

# Rotary International

## District 7690

# DACdb Grants Module

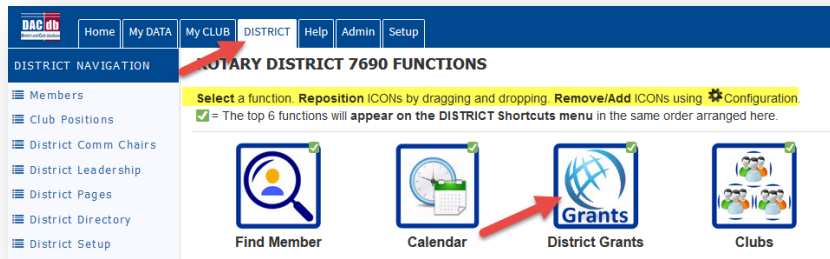
## District Process

v20200105

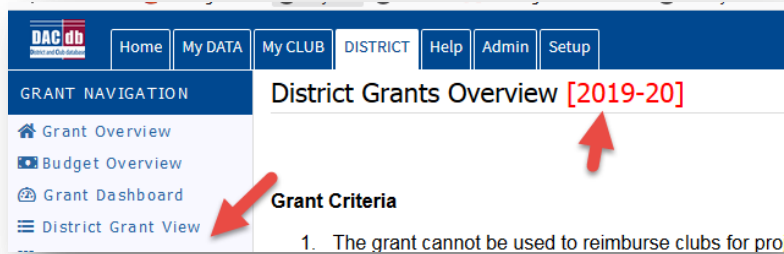
### PRELIMINARY NOTES

- The members of the District Grants Committee include the District Grants Chair and the District Rotary Foundation Chair. Both positions must be a level 6 or higher to access the Grants tab. Both have been authorized to approve club grant applications and final reports. Both must electronically sign the application for the grant process to proceed. In these instructions we will refer to these individuals as **District Signers**.
- District Signers must log on to the District and Club Database (DACdb) using their individual database credentials (username & password, and club number) to be able to electronically sign the applications or reports.
- When working on grants be sure you are working in the correct “OrgYear,” (the year during which the grant will be active.) To change the “OrgYear” click on the **Change OrgYear** button (upper right corner of page) and select the correct year from the drop-down list.
- As the clubs have been drafting, reviewing and signing their grant applications the District and Club Database (DACdb) has been auto-emailing club grant status reports indicating the next step required to prepare the grant for district review:  
(✉Subject: *Furnitureland Draft Grant Sample Project is ready for club review*)  
**Status: Draft**  
(✉Subject: *Furnitureland Draft Grant Sample Project is ready for club signatures*)  
**Status: Submitted Grant for Club Approval**
- The District Signers have no direct electronic involvement until they receive an email advising that a grant has been submitted for district approval:  
(✉ Subject: *Furnitureland Grant Sample Project has been submitted for district approval*)  
**Status: Submitted Grant for District Approval**
- **ALTERNATIVELY . . .** District Signers can review a **summary status list of Grants** in process. To do this sign on to DACdb, then click on the **District** tab, click on **District Grants** icon. If you don’t see that ikon on your desktop, follow

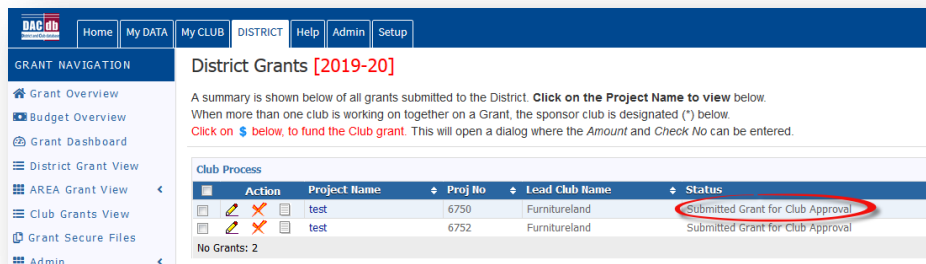
the instructions highlighted in yellow below.



