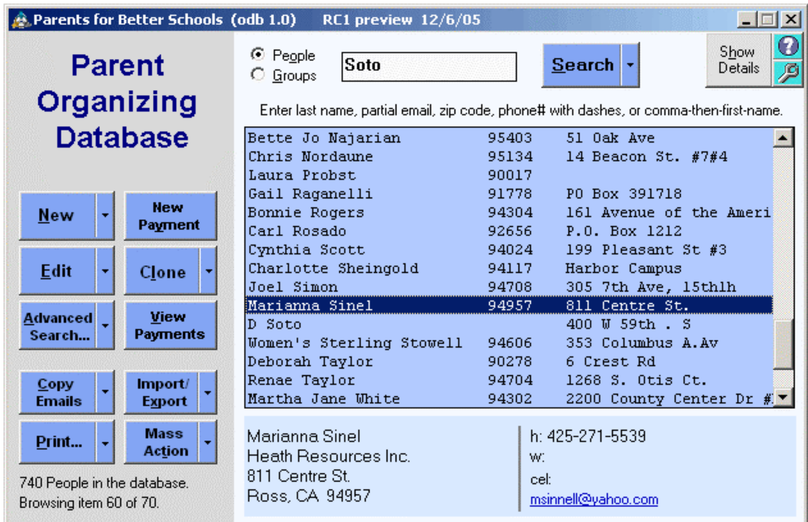
User Guide for Organizers Database

For ODB Version 1.0.1 – draft of 1/4/07



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 14 Beacon St., Boston, MA 02108 http://organizersdb.org

i. Introduction

What is ODB?

ODB (Organizers Database) is an open source membership database program for Windows tailored to the needs of small nonprofits and grassroots organizing campaigns. ODB is free software, designed by a nonprofit whose mission is to make technology more accessible to social change groups. ODB does not require you to purchase products like Access or Filemaker to customize it. There is no "per record" charge, no charge for sharing the software on multiple computers, and no charge for additional "modules". Upgrades to the software are free. Since ODB was introduced in 2002 and before the release of version 1.0, over 450 nonprofit and community organizations have adopted it.

Most groups can download, install, and begin using ODB within five minutes. However, many advanced features in ODB are initially turned off to make things easy for new users. Too get the most out of the software you need to turn on the features and adjust the codes and menus to suit your organization. To get you started we include some "templates" with typical configurations. We offer paid setup assistance so to help you determine which of ODB's 160 settings you need.

Even though ODB is well suited for thousands of nonprofits, and ideal for small grassroots groups, ODB does not fit everyone's needs. Our Truth in Advertising Statement (in the Appendix) clearly explains what ODB was designed to do and its limitations. At the same time, the open nature of the ODB source code and database format allows people to add capabilities to ODB. And the ODB developers will consider new features, if your organization can help to pay for the cost of development. This means that you might end up with exactly what you need by sponsoring $1,500 in ODB development, instead of paying $3,500 for commercial software that already has those features, but is very complex to use.

Obtaining Support

If your organization decides you will adopt ODB, and especially if you have any paid staff, you will probably save money in the end by subscribing to one of our support packages. Organizations may also need guidance in converting old data and learning how to make use of some of the more complex features. OC offers the following services, with costs ranging from $100 to $2500.

- Basic Telephone Support (up to 4 Incidents)
- Setup and Installation Support
- Clean-up and Conversion of Data
- Setup and Installation with Onsite Training

Please see **http://organizersdb.org** for details.

Credits

So many people have helped with ODB, we cannot list them all. Special thanks to ten early adopters for providing feedback to developers: Center for Voting & Democracy, Cambridge Eviction Free Zone, Our Bodies Ourselves, Farmworker Association of Florida, Peace Action, Food Bank of Northeast Georgia, Triangle Rails-to-Trails Conservancy, Mass. Advocates for Children, and Laurie Stillman for School Committee.

Thanks also to the following organizations for financial support: Ploughshares Fund, National Education Association, Haymarket People's Fund, SisBros Collective, Boston Foundation, and the Community Technology Foundation of California.

Donations

Organizers' Collaborative is a 501(c)(3) nonprofit. Your donations support the ongoing development of this free software, making it available to the most underserved organizations. You can donate at: **http://organizersdb.org/donate**

Getting Started with ODB

There are three ways you can begin using the Organizers Database:

Level 1 – Easy Contact Manager

ODB is fully functional out of the box. You can track contacts and gifts without customization.

1. Download and install ODB.
2. Choose a template.
3. Manually enter contacts into the database.

Level 2 – Customized Tracking

Even after you've chosen a template, you may decide to customize it to better suit your needs. Customizing the codes allows you to track donor activities and interests, organize events, and manage volunteers.

1. Download and install ODB.
2. Complete the Customization Survey to help you define the codes and features to include.
3. Go into the "wrench" (settings area) in ODB to customize settings and then "enable code changes" so you can modify tracking codes.

Although many of these settings are intuitive, there are over 170 of them! We thus recommend the Set-Up and Customization Support package so that you can get the most out of ODB.

Level 3 – Conversion from Old Database

You may have an older database or contact list that you wish to convert and import into ODB.

1. Download and install ODB.
2. Customize your template to match your old database fields and include new ones.
3. Convert your old data into text tab-delimited format. (Clean the data first.)
4. Import old data into ODB.
5. Import old donations into ODB, following the steps necessary to match then with donors.

This level of use is more advanced, and we recommend that you purchase support for cleaning, customizing and importing the data. The cost of conversion varies based on the quality and amount of data.

How to Read This Manual

Part A of the ODB User Manual is designed as a tutorial. We highly recommend that a first-time user read along in the manual as s/he learns how to use the software. Try the exercises described, get your fingers dirty – you can't mess it up.

Part A includes important details about searching, right-click features, and more that are not contained anywhere else; it is must reading!

Parts B through E are how-to articles and references, and assume that you are comfortable with the features described in part A.

Section B tells you the basics about customizing ODB for your organization, from turning on hidden fields to modifying your thank-you notes.

Section C describes how to get the most out of using ODB, with articles on fundraising, organizing, and maintaining your database.

Section D addresses the new features added in the fall of 2005 to version 1.0 of ODB: Notes, Pledges, and Reminders.

Section D deals with special features of ODB such as sharing data over your local network, downloading data from a web form, and loading the Spanish translations of the screens.

Finally, the Appendix provides information about the limits of ODB, a comparison to other software, and useful tips for technology consultants who are installing databases for nonprofit clients.

A. ODB Tutorial for Novices

1. Installation

The ODB installer may be downloaded from the Internet, or it may be provided on a CD, in an email attachment, or on a removable disk. New versions of ODB may be installed over older versions without affecting your existing data or settings; just make sure the older version is not running before you begin the installation.

Basic Requirements:

Hardware - any PC running at 50 MHz or faster, running Windows95 or later. Also, the Display settings in your Windows Control Panel should be set to "High Color" or better (16-bit/ 65536 colors).

Free Hard Disk Space – 15 MB.

Virus Protection - ODB (as well as any other software program) may not function properly if your computer lacks up-to-date virus protection. Often you can tell if your PC is protected by clicking (with the right mouse button) on the small "shield" icon, usually in the lower right corner of your Windows screen. Look in this menu for an option that provides the date when the anti-virus software was last updated. At www.Symantec.com, www.McAfee.com, or most electronics stores, you can buy virus-protection software for $30-$40. Or, from www.grisoft.com or www.free-av.com you can download a free anti-virus program. Make sure your virus protection is updated at least every two weeks.

Also, it is important to enable automatic updates (http://windowsupdate.microsoft.com) so that defects in Windows are fixed. This prevents both viruses and spyware from infecting your machine.

Adequate RAM Memory – The latest version of McAfee can use up enough RAM to bring your PC to a crawl, substituting one problem for another. Right-click on My Computer and choose Properties to check your RAM. If it is less than 64 MB on Windows98, 128 MB on WinME, 192 MB on Win2000, or 256 MB on WinXP, you should refrain from using McAfee, and consider upgrading your RAM to 256 MB or more. The upgrade should cost less than $40 for most PCs.

Installing from web browser:

1) *From any web browser go to the location:* **http://organizersdb.org/download**

   and follow the instructions.

   Choose to save the installer to disk; we recommend saving to your desktop so you can find it later. Then, double-click to open it, Click Next, and then Finish.

2) If your Windows version already has "Jet 3.5" database drivers installed, ODB will start up automatically.

   If your PC needs the database drivers, ODB will offer to download them automatically. (To keep the installer compact, we left this support out of the installer as 50% of Windows users already have it.) The additional components take twenty seconds to download via DSL or cable, or seven minutes via 56K modem. All the steps are explained at http://organizersdb.org/installhelp.

   Please note that on WinXP or 2000, you must have Administrator rights to add the database drivers.

3) If this is an upgrade, ODB will open your existing database. If this is a new installation, the program will ask you a few questions (do you want to use a sample database or create a new database). To get going quickly, just accept the "default" settings by pressing the **enter** key on your keyboard four times. (See the Setup Wizard below.)

Installing or Upgrading from CD or Zip Disk: (Instructions to install from diskette are available on request.)

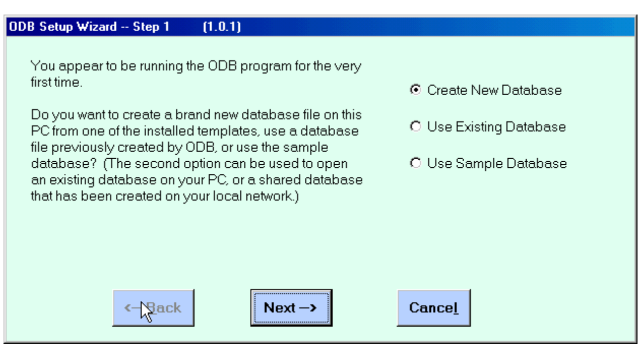
1) Click or Double-click the "My Computer" icon on your desktop (or in the Start menu in WinXP).
2) Click or double-click to open the CD or removable drive with the ODB software (usually D: or E: or F:).
3) Click or double-click the folder "ODB 1.0".
4) Click or double-click to open the odbinstall program. Just click Next, and then Finish.
5) See steps 2 and 3 - *Installing from web browser.* Note: if your PC needs database drivers, you may use the installer in the Database Support folder on the CD; the Internet is not needed.

