI Club Administration Software (RI-CAS).

The results of keeping your club records up-to-date can then be shared with other club officers, including the secretary.

Copies of your club database can be regularly sent to other club officers as an email attachment. In this case you would send a Data Transfer file which would be "retrieved" by the receiver.

Reports can be exported from RI Club Administration Software (RI-CAS) in a number of formats and sent as an email attachment or even published on your club's web site.

Setup Steps for RI Club Administration Software (RI-CAS) for Rotary Clubs

Once you have installed RI Club Administration Software (RI-CAS), completed the registration and created users, all explained in the previous section of this guide, you should follow the following steps to set your club up:

Step 1 – Setup Club Meeting Day



In **Club Setup**, found under the **View** menu, select the meeting day from the first tab **Club Details**. All other entries in Club Setup can be entered later but the meeting day is important for the attendance functions. Refer Chapter 3 **Setup Club & Preferences** for more details.

Step 2 – Setup Positions & Committees

In **Club Setup**, found under the **View** menu, the third tab **Descriptions** add and change club positions and committees to suit your club. Refer Chapter 3 **Setup Club & Preferences**.

Step 3 – Setup Club Structure

In **Club Setup**, found under the **View** menu, the third tab **Descriptions** click on the Club Structure button to establish how positions and committees should be structured. Refer Chapter 3 **Setup Club & Preferences**.

Step 4 – Import Data

If you have no data to import go directly to **Step 5**.

Getting Started Checklist

Your club member information can be imported into RI Club Administration Software (RI-CAS) from other software (including an extract of your data available from the RI database, check with RI).

When importing data from a non-RI Club Administration Software (RI-CAS) source the import file should include the member's last name.

Import from a non-RI Club Administration Software (RI-CAS) source is discussed in Chapter 33 **Import Export**.

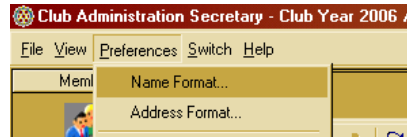
Step 5 – Add Member Records



Now that the club has been setup in RI Club Administration Software (RI-CAS) you can finally add your members.

Two fields are particularly important in every member's record. the **Member Type** and **Date Joined** fields determine "who" is included when creating meetings in the Attendance function. Chapter 7 **Member Database** for more details on adding members to your database.

Step 6 – Edit Name Format Preferences



Name Formats are where you establish how RI Club Administration Software (RI-CAS) will display people's names for the different situations where names are used. Refer Chapter 3 **Setup Club & Preferences**.

Treasurer Module

The **Treasurer Module** is designed to manage the income and expenses for a Rotary club. This is a full accounting system that is normally run “stand-alone” on a separate computer to the Secretary Module. A **Data Transfer** function allows updated member information to be sent to the treasurer from time to time so that the treasurer doesn't need to duplicate work already done.

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

Step 1 - Starting date

RI Club Administration Software (RI-CAS) 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 club database.

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

Step 2 - Accounting format

Accounting Formats, found under the **Club** 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.

The “US” format lists Asset & Liability accounts first and the “Other” format lists Income & Expenditure accounts first.

Step 3 - Setup Chart of Accounts

Add and change the accounts you wish to use for your club'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 28 **Chart of Accounts**.

Step 4 - Setup additional Entities

If your club runs a separate trust or foundation then you can setup a new entity and Chart of Accounts for this. Refer to Chapter 5 **Setup Accounting**.

Step 5 - Setup taxes

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

Step 6 - Setup projects

Projects are how RI Club Administration Software (RI-CAS) takes care of fundraising activities and charitable donations. Create a separate project for each activity. Refer to Chapter 24 **Club Projects**.

Step 7 - Load opening balances

Opening balances are the closing Balance Sheet balances from your last set of (non RI Club Administration Software (RI-CAS)) accounts. Refer to Chapter 6 **Setup Opening Balances** 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.

Overview

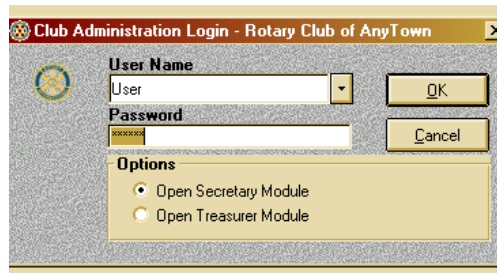
RI Club Administration Software (RI-CAS) is a great way to get your Rotary club better organized.

This is a software system that lets you know what's going on in your club because it is so easy to collect information and introduce consistent reporting. RI Club Administration Software (RI-CAS) reduces the time it takes for administrative chores, it helps your members to collaborate, share duties and work as a team. RI Club Administration Software (RI-CAS) can even let your club make better use of the Internet.

RI Club Administration Software (RI-CAS) can be run as either a desktop system installed on a PC or as an Internet hosted program together with special software that allows members to login to your Rotary club.

What is RI Club Administration Software (RI-CAS)?

RI Club Administration Software (RI-CAS) is software written specifically for the management of a Rotary club. This overview describes the major parts of the system.



