

- Project One is a development from the 'ERP' (**E**nterprise **R**esource Planning) system built for ROZops to enable mass marketing across the Zone
- This report is a living document, first presented in 2021 and this version is focussed on the project strategy for 2023 through to end 2025
- The presentation provides the background, the achievements and the key objectives over the next 2 years.

- This report has been updated and presented to Zoom meetings to the DG train and others (the invitations have been open) as follows:

First presentations were by Richard Stephen starting in October 2018

This presentation was first presented in 1 September 2020. Updates and re-presentations have occurred on

#2 February 2021

#3 9 May 2022

#4 12 May 2022

#5 17 June 2022

#6 9 August 2022

#7 20 November 2022

#8 20 January 2023

#9 10 March 2023

#10 1 September 2023

REMINDER

Why ROZOPS ? – Specific Drivers



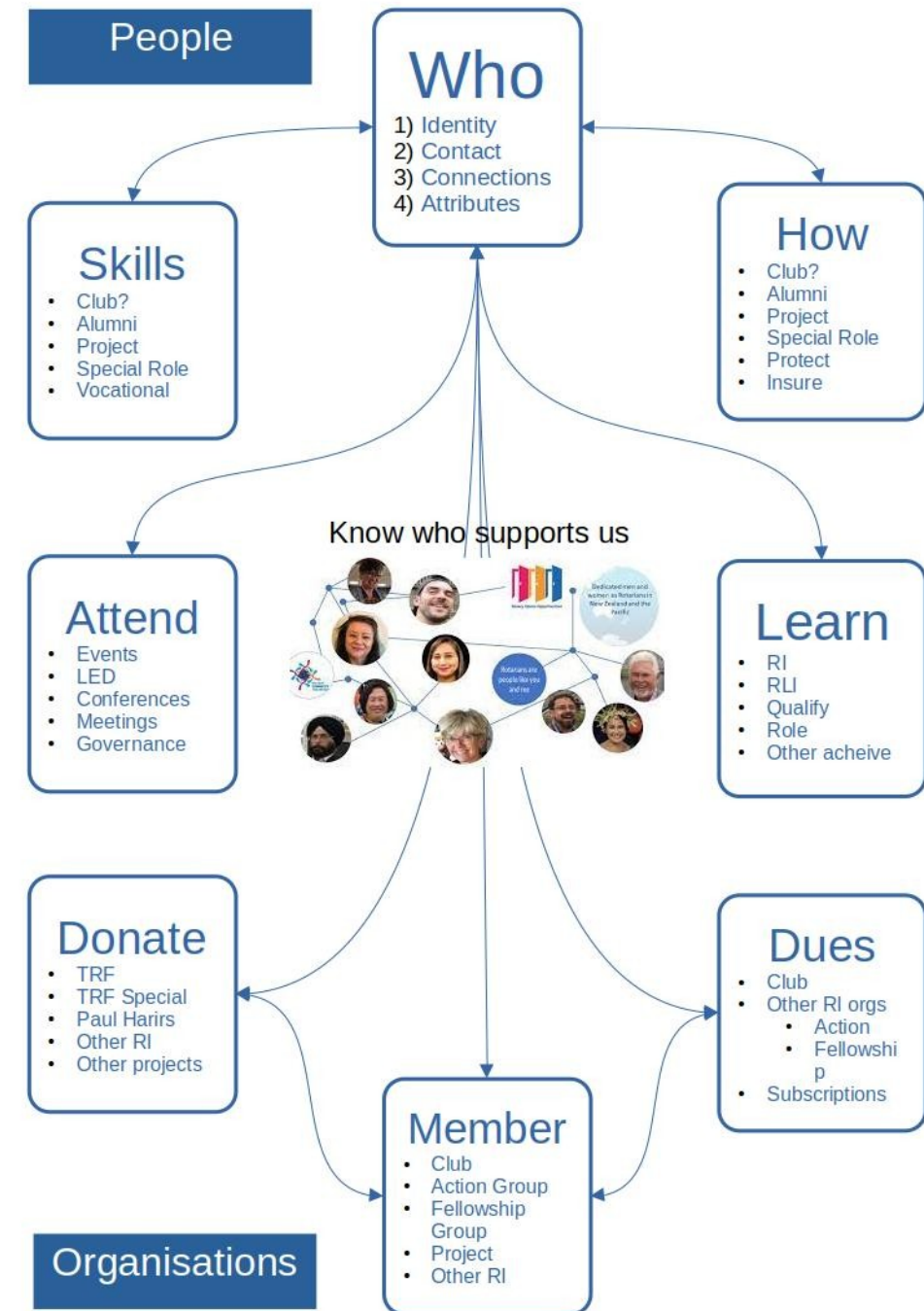
Project ONE
Being One:Based on One
A project operated by ROZops Limited

