

How to get started using the Rotary Youth Exchange Management System.

This guide is based on the experiences made when using the system in Denmark. We have endeavoured to make it as short and precise as possible, and it is intended as inspiration and sharing of our best practice.

If wanted, we may demonstrate the system online by means of the remote control program TeamViewer. We have good experience in helping districts to start in this way.

We recommend you to find a local support person in your district – a person with an interest and basic knowledge of IT. This person should function as local support and possibly also train club counselors and YEOs.

Please note - It is only necessary to create a person once in the system. A user may be connected as contact person to more students. One student family may e.g. be natural parents and host student family to more students. Users may have several rolls in connection with one student – a club counselor may e.g. be both host student family and club counselor.

This is the Danish proposal for how to get started:

1. Create your district and add clubs that have a club counselor or/and have a youth exchange officer. If you work in a multi district, all the districts have to be created with the clubs wanted.
2. Then create club counselors and YEOs in your district. Only write their name and e-mail address, and their district and club. When this is done, click Save. Then click the Account pane, activate the person and click Save. Then send an e-mail to the person and ask him/her to login to the database and fill in the missing personal information. The manual explains how to send an e-mail to all active counselors and YEOs.
3. Create an inbound and an outbound team. Team name should be short and relate to your district or multi district, e.g. 1470-Out09/10.
4. Create relevant search templates in Advanced Search, e.g. a template which may find all students in one team, or a template that may find all active club counselors. These templates allow you to quickly send an e-mail, write letters or create/print lists from the system.
5. Create your inbound and outbound students in the system. You must enter all information on the student, as the students do not have access to correct own information. Once you have created a student, you must add all relevant Contacts in the Contact pane.

Please note that as of August 2009, at the latest, both inbound and outbound students will be able to enter/fill in information on themselves and also on parents and Emergency Contact person. This feature will save us all for a lot of work and will no doubt reduce incorrect information in the system.

6. Then create relevant e-mail/letter templates in the Letter/E-mail module. This will enable you to individualize your e-mails and letters by using Merge Fields. Furthermore, these templates may be reused for new teams.
7. Then create relevant print lists in the Print List module.

The system contains two more modules, the Quarterly Report and the Event module. It may be a good idea to wait a little to start using these two modules. Experience shows that focus should be on the previous items in the beginning.

8. When you feel well accustomed to the first items, then start using Quarterly Reports. The module makes it easy and clear to have your students send in Quarterly Reports.
9. The last module is Event, which is used for handling arrangements for students, counselors or YEOs.

Future modules and guides

1. August 2009 - Online Web registration, which is used by the students to update relevant information in the system.
2. 2010 – Guide to be used by students or club counselors in order to create host families.
3. 2010 – System to be used to register number of exchanges that you have in foreign districts for your outbound students and to register contact persons in these districts.

For help and support on how to get started, please do not hesitate to contact me.

Niels Oehlenschläger
District Chair – District 1470
Multi District Denmark

E-mail noe@rotary-yep.dk