Upgrading from within ODB:

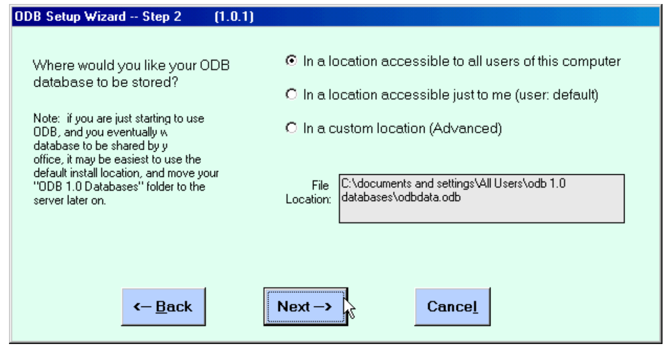
ODB will automatically check for a new version and offer to download it for you every 15 days, if you are connected to the Internet.

The Setup Wizard

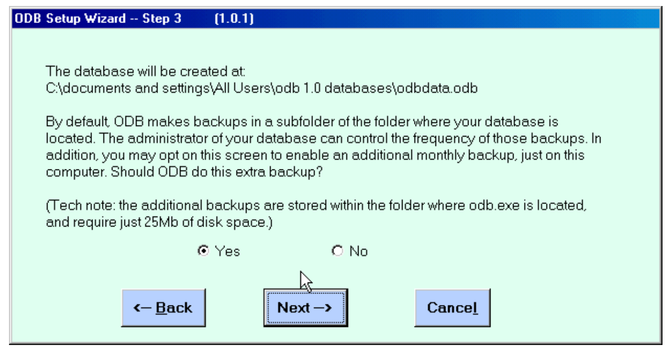
1) Choose to create a new database. (Or if you have an ODB database already, choose the Use Existing Database option. You can also play around with ODB using sample data. To do this, choose the Use Sample Database option).



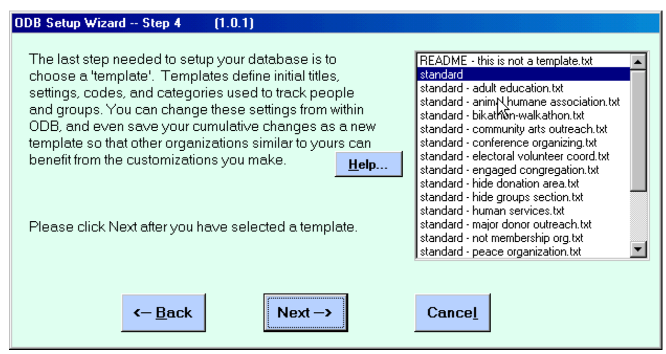
2) Select a location to save the data file.



3) Choose to back up your database automatically.



4) Select a template that most closely matches your organization, or choose the tutorial template to follow along with Section A below.



5) After you first set up ODB, the software will offer to print a "Tip Sheet" providing information on your ODB configuration. You can generate the Tip Sheet at any time by clicking on the question mark in the upper right corner, then on Print Tip Sheet.

2. Opening and Closing the program

The first time ODB is run, it puts an icon labeled "odb.exe" on your desktop (see the picture below). You can double-click that icon to start up the program the second time you use it. You can also drag the icon to the bottom margin of your screen (near the Start button) to create a tiny quick launch icon, and then delete the desktop icon if you wish.

On a machine without an icon, there are two other ways to start ODB:

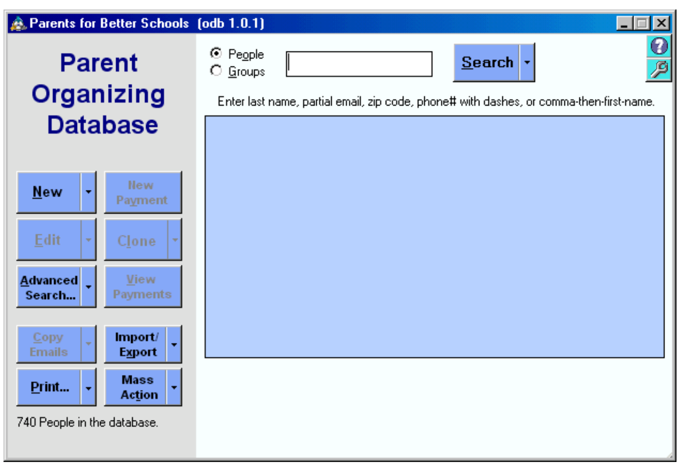
a) Click Start → Programs, then go to: **Organizers Database → Run ODB 1.0**

b) Click Start → Run, type **odb**, and then click the **OK** button.

To exit ODB, click the close ("x") icon in the upper right-hand corner of the ODB window.

3. Basic Data Entry, Searching, Cloning, and Viewing Records

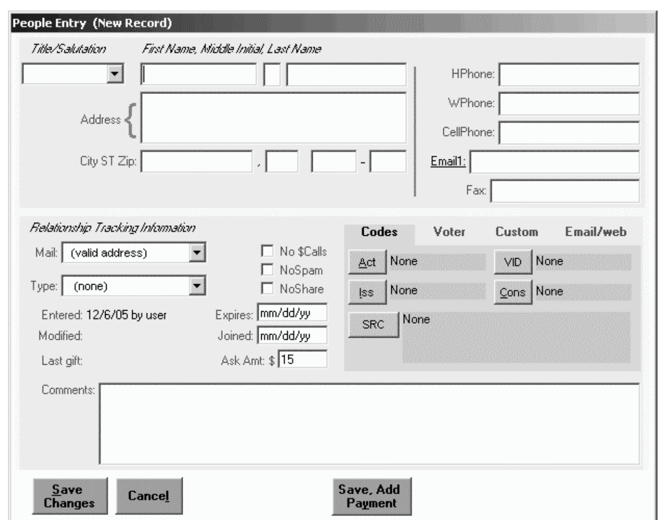
When ODB opens, you see the 'control center' for the database, known as the **Main Menu**. The buttons on the main menu are as follows: **New**, **New Payment**, **Edit**, **Clone**, **Advanced Search**, **View Payments, Copy Emails**, **Import/Export**, **Print**, and **Mass Action**.



We recommend that you try clicking on the center of all these buttons in order to get a feel for the program. Most of the buttons also have advanced options which can be accessed by clicking on the little triangle on the right side of the button, which will pull down the menu.

Most functions are self-documenting. Features that do not apply to what is currently selected on the screen will always be disabled. Operations that delete information will always ask you to confirm, so it is hard to mess things up!

Initially you will only have two options: adding an entry to your database, or importing information from somewhere else. Try adding someone! Just click the **New** button to open People Entry:



Then, type the person's name, address, phone number, email address, etc., using the **Tab** key or the mouse to navigate.

One thing you will immediately notice is that the main part of the addres is optmized for data entry speed. The program allows you to type an address freeform in on big text block when you create a new record.

Then, when you press the TAB key, ODB automatically splits the address into its component parts, such as second line, street number, street name, and optionally the suite/apt. #. The address is stored in split format so that you can sort addresses by street name and number if you need to. If you want to go back and edit an address as one big text block, it's easy: just double-click on the word "Address:" (or on the curly brace) and ODB will restore the address to one big text block.

By default, ODB allows you to create 3 or 4-line addresses. There are customization optoins that allow you to expand the address to as many as five lines in ODB 1.0.1.

If you are unsure what a button does, or what information should be entered into which field, hold the mouse cursor over the field, field name, or button and it will display a tool tip with helpful information.

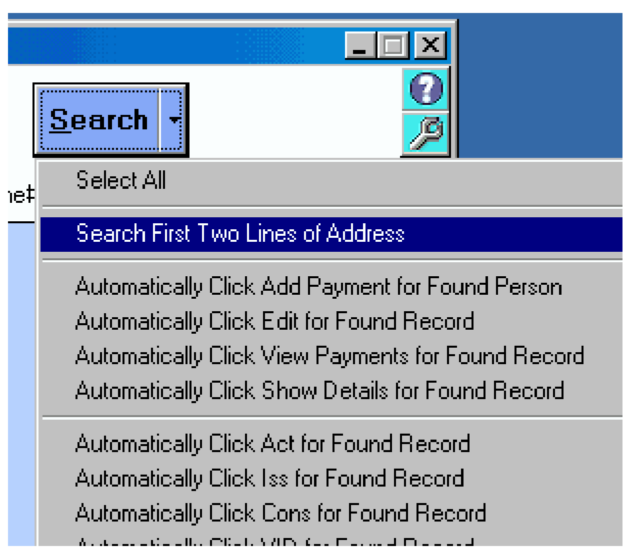
Note: addresses will be printed out in the case theat they are entered. If you do not capitalize names, ODB will not do it for you.

When you are done entering the information, click the **Save Changes** button to save it permanently. Now you have a database with one entry. An entry, in database lingo, is referred to as a 'record'; after you have added five people to the database, the database will have five records.

Searching. Once you have entered at least one record, you can try the search function. Enter the first two or three letters of a person's last name in the search box near the top of the Main Menu, and click the **Search** button or press the **Enter** key. You can also search by entering a comma followed by the first few letters of someone's first name. This feature is very important when you have thousands of people in your database; there might be 50 people with the last name of "Smith" and 25 people with the first name "Betty." All you have to do is type "sm,bet" and press **Enter** on your keyboard and you will most likely find Betty Smith. If you leave the box blank and press **Search**, ODB will retrieve all of the records in your database.

You will notice that when searching the list of people you can type a 5-digit ZIP code to find all people in that ZIP code. You can also use any piece of an email address (that includes a dot or @ sign, i.e. "@aol" or "aol.com") to search for people (or groups) with a specific kind of email address. You can even search by phone number, which allows you to identify calls on your phone bill – provided your phone numbers are entered in a XXX-XXXX or XXX-XXX-XXXX format.