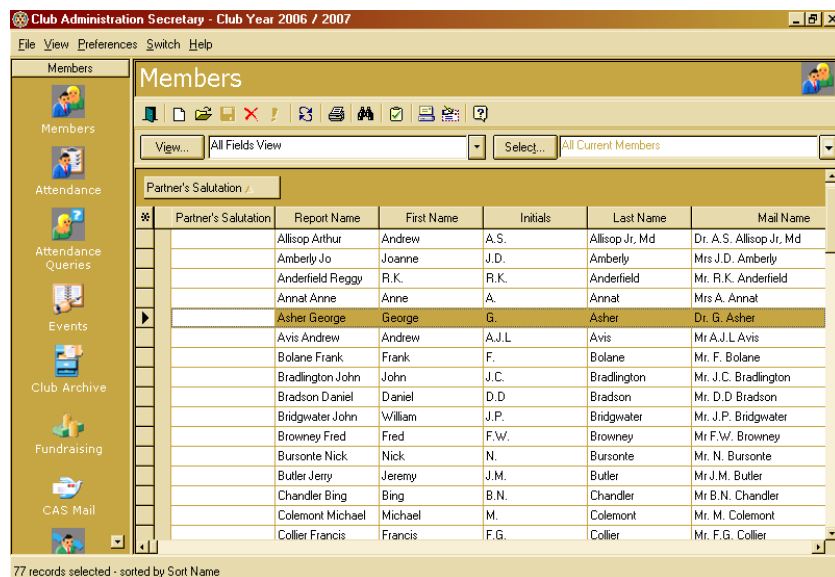
So let's login and take a tour of the system known as RI Club Administration Software (RI-CAS).

It all starts with the people in your club. Their information sits in a database of members, which can be displayed in many different ways

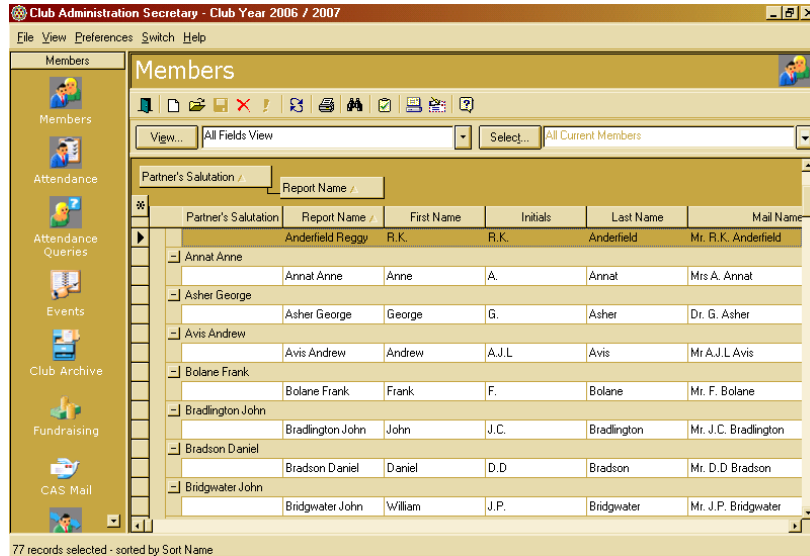
using the RI Club Administration Software (RI-CAS) “Member Grid”.

The Member Grid

The Member Grid is a very useful tool when dealing with lists of people such as members of a Rotary club.



It allows you to see and edit your member information in a “spreadsheet like” view, which is fully changeable by you. You can decide which of your member information is listed in columns, how the members are sorted, who is included and how they are grouped.



Behind each “row” in the Member Grid is a member database record that contains all the information on each member (see next page). The Member Grid will display just the information you want to see for whatever purpose you have and you can save the layout in a **View**, which can be re-used.

Any group selected from the Member Grid can be instantly sent a message by email (or print a letter). But more importantly, the message will be sent using the member’s preferred “message by” method. The Member Grid toolbar contains buttons that bring up the communications tools. These are explained later in this overview.



The Database

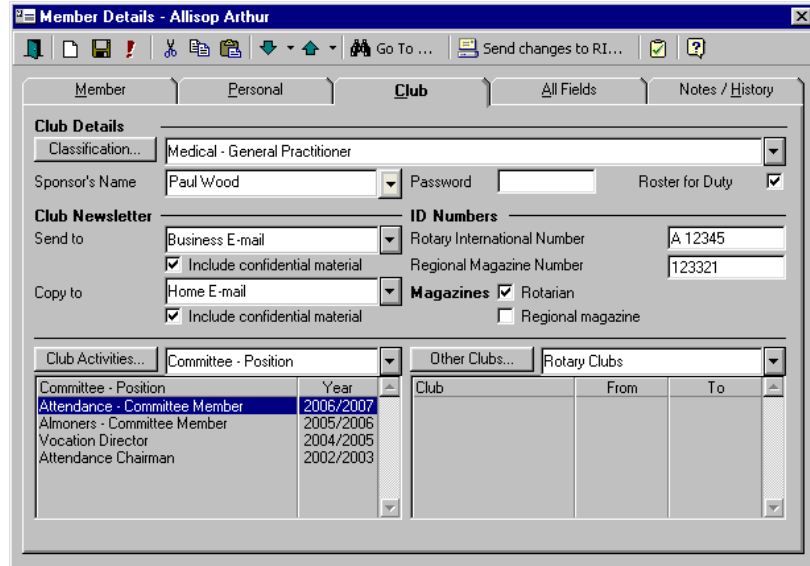
Members (past, present or potential) are stored in a database that is set out in a format, which provides for the natural separation of

information into personal, business, family and so on. Each section is displayed and used by clicking on the appropriate “tab”. A member’s personal record and photograph area looks like this:

The screenshot shows a window titled "Member Details - Allisop Arthur" with a menu bar containing "Member", "Personal", "Club", "All Fields", and "Notes / History". The "Member" tab is active. The form contains the following fields:

