

- 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

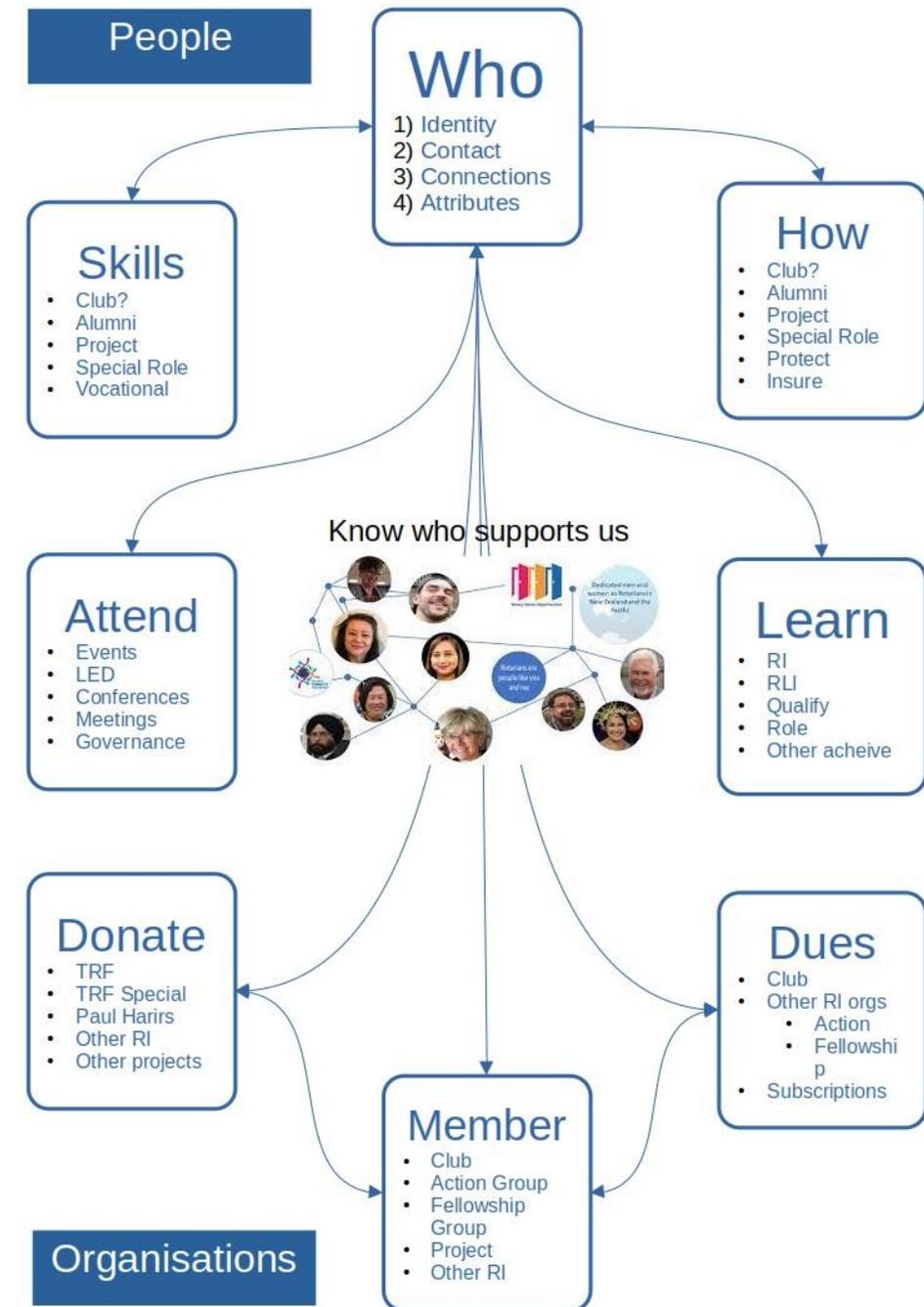
REMINDER Why ROZOPS ? – Specific Drivers

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 shows a CRM interface with a dark sidebar on the left and a main content area. The sidebar has sections for SALES, REPORTING, and CONFIGURATION. The main content area is titled 'Customers' and displays a list of seven Rotary Clubs. Each club entry includes a 3D building icon, the club name, and a list of tags. 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 Otahuhu Inc., Rotary Club of Penrose Inc., and Rotary Club of Suva. The interface also features a search bar, filters, and navigation controls.

CRM

Customers

Tags contains "club" x Search...

Filters Group By Favorites 1-7 / 7

Club Name	Tags
Rotary Club Half Moon Bay Inc.	Organisation / Rotary Club
Rotary Club of Ashburton Inc.	Organisation Organisation / Rotary Club
Rotary Club of Auckland East Inc.	Organisation Organisation / Rotary Club
Rotary Club of Auckland Inc.	Organisation Organisation / Rotary Club Auckland, New Zealand accounts@rotaryauckland....
Rotary Club of Otahuhu Inc.	Organisation Organisation / Rotary Club otahuhurotaryclub@gmail....
Rotary Club of Penrose Inc.	Organisation Organisation / Rotary Club Auckland, New Zealand tyoungnz@gmail.com
Rotary Club of Suva	Organisation Organisation / Rotary Club rathod.fiji@gmail.com



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 shows a project management interface with a sidebar on the left and a main grid of project cards. The sidebar includes various tools like 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 grid displays 25 project cards, each with a title, a task count, and an 'Overview' link. The projects are organized into a grid with 5 columns and 5 rows, with the last cell in the bottom row being empty.

