
District and Club database



Membership Directories

User Documentation

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Table of Contents

1. Introduction	1
1.1 Overview.....	1
1.2 Best Practice.....	1
2. Output Formats	2
2.1 HTML View	2
2.2 Microsoft Word.....	2
2.3 Adobe PDF	2
2.4 Microsoft Excel.....	2
2.5 XML.....	3
3. Generation Issues	3
3.1 Variable Picture Size.....	3
3.2 Variable Member Data	4
3.2.1 Member Name	4
3.2.2 Spouse Name	4
3.2.3 Business Name	4
3.2.4 Phone Fields	5
4. Custom Template	5
Custom Template Requirements.....	1

1. Introduction

This document was written to discuss printing Membership directories from the DaCdb database.

1.1 Overview

All membership directory templates are designed to be printed from Word or printed from a PDF that is created. The VIEW screen option is there for users to preview the data and formats -- but NOT for printing. Printing from the VIEW screen may work, but there are no guarantees -- so please do not call support for issues when printing from VIEW. All bets are off the table on this point

If you are having issues successfully generating a report, please read on -- especially section 3.0 below.

Image Sizes. DaCdb standardizes on a Member Picture width of 150px wide. The height of the Member image is proportional to the width. When a member picture is uploaded, the upload utility will resize the member image to 150 wide by some amount high. So the millions of bits uploaded with your 3,000 x 3,000 pixel \$2,000 SLR camera are thrown away when the image is resized. The point here is -- the width is controlled -- the height will vary. The varying height on your images will have a significant impact on maintaining the desired template format.

Image Quality. As mentioned, DaCdb will standardizes on the 150px X ? image. Two points here:

- 1) Resizing your member's 3,000 x 3,000 bit image will not always generate the "best" possible image. It is often better to do your own resizing and cropping prior to uploading an image.
- 2) There is an option to upload a higher-resolution image. However, when most of the membership directory images are 150px or less -- having a higher resolution image uploaded will have little effect on the quality of the image. This option should only be considered for special templates with larger images -- typically used for printing the leadership bio pages.

1.2 Best Practice

To maximize the success of generating a membership template consider these best practices:

- 1) Image size. Review all member images. Crop all images with a disproportional height. The template generation will work best when all pictures are approximately the same height.
- 2) Variable data. Depending on the template selected, including variable data will play havoc on keeping the data constrained within the allotted template window (height and width). For example, if an 8-up template (8-members vertical on the page) is selected and the data for one or more members blows the space - you may end up with a page with 7 or maybe 6 members per page. This may be acceptable -- and it may not.
- 3) Plan for worst case. A number of templates will suppress displaying lines without data. For example, a template may include the display of all five fields -- home, office, cell, fax and toll free. But if only the home and office fields are populated with data -- only those two fields will be output. So when considering your template -- plan that all 5 phone fields (if used) may have data and will be displayed.

2. Output Formats

The DaCdb system can generate the **membership directory** in a variety of output format. Each format is discussed below. As one might suspect, there are pros and cons with using each. Each format is extremely sensitive to the template used, the variable nature of your data and the image size being generated. We will attempt to discuss these issues below, so that you can make the optimum decisions necessary for generating a quality membership directory.

2.1 HTML View

The VIEW is primary just for that -- quickly viewing the data. The data is rendered using the selected template so you can see how it will look when sent to Word or PDF. VIEW is not designed to print the data. It may work -- it probably will not.

2.2 Microsoft Word

Microsoft Word is the primary vehicle used for printing the Membership Directories. The resulting data is sent to Word, where Word will format the data into pages for printing. The primary advantage of generating your Membership Directory into Word is you can change and make final edits on the document prior to printing it.

Word has a nice feature not to break tables across pages. Some of the Membership Directory templates will use this technique to properly page break data. This is mostly the case with templates that allow for variable data to be included.

Word is also used because Microsoft knows how to deal with all the various printers. Documents generated in Word can also be tweaked and massaged as needed to get the best possible output format. Margins can be changed, gutters can be added, headers/footers can be included. Word 2007 (and later) has a built in PDF writer, so an option here is to create your final PDF's using Word after making the final corrections to the generated document.

Issues (of course):

- Word 2003, Word 2007 and Mac Word all generate the documents slightly different. Don't ask -- send your questions, issues and complaints to Microsoft. We are as frustrated about this as you are. Thus, documents rendered in Word 2003 may not render the same in Word 2007.

- We have found when generating a large number of members -- a number in the order of 300+ members, Word will not correctly image all the member pictures. Basically it seems to choke and show the missing images with a message that it cannot display the data. We don't completely know why, nor exactly where the breaking point is. It also does not seem to be tied to the amount of memory or speed of the system generating the membership directory. Consider this a Microsoft feature and send your comments to them (not us).

