



# District and Club database

## Release Notes – 4.19.09b

### Summary

This release note focuses on a number of changes that have been made over the last month and a few upcoming changes. The major changes are:

- Menu
- Dashboard
- PMail changes
- Two new Reports
- Member Add/Edit required fields

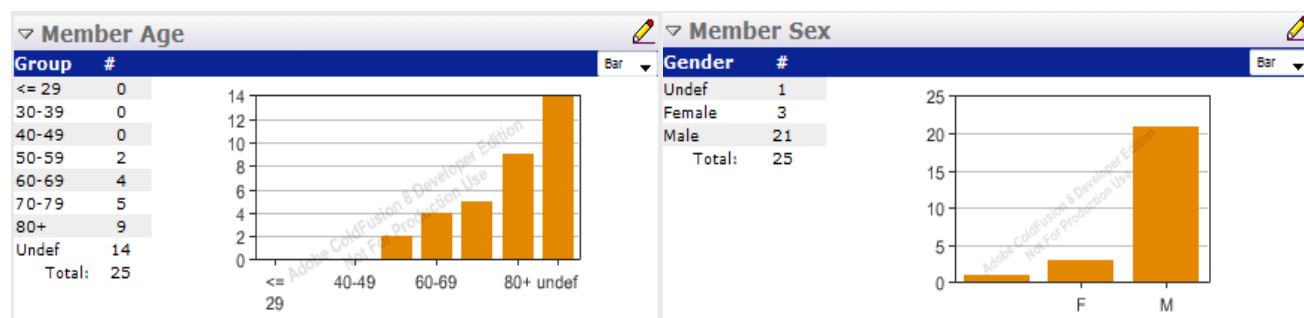
And most import: ***If you have any references to IP 76.12.37.249 (our Server IP, you MUST CHANGE IT.***  
Please read below.

### New Features / Changes

- 1) **Menu.** The system menu was updated. It loads once at startup based on your security role. The biggest difference you will notice is a slight change to the tab colors and the fact that it does not refresh when you click on a tab.
- 2) **Dashboard.** Changes made over the last month include:
  - a) The ability to refresh the dashboard was added this weekend. As we mentioned in the past, the dashboard data is cached (for up to 6 hours). This dramatically reduces the load on the system on page views. However, there have been times in the past where data has been updated (e.g., physically deleting a member that was added by mistake) and the dashboard would take hours to reflect the change. Now you can click on the refresh link and the change will be reflected immediately.

**Rotary District 7750 Dashboard** [Edit] [Refresh]

- b) Two new Widgets are created – Member Age and Member Sex



- c) Birthday Widget user interface (UI) was updated and hyperlinks to the member were added.



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- 3) **Login Page.** Regarding the security comments last month, there is a slight change in strategy and approach. In the near future, all Lvl 2+ users will need to enter their club number on the login screen. Lvl -1 members will not be required to enter anything in this field – although it will not hurt anything if they do. Also added comment about not checking the “Remember Me” on public access systems. And, a new “help” link for those that have a new e-mail address.

### Sign In

User Name: mike7710@mikethacker.com  
Password: ●●●●●●  
Club Number: 6128  
This will be a required field in the future for greater than Member LVL-1 access.  
Login  
Remember Me   
DO NOT check this on public systems (e.g., libraries, internet cafes)  
Forgot Password? Click Here  
Or other Login Problems?  
My Email address changed, now what?

- 4) **COG Report.** If a DG serves multiple years as the DG (yes unlikely), the years of service will all be listed as long as they are in the corresponding DLT record.
- 5) **PMail.** PMail changes include:
- a) **PMail All.** The ability to use PMAIL was previously limited to the DG and all Lvl-7+ members. We have added a security feature where individual members can be identified and allowed to use the PMail ALL capability. The identified users can be any member security level.
- b)

Members Committees Calendar Reports SpkrsBureau ATTND Asst Govs Help Admin  
List ALL Members PMAIL ALL in District Member DUES History Member Attendance Setup  
Member Setup  
Profile Updated Save Setup  
PMail All Security  
PMail All Security  
By default, only Lvl-7+ members in the District can PMail ALL members. Additional members can be granted similar access rights, by selecting them from the list on the left, moving them to the list on the right.  
Note: You are encouraged not to grant too many members access.  
Select from Members: Members with PMail All Access:  
Abab, Abab Thacker, Connie  
Abbott, Christopher K.

THEN, the Member who now has access to the [PMAIL ALL] functions, will see it at the TOP right of their screen, beside the LOG OUT link.

- c) Multiple CC's were added on the PMail. Just select and click on multiple recipients.