- Be sure you're in the District Grants View and in the correct ORGYEAR



- You will see the list of grants annotated with their current status:



- Here is the list of grant statuses:

1. Draft
2. Submitted Grant for Club Approval
3. Submitted Grant for District Approval
4. Approved Grant
5. Submitted Final Report for Club Signatures
6. Submitted Final Report for District Approval
7. Final Grant Approved

## APPROVING THE GRANT APPLICATION

The District Signers have received an email advising that a grant has been submitted for district approval:

(✉ **Subject: Furnitureland Grant Sample Project has been submitted for district approval**)

Status: Submitted Grant for District Approval

1. Click on the pencil-edit for the grant you wish to work on.

**District Grants [2018-19]** Search...

A summary is shown below of all grants submitted to the District. **Click on the Project Name to view below.**  
 When more than one club is working together on a Grant, the sponsor club is designated (\*) below.  
 Click on below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

☐ Show Deleted? Apply Block Grant No

| Completed    |        |              |         |                |                       |               |               |               |      |  |
|--------------|--------|--------------|---------|----------------|-----------------------|---------------|---------------|---------------|------|--|
|              | Action | Project Name | Proj No | Lead Club Name | Status                | Funded Amount | Requested DDF | Other Funding | Proj |  |
|              |        | Project 2    | 4906    | Furnitureland  | Final Report Approved | 250.00        | 250.00        | 250.00        |      |  |
| No Grants: 1 |        |              |         |                |                       | 250.00        | 250.00        | 250.00        |      |  |

| District Review and Approval |        |              |         |                |                                       |               |               |               |      |  |
|------------------------------|--------|--------------|---------|----------------|---------------------------------------|---------------|---------------|---------------|------|--|
|                              | Action | Project Name | Proj No | Lead Club Name | Status                                | Funded Amount | Requested DDF | Other Funding | Proj |  |
|                              |        | Project 1    | 4901    | Furnitureland  | Submitted Grant for District Approval | 0.00          | 250.00        | 250.00        |      |  |
| No Grants: 1                 |        |              |         |                |                                       | 0.00          | 250.00        | 250.00        |      |  |

2. Review the information under the various tabs on the top of the grant. If you need more information, contact the club. At the District level you can modify the grant if necessary and the club will not need to re-sign and resubmit the grant. **OR** you may reject the grant, **returning it to draft status** if necessary, so that more information can be added. If you have rejected the grant the club will need to re-sign and resubmit the grant.

**Edit Grant: Project 1 [2018-19]** ID=4901

Grant Status: **Submitted Grant for District Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. This Grant has been submitted for **approval by the District**.

Details | Contacts | Application | Budget | Documents | Activity Log | Signatures

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

\* Project Name:

\* Deleted:  Delete flag for Grants (Note: Level-7+ function)

RI Project No:  (By default, this will be set to the internal Grant No assigned)

3. When you are ready to sign the grant, the first signer clicks on **District-Sign Grant**.

**Edit Grant: Project 1 [2018-19]** ID=4901

Grant Status: **Submitted Grant for District Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. This Grant has been submitted for **approval by the District**.

Details | Contacts | Application | Budget | Documents | Activity Log | Signatures

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

\* Project Name:

\* Deleted:  Delete flag for Grants (Note: Level-7+ function)

RI Project No:  (By default, this will be set to the internal Grant No assigned)

Priority:

\* Org Year:  (Level-7+ can change the OrgYear, if necessary)

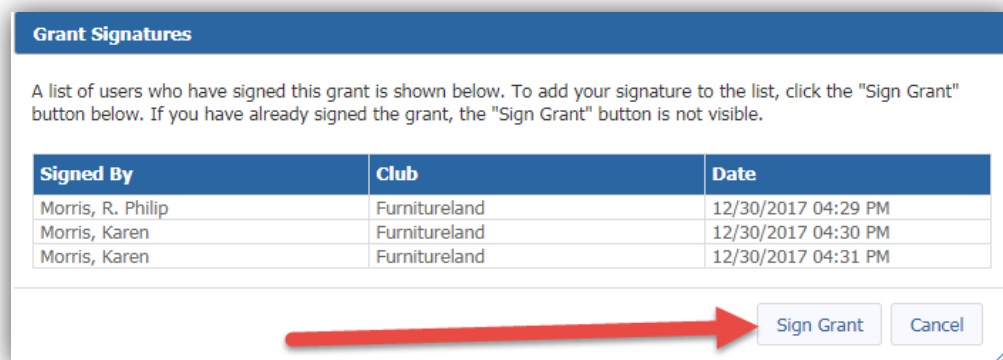
\* Round:  (e.g., 1 or 2)

\* City:

\* State:

\* Country:


4. A pop-up window will appear with the names of the people who have signed the grant in its various stages of production and approval. Click on **Sign Grant**.



