

## ODB Demonstration Sample Script

*[Initially created in July 2002 by OC Intern Kyla Artley and volunteer Kim Redmon. If you have suggestions for changes that would not lengthen the demonstration, please email Organizers' Collaborative]*

- ❖ Who am I? Who is OC? What does the software do?
  - “My name is...” [talk about your background working with community groups/activists /nonprofits/agencies, the fact that many groups you have seen over the years have difficulty with databases.]
  - “The ODB software is created by Organizers' Collaborative, or “OC”, a non-profit organization set up in 1999 to help non-profit and activist groups all over the US more effectively use computers and the Internet in their work for social change. The ODB software is not all that the org. collaborative does; they/we also put on an annual conference and they run several email lists on the use of technology for grassroots organizing. The group decided to put a lot of its energy into the ODB project because they/we identified it is a critical, unmet need for all kinds of community organizations.”
  - “Organizers' Database (ODB) is a free program. After this demonstration you will have all the information you need (pass out flyers) to go home and download it and start using it. It is designed for Windows. It has features to track people association with your organization, and it makes it easy to manage email addresses and also enter donations. The intent is to make the software free, as the Internet make is very easy to distribute to thousands of people. The software is much easier to use than any other database program we are aware of. Still to make sure that you get the full power out of it, we recommend that groups take advantage of setup services to help guide them through the process of customizing it and importing data. By having someone help you it can take you much less time in the end, and OC has a network of people who are able to help you complete these tasks in a very short period of time. The goal is to make you self-sufficient enough so that you will not need to depend on a consultant.”
  
- ❖ Demonstration
  - Install ODB from diskette. “You can obtain the software from CD from us should you have difficulties with Internet access. However, the easiest way to get the software would be from the web at [www.organizersdb.org](http://www.organizersdb.org). The download takes less than a minute from a high speed internet connection and about 6 minutes using a dial up modem.”
    - Demonstrate how easy this is and how quickly it is installed. Follow the installer instructions and you will have no troubles.
    - “It will ask if you want to create a new database or if you'd like to use an existing one. Unless you are upgrading from an older version of ODB, you will want to create a new database.”
    - “It will ask where you'd like the database file to be saved. It is recommended that you create a file folder for all your databases so that they will be easy to find. Pick the file folder to which you'd like to save this new database.”
    - “It will ask if you'd like the program to automatically save backup copies of this file. We recommend that you do this as it will prevent data loss should

anything happen to your computer. You can then save it to a diskette, zip disk or network drive for safekeeping.”

- “The next screen will show you several templates made specifically for tasks that your organization might perform. You can start with one of these templates and then edit the information contained for your own purposes. You may also create your own template; however, we suggest that you start with a ready-made template until you are familiar with the software. Choose the Standard template to start or choose a template that closely matches your organization’s activities. You will have the opportunity to save this file under your own name in the program. [try Parents for Better Schools perhaps]”
- “You can now view the user’s manual in Word. It may be helpful for you to print this out in hard copy to have it handy while you work on ODB.”

#### ❖ Using ODB

- “ODB will open automatically from the installation process. You can open it directly from your desktop in the future.”
- Try to find someone, pick a name from the class. You will be prompted that there are no records within this database and you must first create records.
- Mention how the user interface is very clear about what you can and cannot do within it. If a function is not available to you at this time (i.e. you have no records yet), the function buttons that need records will be grayed out.
- Add a new record, pick someone from the class. Go through the basic information but do not use the advanced information now.
- Try entering the street address info on the second line, so that when you try to save the information, the program will prompt you to move it to the proper location. “This makes it much easier to standardize data entry, and allows you to have volunteers enter data without having to go back and fix what they did later.”
- Explain that there is a line in the address for an organization or company name and that the street address is usually on the third line of the form, to make it possible for the program to sort the information by street name and number.
- Include an email address and a phone number, and then mention that when you are ready save the information. Note that “some people have difficulty using a mouse, so we have provided keyboard equivalents. So you can click on the save button, or you can hold down the Alt key while pressing ‘S’.”
- Search for this person and select their record. Toggle the details mode on and off so that they can see how it works.
- Clone the record to add a second person at the same location [you can ask the volunteer for any other name]. Alter the name and save the info and ODB will report that the email address is bad. Fix the email address and then save it.
- [if internet is available] Find the person you just entered, and show that once someone is selected, you can pull up their address on an Internet map. [if zip code file not installed yet] demonstrate how to go to the Wrench and download the zip code file from the Internet. [this should work about 90% of the time, some people have a firewall that gets in the way.]
- Add a third person to the database, and if you have the zip code file installed enter partial zip information (just name, and zip). Show how city and state are filled in automatically. Add email and phone number). Show what happens when you try to save the information. “ODB will automatically mark the address as incomplete.

This is so that you will be able to exclude incomplete addresses when you print labels.”