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- 6) **Member Add/Edit.** Several changes with the Member Edits and Adds:
  - a) Removed the proper casing of the Nick Name field on Add and Edit. There are just too many variations to deal with and do it right.
  - b) Added required fields as denoted by a red “\*” next to the name. The fields are: Gender, Last Name, First Name, Date Joined, Address, City, State, Zip
  - c) When the Email field is changed, and the Login Name is an email address, the Login Name will be updated. A pop-up warning will be displayed.
- 7) **New Reports.** Several new reports were added to the system.
  - a) #1.1 Club Member Directory (with Contact Info) – Requested by a member, this new report (2 variations on-line) gives you an abbreviated member directory. This is an XSLT-based report – so if you want your own version of this – you can have it. See comments about this later.
  - b) #3.2 - District and Club Leadership. Not a new report – but moved to the report menu vs. hiding this under the Utilities hyperlink.
  - c) #24.2 - Not Registered for Event. Ever want to market to your club or district members that have not registered for an event and not include members that all ready have registered? Now you can! Check out #24.2 Not Registered for Event – accessible as a report ONLY from the backroom FROM the Event being queried.
- 8) **System Performance Graphs.** These were turned on for Lvl-7+ access. You can find this under the Help tab.
- 9) **District uPage Security.** Access to the District uPages (optional module) was limited to Lvl-7+ users. We have now added a security layer where one or more identified members can be given access to make changes. This includes access to the governor’s WELCOME and THANK YOU letters.
- 10) **Registration Backroom.** The ability to filter the registered listing by Club Name was added. You will notice, that a partial names works – but may not give you the results you expect. So, be sure to enter in enough of the Club Name to make it a *UNIQUE* entry for the Club you are looking for.
- 11) **Off-Line Attendance.** The off-line attendance module (part of the Weekly Club Attendance) has been rewritten to bring it closer to parity with the on-line function. The new application must be downloaded.



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### Bug Fixes

- 1) Dashboard – Member Anniversaries. **The dashboard widget was pulling Wedding anniversaries and not Member admission anniversary dates.** Corrected.
- 2) **Member Contact Report.** Member type selection was not working. Corrected.
- 3) **PMail ALL.** The ability to PMAIL ALL by a selected Member Type was not working. Corrected.
- 4) **Country Code Admin.** An error in this function was corrected.
- 5) **PMail Character Set.** In some cases, when documents were pasted into the PMail editor from Word, characters (e.g., the “ and ‘) were replaced with a question mark “?”. This occurred after the document was saved. This was corrected.
- 6) **FireFox Field Edits.** The field edits (e.g., numeric only) were not working correctly with FireFox browsers. This was corrected.
- 7) **Dashboard.** The ClubID was not changing properly when switch around on the club dashboard. This was corrected.
- 8) **EZ-Link.** In some cases, due to the naming of the file, the delete was not functioning properly. This was corrected.

### Miscellaneous Changes

- 1) **Club Weekly Attendance.**
  - a) PMail default to PMail **ACTIVE** members that missed the meeting, was added
  - b) Future meetings were excluded from the displayed calculations for attendance
- 2) **Club Dues.** The member pull-down on the Deposit ticket was changed to show only 5 members. Previously it was 15 members, which extended beyond most screens.
- 3) **Password Update.** The ability to cancel out of this screen without updating the password was added.

### Utility Applications

- 1) **Email Purge.** A utility was written to take bounced email-address and purge them from the system. One or more addresses can be entered into a window. The email address of the members having that email will be deleted. While this doesn't solve your more important issue of being able to communicate with your member – it will reduce the number of bounced emails.



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### Under Construction

- 1) **New PMail Function.** To address a number of issues and enhancement requests by our users, the PMail subsystem is being rewritten. More documentation on the functions and features of PMail will be forthcoming.
- 2) **XSL Reports.** We introduced the first report above. There are two XSL style sheet templates that produce slightly different report outputs. Now we are working on the ability for you to download the template and to upload your own template. This way – you can make the report look anyway you want – from minor changes to very radical format changes.

### On Test

- 1) **Login Retry Count.** We are adding a retry count. After 3 successive failed login attempts, your account will be locked out for 30 minutes. During this 30-minute period, the members can call Support, their DCO or Club Leaders to reset the password. This is to thwart any hacking or automated “password cracking” programs.

Note: After the 3<sup>rd</sup> attempt an email will be sent to Support regarding successive login attempts. If we can identify who we believe the login attempt is for, we will also mail the DCO a message too. Not every Login Name can be traced back to a specific user.

- 2) **Leadership Position Cell Number.** We have coded the ability to add the cell number to the members identified in a leadership position.
- 3) **Member Termination Letters.** We already have the ability to send out a WELCOME-New Member and THANK YOU to the New Member’s sponsor email (optional feature). We have coded and are testing the ability to send out a Termination email to members. However, in some cases, this is not appropriate, so the Termination Code table was expanded to flag the different termination codes when a letter should be sent.
- 4) **New Server.** We are within a week of moving to a new, faster server. The new server environment will provide a level of performance what we do not have now, such as dynamic “load balancing”. And, it provides us with an environment where we can add additional RAM and disk space, without having to move again.

 **IMPORTANT: If you have any references to IP 76.12.37.249 (our existing Server IP), you MUST CHANGE IT to use the domain name: [www.Directory-Online.com](http://www.Directory-Online.com)**

Please only refer to us as: [www.Directory-Online.com/Rotary](http://www.Directory-Online.com/Rotary)

DNS will resolve this into existing server at 76.12.37.249, or our new server’s address



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Also, if you have any old legacy reference to your district number in the URLs from your club or district web sites, they are no longer going to be supported on the new server platform. For example if you use: [www.directory-online.com/nxxx](http://www.directory-online.com/nxxx) where nxxx is your district number, that convention is no longer going to be carried forward to the new server. We used that 4-years ago and it's time to drop support for its use, as I doubt anyone is stilling using that convention.

## Suggestions

We welcome your ideas and comments. If you have some ways that you think would enhance security on the system, please suggest them. If you see areas where security can be improved – we really want to know those as soon as possible.