Presidents Elect and Presidents Nominee Training, 2016-17

Rotary Information Management Tools for Club Presidents

Sat March 5, 2016, 4:15-5:25PM

During this session, **there will be several short presentations**, often using multimedia, followed by **Q&A.** The following notes are intended for review as well as reference to digital sources including YouTube videos, district webpage, My Rotary and DACdb. These resources can provide extensive details as you need them.

A digital version of these notes are on the district webpage at www.rotarydistrict6910.org. After the page opens, select "Training" then select "2016 PETS Information Technology Notes"

Online Resources for D6910 Leaders

My Rotary: Go to www.rotary.org, select "My Rotary". You must sign in to proceed further.

Rotary Club Central (RCC): Go to www.rotary.org, select "My Rotary", Sign in, Scan down to "ONLINE TOOLS" and select "Rotary Club Central"

DACdb Database: Ways to log in:
- go to www.dacdb.com then select "LOG into DACdb" or
- open the district webpage; click "Log into the District and Club Database"near the top of the page or
- open any DACdb driven webpage then select "login to DACdb"

District Web Page: www.rotarydistrict6910.org"

District Facebook Page: Ways to log in
- Open your Facebook account and search for "Rotary District 6910". Be sure to "like" the page.
- open the district web page; place the cursor over "Social Media" and select "D6910 FaceBook"

District YouTube Channel: View training videos created by district members. Go to www.youtube.com. ; after the page opens, enter "Rotary District 6910" in the search box. The D6910 icon   will appear as the first option in a list. Select the "CHANNEL" Box by the District Icon.

Rotary Foundation Reference Guide: Rotary Foundation REFERENCE GUIDE

Rotary Presidents Manual 2016-19: Rotary Document Center (you can download current manuals for President, Secretary and Treasurer from "Club Administration")

The Manual of Procedure. Manual of Procedure (Instructions for managing Rotary issues of all kinds)

My Rotary and DACdb- What Does What? - Tom Upchurch

You Tube Video: My Rotary & DACdb; What Does What by AG Tom Upchurch

- **Rotary.org/MyRotary** http://www.Rotary.org is the official webpage for Rotary International. It is huge and published in several languages.

  - **My Rotary** is the password protected area where Rotarians work. Any basic Rotary function can be managed in My Rotary. It is most useful for Setting and Tracking Goals and for reviewing Reports. RI recommends Data Integration Partners for District sand Clubs who wish more comprehensive membership and communication management. Major functions that are best or ONLY managed in My Rotary are:

    o Club Invoice: *My Rotary/Manage/Club Administration/Club Invoice (Must be a Club Officer to see the invoice)*

    o For setting goals and recording achievements: *My Rotary/Online Tools/Rotary Club Central/Club View*

    o For viewing reports related to Rotary Foundation esp the Presidential Citation Dashboard

      ▪ Presidential Citation Dashboard : *My Rotary/The Rotary Foundation Tab/Foundation Reports/Awards then View Report/Presidential Citation Dashboard*

- **DACdb (District and Club Database)** An official Data Integration Partner with Rotary International. There are other Integration Partners, but DACdb is the official partner for District 6910. DACdb is focused on all aspects of membership management and communication at Club and District level. Information needed by RI is automatically transmitted to RI from DACdb. DACdb includes the following functions that are either not in My Rotary or are not as comprehensive:

  - Membership management
  - Club and District Calendar
  - Officer lists
  - Committees
  - Customized e-mail (P-mail), regular e-mail or text message
  - Attendance
  - Dues management
  - eBulletins and newletters
  - Web Site information to push to authorized Web Pages
  - Club and District Web Pages
  - Cloud storage for Club and District information

Q & A

Entering and Tracking Service Goals in Rotary Club Central. - Peter Gleichman
My Rotary/Online Tools/Rotary Club Central/Select "Club View"/Select the "Service" tab.

- Enter service related goals
- **Basic Presidential Citation information** is entered under the service tab
    - **f**or answers to most common questions about the Presidential Citation Click Here
    - This is a TOUGH award to win
    - **To see your club's Presidential Citation Dashboard:** Go to My Rotary; Select The Rotary Foundation Tab; Select "Foundation Reports"; Scan down to Awards and select The Presidential Citation.
- Status of service projects should be updated throughout the year.
- Use Rotary Showcase to share successful projects with the Rotary World

Introduction to the Rotary Presidential Citation Dashboard - Tom Upchurch
My Rotary/The Rotary Foundation Tab/Foundation Reports/Awards then View Report/Presidential Citation Dashboard

You Tube Video - [The Presidential Citation Dashboard](#) by Tom Upchurch

Q&A

Taking Rotary with You - DACdb on Your Smart Phone
You Tube Video - [DACdb on Your Smart Phone](#) by Tom Upchurch

- Go to the Android or IPhone browser and enter **http://m.DACdb.com** (usually m.DACdb.com is enough). This will open a page designed especially for small screen
- Log in is required. Use same log in as in regular DACdb
- The "Find" function is especially useful. However, "find" by occupation is only useful if the Rotarian has completed that field in the membership registration.

Managing Passwords and Privilege

You Tube Video - [Managing Passwords and Roles in DACdb and My Rotary](#)

by Tom Upchurch

NOTE: Club Officers should be selected and posted to DACdb by Dec 31 the year before assuming office (to allow time for training, assigning privilege, and setting goals)

- In DaCdb, Club Officers (level 4) and District Officers (level 5 and above) can change member passwords in clubs they are responsible for. Open "My Club" tab, Select the edit pencil by the member name (if there is no pencil, you cannot edit), Open the "Login" tab, the login name should be the members preferred email address, the password details will not be visible, To change the password, type in a new one, such as the member's first name, and select Update to save your entries. After the member signs in, he/she should change the password

- No one at district or club level can help with My Rotary passwords. The Rotarian must request help by selecting the "forgot user name" or "forgot password". If this doesn't work send a message to data@Rotary.org. Be sure to include the full name and RI ID number, and describe the problem.

- In My Rotary you can delegate your privilege to another Rotarian. Sign in to www.rotary.org then hover the mouse over your name or select the person icon on an ipad. Select delegate then follow the instructions. Each AG should get their club secretary to delegate that role to them.

Q&A