2.3 Adobe PDF

DaCdb can directly generate a PDF. The advantage of the PDF is it is rendered at the server, and will include all the images (assuming there is one there for the member). The downside of generating a PDF is we cannot correctly control the pagination. Thus, templates that include variable data (description, hobbies, several phone number fields), are not good candidates for PDF. Club directories where the image heights are all over the map are not a good candidate for PDFs either.

An alternate option to generate a PDF is to first generate the Membership Directory in Word. Then use Word to create the PDF.

2.4 Microsoft Excel

We offer the option to generate the formatted data into Excel. It works -- that is about the best we can say. Why exactly one would do this is something we have not figured out yet. Good luck here.

2.5 XML

An alternative to formatted data is to get the data in an XML data stream. Some printers would prefer to do their own formatting of the data, so this is an option to get them what they need. This option can also be used to create a mail-merge list in Excel.

Excel has some built in limitation with cell sizes. So, depending on the data selected and output, some data may be truncated (e.g., long **description** or **hobby** fields).

If you do not know what XML is, then this option is probably not for you - read on.

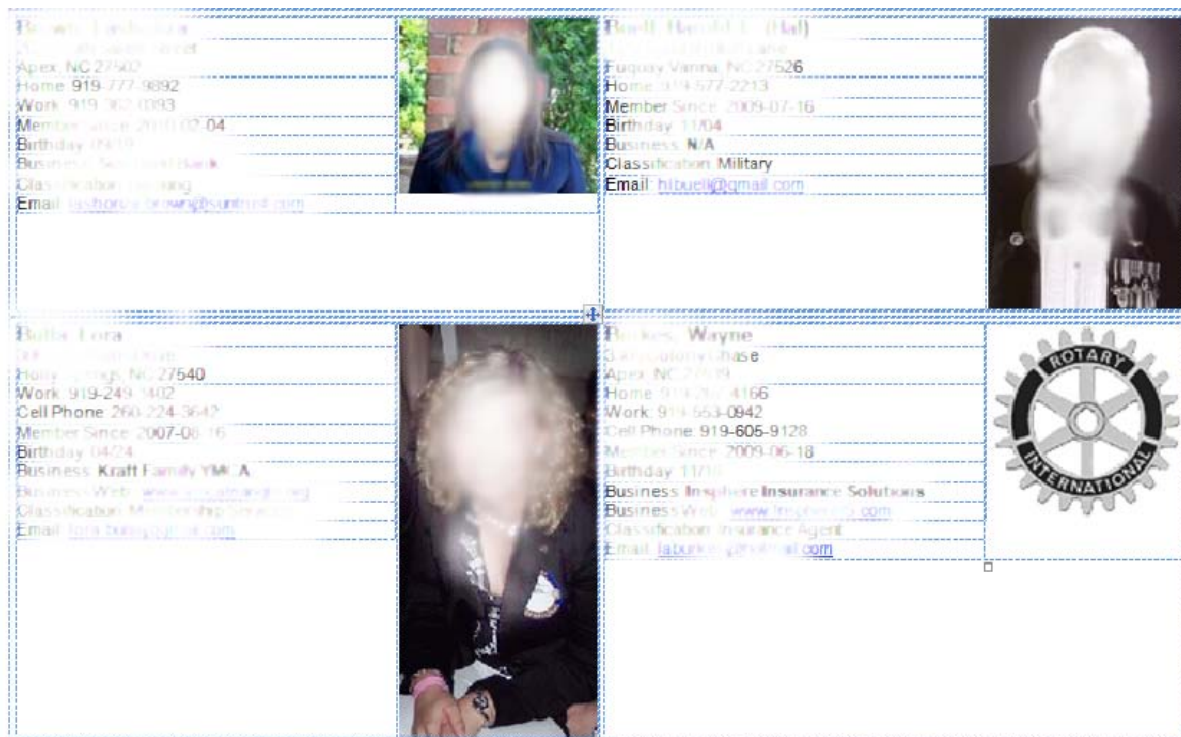
3. Generation Issues

The success of generating a membership directory using the DaCdb system is directly proportional to the quality of your data, the output data format and the template you select. This section covers some of the major issues we have experienced so far.

3.1 Variable Picture Size

Since the height of a member picture can vary (in some cases greatly), your ability to consistently put a fixed number of members on a given page is at risk. It is best if all member pictures are cropped to approximately the same size.

For example, when the picture at the top left is the standard, and two members have pictures similar to the top right and bottom left, the format and number of members per page will be blown



3.2 Variable Member Data

A fixed format template (e.g., 8-up per page) and variable data is a recipe of disaster. Most templates are designed to suppress blank rows. For example, a template that includes Home, Office, Cell, Fax and Toll Free phone numbers works consistently when all members have data in all five fields. However, when a member only has a home phone, the other four fields are typically not included on the output.

Thus, a member's display may look like the following image. In these cases it is nearly impossible to get N-up templates to work correctly.