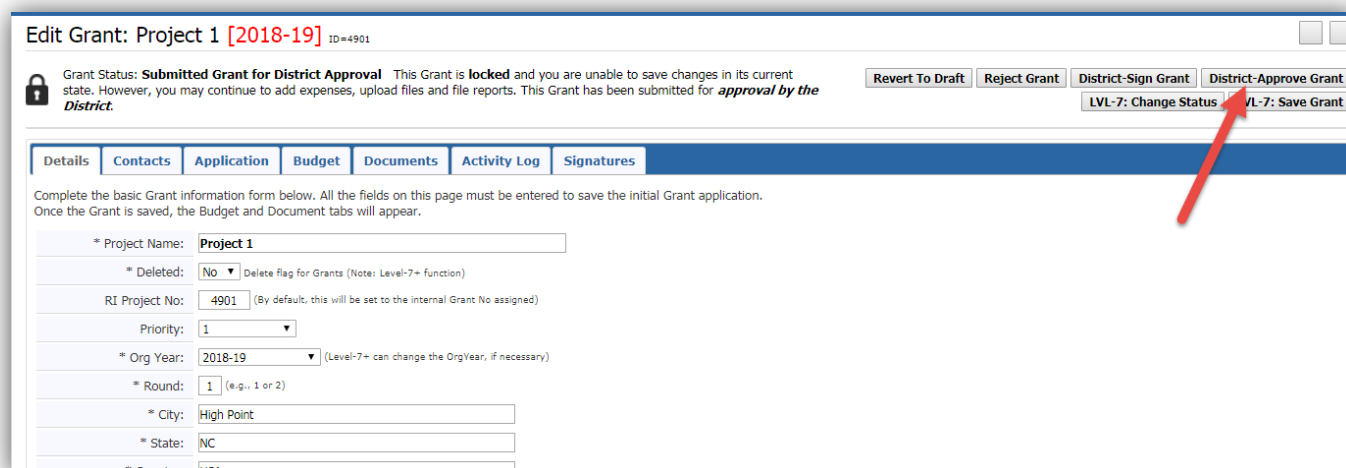
**Grant Signatures**

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

| Signed By         | Club          | Date                |
|-------------------|---------------|---------------------|
| Morris, R. Philip | Furnitureland | 12/30/2017 04:29 PM |
| Morris, Karen     | Furnitureland | 12/30/2017 04:30 PM |
| Morris, Karen     | Furnitureland | 12/30/2017 04:31 PM |

 **Sign Grant** **Cancel**

5. The first signer needs to notify the second signer that the grant is ready to be signed. After signing, the second signer should click on **District-Approve Grant**.



**Edit Grant: Project 1 [2018-19] ID=4901**

Grant Status: **Submitted Grant for District Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. This Grant has been submitted for **approval by the District**.

**Revert To Draft** **Reject Grant** **District-Sign Grant** **District-Approve Grant**  
**LVL-7: Change Status** **LVL-7: Save Grant**

**Details** **Contacts** **Application** **Budget** **Documents** **Activity Log** **Signatures**

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

\* Project Name: **Project 1**

\* Deleted: **No** Delete flag for Grants (Note: Level-7+ function)

RI Project No: **4901** (By default, this will be set to the internal Grant No assigned)

Priority: **1**


\* Org Year: **2018-19** (Level-7+ can change the OrgYear, if necessary)

\* Round: **1** (e.g., 1 or 2)

\* City: **High Point**

\* State: **NC**

\* Country: **USA**



6. At this point, an e-mail will be sent to the club, notifying it that the grant has been approved and that the next step is to submit a final report after the grant activities have been completed.

(✉ **Subject: Furnitureland Grant Sample Project has been approved**)

Status: Approved Grant

7. The grant will now appear under the **Approved** section of the listing of district grants.
8. When the district treasurer writes a check to fund the grant, the check number can be recorded with the grant. To do this, click on the \$ in the Action section.