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



And Products continue to be established and sales invoicing happening

The screenshot displays a software interface for managing products. On the left is a dark sidebar with navigation options: Sales, ORDERS, TO INVOICE, PRODUCTS, REPORTING, and CONFIGURATION. The main area is titled 'Products' and shows a grid of 25 product cards. Each card includes a plus icon, a product name, and a price. The products listed are:

Product Name	Price
Accrual for Excess Contingency	\$ 1.00
Additional email addresses - Monthly Fee	\$ 2.50
Admin Charge - Event Insurance	\$ 80.00
Admin Charge - Travel Insurance	\$ 8.25
Amazon Web Services Fee	\$ 1.00
Aon Fee - Chubb MN Public Liability	\$ 1.00
Chubb Associations Forefront ML	\$ 1.00
Chubb Multi National Public Liability	\$ 1.00
Club Trust (assets over \$100,000) Monthly Base Fee	\$ 45.00
Club Trust (assets under \$100,000) Monthly Base Fee	\$ 0.00
Cruisin' to End Polio	\$ 1.00
D9920 2023 District Conference Event Registration	\$ 10.00
Entity (to over \$100,000) Monthly Base Fee	\$ 75.00
Entity (to under \$100,000) Monthly Base Fee	\$ 45.00
Event Insurance - Event Rate up to 5 days	\$ 600.00
Event Registration	\$ 10.00
Expenses	\$ 0.00
Flectra Set up Fee	\$ 250.00
GECAF Donation [GECAF]	\$ 1.00
Go Daddy Domain name	\$ 31.00
Independent Trusts (Assets under \$200K) Monthly Base Fee	\$ 40.00
Independent Trusts - Non Trading (Assets over \$200K) Monthly Base Fee	\$ 75.00
Polio All Transit	\$ 5.00
QBE Public Liability	\$ 1.00
RCT - Rotary Membership Dues - 6 Monthly	\$ 239.13
RCT - Rotary Membership Dues - Annual	\$ 478.26
RCT - Rotary Membership Dues - Monthly	\$ 39.86
ROMAC Donation	\$ 1.00
Rotary Companies (Investment income under \$200K) Monthly Base Fee	\$ 250.00
Rotary Oceania Districts Excess Contingency Fund	\$ 1.00
Rotary Oceania Districts Management & Public Liability Insurance to 30 Jun 2023	\$ 1.00
Rotary Oceania Management & Public Liability Insurance to 30 Jun 2023	\$ 1.00
Service on Timesheet	\$ 40.00
TRF APF Donation	\$ 10.00
TRF Disaster Relief Donation	\$ 10.00
TRF POLIO Donation	\$ 10.00
Test	\$ 1.00
Test (copy)	\$ 1.00
Travel Insurance Daily Rate	\$ 20.31



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

The screenshot shows a software interface with a dark sidebar on the left containing navigation items: Notes, Contacts, CRM, Sales, Subscription Management (expanded), SUBSCRIPTION MANAGEMENT, Subscription, Recurring Types, Website, Documents, eLearning, Insurance Management, Windcave Transactions, and Members. The main content area is titled 'Subscription / Rotary Club of Auckland - Monthly Flectra Subscription'. It includes an 'Edit' button, a '+ Create' button, and an 'Action' icon. Below this is a 'Process' button and a status indicator showing 'Draft' and 'Running'. The main content area displays the following details:

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	Months
Number of Calls	0	First Date	12/01/2022 10:59:46
Source	INV/2022/11/0001		
Document			

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



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

Donation

DONATIONS

- Donations
- Recurring Donations
- Generate Recurring Donations
- Donors

TAX RECEIPTS

- Donation Tax Receipts
- Print Receipts
- Create Annual Receipts

REPORTING

- Donations Analysis

Products

[+ Create](#)

Donation x

Filters Group By Favorites

1-6 / 6 < > Grid List

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.

Trusted in Serving NZ communities for over 100 years

Flood Relief Appeal

\$ 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.

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The inbuilt Helpdesk functions is being used to address specific requests

The dashboard displays the following data for each team:

Team	Total Issues	Unassigned Issues	Issue Types
IT Team - Electra Domain Names Email Etc	0 Issues	3 Unassigned Issues	<ul style="list-style-type: none">SUP-Support (Not relating to passwords or logins - screenshot if possible)ENH-Enhancement Requests (Features that you would like)OTH-Other (Enter as much detail as possible in the Issue Description below)LOG-Login Issues (I have read the advice on how to maintain passwords)
Accounts Team	0 Issues	0 Unassigned Issues	<ul style="list-style-type: none">ACC-Accounts Issue
Insurance Team	0 Issues	0 Unassigned Issues	<ul style="list-style-type: none">INS-Insurance issue (may be shared with our Broker AON)
Donations Team	0 Issues	0 Unassigned Issues	<ul style="list-style-type: none">DON-Donations Issue
Events Team	0 Issues	0 Unassigned Issues	<ul style="list-style-type: none">EVE-Events Issue



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

Events

Search...

+ Create

Filters Group By Favorites

New + Booked + Announced +

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

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?**