3.2.1 Member Name

The member's name is typically found at the top of the member information. Depending on the template style, the member name is often rendered with a larger bold font. This is usually not a big problem. However, the following should be considered

- Extremely long names (50 character last name, 30 character mid-name, 30-character last names)
- Names with suffixes (suffixes can be up to 12 characters)
- Templates that include the Member's nickname. Many templates print out the Member Name (Nickname) in parenthesis

For example, some typical name templates might look like

Thacker, Michael W CDP (Mike)

Thacker, Michael W CDP (Mike and Connie)

Name: Thacker, Michael W CDP (Mike and Connie)

3.2.2 Spouse Name

A similar situation exists with the spouse name. In most cases the spouse/partner name is included if the nickname is different than the first name. Space must be allocated for reasonably long names, otherwise the name will wrap and possibly blow out the template format.

3.2.3 Business Name

The typical issue with business names is long business names. There is not much that can be done about these -- they will wrap and possibly blow out the template.

3.2.4 Phone Fields

We have discussed before the issue with phone fields. Sometimes phone fields are listed on separate lines:

Home: xxx-xxx-xxx
Office: xxx-xxx-xxx
Cell: xxx-xxx-xxx
Fax: xxx-xxx-xxx

Usually, in these situations the number of rows generated or not will affect the template format.

In other cases, the phone fields are listed on one line. In some cases, the numbers will not fit on one line, thus a 2nd line is created -- possibly blowing out the template format

H: xxx-xxx-xxx O: xxx-xxx-xxx C: xxx-xxx-xxx F: xxx-xxx-xxx

Issues:

- Numbers with extensions. Phone numbers can be up to 20-characters each

4. Custom Template

Custom templates can be created and supported for each District or Club. The report module is designed so that a custom template can be limited to a certain *District* -- so literally hundreds of unique templates can be supported on the system.

We can create customized templates for Districts and Clubs. Customized Club templates will be displayed to all Clubs within their District once they are on DaCdb.

DaCdb provides a variety of different default templates that all Districts and Clubs can use. However, some Districts and Clubs are very specific about their needs and requirements. A number of custom templates have already been written to generate Membership directories exactly how a District or Club wants them.

If you are interested in this option, please complete the requirement form below and contact support. Custom templates can be generated -- typically within a week (normally a couple of days) and **will cost** \$100.00 per template. As part of the process, we will typically generate one or two other variations for discussion and review before a final one is chosen.

Custom Template Requirements

If you want your own District or Club template, please complete the checklist below.

Member's Name:

Always included - Select format:

LastName, FirstName, MidName, Suffix

FirstName MidName LastName Suffix

Other: _____

Partner Name:

Include? Select one: NickName FirstName / Always Include Include if != FirstName

Member Picture:

Include? Select one: Left Center Right Image Size: _____

Addressing Model (address optional):

Preferred Address, Home Address, Office Address None

Preferred Email Label: _____ Include label if number missing: Yes / No

IM Label: _____ Include label if number missing: Yes / No

Phone Numbers (each optional):

Home Phone: Label: _____ Include label if number missing: Yes / No

Office Phone: Label: _____ Include label if number missing: Yes / No

Cell Phone: Label: _____ Include label if number missing: Yes / No

Fax Number: Label: _____ Include label if number missing: Yes / No

Toll Free: Label: _____ Include label if number missing: Yes / No

Include Date Fields:

Start Date: Label: _____ Include label if number missing: Yes / No

Birth Date: Label: _____ Include label if number missing: Yes / No

Partner Birth Date: Label: _____ Include label if number missing: Yes / No

Anniversary Date: Label: _____ Include label if number missing: Yes / No

Include Business Fields:

Business Name: Label: _____ Include label if number missing: Yes / No

Membership Directories

Business Position: Label: _____ Include label if number missing: Yes / No

Business Website: Label: _____ Include label if number missing: Yes / No

Other Fields:

Club Name: Label: _____ Include label if number missing: Yes / No

Club Number: Label: _____ Include label if number missing: Yes / No

Member No: Label: _____ Include label if number missing: Yes / No

MemberType: Label: _____ Include label if number missing: Yes / No

Badge Title: Label: _____ Include label if number missing: Yes / No

Badge Number: Label: _____ Include label if number missing: Yes / No

Classification: Label: _____ Include label if number missing: Yes / No

Degree: Label: _____ Include label if number missing: Yes / No

Hobbies: Label: _____ Include label if number missing: Yes / No

Description: Label: _____ Include label if number missing: Yes / No

Cover Page:

Do you want a cover page: Yes / No.

If Yes, please describe what you want below. Typical cover includes:

Typical Cover Page	Your Cover Page
Club Name Membership Directory {Logo} Date Printed: mm/dd/yyyy	

Output Format:

Word - specify which version: Word 2003, Word 2007, Word 2010, Mac Word

PDF - PDF works best when the data is fixed and not variable.

Template Format:

Please provide your desired look below (or attach) and example or marked up version for one of the current templates on line.