- Name: Allisop Arthur
- Gender: Male (selected), Female
- Address: 15 Howard Way, Chaska, 6303, USA
- Address Type: Business
- Phone: Home (9714-4465), Business (724-9127), Pager (9724-9127)
- Fax: Home, Preferred Fax (checked)
- E-mail: Business (allisop.md@foxgpr.com), Preferred E-mail (checked)
- Send mail to: Business Address
- Send bill to: Business Address
- Send message by: E-mail
- WWW:
- Club Details: Badge # 1, Date Joined 01/08/1985, Resigned, Member Type Active - LOA, LQA button
- Time in: Club (21 years, 0 months), Rotary (21 years, 0 months)
- From: 23/06/06, To: 31/08/06

RI Club Administration Software (RI-CAS) provides a complete record of information for each of your members, although it is not necessary to enter it all. As well as the usual contact and personal information such as address and contact numbers, there is also a comprehensive list of Rotary information. This includes classification, RI membership numbers, a complete history of positions held and past membership of other clubs.



Meetings & Attendance

RI Club Administration Software (RI-CAS) has a complete attendance and make-up management system, which can be run by a member on a separate computer and integrated into the club's master database.

Meetings are created according to your club's meeting day and RI's attendance rules in the Attendance function.

Members will be added to a meeting when it is created based on their attendance status. Attendance statistics, for each member and the club, are automatically generated as the meeting attendance is entered.

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Club Administration Secretary - Club Year 2006 / 2007

File View Preferences Switch Help

Members Attendance

Meeting Date	Status	Date Created	Total Members	Total Exempt	Attended	Missed
7/3/2006	Completed	8/23/2006	76	6	57	10
7/6/2006	Completed	8/23/2006	76	6	57	10
7/13/2006	Completed	8/23/2006	76	6	45	22
7/20/2006	Completed	8/23/2006	76	6	62	5
7/27/2006	Completed	8/23/2006	76	6	33	34
8/10/2006	Completed	8/23/2006	76	6	45	22
8/17/2006	Completed	8/23/2006	76	6	51	16
8/24/2006	Completed	8/23/2006	76	6	61	6
8/31/2006	Printed	8/23/2006	76	6	0	67
9/7/2006	Available		0	0	0	0
9/14/2006	Available		0	0	0	0
9/21/2006	Available		0	0	0	0
9/28/2006	Available		0	0	0	0
10/2/2006	Available		0	0	0	0
10/5/2006	Available		0	0	0	0
10/12/2006	Available		0	0	0	0
10/19/2006	Available		0	0	0	0
10/26/2006	Available		0	0	0	0
11/9/2006	Available		0	0	0	0

Meeting Manager - 08/31/06

Attendance

Name	Type	Attended	Apology	Meal
Allisop Arthur	AL	<input type="checkbox"/>	<input type="checkbox"/>	
Amberly Jo	AD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Anderfield Reggy	AD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Annat Anne	AD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Asher George	AE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2
Avis Andrew	AD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Bolane Frank	AD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Bradlington John	AD	<input type="checkbox"/>	<input type="checkbox"/>	
Bradson Daniel	AD	<input type="checkbox"/>	<input type="checkbox"/>	
Bridgwater John	AD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Browney Fred	AD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Bursonte Nick	AD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1

Search: 56 2

Guests

Meeting Statistics

Total Members	76
Exempt this meeting	9
Required to attend	67
Credit attendance	48
Attendance %	72%

View Member Details
Add Member
Remove Member
View Makeups
View Extended Meeting Statistics

Meals and guests can be added for reporting summaries but also for billing purposes in the Treasurer's module.

Remote Attendance

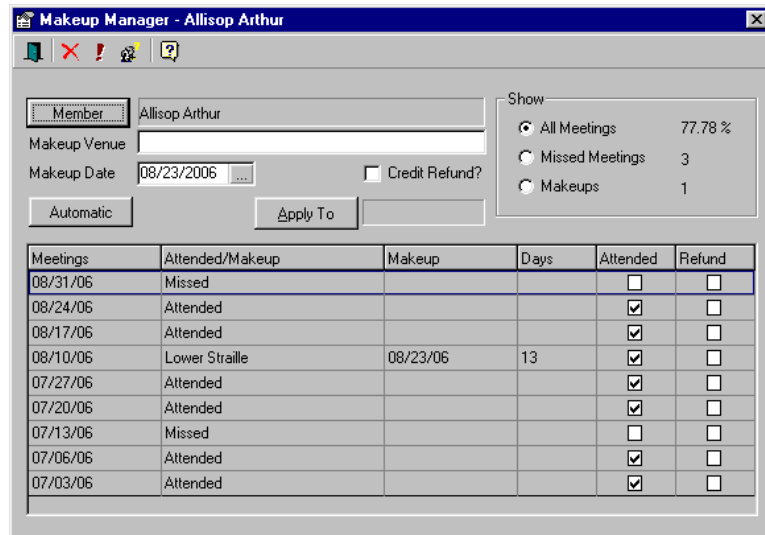
Overview

A meeting created in RI Club Administration Software (RI-CAS) can be exported to another computer, or a Palm handheld computer, as a file.

Attendance for the exported meeting file can be completed on the other computer at the door of your meeting, then re-imported back into RI Club Administration Software (RI-CAS). This function is useful when you run RI Club Administration Software (RI-CAS) online or if a different person manages the attendance records for your club.

Make-up Manager

The Make-up Manager provides a fast method of entering make-ups and having these automatically applied to any meeting missed by the member.



All attendance statistics are available in comprehensive Attendance and Meeting reports as well as the District report.