1. Cyber risks and insurability

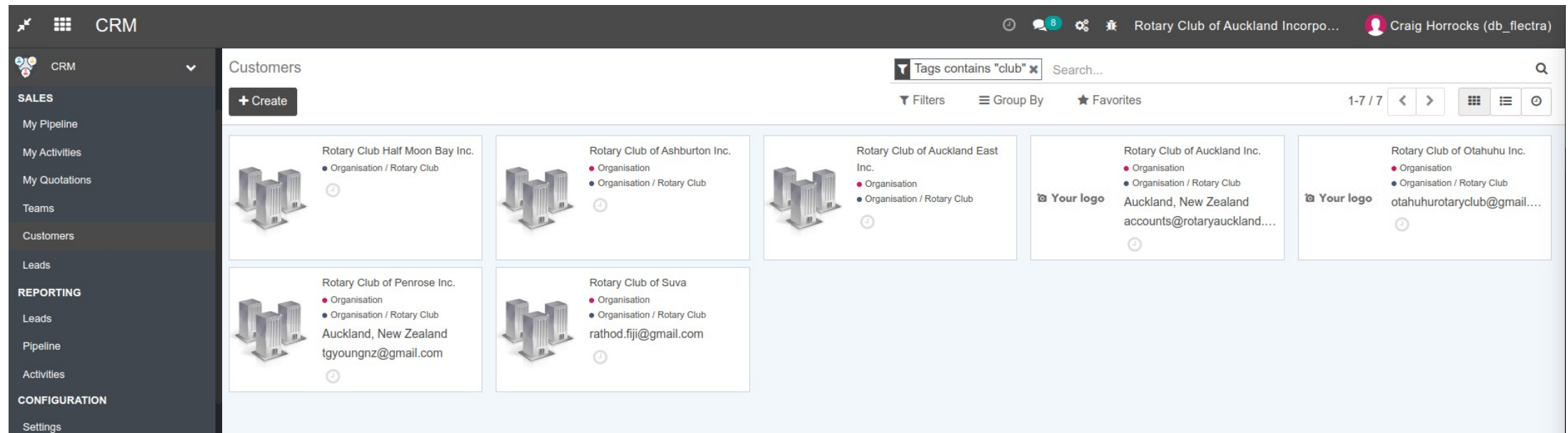
2. RI RYE 2023 re-certification and new MoE 2021 requirements
3. The 2020 Privacy Act and the HIPC (Health Info Privacy Code)
4. Public Image consistency
5. Membership programmes - Rotary, Rotaract, Interact, Rota-Kids,
6. Alumni programmes – RYE, RYLA, RYEN
7. Volunteers and Projects
8. Donors – funds (TRF etc) programmes and projects
9. Local chapters – Action Groups and Fellowship Groups
10. Rotary at the Corporate level – support (Helpdesk) development (Rotary)
11. National Communication – email and txt msgs
12. Regionalisation
13. Central management of other web services through single sign-on
14. Managing permissions and access logging to sensitive data – children
15. Member dashboard

Benefits

- ONE place – single view
- Making it easier for District Leaders and Clubs
- Websites, marketing, accounting – all in one
- Our solution but open source community support
- Scaling national projects
- True MRM – Membership Relationship Management
- True LMS – Learning System Management – especially
- True Identity – one login for all
- True ERP – Multi organisation Enterprise Resourcing
- OUR SERVER with no subscriptions or seat licensing



Clubs continue being 'onboarded' Being setup with Zoom meetings



The screenshot displays a CRM interface with a dark sidebar on the left and a main content area. The sidebar contains the following sections:

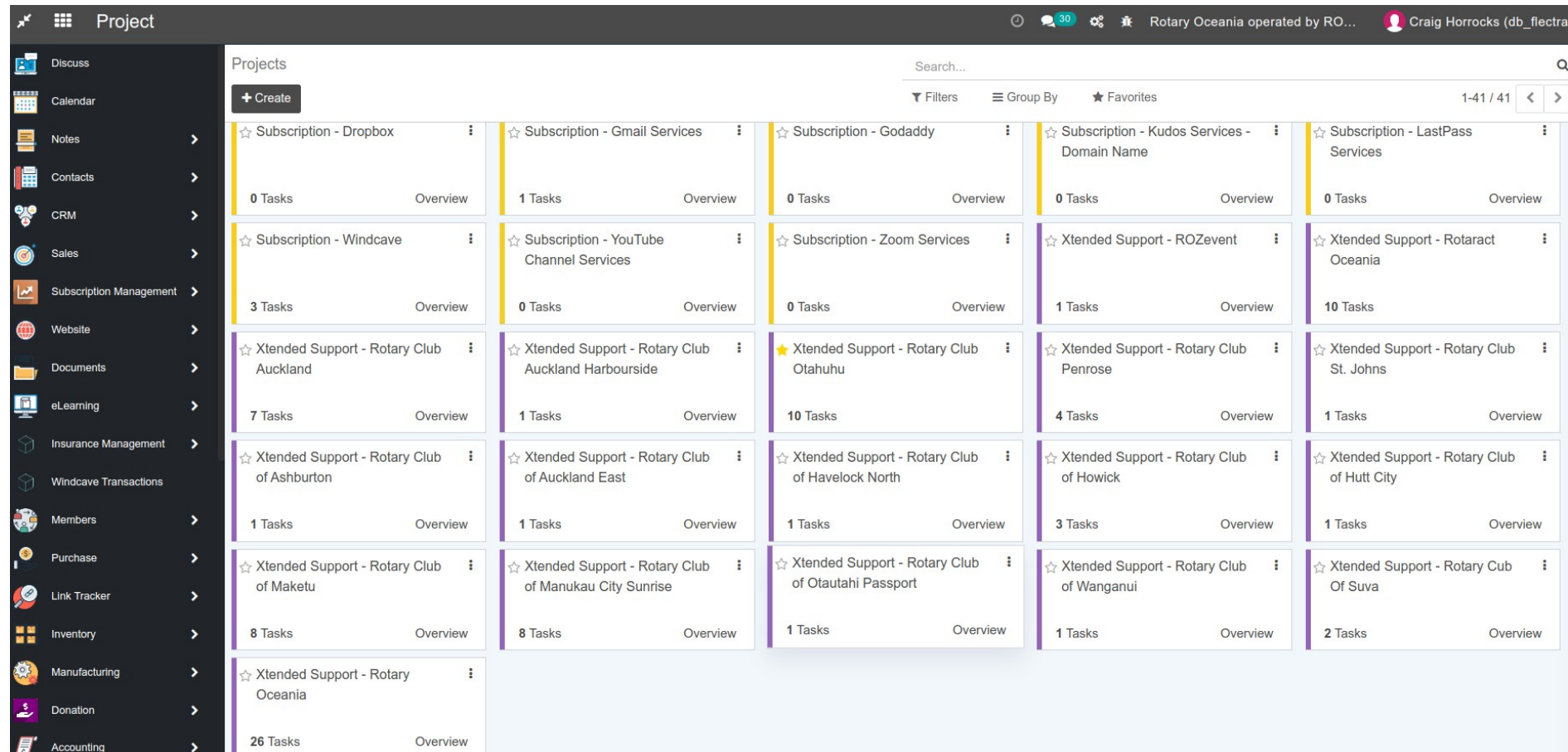
- CRM** (with a dropdown arrow)
- SALES**
 - My Pipeline
 - My Activities
 - My Quotations
 - Teams
 - Customers** (highlighted)
 - Leads
- REPORTING**
 - Leads
 - Pipeline
 - Activities
- CONFIGURATION**
 - Settings

The main content area is titled "Customers" and includes a "+ Create" button. At the top right of the main area, there is a search bar with the text "Tags contains 'club'" and a "Search..." input field. Below the search bar are filters and group-by options: "Filters", "Group By", and "Favorites". A pagination indicator shows "1-7 / 7".