Select All or **Find by Spouse's Last Name**. If you right-click the **Search** button, or click the small arrow beside the **Search** button, a menu pops up that provides two key options at the top. **Select All** will choose all records in the database. **Search First two lines of address** will include the 2nd line of someone's address in your search. This is useful when a **spouse or organization name is entered on Line 2** of someone's address.



Previewing Records. Once you have found some records as described above, use the mouse to highlight a single record. This will cause the address, phone, and email information to be displayed in a "preview pane" found at the bottom of the screen.

If more than one record has been found, you can then use the arrow keys, or the **Page Up** and **Page Down** keys, to navigate through the list (which will be sorted alphabetically by first name). Initially, the preview pane shows only basic information. To expand it and see more, click the **Show Details** button in the upper right-hand corner of the Main Menu screen. To make the entire window larger, try clicking and dragging the edge of the window.

When one or more records are found by a search, the **Copy Emails**, **Mass Action** and **Import/Export** buttons are enabled. When you select a single record, the **Edit**, **Clone**, and View **Payment** buttons will also be enabled (though donation history at this time does not apply to groups).

The **Clone** button is pretty self-explanatory: you can use it to create a new person or group that is almost identical to the person or group now selected. If Anna Jones is already in your database and her housemate signs up at an event, you can enter the housemate more quickly by finding Anna and then clicking on the **Clone** button when her name is selected. This will create a fictitious person named Cloned Jones with all of Anna's basic contact information. Just change the name, email, etc. and save the new record. This feature can save a lot of time, for instance, when you need to enter a second contact at an organization or in a household.

4. Editing and More Data Entry

There are three ways to open a selected record for editing. Highlight the record in the search results box on the Main Menu, then: double-click it, press **Enter** on your keyboard, or use the **Edit** button.

If you change the information and then try to **Save Changes**, ODB will perform a few checks on what you have entered. If you did not enter a complete address, for example, ODB offers to mark it with an **"Address Incomplete"** mailing code so that you can exclude it when printing mailing labels.

If an address has previously been marked as bad or incomplete, and you change the address, ODB automatically asks you if you would like to erase the **"mail code**."

If everything is okay (no bad email addresses, duplicate records, etc.), the data entry screen will close, bringing you back to the **Main Menu**.

If you don't want to make any changes, or you accidentally delete some information, use the **Cancel** button to exit the data entry screen without saving changes. If you abandon changes when entering a new (or "Cloned") record, the new record will not be added to the database.

Type Code. The pull-down menu named "Type:" appears on the bottom half of the Entry screen, next to the "Mail" menu. This code is used to assign each record to a particular group. Types are **not** "overlapping" categories, which means a person may not be assigned more than one "type." This code is very useful to efficiently segment your mailing list. If you have assigned a type to every contact, you can send different letters to different groups, with confidence that no one has been left out. Because "type" is not an overlapping category, it also means that you will send a letter only to each person once, without worrying that people will get duplicate letters because they fall into more than one category. You may completely customize the list of types that appear in the pull-down menu, as described in Section B.

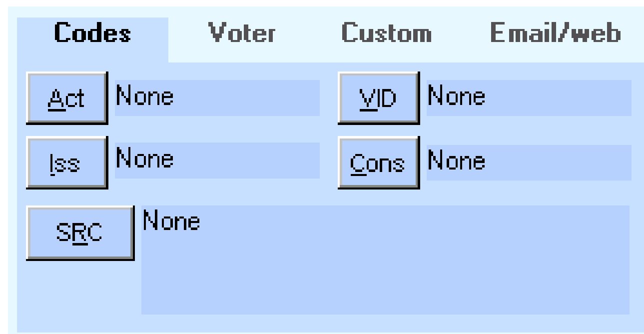
Non-U.S. Addresses. ODB is designed primarily for use in the United States. If you need to enter an address outside the United States, we recommend that you put the name of the country and any postal code in the "City" field, and then fit any remaining information on the lines labeled "Line2" and "St./Address." When the item is travelling over water – this would be anything except US territories or Canada or Mexico – we recommend that you put the words "AIR MAIL" in the two ZIP code fields. Sometimes, you might find it useful to put the postal code in the two portions of the ZIP code field; this can be done with Canadian postal codes, for instance. (Note: if your list has a large number of international addresses, it is possible to add a "country" field to ODB, described in section B, although we recommend against this in most cases, so that you will not have more address lines than will fit on a standard label.)

Special Fields for Organizing Tasks. In addition to the typical contact information (name, address, phone number, email address, etc.), ODB provides several other standard fields that are useful for organizing. You can enter a person's federal Congressional District, state Senate and House Districts, and local Ward and Precinct. ODB also provides fields for marking a person's voter registration status and party, and preferences to not have their name sold or traded, not to receive mass email (spam), and not to be called for fundraising purposes.

Other Fields. Several other fields are included on the Entry screen; not all of these can be edited. They include the date you first created the record, date it was last modified (changed and saved), date of the last donation, and if applicable, the date the person joined as a member, and the date her/his membership expires.

There are also a number of fields hidden in the standard template that can be turned on, such as fax, country, date of birth, gender, salutation, a person's title or suffix, and 2 user-defined fields. For details about how to turn them on, see Section B.

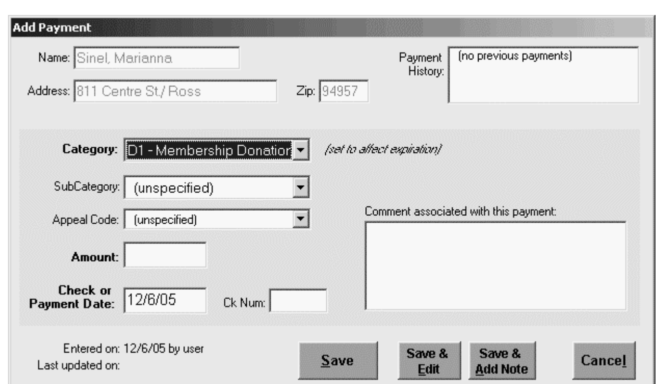
In ODB 1.0, these special fields are organized into tabs; for instance, all the fields related to typical voter database information (ward, precinct, CD) are contained in a tab labeled "voter."



Comments. The comments field allows you to record extra details, from a phone conversation for instance, in each record. We strongly recommend that you limit the use of comments, because data entered this way is hard to search, sort, and maintain over time. If you run out of space, you can increase the number of characters allowed in the field, as described in Section B, or enable the "Notes" feature as described in Section E.

5. Entering Donations, Payment History, and Memberships

To enter donations (possible for a person, but not for a group at this time), use the **New Payment** button on the Main Menu and enter the amount and date of the gift. The ability to directly add a donation without opening the data entry screen allows you to enter a large number of donations very quickly. The screen below shows the Add Payment window with the subcategory, appeal code, and check number optionas enabled.



Category is a pull-down menu, which you can use to assign a gift to a specific payment category. Different categories have different characteristics associated with them, including whether or not they count as "membership dues" and will affect a member's expiration date. Many groups also turn on Subcategory and AppealCode fields, which can be used to further categorize payments. For details, see section B)

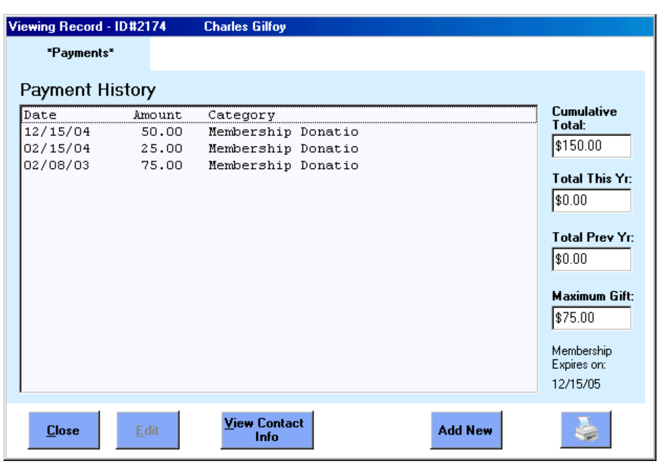
The **Name**, **Address**, **ZIP Code, and Payment History** fields are shown for reference and are not available to edit in this screen.

Simply enter a dollar number into the "Amount" field - you may use cents - and enter the date of the payment. We recommend you use the date that the person wrote on the check, because ODB will automatically store the date you are entering the payment into ODB. You may also enter a comment into the "Gift Comment" field. This is useful if a payment was on behalf of or in memory of another person, or if it is being made through a third party.

ODB will automatically record when each payment was entered, and also if and when it has been modified.

Viewing Payment History. Clicking the **View Payments** button on the Main Menu brings up a window with a tab showing a person's donation history, with recent donations first. (This screen can be enhanced to also show tabs for notes and pledges as described in section D.

Note that you can also get to the **View Payments** window from the People Entry window by clicking on the **Save and View Payments** button.



To edit an existing payment, highlight and double-click on the entry: a new screen will show up for editing. When you are finished, press the Save button and ODB will prompt you to review membership dates that may be affected by a change to a donation.

To delete an existing payment, highlight the gift in the **Payment History** screen, and press the Delete key on your keyboard. ODB will ask you to confirm, and prompt you to review membership information as well.