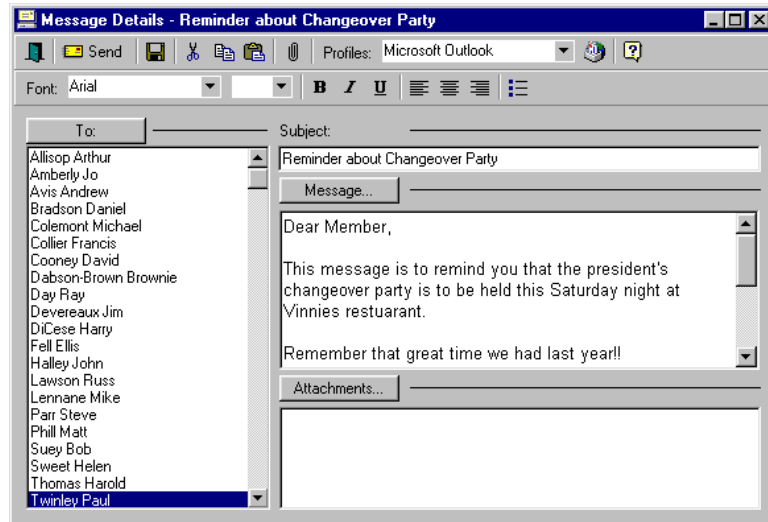
The Attendance Queries screen has been designed to allow an easy way to view the current state of member and club attendance statistics. There are two screens, the Current tab provides details of the current year, while the Historical tab provides attendance history for each member for up to 100 years.

Communications

Communicating with your members is fast and very easy with RI Club Administration Software (RI-CAS). You will mostly communicate using email but the same message can be printed as a letter for those members who cannot receive emails.

RI Club Administration Software (RI-CAS)'s unique licensing allows as many of your members as needed to run a copy of the software. The communication features can be used by different club officers for different reasons. They can quickly obtain an up-to-date copy of the member database as an email attachment or download from your web site.

Sending a message, which can include for example the distribution of your newsletter, is as easy as selecting a group of people from the Member Grid and clicking on one of the two message buttons on the toolbar.



You can create message “templates” by re-using the contents of previous messages.

The letter option produces fully merged letters without any of the difficulties of mail merge. It is also possible to export a file from RI Club Administration Software (RI-CAS) using the Export function and create your own merged letters using Word or any word processing package.

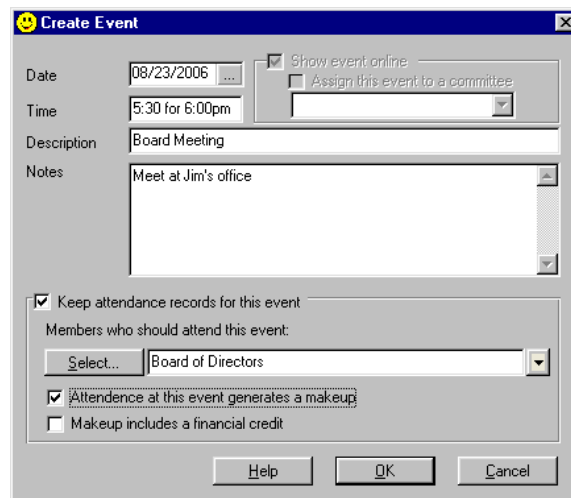
Events

In addition to your regular meetings, RI Club Administration Software (RI-CAS) can keep track of other events such as committee or board meetings as well as fellowship activities. Attendance at events can create automatic makeups for members.

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The Events function allows the date, time and location of any club event to be recorded. There is an option to record attendance by members, guests and to note any event charges. Event attendance, guests and event charges can be “seen” by the Treasurer” module for billing purposes.

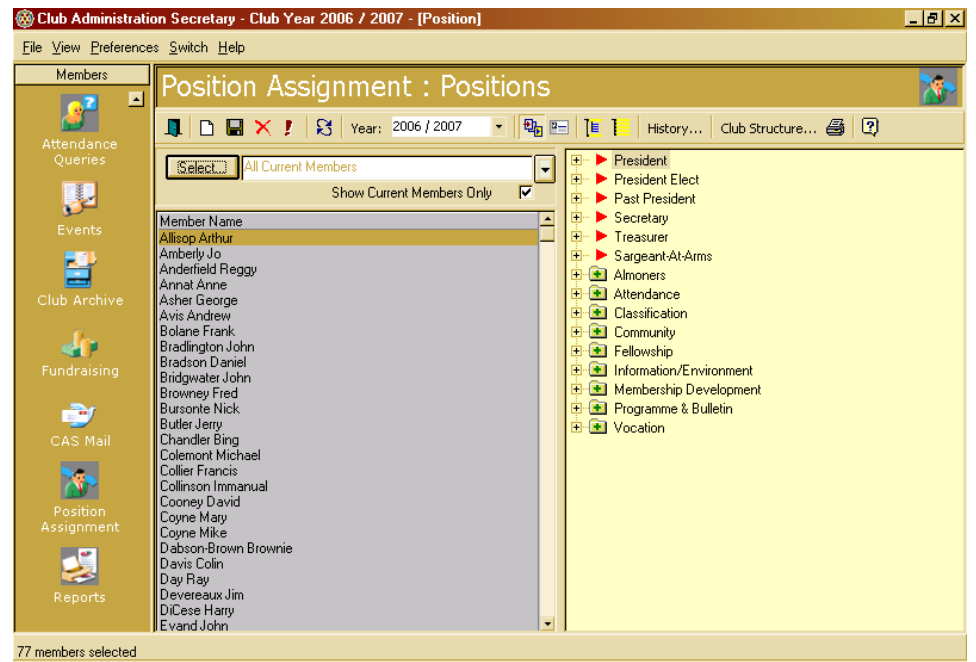


If your club uses RI Club Administration Software (RI-CAS) Online, events can be “seen” by members when they log into the Member Access Portal. Using this facility the club can start to collect event attendees, apologies and a guest list for an event before it happens.