**District Grants [2018-19]** Search...

A summary is shown below of all grants submitted to the District. **Click on the Project Name to view below.**  
 When more than one club is working on together on a Grant, the sponsor club is designated (\*) below.  
**Click on \$ below, to fund the Club grant.** This will open a dialog where the Amount and Check No can be entered.

☐ Show Deleted? [Apply Block Grant No](#) [Change Org](#)

| Approved                 | Action | Project Name | Proj No | Lead Club Name | Status         | Funded Amount | Requested DDF | Other Funding | Project Budget |
|--------------------------|--------|--------------|---------|----------------|----------------|---------------|---------------|---------------|----------------|
| <input type="checkbox"/> |        | Project 1    | 4901    | Furnitureland  | Approved Grant | 0.00          | 250.00        | 250.00        |                |
| No Grants: 1             |        |              |         |                |                | <b>0.00</b>   | <b>250.00</b> | <b>250.00</b> |                |

9. A pop-up will appear on which the check number can be recorded. Press **Fund Grant**. This will record that the grant has been funded and will reduce the amount of unallocated money in the **Budget Overview** section of the left hand menu:

**Fund Grant** ✕

Fund the Club's Grant request. Enter the Check No, and optionally change the state of the Grant.

Check No:

Amount:

Funding Notes:

10. If a grant has been rejected, click **Reject Grant**. At this time,

**Edit Grant: Project 1 [2018-19]** ID=4901

Grant Status: **Submitted Grant for District Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. This Grant has been submitted for **approval by the District**.

**Details** | Contacts | Application | Budget | Documents | Activity Log | Signatures

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

\* Project Name:

\* Deleted:  Delete flag for Grants (Note: Level-7+ function)

RI Project No:  (By default, this will be set to the Internal Grant No assigned)

Priority:

\* Org Year:  (Level-7+ can change the OrgYear, if necessary)

\* Round:  (e.g., 1 or 2)

\* City:

\* State:

\* Country:

The grant status will be changed to **Project Cancelled** in the listing of District Grants. At this point it appears that no e-mail will be generated automatically, so you will need to contact the club directly to inform them of this status.

summary is shown below of all grants submitted to the District. **Click on the Project Name to view below.**  
 When more than one club is working on together on a Grant, the sponsor club is designated (\*) below.  
 Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

Rejected or Cancelled

| Action       | Project Name | Proj No | Lead Club Name | Status            | Funded Amount | Request |
|--------------|--------------|---------|----------------|-------------------|---------------|---------|
|              | Project 1    | 4923    | Furnitureland  | Project Cancelled | 0.00          |         |
| No Grants: 1 |              |         |                |                   | 0.00          |         |

11. If the District required more information to process the grant, a level 7 or higher may **Change Status** to Needs More Information. Click on **Change Status** in the upper right hand corner and change the Grant Status to *Need More Information* in the resulting pop-up box.

Grant Status: **Submitted Grant for Club Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. **The Grant can now be submitted to the District for approval**

Club: Sign Grant Application Revert To Draft: Submit Grant for District Approval

Lvl-7: Change Status Lvl-7: Save Grant

Details Contacts Application Budget Documents Activity Log Signatures

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

**Change Grant Status**

Interim=N Change the Grant Status.  
 Note: Lvl-7's can move the Grant to any state.

New Grant Status: Need More Information

Cancel Change Status




12. An e-mail will be generated to the club to contact you. After the changes have been received, a level 7 person can make the changes and revert the draft to *Ready for District Approval*. It may be just as easy to contact the club directly, obtain the needed information and have a level 7 person make the changes without going through the extra step of changing the grant status.

## Approving a Final Report




13. Once the club has completed the grant and has prepared and submitted a Final Report the District Signers will receive email indicating that a Final Report is ready for approval  
 (✉ **Subject: Furnitureland Grant Sample Project Final Report has been submitted for district approval**)  
 Status: Submitted Final Report for District Approval.
14. District Signers click on the **Grants** tab and select **District Grants** in the left hand menu. Click on the pencil edit icon to access the grant.