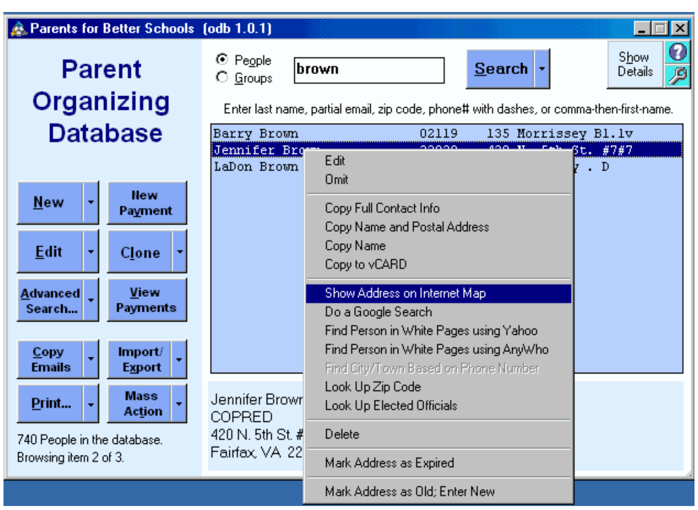
Memberships. By default, ODB is designed to handle memberships. ODB will mark someone as having **"joined"** starting on the date you enter for his or her first gift. It is possible to enter payments that do not affect membership, or disable the membership options altogether (see Section B).

A membership lasts a year by default, but the time period can be adjusted to suit your organization. The **"renew window"** is a timeframe (45 days by default) before or after the expected renewal date for a person's gift to be considered a renewal. ODB decides if a subsequent gift counts as a "membership renewal" or an "additional gift" depending on the person's expiration date and whether the donation is "within the renew window," "near but not within that window," or "significantly before or after the renew window." When you enter a subsequent gift, you will be prompted with the option for recording the gift most appropriately, but you also have the ability to override it.

6. Deleting and the Power of Right-Click

ODB supports **"right-clicking"** on practically anything that shows up in the Main Menu. This is a crucial point: if you try to use ODB without making use of the right mouse button, you will miss many of ODB's features. We previously mentioned the right-click capabilities of the search button. A special "context menu" can be accessed using the right mouse button or by left-clicking on the triangle on the right side of the button. The New, Edit, Clone, Print, Advanced Search, Copy Emails, Import/Export, and Mass Action buttons also a right-click area on the button so that you can access those features using the left mouse button. We recommend that you try all of these buttons.

Right-Clicking on a Record. If you right-click on a record highlighted in the search results box of the Main Menu, you will see a list of sixteen additional choices you can make.



You can **copy** a person's name or other contact information to the Windows clipboard, so that you can paste it into a letter or an email message very easily. (Almost every Windows program allows you to paste information in this manner from the Edit menu, or with the Control-V key combination from the keyboard.)

If someone moves, you can mark that person's **"address expired"** so that if you reconnect with her/him later, you will retain all the other non-address information you have collected. When you choose this option, the selected address will be marked in red to clearly indicate that it is no longer a good address. It also makes it easy to omit known bad addresses from mailings to save postage.

This feature is designed especially for the nonprofit that sends out a fundraising mailing to a few thousand people, and ends up with hundreds of returns from the post office. And in case you do get a forwarding address from the post office, the option **"Mark address as Old; Enter New"** provides a shortcut that saves the old address, clears it out, and opens the record for editing. These features save a lot of time when you have a stack of returns to go through.

If you are connected to the Internet, you can automatically do a number of searches. ODB will pull up a **map** (Mapquest), look up a phone number in the **white pages** (Yahoo or AnyWho), search for a person in **Google.com**, look up a **ZIP code** if you have the rest of an address (USPS), or even **find a city** if you only have a phone number (Google).

The ability to **delete** a record is also available in this list of sixteen right-click options. The delete option is not available on the Main Menu screen to reduce the potential for a novie user to inadvertently delete records. You can also use the **delete** key on your keyboard to delete a highlighted record.

Note that when you delete a person's record from the database, ODB will also delete any donations that belong to this person. To delete a single payment: go to the **View Payments** screen, highlight the specific payment, and then use the **Delete** button or the **delete** key on the keyboard.

To delete all chosen records, click on Mass Action and then click on Mass Delete.

When deleting anything, you will be asked to confirm the operation, and mass delete requires an extra password as well for extra security.

Right-Clicking on the Preview Pane. Besides clicking on a whole record in the search results box on the Main Menu, you can right-click on any of the parts of a record shown in the preview pane and the detailed preview pane (street address, city, state, phone numbers, etc.). This will bring up a whole new set of menu options.

Some of these options are **"Find People Like Me"** searches. For example, if you right-click on the address in the preview pane, you will see options to select all the other people in the same city, or the same state, or the same ZIP code. If you right-click on the tracking code buttons in the Detailed Preview area, you can find other people who share some or all of the same tracking codes. (See below to turn on the Detailed Preview area.)

Right-clicking in the preview pane makes it possible to erase an *email address* entirely, or just mark it as bad. The feature is similar to **"Mark Address As Expired"**: it makes a note in the person's comment area. If you send an email message to 200 people and get 20 "bounces" from people whose email accounts have permanently expired, you can quickly update your contacts. ODB allows you to do the same thing with bad phone numbers; an ODB user suggested this addition.

Two other options in the right-click menu for an email address are **"Visit Website for this Email Address**" and **"Find Records with Same Email Suffix."** The first feature means that right-clicking on steve@hudsoncdc.org will open up your web browser, and if you are connected to the Internet, take you to the page http://hudsoncdc.org. This feature is extremely convenient if you have Steve's email address and you want to find the postal address of his organization. (This feature will not be useful if the email address is an account at Gmail or Hotmail.) The second feature allows you to select all the records that have the same email suffix. This means that if you right click on Steve's email address and choose this option, you will see a list of records that all have an email address ending in @hudsoncdc.org. This can be used to find all members of an organization based on email address.

7. Detailed Preview Pane and Using the Tracking Codes

The Main Menu has yet another time-saving feature: the **Show Details** button in the upper right-hand corner of the screen will expand the preview pane so that when a record is selected, you will see additional information associated with it: date entered, membership status, geographical categories, comments, etc. Clicking on this button a second time will **Hide Details**.

<add screen shot>

Tracking Codes. The most important feature provided by **Show Details** is the ability to directly access tracking codes, which are used to categorize your members and supporters as involved in various activities (the **Act** button), interested in key issues (the **Iss** button), or as part of various constituencies (the **Cons** button). Clicking on each of these buttons brings up a separate window, showing up to 32 checkboxes that make it easy to track this key organizing information. Section B explains how to customize these tracking codes.

Using the view provided in **Show Details**, you can easily scroll through a list of people in the search results box to update the tracking codes in their records. For instance you can mark participation in an *activity* like membership on your board or attendance at a conference. Or you can identify the people interested in hearing news about an *issue* your group works on. Finally, if you are interested in doing outreach to immigrants or youth in your area, the tracking code feature makes it easy to identify those individuals who have connections with those communities. Of course, changes to contact information, comments, or district information still require that you use the **Edit** button as mentioned earlier.

The fourth tracking code button, the **VID** button, is the most powerful feature of all. This stands for "Voter/Volunteer Identification" – a process organizers use to ID, or identify, people who are most supportive of an activity or campaign. You can have up to 24 VID codes. The idea is that you want to be able to identify your likely supporters, sympathizers, core committee members, people on the fence, most active volunteers, etc. Political campaigns often do this by rating people on a scale of 1 to 4, where 1 indicates solid commitment and 4 indicates least commitment.

Of course, how you use this feature is up to you. Most often in an election campaign you will enter hundreds or thousands of possible supporters into your database, rating each person a code of "3". Then as the campaign wears on you will cultivate these potential supporters, and try to move as many as possible into the "1" column. In a well-run campaign, most of the people by the end will either be rated as "1" or "2" (potential supporters) or as "4" (someone who supports the other side).

You can also use the VID code to rate the chance of receiving gifts from prospective donors. For example, you could code potential high donors in your database with a VID code named "High Donor Prospect" and start them at rating level 3. Then, when you meet them face to face, you can change the code to 2 if the results of your effort warrant it (or 4 if this donor does not seem like he or she will give to you). Then, if the potential donor shows real interest in supporting your group you can elevate their "High Donor Prospect" rating to "1."

Similarly, you can set up a VID code at an activist organization to keep track of the level of involvement of members of your group. "1" is usually used to rate core members who come to meetings. "2" is for key members who don't attend meetings but still get the minutes. "3" is for people who volunteer occasionally, and "4" is for those who only attend your events.

Note: you can check off, or assign, multiple tracking codes to people or groups in your database. That means a person can have several Activity codes, several Issue Codes, several VID codes, etc.

Source Codes. (Note: If you cannot see the SRC code in the detailed preview pane, make the window wider by clicking and dragging the edge of it.) The idea behind source codes (called SRC codes in ODB to distinguish the term from the software term "source code") is to preserve information on the source of each record in the database. If you import 1000 records from three different organizations at the start of your run for office, it might be useful to know which of these organizations was responsible for giving you Joe Frasier's name. SRC code fields can be automatically populated when importing data to make it easy to track this kind of information.

SRC code fields are also automatically associated with the date the code was added, so by default you only see the codes that were recently added, and therefore tend to be in active use. For this reason, SRC codes are useful for organizing events and activities. For example, you can set up a SRC code for "Attended 3/15/04 organizing meeting" and you can check off this box in the SRC code editing screen for everyone who attended the meeting. But SRC codes are distinct from activity codes as they are kept in a different data table, and will be queried differently by the Advanced Search Tool.

SRC codes are turned on by default in all templates, but there may not be any codes initially created. To create, delete, or modify them, see section B.

8. Record Selection, Donation Searches, and Sorting

The ability to assign tracking codes would be worthless if there were no way to select the people identified. Accordingly, the **Advanced Search...** button on the main menu screen opens up a **Advanced Search Tool** for this purpose.