An event attendance worksheet can be printed to collect actual attendance during the event and comprehensive event attendance reports allow your club to manage this area more easily.

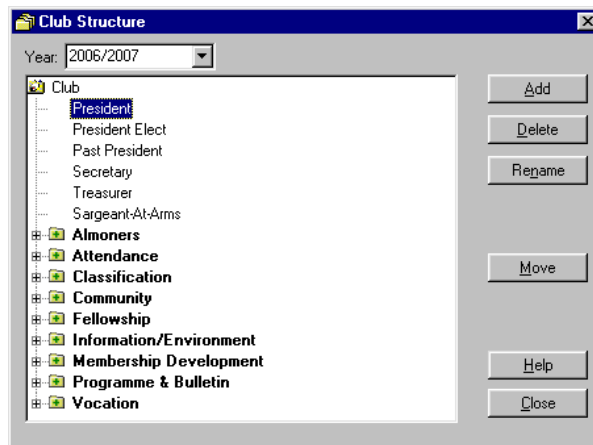
Club Officers

The Position Assignment function is a tool to easily create the positions and committees for the next Rotary year before the year begins. The History buttons pop up a list containing the history of all previous club positions held by a member, or the history of all members who have held a particular position. This information is useful when making the position assignment decisions.



Club Structure

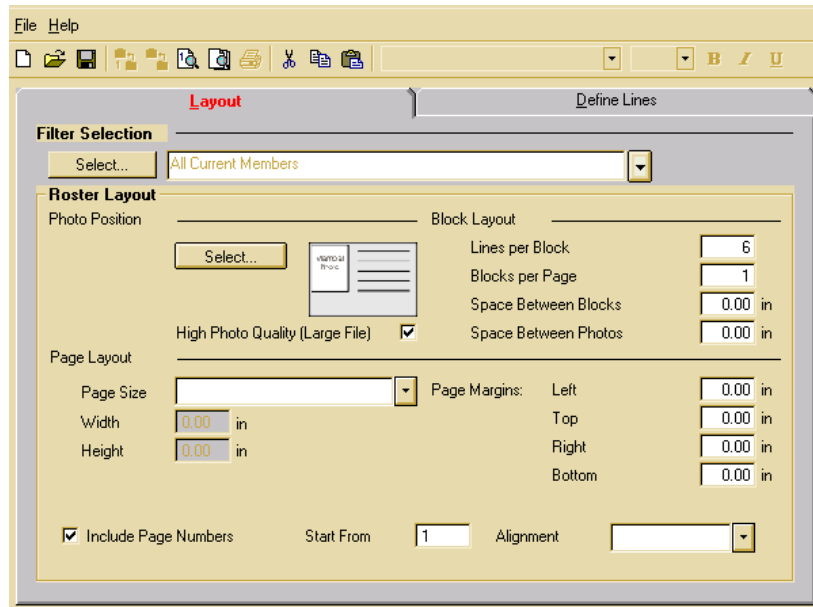
Club Structure saves a layout of the positions and committees for your club for each Rotary year. The layout makes it easier when assigning members into positions and for reporting.



Using Position Assignment together with the Club Structure function your president elect has a great set of tools to develop the "team" well before the next Rotary year starts.

