



District And Club Database

District Guide to Year-End Rollover Processing Release Note – June 2021

Summary – Roll-over Processing

This release note is intended to cover some of the specifics of the year-end rollover processing that DACdb will do on June 30th. At approximately 6 PM US Mountain Time June 30th, DACdb support will take the system off the air for a couple of hours to run the rollover scripts. We will also take snap shots of the database and file systems reflecting the year-end state. Those backups take the longest time (hours) – as the rollover scripts run in about 10-15 minutes.

Once we are done – we will bring the system back up. If there are remaining hours in June 30th – the new officers that we promoted will show. The committee listing will be correct at 12:01 AM Eastern Time (you must login after that time).

What Do Districts Need to Do?

There are two items each District needs to complete by June 30th (or very shortly thereafter):

Define the DLT

The *secret sauce* in DACdb at the district level is all about the District Leadership Team or Committee. This is a very special committee with the RoleKey “DLT” – that defines the District Leadership. You can call the committee any name you want – as long as the RoleKey “DLT” is used.

At a minimum, the DLT should include:

- District Governor (DG)
- District Secretary (DS) and/or District Executive Secretary (DES)

These two positions are important, as the email messaging for birthdays, new members, sponsors, terminated members, anniversaries are addresses using these positions.

Other District level positions are typically defined in the DLT:

- District Governor-Elect
- District Governor-Nominee
- District Treasurer
- Area Governors
- District Communications Officers
- District Webmaster
- District Finance Chair
- District Foundation Chair

Other than the DG, DS or DES positions, there are no limits or constraints as to the titles or number of positions defined. Each District is unique and can populate this as needed. If you do not want to include the AGs – don’t. If you do, then please do so – but first define them in the Areas (more on this later).



District And Club Database

District Guide to Year-End Rollover Processing Release Note – June 2021

So, each District needs to create a “DLT” committee – and populate it with the members and roles for next year. Typically, this is done way before June 30th by the incoming DG (DGE) and their team. So, we **DO NOT** touch this committee as part of the roll-over process.

DLT – to create this committee:

1. Click on the “DISTRICT” tab
2. Click on the “District Committees” icon
3. Select 2021-22 from the OrgYear dropdown
4. Click on the golden “Add Committee” button
5. Enter DLT in the “RoleKey” box
6. Enter “District Leadership Team” or whatever you want to call this committee in the “Committee Name” box.
7. Click on the golden “Add” button
8. Click on “Members and Positions” tab to add in the members and roles as needed.

If this committee does not exist at the time of the roll-over, DACdb will create it – but not populate it. This can be done after June 30th.

DACdb, **will** create the following committees IF they are **NOT** found in the new OrgYear:

- Club President (P)
- Club Secretary (S)
- Club Treasurer (T)
- Club President-Elect (PE)
- Club Secretary-Elect (SE)
- Club Treasurer-Elect (TE)
- Membership (M)
- Rotary Foundation (TRF)
- Club Executive Secretary (CES)
- Club Communication Officer (COO)

Each of these committees will be populated with the corresponding club positions defined in the club – after the club promotions for the coming new year are completed.



District And Club Database

District Guide to Year-End Rollover Processing Release Note – June 2021

Define the Areas

Some Districts call it AREAS and some call it REGIONS, but whatever it is called, to properly setup the Assistant Governors, a couple of things need to be defined.

- 1) **AG Committee.** If you are interested in having a committee with the AGs, on it, create a new committee in the 2021-22 OrgYear with the RoleKey “AG”. This is completely optional, but recommended, as it provides a list of the AGs, along with their contact info – and an easy vehicle to PMail the AGs at one time if needed.
- 2) **Club Areas.** **WAIT** to perform this step until **AFTER** July 1. Club area assignments take effect immediately. The 1st step in the process is to review the areas each club is assigned to. Most of the time, the areas will not change year-to-year. But there are cases where the district will reallocate clubs to different areas and the area needs to change.
 - a. Click on the “DISTRICT” tab and then the “Clubs” icon in DACdb. The Area should be listed in one of the columns displayed. Review and use the Pencil edit next to the club’s name to make changes as needed. The Area designation is on the 1st tab (Information) when you edit the club.
 - b. Click “Update” if you have made a change to a club’s record.
 - c. Repeat above until all clubs are in the right area for 2021-22.
- 3) **Areas.** Click on the “DISTRICT” tab and then the Area (or Region) icon, then click on the “Area Edit” menu item in the left sidebar navigation menu in DACdb. A list of the AGs and presidents for **this year** should be listed. There are two situations to deal with here:
 - a. Areas are defined this year. In most districts the areas should already be defined. Click on the Area Edit – a list of all the areas should be displayed. If the Areas are displayed, you will be able to clone them to next year – a much easier process.
 - i. Make certain you are in the CURRENT org year (Click on the “Change OrgYear” button on the upper right to change this if you need to).
 - ii. Click the “Clone” button (top right) and select the 2021-22 OrgYear (which is what it should be by default).
 - iii. Click “Clone”.
 - iv. Change to OrgYear 2021-22 and make sure “Include Members in Areas?” is checked.
 - v. Click on “Clone Areas” button in the dialog box.
 - vi. Click on “Change OrgYear” and make sure 2021-22 is selected.
 - vii. Pencil Edit each Area – reviewing the AGs assigned, making changes as necessary.
 - viii. In some cases – new Areas may need to be created, in other cases Areas that were consolidated may need to be deleted.
 - b. Areas are NOT Defined this year. If the areas are not defined, you will need to enter them for the new OrgYear.
 - i. Change to OrgYear 2021-22.



District And Club Database

District Guide to Year-End Rollover Processing Release Note – June 2021

- ii. Using “Edit Area” (left hand navigation), enter each area.
- iii. Once you enter the Area, Pencil Edit the area, and add in the AGs (and in some Districts – the Executive AGs, Foundation Chairs and Membership Chairs) assigned to each area.

In either case, the area number you enter should be tied directly to the area number that was entered (or updated) in the club record.

AFTER July 1, Templates for automated DG PMail should be edited to use new theme graphics and any other personalization the new governor wants to include. These templates are available for edit by clicking on the “DISTRICT” tab, then “District Files” in the left sidebar menu and then click on “Pages” also in the left sidebar menu. Click on the folder “Templates” that displays on the center of the screen. There you will see the templates used for automated Pmails sent on behalf of the District Governor. The files with the edit Pencil beside them can be edited to suit your District Governor. We highly recommend that you review each of these and replace any theme graphics with the new theme for the current Rotary year.

That’s it!

If the districts want to add other committees or organize the committees in a tree-like structure, they are free to do so. But the steps outlined here, will get the basic structures in place for the new-year.

Should there be questions about this, please contact DACdb support (support@dacdb.com – Toll Free (US and Canada) +1 (833)-DACdb4U or +1 (833)-322-3248).

Suggestions

As always, we welcome your ideas and comments. If you have some ideas that you think would enhance the application, please let us know. If you see some areas where things can be improved or don’t work as expected – we really want to know those as soon as possible.