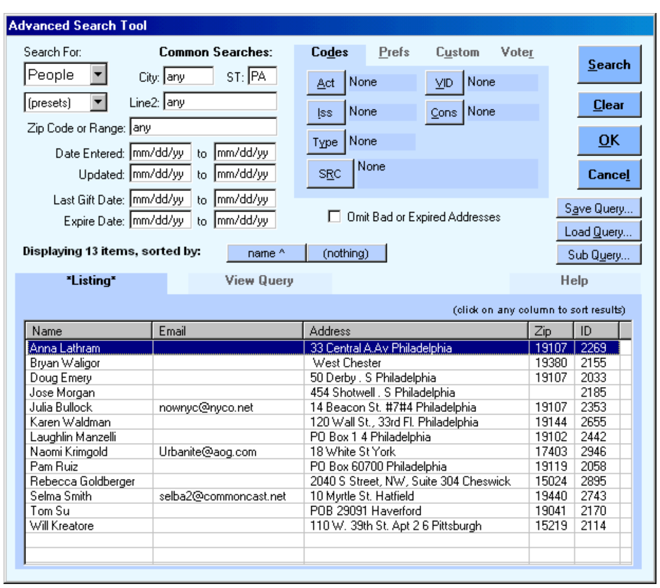
<insert graphic here>

You will note that for the People and Groups sections of the Advanced Search screen, ODB groups some of the search fields into separate tabs, labeled **Codes**, **Prefs**, **Custom**, and **Voter**.

This tool lets you select records based on membership status, city, state, precinct, issue interests, activities, etc. It also lets you omit records with bad addresses, no ZIP code, etc.

For instance, to send an email to everyone in Pennsylvania:

1. Type ‘PA’ into the **state** field.
2. Click the **Search** button.
3. Click the **OK** button to pull the search results up to the main menu.
4. Click **Copy Emails**.
5. Compose a new message in your email program and paste the email addresses into the “BCC:" field. (Blind carbon copy is good etiquette for mass email.)



To send a paper mailing to all your Campaign Supporters identified as “1’s” or “2’s”, you would:

1. Click **VID**.
2. Enter “1,2” in the **Campaign Supporters** field and click **OK**.
3. Click the **Omit Bad/Expired Addresses** button to omit people with addresses marked as incomplete or expired.
4. Click **Search**.
5. Click **OK** to pull results up to the main menu
6. Click **Print**, choose the **Laser Labels** option for the label size you are printing, and click **Print** to print.

The date fields on the search screen allow you to specify a begin date and an end date. For example, if you specify 1/1/07 and 1/3/07 as the dates, ODB will return results matching the date January 1, January 2, or January 3. Within an individual date field, type two slashes, //, to indicate the current day, month, and year.

For instance, if you want to send customized donation slips to members who expire before December 1, 2007:

1. Enter “<12/1/07” in the **Expires** field.
2. Click **Omit Bad/Expired Address**.
3. Click **Search**.
4. Click **OK**, then click **Print** and choose the **Donation Slips** option, and click **OK**.

Note that the Donation Slips first need to be customized to your organization, a process that is described in section B of this manual.

The query language used is known as the "Jet" dialect of Structured Query Language (SQL for short). This language is a web standard, for details you can go to http://tinyurl.com/oajbc .

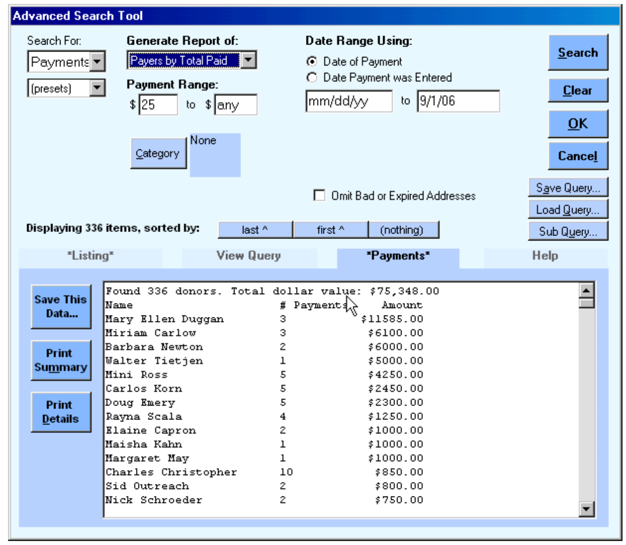
The Logic of Queries. One general note about Record Selection for those of you who are familiar with other databases: the search that you generate is a logical "AND" of the criteria that you have turned on by checking or filling in various search boxes. This means that if you fill in several boxes simultaneously, your search may return no results at all. If your membership list includes ten people from Springfield, but none of your six board members are from Springfield, you could check off "Board" under activities, then enter "Springfield" in the "City" field, click Search, and get no results.

The most powerful feature of the Advanced Search Tool can be seen when you use it in conjunction with tracking codes. Each of the four kinds of tracking codes may have several checkboxes turned on within, and ODB combines these together (as a logical "OR") into a single logical "criterion." What this means in plain English is that if you check the Activity code boxes for "Board Member" and "Staff" and "Advisory Board Member" within the Advanced Search Tool, the program will look for people in your database who match one or more of these activities. And if you also check the "Constituency" code boxes for Women and Youth, the program will restrict the search, limiting the results to people identified as belonging to Women or Youth constituencies, but who also happen to be a member of your Board, Advisory Board, or Staff.

Payment Searches. You can select people based on their donation history so that you can generate reports, send mailings, or export donation or payment data to your spreadsheet program for further analysis.

1) If you select the "Payments" choice from the Search For list in the Advanced Search Tool window, you can then enter a dollar amount range or a date range. By doing so, you can easily generate a list of everyone who gave between $50 and $100 in the month of December 2001, for example.

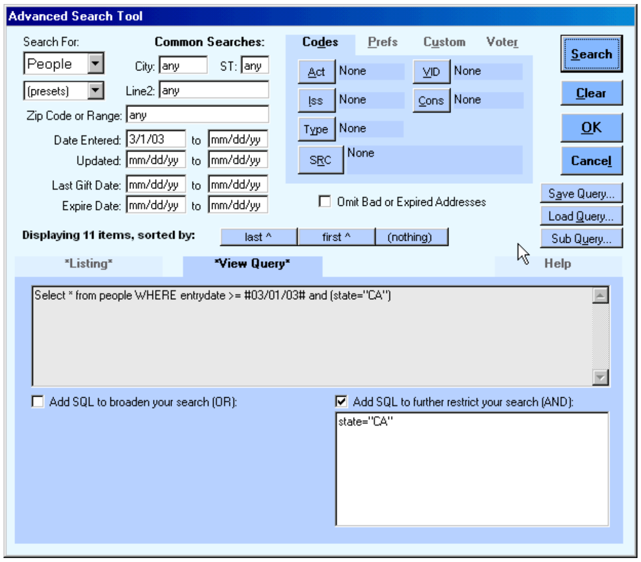
2) Payment selection also allows you to specify a dollar amount range. For example, you can search for all web donations of $50 or more since 1/1/01.



There are six ways of **viewing the results** of your donation search, available in the "Generate Report of" pull-down menu of the Advanced Search Tool window. You can view the payments sorted by payment amount, by date, or by the donor names. Or you can view payers by total paid sorted by the total amount they gave (highest to lowest), payers sorted by the last name, or payers sorted by the number of payments they have given.

Payment search results can be saved to a text file and exported to a tab or comma-separated file by clicking the **Save This Data** button. The fields available for export include name, title, suffix, address, city, state, ZIP, and telephone number for use in generating reports, call sheets, etc.

Advanced Queries. If you need to do a more advanced query than the preset options provide, you can select the **"View Query"** tab to reveal a large text box showing the underlying "structured query language" or SQL. Taking cues from the computer code that ODB displays in the large text box in the custom query area, it is not too hard to further customize your ODB queries.



For example, to broaden a search to include additional records, check the box labeled **"Add SQL to broaden your search."** If you already have 40 people selected but you also want to include all 300 people in your database who live in California, you could type **State="CA"** in this box. This will augment what is already selected above.

If you want to restrict your search to narrow down your results, you can select the second box: **"Add SQL to further restrict your search."** If you already have 50 people selected and you *only* want to see the 5 who are from California, you would type exactly the same SQL in this box: **State="CA"**.

You can restrict a search to specific donor IDs. For example, let's say you have a set of 10 donors on the Main Menu (returned from an advanced search), and you want to exclude one of them from a mailing you plan to do (so you can write a handwritten note instead). To do this:

1) Click the donor's record in the Main Menu to highlight it.
2) Right-click on the Advanced Search button (or click the triangle drop-down arrow).
3) Select the choice: **Advanced search, excluding selected item**. (The Advanced Search Tool appears.)
4) Enter additional query information as needed.
5) Click **Search**. The ID of the person you first selected will not be included in the results.

The list of field names that can be used in your custom SQL is listed under section 7 of the **Help** tab on the advanced search screen.

More examples of SQL:

If you want to restrict your search to people who do not want "money calls," just type in the box: **Nocall**.

Or if you want to restrict the search to people who do want those fundraising calls, just type: **Not nocall**.

If you type: **lastgift > #5/25/04#** in either the restrict or broaden box and leave everything else blank, you will get all the people who have donated since May 25 of 2004. This makes it easier to send those people thank-you notes.

If you type: **comments like '*picnic*'** in one of the boxes, you search for everyone in the database who has a comment that says something about their involvement in a picnic you have held. Note that you can use the built-in comment search field in the Advanced Search Tool as well.

If you are searching within the 'Groups' in your database, you could type: **Name like '*latino*' or Name like '*hispanic*'** to find groups with one of these words in their name.

If you have set up a user-defined field (which has a text format) and wish to search based on it, you will need to query using the custom name you gave the field (in the userfieldname setting). You might type something like: **position like '*Executive Director*'** if you called that field "position".