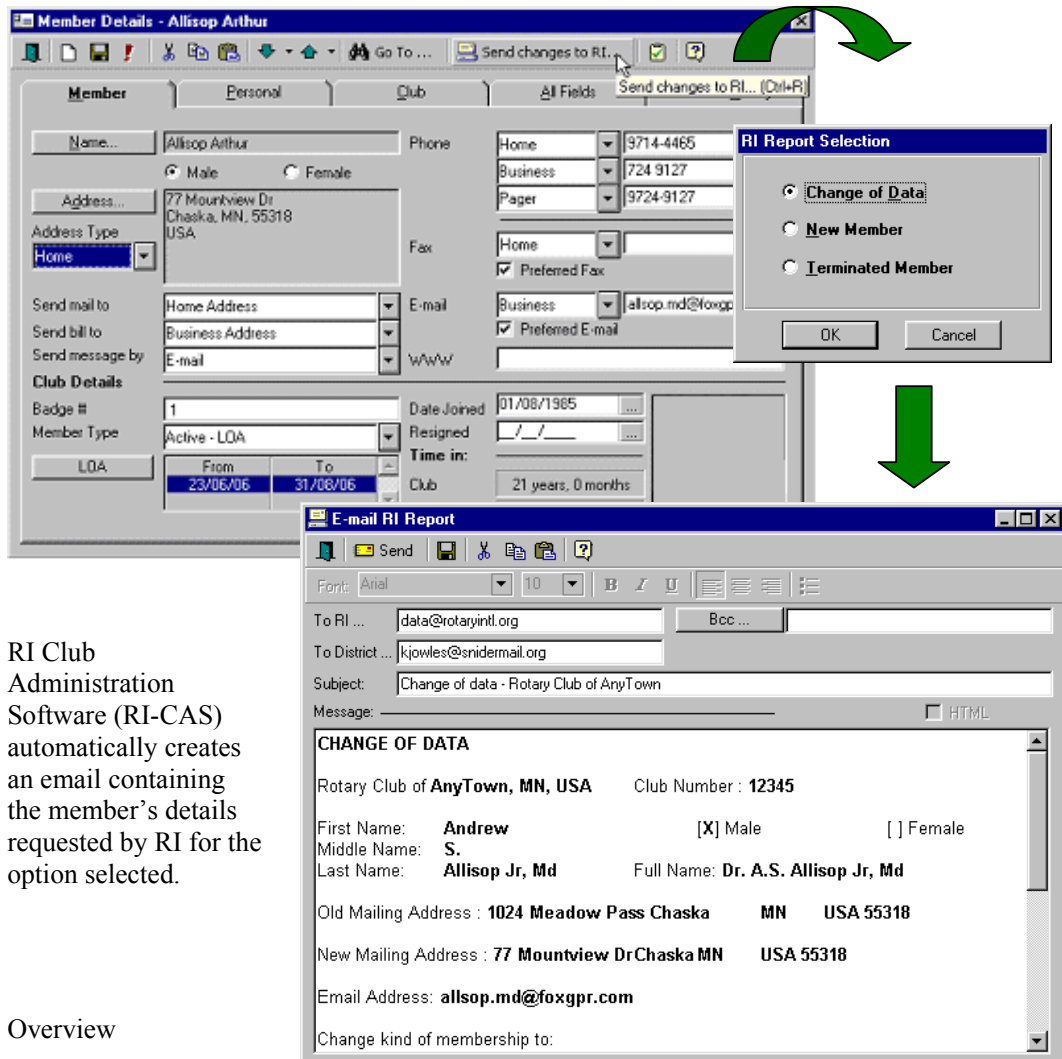
RI Roster

The RI Roster works with your club's RI Club Administration Software (RI-CAS) database and allows you to create your roster (or directory of members) in any format, page size, field selection and photo position. Once created you can print the roster or you can export the roster as a PDF file for import and finishing by your commercial printer or publishing consultant. This program should take thousands of dollars off the cost of producing your roster.



Reporting to RI & District

Member information can be sent to RI (and district) with the click of a button.



RI Club Administration Software (RI-CAS) automatically creates an email containing the member's details requested by RI for the option selected.

Overview

In addition to the method described above, RI Club Administration Software (RI-CAS) also has the *Monthly District Email* that sends all attendance and membership information required by district in an electronic format that they can use.

The information required to be sent in the RI *Semi-Annual Return* can be extracted from RI Club Administration Software (RI-CAS) and printed in the RI format. The report for New and Terminated members can be sent directly to RI, the member change information must still be manually added to the report sent by RI.

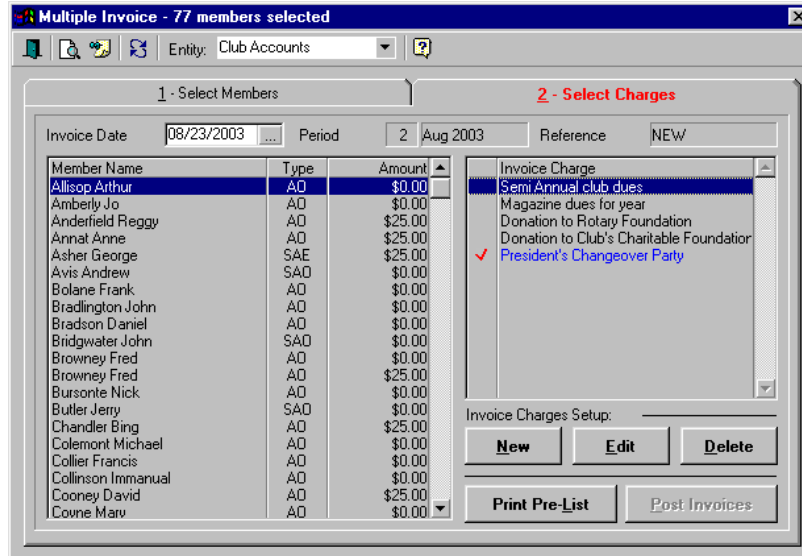
Invoicing & Accounts Receivable

RI Club Administration Software (RI-CAS) has a complete billing, accounts receivable and accounting system integrated to your member database. A unique and highly specialized function, Multiple Invoicing, can prepare an unlimited number of member invoices in a few minutes. As Rotary clubs tend to create invoices in bulk, with many of the invoices similar or identical the Multiple Invoice function often saves many hours of administration time. You will find it very easy to understand and use.

RI Club Administration Software (RI-CAS) can also be integrated into other accounting systems using the Transaction Extract function. If you choose to use another accounting package, then it is a very good idea to complete member invoicing and receipting within RI Club Administration Software (RI-CAS) then manage the remainder of your accounting with the other accounting system.

Multiple Invoice

The Multiple Invoice function is able to generate and print many invoices in one operation. An invoice is generated for each record selected using a "select" procedure.



An unlimited number of invoice charges can be setup and selected to be included on each invoice. Invoices can be posted as either real or proforma. Proforma invoices are tracked, but no accounting takes place until the invoice is actually paid – cash basis.