The main area displays a grid of seven customer cards, each representing a Rotary Club. Each card includes a building icon, the club name, a list of tags (Organisation, Organisation / Rotary Club), and a "Your logo" placeholder. The clubs listed are:

- Rotary Club Half Moon Bay Inc.
- Rotary Club of Ashburton Inc.
- Rotary Club of Auckland East Inc.
- Rotary Club of Auckland Inc.
- Rotary Club of Otago Inc.
- Rotary Club of Penrose Inc.
- Rotary Club of Suva

The inbuilt project management is continuing to be used to task each on-boarding project to specific people but keep everyone informed through the Follower utility.



The screenshot displays a web-based project management interface. On the left is a dark sidebar with a list of application modules: Discuss, Calendar, Notes, Contacts, CRM, Sales, Subscription Management, Website, Documents, eLearning, Insurance Management, Windcave Transactions, Members, Purchase, Link Tracker, Inventory, Manufacturing, Donation, and Accounting. The main area is titled 'Project' and contains a 'Projects' section with a '+ Create' button. Below this is a grid of project cards, each representing a different subscription or support project. Each card shows the project name, a star icon, the number of tasks, and an 'Overview' link. The projects are organized into five columns. The top of the main area includes a search bar, filters, group by options, favorites, and pagination (1-41 / 41).

Project Name	Tasks	Overview
Subscription - Dropbox	0 Tasks	Overview
Subscription - Gmail Services	1 Tasks	Overview
Subscription - Godaddy	0 Tasks	Overview
Subscription - Kudos Services - Domain Name	0 Tasks	Overview
Subscription - LastPass Services	0 Tasks	Overview
Subscription - Windcave	3 Tasks	Overview
Subscription - YouTube Channel Services	0 Tasks	Overview
Subscription - Zoom Services	0 Tasks	Overview
Xtended Support - ROZevent	1 Tasks	Overview
Xtended Support - Rotaract Oceania	10 Tasks	Overview
Xtended Support - Rotary Club Auckland	7 Tasks	Overview
Xtended Support - Rotary Club Auckland Harbourside	1 Tasks	Overview
Xtended Support - Rotary Club Otahuhu	10 Tasks	Overview
Xtended Support - Rotary Club Penrose	4 Tasks	Overview
Xtended Support - Rotary Club St. Johns	1 Tasks	Overview
Xtended Support - Rotary Club of Ashburton	1 Tasks	Overview
Xtended Support - Rotary Club of Auckland East	1 Tasks	Overview
Xtended Support - Rotary Club of Havelock North	1 Tasks	Overview
Xtended Support - Rotary Club of Howick	3 Tasks	Overview
Xtended Support - Rotary Club of Hutt City	1 Tasks	Overview
Xtended Support - Rotary Club of Maketu	8 Tasks	Overview
Xtended Support - Rotary Club of Manukau City Sunrise	8 Tasks	Overview
Xtended Support - Rotary Club of Otautahi Passport	1 Tasks	Overview
Xtended Support - Rotary Club of Wanganui	1 Tasks	Overview
Xtended Support - Rotary Club Of Suva	2 Tasks	Overview
Xtended Support - Rotary Oceania	26 Tasks	Overview

And Products continue to be established and sales
invoicing happening

Products		Can be Sold x		Search...	
+ Create		Filters		Group By	
		★ Favorites		1-39 / 39	
Accrual for Excess Contingency Price: \$ 1.00		Additional email addresses - Monthly Fee Price: \$ 2.50		Admin Charge - Event Insurance Price: \$ 80.00	
Admin Charge - Travel Insurance Price: \$ 8.25		Amazon Web Services Fee Price: \$ 1.00		Club Trust (assets over \$100,000) Monthly Base Fee Price: \$ 45.00	
Club Trust (assets under \$100,000) Monthly Base Fee Price: \$ 0.00		Aon Fee - Chubb MN Public Liability Price: \$ 1.00		Chubb Associations Forefront ML Price: \$ 1.00	
Chubb Multi National Public Liability Price: \$ 1.00		Cruisin' to End Polio Price: \$ 1.00		D9920 2023 District Conference Event Registration Price: \$ 10.00	
Entity (to over \$100,000) Monthly Base Fee Price: \$ 75.00		Entity (to under \$100,000) Monthly Base Fee Price: \$ 45.00		Event Insurance - Event Rate up to 5 days Price: \$ 600.00	
Event Registration Price: \$ 10.00		Expenses Price: \$ 0.00		Flectra Set up Fee Price: \$ 250.00	
GECAF Donation [GECAF] Price: \$ 1.00		Go Daddy Domain name Price: \$ 31.00		Independent Trusts (Assets under \$200K) Monthly Base Fee Price: \$ 40.00	
Independent Trusts - Non Trading (Assets over \$200K) Monthly Base Fee Price: \$ 75.00		Polio All Transit Price: \$ 5.00		QBE Public Liability Price: \$ 1.00	
RCT - Rotary Membership Dues - 6 Monthly Price: \$ 239.13		ROMAC Donation Price: \$ 1.00		Rotary Companies (Investment income under \$200K) Monthly Base Fee Price: \$ 250.00	
Rotary Oceania Districts Excess Contingency Fund Price: \$ 1.00		RCT - Rotary Membership Dues - Annual Price: \$ 478.26		Rotary Oceania Districts Management & Public Liability Insurance to 30 Jun 2023 Price: \$ 1.00	
Rotary Oceania Management & Public Liability Insurance to 30 Jun 2023 Price: \$ 1.00		Service on Timesheet Price: \$ 40.00		TRF APF Donation Price: \$ 10.00	
TRF Disaster Relief Donation Price: \$ 10.00		TRF POLIO Donation Price: \$ 10.00		Test Price: \$ 1.00	
Test (copy) Price: \$ 1.00		Travel Insurance Daily Rate Price: \$ 20.31			