Saving and Loading Queries. You may also save a query to a text file and load it back in, using the **Save Query…** and **Load Query…** buttons that are visible in the bottom right when 'View Custom

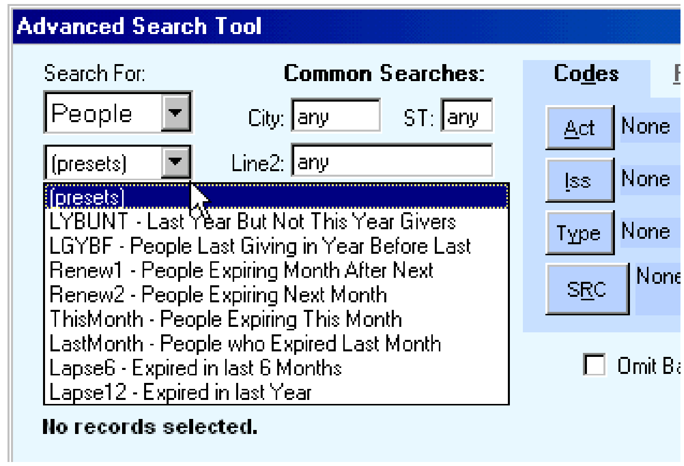
Query' is checked. (Sometimes you have to click this check box twice to see them.) If you want to find donors from New England to gauge the results of a regional membership drive, you will not have to type in the query twice!

ODB provides you with twelve built-in queries for use in database maintenance. These are found when you click **Load Query**. For example, you could select everyone with a bad address who has an email address, and then send those people a request to update their address. The built-in queries are:

- Former good addresses to research.
- People who have email addresses.
- People whose address could be looked up.
- People whose ZIP codes could be looked up.
- People with a phone number.
- People with a state but no city.
- People with incomplete mailing addresses who have email addresses.
- People with no phone number.
- People whose email addresses have expired.
- People whose addresses were marked as expired in the last three months.
- People who have been members but don't have email addresses.
- People who have been members and have had their email address expire.

ODB also automatically saves a copy of the last query that you ran, either from the Advanced Search Tool (after you clicked OK) or as a result of the Search button on the Main Menu. Just look inside your queries folder for a file labeled lastquery.txt.

In addition, ODB provides some standard preset queries that designed around typical donor programs. The preset queries are provided in a menu in the upper left hand corner of the advanced search tool, for People or Payment searches:



Sorting Results. When you do a search in ODB, the results are initially sorted by Last Name and then by First Name. To change the sort order, click the button labeled Last Name where it says: **Displaying xxx items, Sorted by: [last name]** and change the sort order to anything you like, or even remove last name entirely from the sorting specification. Or you can sort your list in reverse alphabetical order, or by the order of the donation "Ask Amount", by the date people joined, or by the date someone's membership will next expire. The sort feature is extremely flexible: you can sort by up to four levels. Try it!

When you sort by a category, if any of your records are missing that piece of information, the records with blank fields will appear first followed by the others in alphabetical order.

To sort by the date of last donation:

1. Select your donors.
2. Remove First Name from the sort order by clicking on "First" and changing it to 'nothing'.
3. Then click "Last" and change it to 'lastgave'.
4. The order will change automatically without pressing the Search button again.

Note that you can adjust the width of the columns of the grid by clicking on the dividers in the top row, and dragging left or right.

Shortcuts for Sorting. The columns of the grid that shows the results are labeled Name, Email, Address, ZIP, and ID. If you click the top of any of these columns, the results will be resorted by this column as described below:

Name – Sorts by first name, and then last name.

Email – This shortcut currently does an alphabetic sort. Eventually we hope to implement a feature to sort email addresses by domain name.

Address – Address sorting allows you to group records by geographic unit. First the records are sorted by state, then by city, then by street name, and then by street number. It should be able to generate meaningful results even with complex street numbers like 232B and 101-11. However there is currently no provision to automatically normalize street names in this version of ODB. If someone lives on "Broadway St." s/he will appear to ODB to be on a different street from someone who lives on "Broadway Street."

ZIP – This is the most common way by which people sort information, as it is helpful in doing bulk mailings. However, the Post Office now requires bulk mailings to be sorted by Area Distribution Center (not ZIP) so we recommend exporting the ODB data to a third party program, as described in section B of this manual, if you want to print your own bulk mail labels.

ID – ODB also lets you sort by ID number. This provides you with a list of the records in the order in which they were originally entered into your ODB database.

9. E-mailing and Printing

Generating E-mail Address Lists. When any number of records are chosen in the Main Menu, you can use the **Copy Emails** button to copy all of the email addresses into a long list, separated by commas. So if you have selected all the people in the ZIP code 20910 you can click **Copy Emails**, and then paste them into the message you are sending.

Almost all email programs allow this, though some Internet Service Providers will refuse to send an email if there are too many people on the "CC" or "BCC" list. We strongly recommend you use the "BCC" feature when you are mailing over ten people because it keeps your list of email addresses private.

You can also copy the email addresses in eight additional formats by right-clicking on the **Copy Emails** button to see them. The formats include:

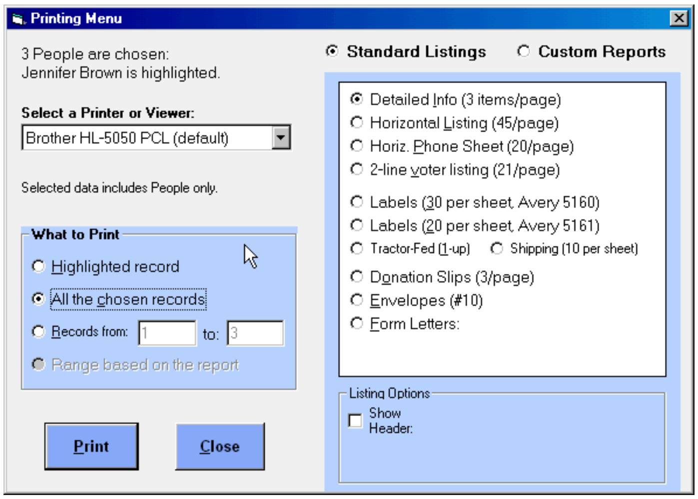
- semicolon-separated (for MS-Outlook 97 users)
- one email per line
- email with name, tab-separated (no duplicates)
- email with name and phone, fixed-width formatted
- email with name and phone, tab-separated

The first five copy-emails options will **eliminate duplicate** email addresses automatically, so that you don't end up sending multiple mass email messages to the same person. These five copying options will also automatically eliminate from the list those people who have the **"nospam"** box checked.

The fourth option (Copy Tabbed List: Name, Email) is designed to make it relatively easy to generate an email merge letter using Word or an inexpensive program like FletMail (http://pancho.dk/fletmail), LiteMail (http://www.sprika.com/litemail2.htm), or WorldMerge (http://www.coloradosoft.com). If you choose this option, then create a new text document in NotePad or WordPad, paste the names and email addresses into the text document, and save it, the resulting document can be used as the "data source" for your mail merge.

To mail to a very large email list over a few hundred names, it is a good idea to use a third-party service such as Constantcontact.com or democracyinaction.com, or a high-volume mailing software program like Phplist running on a web hosting provider that takes steps to avoid having its computers branded as "spammers."

Printing. The printing feature on the main menu allows you to print the group of chosen records in nine different ways. You only need to print what you want to print. If you have chosen ten records, the **Print** form makes it easy to print records 7 through 9, for example.



You can print records in eleven different formats:

- **detailed info** (three per page w/donation info)
- **address listing** of records (45 per page)
- **phone calling sheet** (20 per page)
- **2-Line Voter List** (21 per page)
- **mailing labels** (four different options)
- **thank-you note** (merged with donor data)
- **donation slips** (three per page, customized to match renewal status and giving level)
- **envelopes** (directly onto standard, #10)

The mailing label options are 30 per sheet (Avery 5160 format), 20 per sheet (Avery 5161 format), 10 per sheet shipping (Avery 5163 format) or older style, tractor-fed, dot matrix 1" x 4" labels.

If you need another printing format, you may export the data you want to print, and then use the mail merge feature of any word processing program (MS-Word, OpenOffice, etc.) to generate a custom form.

Also, the Custom Reports feature (see section E) can be used to set up any report you would like.

The **dot matrix labels** feature is carefully implemented to make it easy for you to line up the tractor on your printer so that the labels will print properly, and to let you resume printing midway through the list in case of a printer jam. Dot matrix labels cost about $15 for a box of 5,000 – about one-third the cost of laser printer labels when all factors are considered.

The program is able to print to a fax modem or a PDF (Adobe Acrobat) file, if the proper drivers are installed. This way, you can fax or email nicely formatted contact lists to your volunteers or fellow organizers. The printing screen will be titled "Printing and Fax Menu" if a fax modem is installed. Many versions of Windows include fax software and free PDF software is now available at: http://www.sourceforge.net/projects/pdfcreator for those who cannot afford to purchase Adobe's "Acrobat Distiller."

Labels and envelopes will automatically print the title, first, middle, last, and suffix. Thank you notes will include the salutation if you enabled this feature (For details, see section B)

For the first four printing formats you may add a custom header to the top of each report. If you select the **Show Header** box, the SQL query will appear and you can change it to any text you want.

For the Horizontal, Phone, and Voter List formats you may also turn on the "**break at new value**" feature. This is useful for printing reports sorted by fields that have a limited number of possible values, as it will include markers indicating where each section begins. Currently ODB is set up to do this when your data is sorted by any of the following fields (as the first sort key): street name, city, state, ZIP, party, vreg, nospam, region, askamount, ward, pct, cd, hd, sd.

(NEW to 1.0.1) Form Letters. ODB contains a simple yet powerful form letter generation system to allow you to print customized business letters directly from your ODB database. These letters will automatically provide a full address and salutation at the top. A few preset form letters are included with your ODB installation; you may select the one you want and click the 'Edit form letter' button to customize it. Form letters can now include any field from the database; you just need to enclose it in double brackets, like this: [[zip code]]. When printed, the letter will show the actual zipcode and the brackets will not appear.

If you turn on the customization options as described in section B, you can install new form letters or delete letters you no longer need.

The first option in the form letters pull down menu is labeled "Thank You for Chosen Donor"; this will print a thank you note, which is a special type of Form Letter. Thank you notes are stored in the same place as other form letters but can be printed only for people who have a payment history. You can set up different thank you notes for different categories of payments; please refer to Section B for details about customizing ODB to do this.

Donation slips. The ODB membership system is designed to support an "annual giving" model. This means that your goal is build a base of supporters who donate at least once every year. To encourage regular giving, ODB has built-in donation slips. (The default period of 1 year may be changed.)