- Save the record and then go back in and fill in the address. Show how you can then save the record and ODB will notice that have you modified the address... (read the box that appears on the screen). Save the record.
- Demonstrate how searches from the main menu screen work, by last name, first name (“, first name”), and zip code. “All you need to enter is 2 or three letters, most of the time” Show that a more advanced search can be done within Search Records, but we will get to this later in the demonstration.
- Exit out of ODB and then reopen it to demonstrate how the database will back up the data for you. “You will have a choice to back up this data to a diskette on the first screen by clicking Ok on this screen. If you want to back the data up to a network drive or a removable zip disk, click Cancel on the first screen and then Ok on the second. For our purposes today, we will say Cancel for both as we are not backing up our data at this time.”
- Demonstrate the edit button. “Say we have made contact with a donor for our campaign and we would like to record their donation.” Select a record and click Edit.
  - Add a donation. Note that the database will then make a date renewal for membership expiration. This is useful to keep track of when to contact them again next year for another membership or dues donation.
  - Add a second donation. Note the “Leave expiration date alone” option so that you are not extending their membership further into next year, but are recording a secondary donation. You may unselect this option by clicking at the check mark if you would like to extend their membership date.
  - “You may also edit a record by selecting it and double clicking on it with your mouse, or by using the Alt-E keys. This program is built to be able to work with only keyboard strokes should anyone have difficulty manipulating the mouse.”
- Demonstrate the Print functions.
  - Select all the records in database and click on Print. “You have many options for printing formats here. We will be printing labels so that we can mail out some information today, but you can explore all the other formats, as they are designed to meet the needs to non-profit organizations.” Print to PDF as we don’t have a printer and display the file output.

#### ❖ Basic Organizing Tasks

- Briefly explain tracking codes. “Most organizations need to keep track of the activities of your members/volunteers/constituents are involved in, the issues that interest them and the constituencies with which they are connected.”
  - Edit one record and make them a Board member and a member of one committee.
  - Use the Show Details screen to make a second person a Volunteer and a member of one committee.
  - Illustrate how you can hold the mouse cursor on top of someone’s list of codes. ODB will automatically show what the codes mean. “You know how many organizations have a piece of paper taped up on their monitor to explain the codes? With ODB you no longer need to do this.”

- Explain that you aren't stuck with the codes, you can totally customize them. Explain that "all you have to do is click on the Wrench and then 'Enable Code Changes'. Once you do that you can remove or add codes very easily." Let it sink in. Reassure people that once you have the codes set up the way you want, you can lock them so that they cannot be changed without a password.
  - Use the Show Details screen to make a third person another Election Day worker.
  - Use the Select Records function to search for all the people who will do Election Day work. Show that this search can be presented in four different ways or how you could use the Copy Emails function in conjunction with an email program to send a group email. Right mouse click on Copy Emails and review the options. "If you're not sure, look at the way your email program formats multiple email addresses, with comma or semicolon and you'll find the one that is right for you." Note that emails would need a semicolon between them for MS Outlook, like so: [tia@rcn.com](mailto:tia@rcn.com); [kyle@organizenow.net](mailto:kyle@organizenow.net).
  - Ask "what happens if I send out 500 emails"? to the audience. People should respond, "you will get a bunch of bounces or vacation messages". Show how to take an email address and mark it as bad, using details mode so people can see the email go down into the comments. "That way, you know when the email bounced so that if you see the same email again, you will be less inclined to enter it in the database.
  - The Search Records feature also has a method to show you all your records. Right click on the Search Records button and you'll find the Select All feature.
    - Show how to use the "Add repeated comments" feature for entering sign-up lists. Right click on the New Record button and the option will appear.
    - Right click on the record and review the options here. Explain the copy features, but also mention that you can always get labels printed as well. Show how to work with bad addresses using the Mark Address as expired feature. "This makes it easy to go through a stack of address corrections. Then you can search on just people with good addresses to reduce your mailing costs." Show how to search for people using the "Omit Bad/Expired Addresses" feature.
    - Show Email Right mouse click options. Open a record and right click on the email field from Search Results screen (main screen). Review all options including going to website of email address, "of course, this won't work with a hotmail account."
    - Show how to create canvassing lists. Search records by one zip code and get results. Sort the list by Street Address to get the records grouped for canvassing. This feature is also being worked on to get the sorting to be even more accurate and in numeric order on each street.
- ❖ Groups
- Briefly go over group features. Explain that at the moment you cannot link the groups with the people in the database, but we are working on the ability to link them in the future.
- ❖ How to get Help!
- Click on the Help button and review the options. "You can also get search tip help from the Search Records screen, under the Help button."

- When you download the software, you will be receive email about joining two email lists, odbusers and odb-help, which are free.
  - If you sign up for a support contract (sliding scale, low rates) you may receive telephone support.
  - Point out that from the Help button you can check for upgrades. The upgrades are even faster than when you install the first time, and we have bee updating about 6 times a year, and the cost is free.
- ❖ Advanced Features
- Explain the event tracking features of the software, how you can use SRC/event codes.
  - Explain the concept of the 1-4 level of ID codes. This is used to identify the level of participation.
  - Show that it is possible to search by the names on the 2<sup>nd</sup> line of the address labels by right-clicking on the search button.
  - Show some of the features available in right-clicking, i.e. adding a dated comment, adding another person with the same comment, etc.
  - If the audience is very advanced, show how you can actually use SQL to restrict or broaden searches, and how you can save queries and load a bunch of existing queries that are used to clean data.
  - Use these selected records, and export records. Then show how records can be easily formatted into an Excel Document.
  - This same function of export can be used for a mail merge as well. Demonstrate if time permits.
  - Import information from other databases. Take the file you just exported and change a few of the names (so that these will no longer be duplicates), then import them back in. Mention that ODB is very good if you have lists to import and some of them have the first name and the last name combined in one field, other have the first name and the last name in separate fields. Same for street number and name.
  - Talk about upcoming features of ODB.

Questions?