And automated billing has been established for entity accounting – functions requires tech input to fully activate

Subscription / Rotary Club of Auckland - Monthly Flectra Subscription

[Edit](#) [+ Create](#) [Action](#) 1 / 2 [<](#) [>](#)

[Process](#) [Draft](#) [Running](#)

Rotary Club of Auckland - Monthly Flectra Subscription

Partner [Rotary Club of Auckland Inc.](#) **User** [Kirsten Hawke](#)

SUBSCRIPTION DATA	DOCUMENTS CREATED	NOTES
Interval Qty	1	Interval Unit
Number of Calls	0	First Date
Source	INV/2022/11/0001	12/01/2022 10:59:46
Document		

And the Donations sub-system
Is also being established and used with the nzfloods
appeal being a demonstration of the new capabilities



Donation

DONATIONS

Donations

Recurring Donations

Generate Recurring Donations

Donors

TAX RECEIPTS

Donation Tax Receipts

Print Receipts

Create Annual Receipts

REPORTING

Donations Analysis

Products

+ Create

GECAF Donation [GECAF]
Price: \$ 1.00

Polio All Transit
Price: \$ 5.00

ROMAC Donation
Price: \$ 1.00

TRF APF Donation
Price: \$ 10.00

TRF Disaster Relief Donation
Price: \$ 10.00

TRF POLIO Donation
Price: \$ 10.00

WEBSITE

Pages

Customize

Promote

Published

Rotary

Home

About Rotary

Forum

Projects

Stories

Shop

Events

Blog

Contact us

Helpdesk

Craig Horrocks

Products / Flood Relief Appeal

Search...

DONATE \$10 TODAY

nzfloods.org

A ROTARY COMMUNITY INITIATIVE.
The funds will be distributed to affected communities through our network of local Rotary Clubs.

Rotary
Trusted in Serving NZ communities for over 100 years

\$ 10.00

1

Add to Cart

Donations are in multiples amounts of \$10. The funds will be distributed to affected communities through our network of local Rotary Clubs. Tax receipts will be issued for all donations made.