The **donation slips** printing option only applies to "people", and should be customized first with your organization's information, as explained in section B.

When printing the donation slips, ODB will automatically include the donor's contact information, print a warning line if someone's membership is **about to expire**, or print a friendly indication of when the membership did expire. Renewal slips are also designed to encourage a donor to upgrade their membership and give more by starting the dollar amounts on the slip at the expected donation level (the "ask amount").

Thus, a donor who gave $100 last year will have a slip that provides options starting with $100:

__$100 **__$150** __$200 __$300 __$500

Donation slips are printed three per page and will fit in a standard reply envelope ("number 9" or "number 6 ¾") after they are cut. Printing 50 donation slips (or cards, if your printer can handle thicker stock) will require seventeen sheets of paper. Colored paper and a paper cutter are highly recommended to ensure that your donation slips have a professional appearance.

10. Import and Export Features

The **Import/Export** button on the main menu opens the Import/Export Tool -- window with two tabs on it: the Import tab and the Export tab. Normally, the **Import/Export** button will open the tool with the Import tab showing. Right-clicking the button will show four shortcuts that take you directly to the Export tab, and preselect some options for you.

You use the Export tab to output data from any of ODB's main tables (People, Payments, Groups, Notes, Pledges) to a text file. This is most useful if you want to send a mailing list to a mail house, generate the addresses for an MS-Word or Word Perfect mail merge, or view some of your data in Excel or Open Office.

The records can be saved in three different formats: tab-separated text (with headers and data, data only, or headers only), comma-separated text (with headers and data, data only, or headers only), or XML. You may export all the records, or only the chosen records on the main menu. After you click the Import/Export button, the Import/Export Tool appears. Once you click the Export tab, you can set up your export in three steps:

1. Choose what you want to export, including: People, People with extended information, Groups, Groups with extended information, Donations (Payments) and Custom Export. The last option is used if you right-clicked the Import/Export button and chose one of the four options there.

2. Select the check box for each field you wish to include in the export, and then adjust the order. The top field will be the first (leftmost) one in the file. The bottom selected field will be the last (rightmost) one in the file.

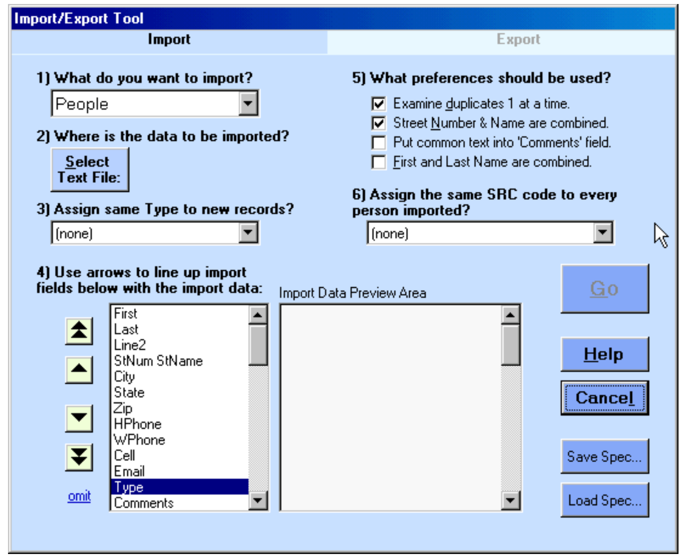
3. Select the export format from the list (described earlier).

4. Select the destination. The default is "Text File", but you can also choose the Windows Clipboard. Two of the shortcuts available from the main menu screen by right-clicking on the Import/Export button will select the "Clipboard" option.

When you are ready to export the data, click the **Go** button. Unless you selected the clipboard in step 4, a window will appear that lets you choose the location and file name for the data. Click the **Save** button.

Currently there is no way to export **SRC codes** using the Export button. As a workaround, you could copy the SRC codes you need exported to Issue, Constit, or Activity codes using the Mass Actoin tool.

You use the Import tab to quickly add contacts generated elsewhere to your database, without having to retype the information. This feature supports both tab-separated and comma-separated files. If you have data in an Excel file, you have to save it to be Text (Tab-delimited) or CSV (Comma-delimited).



We recommend that you include a header row in your data before importing it, listing the names of each column of data. ODB will not import the header row; it is used only to make it easier for you to line up the import data with the corresponding fields in ODB.

It is very important to ensure that your data does not contain any linefeeds (carriage returns or hard enters) in the middle of data fields. Data within a field should be separated only by spaces. ODB requires that the carriage returns only be used to end a line of data. Longer fields like Line2 should to be trimmed to 40 characters; the first and last name fields should be trimmed to 20 characters each.

Assuming your input file meets these requirements, importing will involve five steps (six steps if your database has the SRC code feature turned on):

a) Identifying the **type** of information you are importing (people or groups).

b) Selecting the text file you want to Import. When you click **Select File**, a "Select a File" box will open and allow you to select the type of file. You have two choices: Comma or Tab separated. You can also use AutoImport to have ODB try to recognize whether your file is Comma or Tab separated. AutoImport will not recognize other file formats. To open an Excel file you must first save it as text as is described on the ODB web site (organizersb.org/importhelp).

c) Deciding if you want to assign a **type code** to the data. This is strongly recommended if all the data is from the same class of records, and if that information is not already included in the data file you are importing. For example, if you are importing a list of foundation contacts, and you have assigned "F" as the type code for funder in ODB, you could have ODB assign the type code "F" to each of the records.

d) Changing the **order of the ODB fields** (that are listed on the left-hand side of the import screen) to match line-for-line with the fields of your imported data (in the second column to the right under Import Data Preview Area). Whatever data is contained in a field on the right (second) column, will be imported into the corresponding ODB field on the left. The two sets of fields scroll simultaneously so that you always see how things are lining up. If your old data file contains a field that you will not import into ODB, use one of the <omit> tabs at the bottom of the ODB field set to correspond to that data.

When you start the import process, you might notice that one of ODB's optional fields (i.e. FAX or Occupation) is not turned on. If this is the case, you must go into the ODB settings area and enable those fields before resuming the import process. (See section B of the manual for more about the settings area.)

e) Choosing any of the **import options** available. For instance, the "examine duplicates one at a time" feature is designed for relatively small input files of 2000 records or less, or input files that you know in advance will not generate hundreds of duplicates. If you are importing 5,000 people into ODB, it is almost always better to uncheck this option. The other options are fairly self-explanatory: they allow you to automatically have ODB separate out firstname/lastname into two fields if they are combined. They also allow you to have ODB automatically separate out street number and street name if they are combined. Finally, ODB allows you to put any text you want into the comments field of the new record; this is one way to identify where the record was imported from.

f) Assuming that you have enabled the SRC code enabled in ODB, you will have a sixth step: assigning a **SRC code** to all the imported records. A SRC code will help you track how you first made contact with a particular person in your database, or what the "source" of their information is. For instance, if you are importing from an old database, a logical SRC code might be: "Former database contacts in Excel." The SRC code pull-down also allows you to import your SRC codes directly from your import file. Note that it will only accept SRC does that are defined in ODB before you start importing.

You can **save and load import specifications**, so that once you set up the order of the fields in the data files you commonly import, you won't have to do that all over again the next time. There are two buttons in the lower right corner of the search screen: one for saving import specifications, and one for loading import specifications. The import specifications are saved as a simple text file.

Once you have selected the options that make sense for your data, click the **Perform Import** button to perform the import operation and screen out duplicates.

The ODB software will assist you in several ways after you begin the import process. When the software first encounters a duplicate, it will ask you if you want to skip all possible duplicates encountered. If you turned **one-at-a-time duplicate checking** on and the software notices five consecutive duplicates, you will be prompted by ODB to automatically skip all remaining duplicates. **Skipped records** are saved to a separate file, and tagged with codes indicating the type of duplicate each record is: FL (first and last name), NE (last name and email address), NZ (last name and ZIP code), NEZ (last name, email, and ZIP). This way you can double-check if skipped records are actual duplicates. You can also add any extra data from duplicates to the corresponding records already in the database.

Importing Tips. If you made a mistake, or wish to delete the records you just imported, click on the Mass Action button in the Main Menu screen and click on **Mass Delete**.

For large imports, we recommend turning the "Check Duplicates One at a Time" option off entirely. If you are importing a large data file (at least 2000 records), the duplicate checking method is relaxed to keep down the number of false positives – or records identified as duplicates but which are really not.

If you plan to import more than 2,000 records, you should also make sure that you save the old data file to the same computer where you have the ODB data file installed; this can be over five times faster than importing your data over a local network connection.

If you have an existing database that has a large number of fields needing to be imported, the best solution is usually to first open that database using a spreadsheet such as MS-Excel. Excel is able to read DBF (dBase) files, for example. Once the information is in Excel, you can use Excel formulas, the "Search and Replace" feature, or macros to adjust the data to a format similar to that used by ODB. Just be sure to save multiple versions of your Excel file so that if you mistakenly mess up the data along the way, you can go back to an earlier version

Special Note: it is possible, using import specifications, to make ODB import data into the comments field without overwriting existing data in that field. Normally, comments are indicated in an import specification by the number "-16", which tells ODB to run some filters to strip incompatible information, like linefeeds, before importing. The code for appending data to comments is "-17". So If you want to add several fields to the comments containing data you don't expect to use much, you can go into Wordpad and edit your import specification file to include several lines looking like this:

Comments -17

That's it! Doing this will cause the comments field to be repeated several times in the list of fields on the left hand side of the window, and it will cause your imported data to be appended to this field.

Advanced Import. As with the Export feature, by default only the basic contact information fields for the People table are selected. You can easily change this, to include more fields, or import Groups, or import Notes, or Payments by using the pulldown menu in step 1.

If you are importing payments or notes, it is important to use the OldID field when importing your people data. This field should then be populated with the ID numbers of records in your old database.