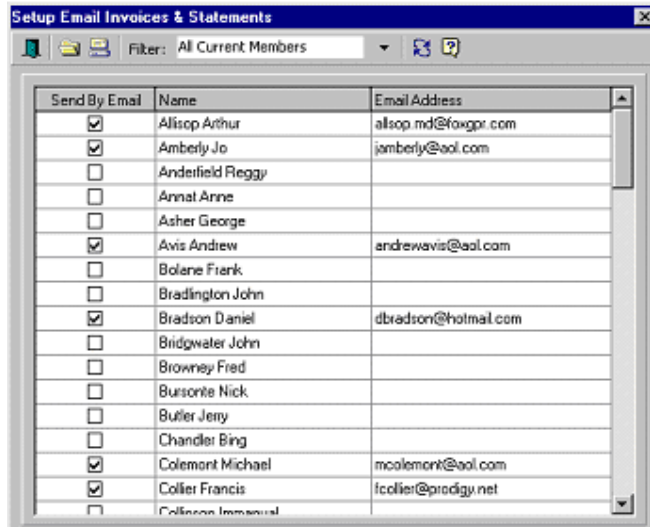
Once invoices (real or proforma) are printed and posted an accounts receivable record is created for each member. This is a business level system and can be used to manage many more charges besides membership dues. For example events, fundraising receipts and donations can be managed with this system.

The Aged Trial Balance is a report listing all members who have an amount outstanding, either debit or credit. The amounts are analyzed into 30 or 90 day periods based on the date of the transaction and if you operate on a quarterly basis or not.

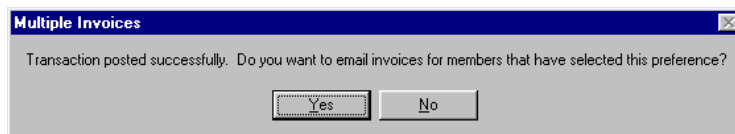
Email Invoices & Statements

Save money on postage and an enormous amount of your Treasurer's time by combining the unique *Multiple Invoice* function in RI Club

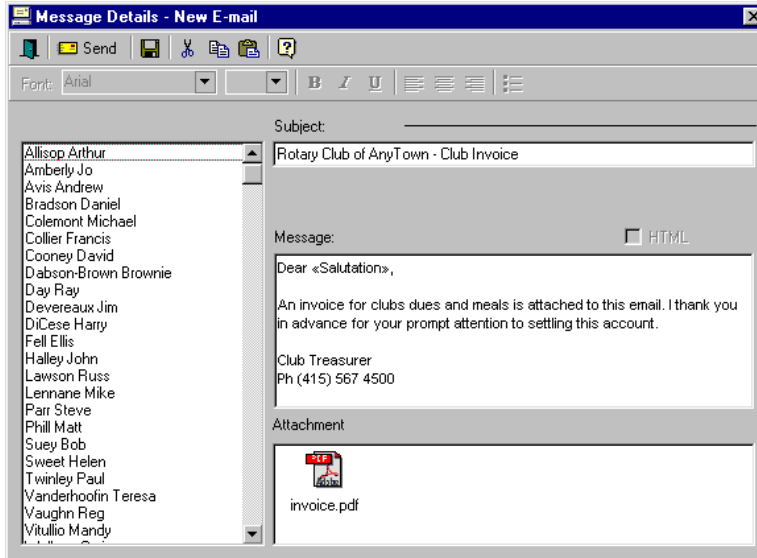
Administration Software (RI-CAS) with a simple bulk email. It works like this:



- In the **Treasurer Module** setup each member's preference for receiving invoices & statements by email or regular mail.
- In **Multiple Invoice**, invoices for all your members can be completed in under 1 minute.



The system detects which invoices to email and those to print (for regular mail).



- A bulk email is automatically created and a custom invoice sent to each member.
- Invoices can be changed and reprinted or re-emailed at any time.
- Statements can be sent just as easily.

Sending out invoices and statements by email can be a big time-saver for your club because there is no need to print and mail invoices ever again.

Cashbook & Accounts Payable

If you use another accounting system, invoicing and receipt transactions can be extracted and summarized for fast entry into these systems.

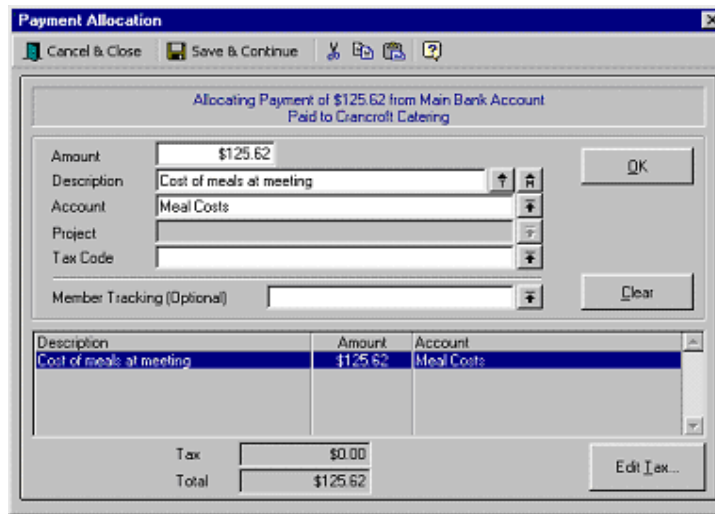
Alternatively you can use the RI Club Administration Software (RI-CAS) Cashbook & Accounts Payable section, which is designed to manage cash movement in and out of multiple bank accounts and produce detailed financial reports for the treasurer. There are three data entry functions:

- Receipt
- Vendor Bills & Payment
- Bank Transfer
- cash receipts
- accounts payable and cash payments
- transfer funds between bank accounts

There is also a Bank Reconciliation function that provides a tool to reconcile cash transactions against the bank statements, while at the same time, providing a data entry tool for many transactions that originate from the bank statement.