Connect with us

Contact us

0800 476 8279

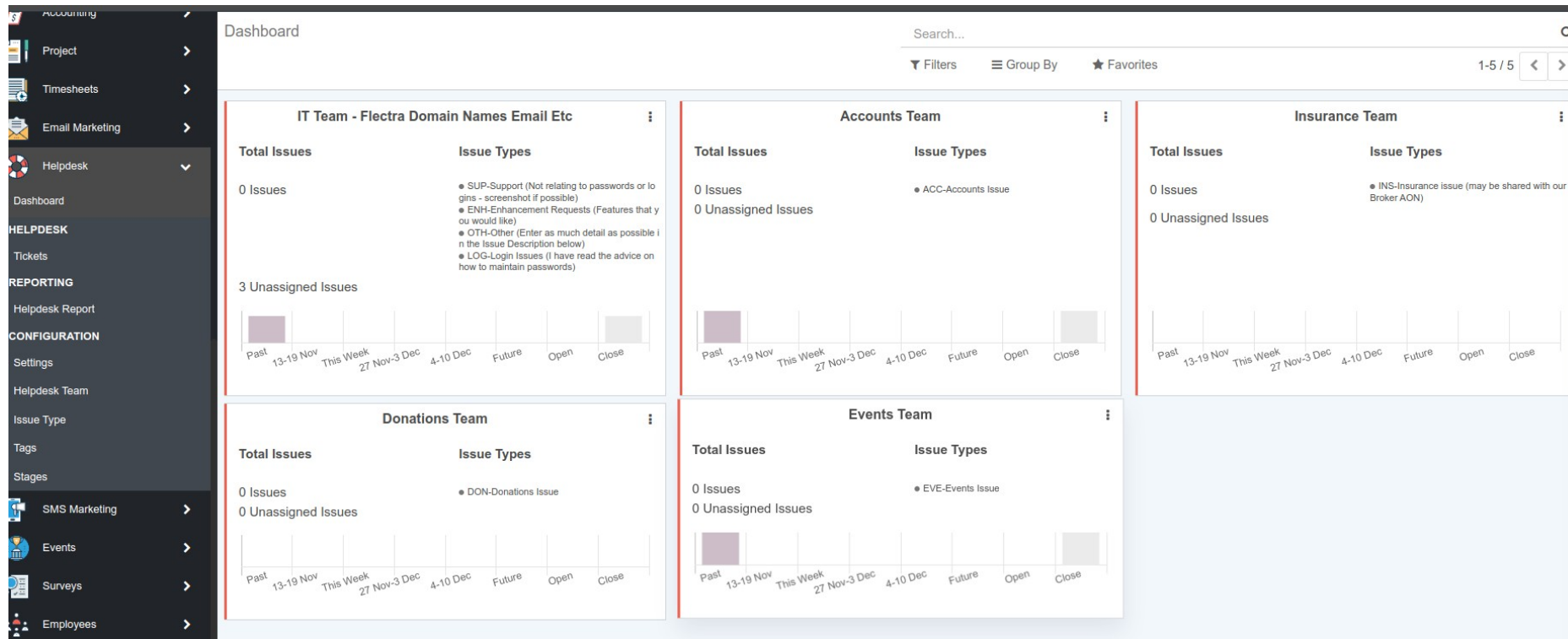
Rotary Oceania operated by RozOps Ltd.

Rotary is a global network of 1.2 million neighbours, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.

Copyright © ROZops Limited

English (AU)

The inbuilt Helpdesk functions is being used to address specific requests



The inbuilt event management is being used to set up
And market events

Events

[+ Create](#)

Search...

▼ Filters ≡ Group By ★ Favorites

New	+	Booked	+	Announced	+	Ended (1)	Cancelled (0)	+	A
				<div><div>24 Feb 2023 6:00 PM</div><div>Cruisin' to End Polio 📍 Berth 8 10 Expected attendees</div></div>					
				<div><div>31 Mar 2023 6:00 PM → 1 Apr</div><div>Rotary Club of St Johns invites... 📍 Karaka Bloodstock Pavillion 19 Expected attendees</div></div>					

Strategy - 2023-2024

1. Orderly roll-out and expectations especially those Clubs that have cancelled ClubRunner - **CONTINUING**
2. The ongoing work with the connections to RDU and RI have been paused by the Regional team **PAUSED**
3. The insurance and donations subsystems are part of the ZIPC and NZRCCT work - **NOW ACTIVE**
4. The limited pool of skills and talent to call on to assist with:
 - (a) Accounting configurations – mainly CoA (charts of accounts) and PRODUCTS - **Resourcing - need more accounting assistance**
 - (b) Artwork for templates such the donations receipts - **Resourcing - added capacity with Alex Garden Resourcing STILL ISSUE**
 - (c) Confirmation on the key project – all members IN ALL PROGRAMMES to be in system and checked by December 2023 requires User Permissions and Documents Officer(s) - **Resourcing**
 - (d) Learning and development - **REQUIRED FOR RYE - FUNDING?**
 - (e) **NEW - Funding GAP - DASHBOARD (especially needed for search members) and RYE (document control under Privacy Act HIPC) FUNDING?**
 - (f) **NEW - major system upgrade plan for features and security - plan is to move hosting to Akamai and upgrade to Odoo 17 (release due in Oct 2023) and implement WSO2 Data Services Server - FUNDING?**