**District Grants [2018-19]**

A summary is shown below of all grants submitted to the District. **Click on the Project Name to view below.**  
 When more than one club is working on together on a Grant, the sponsor club is designated (\*) below.  
 Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

| Completed                |   |              |         |                |                       |               |           |
|--------------------------|---|--------------|---------|----------------|-----------------------|---------------|-----------|
| <input type="checkbox"/> | Action  | Project Name | Proj No | Lead Club Name | Status                | Funded Amount | Requester |
| <input type="checkbox"/> |    | Project 2    | 4906    | Furnitureland  | Final Report Approved | 250.00        |           |
| No Grants: 1             |   |              |         |                |                       | 250.00        |           |

| For District Review      |   |              |         |                |  |               |           |
|--------------------------|---|--------------|---------|----------------|--|---------------|-----------|
| <input type="checkbox"/> | Action  | Project Name | Proj No | Lead Club Name | Status                                       | Funded Amount | Requester |
| <input type="checkbox"/> |    | Project 1    | 4901    | Furnitureland  | Submitted Final Report for District Approval | 250.00        |           |
| No Grants: 1             |   |              |         |                |  | 250.00        |           |

15. When you are ready to approve the final report, the first signer clicks on **District: Sign Final Report**.

**Edit Grant: Project 1 [2018-19]** ID=4901

Grant Status: **Submitted Final Report for District Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. The Final report is **waiting on District signatures**. 0 of 2 District signatures have been received. **Additional signatures are required.**

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

\* Project Name:

The now familiar pop-up menu appears with the list of people who have previously signed the grant. Click on **Sign Grant**.

**Grant Signatures**

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

| Signed By         | Club          | Date                |
|-------------------|---------------|---------------------|
| Morris, R. Philip | Furnitureland | 12/30/2017 04:29 PM |
| Morris, R. Philip | Furnitureland | 12/30/2017 04:35 PM |
| Morris, R. Philip | Furnitureland | 12/30/2017 04:57 PM |
| Morris, Karen     | Furnitureland | 12/30/2017 04:30 PM |
| Morris, Karen     | Furnitureland | 12/30/2017 04:31 PM |
| Morris, Karen     | Furnitureland | 12/30/2017 04:58 PM |

Sign Grant Cancel

16. Notify the second signer, who will repeat the signing process. The second signer will then click on **Approve Final Report**.

**Edit Grant: Project 1 [2018-19]** ID=4901

Grant Status: **Submitted Final Report for District Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. The Final report is **waiting on District signatures**. 2 of 2 District signatures have been received. The District can now approve the report.

Reject FINAL Report District: Sign Final Report Approve Final Report  
LVL-7: Change Status LVL-7: Save Grant Lvl 7: Update FINAL Report

Details Contacts Application Budget Documents Activity Log Signatures Interim Report Final Report

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

17. At this point for our District the grant is basically complete. Some districts fund their grants after the final report has been approved, so the grant is not actually complete until the funding has been sent. In our district we might not consider a grant complete until we have received from the club any unspent money that needs to be returned to the District. When the District determines that the project is indeed complete, press **Close Project**.

**Edit Grant: Project 1 [2018-19]** ID=4901

Grant Status: **Final Report Approved** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. The Final report is **approved**. The District can now close the project. Closing the project will generate the Closing Report, which can be found under the Document Tab. The Closing Report will contain all the signatures.

LVL-7: Save Grant Lvl 7: Update FINAL Report Close Project  
LVL-7: Change Status







Details Contacts Application Budget Documents Activity Log Signatures Interim Report Final Report

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

\* Project Name: Project 1



18. The grant's status will now be **Project Complete** in the listing of District Grants.

| District Grants [2018-19]  |   |              |         |                |                  |               |               |  |
|--|---|--------------|---------|----------------|------------------|---------------|---------------|--|
| <div>A summary is shown below of all grants submitted to the District. <b>Click on the Project Name to view</b> below.<br/>When more than one club is working on together on a Grant, the sponsor club is designated (*) below.<br/>Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.</div> <div><input type="checkbox"/> Show Deleted?</div> |   |              |         |                |                  |               |               |  |
| Completed  |   |              |         |                |                  |               |               |  |
|  | Action  | Project Name | Proj No | Lead Club Name | Status           | Funded Amount | Requested DDF |  |
| <input type="checkbox"/>   |    | Project 1    | 4901    | Furnitureland  | Project Complete | 250.00        | 250.00        |  |
| <input type="checkbox"/>   |    | Project 2    | 4906    | Furnitureland  | Project Complete | 250.00        | 250.00        |  |
| No Grants: 2   |   |              |         |                |                  | 500.00        | 500.00        |  |