Cash transactions can be analyzed from the organization's point of view and also from a member's point of view using the Member Tracking functions.

Example of Payment Allocation screen:



The RI Club Administration Software (RI-CAS) accounts payable system can allow vendor's bills to be entered immediately on receipt and checks (cheques) can be printed from RI Club Administration Software (RI-CAS) using pre-printed stationery. Full accounts payable management reports provide a complete system suitable for larger Rotary clubs.

If your club still uses a manual check writing system, then these can be entered directly as expenses and the accounts payable system simply bypassed.

General Ledger & Financial Reporting

The General Ledger is built around a chart of accounts which has been standardized to be as close as possible to a typical Rotary club's requirements. Accounts can be added, edited or deleted from the chart of accounts by each club to complete the process.

The General Ledger has the ability to easily separate club and charitable funds by the creation of projects. Projects can be added to transactions providing increased analysis and profit reporting by fundraising activity.

Financial budgets can be entered for each of the income and expenditure accounts in the chart of accounts using the Budget function. The budgets can be broken down into monthly amounts and used as a comparison against actual results.

Financial reports include a series of income and expenditure reports, balance sheet and other General Ledger analysis reports. The treasurer has cash movement analysis reports to manage clubs funds. Detailed audit trail reports provide a tool for the club's auditor or for analysis if things go wrong.

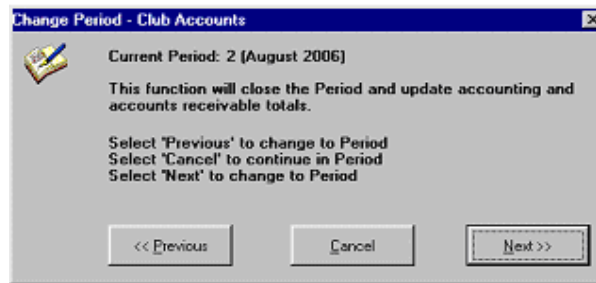
The View Transactions function displays transactions by period and type and allows a "drill down" to the underlying documentation. Transactions can be deleted and some non-essential parts edited but RI Club Administration Software (RI-CAS) has sought to maintain financial integrity by forcing an Audit Trail to be recorded whenever transactions are changed after they have been posted.

Financial Periods

The RI Club Administration Software (RI-CAS) accounts run from July 1st through June 30th with July period 1 and June period 12. The

software keeps track of the current period and allows accounting transactions to be entered into any period of the current year.

The Year End function will close the financial year and transfer the operating result to the retained earnings account. Invoice numbers are reset to 1 and transactions more than two years old are deleted. Once the financial year is closed transactions can be posted to, and reports printed from, the previous year to allow the final accounts to be prepared after the new year has started.



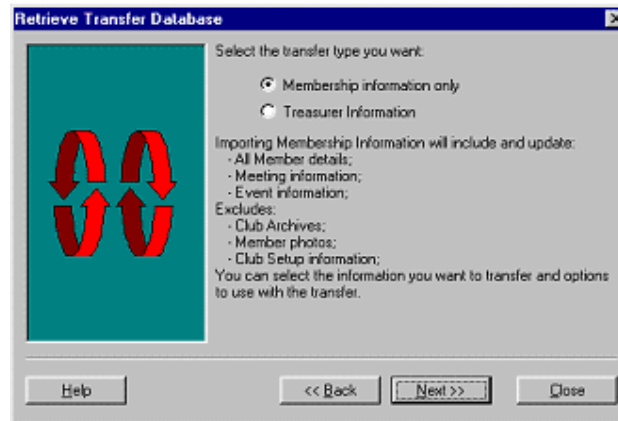
Data Sharing & Teamwork

In many Rotary clubs different people carry out the duties of preparing and maintaining the club's information. For example attendance is recorded by one member and the member database maintained by another. Usually the treasurer is separate person again. Sometimes a club would like to split these duties but can't.

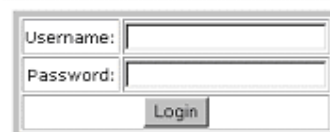
Often many different people need to use the club's information for various reasons. For example the membership chair wants to see member attendance history or the sergeant-at-arms needs to check anniversary dates.

RI Club Administration Software (RI-CAS) has two important design considerations to assist the sharing of duties and information between club officers and members;

The Data Transfer function is a very powerful utility that is able to extract and synchronize member information transferred between copies of the club's database.



RI Club Administration Software (RI-CAS) Online and the Member Access Portal is a service that hosts your club's database on a secure server managed by Rotary International. Your club officers can access the database and use the RI Club Administration Software (RI-CAS) software over the Internet. Individual members can also login to your Rotary club using the unique Member Access Portal and take responsibility for managing their own database record, view a club roster, check their account and even manage a committee.



The Data Transfer function allows your club to better operate as a team by enabling the sharing of duties and information.

Computer Requirements

RI Club Administration Software (RI-CAS) software runs on IBM compatible PC computers. The minimum configuration will be a Pentium processor with 64 MB of RAM memory. At least 50 MB of hard disk space must be available. A high speed fax/modem 28.8K or above will be necessary to send email or fax or to connect with RI Club Administration Software (RI-CAS) Online.

RI Club Administration Software (RI-CAS) will not run on Apple computers unless they are of a late model and are capable of running Windows software. However Apple computers are able to use RI Club Administration Software (RI-CAS) Online.

Multi-User Network Ready

RI Club Administration Software (RI-CAS) is a multi-user network ready system. The software can be installed on a network drive and shared by concurrent users.