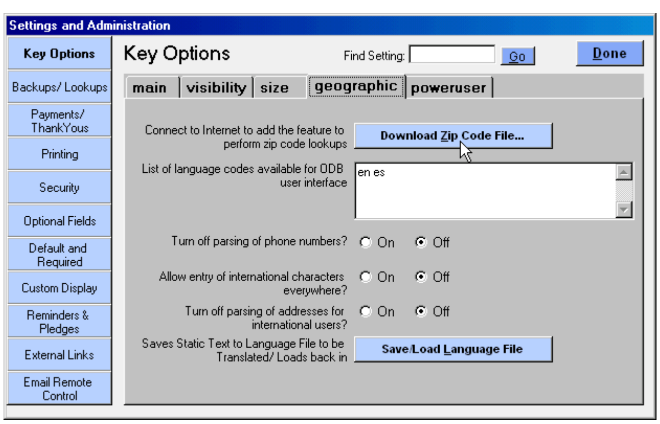
Then will you be able to import your old donations, making sure to enable the import to automatically match up the payments or notes with the donors they belong to by ID number. There is a checkbox labeled "Use OldID to associate payments (or notes) with people" that you must check off to make this matching process happen.

11. Data Entry Aids

As a professionally designed software program for high-volume use, ODB's features encourage volunteers and staff to put in complete information, and discourage them from entering incorrect information, to save you time later.

ZIP Code Lookup. ODB allows you to turn on a ZIP code feature that automatically looks up city and state based on ZIP code, or looks up rural, 5-digit zip codes, for you. To install this feature, first connect your PC to the Internet. Then open the **Settings** window using the wrench icon in the upper right-hand corner of the ODB screen. Within the first group of settings, labeled Key Options, select the last tab, labeled geographic, then click on the button labeled **Download ZIP Code File**. By default, the file will be downloaded to the location where your database is stored (which could be on the network, to give your whole office access to this feature). You will be given the option to install it in the program files folder (in which case the ODB uninstaller is able to find and remove it). After the download completes – 20 seconds over a standard DSL connection – it should automatically turn ZIP-code lookups on.

Once installed, you don't have to do anything special to use this feature. As soon as you finish typing a ZIP code in the People Entry screen, or as soon as a city or state you are typing results in a unique match, the system will update the appropriate field(s) for you.



Note that the ZIP-code file available for download provides United States ZIP codes. If your group is based in Mexico and you have access to data for Mexican postal codes, please contact us and we can show you how to use this data with ODB.

Area Code Identification. ODB's ZIP Code database has the information needed to display the location (city and state) associated with a phone number, when you hold the mouse cursor on top of a phone field in the data entry screens. It also includes geo-coding information that could be used to search for other records with addresses within a certain distance (say five miles) of the address of the selected record. If you would like to do this, please contact us, we need sponsors to add this feature to ODB.

Keypress Filtering. ODB will not let someone enter invalid information, such as numbers in the space for a State abbreviation, or random letters in the middle of a phone number. You may turn some of this key filtering off (see Section B) if you need to enter international phone numbers that allow different characters.

Warnings on Bad Data. The program checks the validity of all email addresses and checks for invalid data in the phone number field.

Lookup by ID Number. ODB prints the ID number of a donor on every donation slip, so that you can use the number as a shortcut to access the record. If you are entering a donation slip that has an ID number of "555", all you have to do is type "#555" into the main search box of ODB to open the record, or "$555" to add a payment to that record.

Required Fields. It is possible to configure ODB to require you to fill in a "type" code for each person or group. When turned on, a record may not be saved unless this menu item is chosen. By requiring people to fill in the "type" code, you enable your organizers and fundraisers to use this information more efficiently when generating lists. It is also possible to *turn off* the feature that requires you to save the geographic area covered by a group, as well as the organization type. You may set ODB to require comments for each record, making sure that you can track the source of each entry. You may also set ODB to require that you assign a SRC code and/or a type code when you import data. See section B of this manual for details.

Default Fields: ODB also allows you (in the settings) to specify default values for several fields. These include the individual and organizational type fields, and the default donation categories. Use of these defaults is not recommended unless almost all of the data you expect to be entering will use the defaults.

Automatic Click Features: ODB also allows you to auto-open various screens in succession when a single record is found. To enable this feature, right-click on the Search button on the main menu. Then you can toggle the actions you want ODB to take upon a match. For instance, you might want the add payment screen and the "activities" window to show up when you select someone, so that you can enter payments and specific tracking codes for a pile of data entry without the extra mouse clicks involved in opening these windows.

Accessibility Features: Almost all of the buttons are accessible using tabs and keyboard equivalents, for people who are not able to easily use a mouse or prefer not to do so. We would love feedback on these accessibility features! The **Alt** key is used to access the keyboard equivalents, which are indicated by letters underlined on buttons.

Here is the full list of keyboard equivalents available on the "main menu" screen:

Alt-A	Activities codes
Alt-C	Constituencies codes
Alt-D	Advanced Search
Alt-E	Edit
Alt-G	New Pledge
Alt-H	Show/Hide Details
Alt-I	Issues codes
Alt-L	Clone
Alt-M	Copy Emails
Alt-N	New Record
Alt-O	New Note
Alt-P	Print
Alt-R	SRC/Event codes
Alt-S	Search
Alt-T	Mass Action
Alt-V	VID codes
Alt-W	View History
Alt-X	Import/Export
Alt-Y	Payment History
Shift-F10	Bring up the right-click menus on several fields that are in the main menu.

Help Functions. To call up this user guide from within ODB, click the **question mark ("?")** button in the upper right-hand corner of the ODB window and choose **"Help & Documentation…"** Then click "Open User Guide." To display tips when selecting or importing records, help buttons are also available on those screens.

12. Data Entry and Selection Shortcuts

ODB provides shortcuts that help you save steps when entering data. Some of these functions are available through right-clicking; others are triggered when you paste data in to a field that expects a consistent format (i.e. phone number or zip code). Most of these functions are on the People Entry screen, or on the Main Menu.

a) *Repeated Comments.* Often you will want to enter a group of names from a sign-up sheet and have a comment associated with those names, such as indicating at which event they signed up. To do this, **right-click** the **New** button and you will see two menu options labeled "Add with Repeated Comment from Selected Record" and "Add with Last Repeated Comment." This menu will vary, depending on what is selected on the screen. For instance, if you had entered one record with the comment "Clambake Fundraiser" you could choose "Add with Repeated Comment from Selected Record" to initiate entry of the rest of the people on your list.

b) *Dated Comments.* Often you will want to add a comment to someone's record reflecting an interaction you had with that person. If you want to automatically put today's date into the comment area of a person (or group), all you have to do is **right-click** the **Edit** button and choose **Add Dated Comment**. Although, for longer notes, we recommend you turn on the "notes" feature of ODB 1.0 as described in section D of this manual.

c) *Cloning Options.* Similar to Repeated Comments, there is a **right-click** menu available on the **Clone** button. This allows you to clone a record with or without all of the tracking codes associated with it. So you can decide whether you just want to copy someone's address or whether you want to copy all of the attributes you have assigned to that person.

d) *Phone Number Pasting*. When you paste a **phone number** into any of the three phone number fields, bad characters and leading "1's" are automatically removed and it is formatted with hyphens for consistency.

e) *City/State/ZIP Pasting*. When you **paste city, state, and ZIP code** information into the city field, ODB will automatically split it up into the component fields.

f) *Full Address Pasting*. When you paste a full address into the Address field, ODB will automatically split up the address into up to seven component parts when you press the tab key.

g) *Contextual Search.* When you **right-click** on any part of a person's **address** in the Main Menu preview pane, ODB will show you menus that allow you to find people with similar addresses. The same applies to phone numbers, and to the field that displays a person's type or district information. This is an extremely powerful feature as it bypasses the need to do customized queries for some searches.

h) *Contextual Code Search*. When you **right-click** on any **tracking code** shown in the main menu detailed preview pane, ODB will show you a menu allowing you to find people sharing the exact same set of tracking codes, or any of the tracking codes used by the person or group you are currently browsing.

i) *Date autocompletion*. When you enter part of a date, such as '1/5', ODB automatically adds the year. If any part of the date is omitted, ODB substitutes today's information, thus '//' is a shortcut for today's date.

j) *Smart cursor placement*. When you do a **search** that yields no results, the cursor will jump back to the search box. When your search has results, the cursor will jump down to the results box (in the Main Menu) and the down arrow can be used to scroll through the results, saving mouse clicks or keystrokes.

k) Mailto extraction. When you copy an email link from a web page, and paste it into the email field, ODB will automatically strip off the "mailto:" portion of the link.

13. Upgrading and a Note About Uninstalling ODB

Upgrading. It is extremely easy to get enhancements and upgrades to ODB as soon as we release them. ODB has a built-in a feature to allow Internet users to download and run a new version of the ODB setup program from within ODB.

Unless you disable the feature, ODB will automatically check for a new version upon startup every 15 days. If a new version is found and you agree to download it, ODB will wait another month before checking again. If you are not on the Internet during a check, ODB will try again the next time you start up the software.

Note: while the ODB data file may be kept in a shared network folder, every user has a distinct installation of the ODB program on her/his computer. This means that each user will need to upgrade ODB separately.

The installer used when you upgrade in this fashion includes new software plus updates in templates and the user guide. But it is not a full installer that can be used to install ODB on a machine that never used it before. If you need that installer, you must go to the **www.organizersdb.org** web site and follow the instructions on the download page.

Making your upgrade go smoothly. People who are accustomed to other software often fear the upgrade process. With ODB there is little to fear. You simply install either the upgrader or the full installer on top of your original ODB software. You will **NOT** lose your data.

When you install on top of the old version, the new version of ODB will be able to locate your old data file. For larger upgrades, ODB will also offer to run a conversion utility on your database. A conversion utility alters the format of the ODB database, usually to add fields and settings that are needed to implement new features. If you fail to run the conversion utility, ODB is fairly lenient; it will work, but the newer features will be disabled. The sole exception to this rule is the upgrade to 1.0.1; the changes involved in this upgrade were so major that running the conversion utility is mandatory.

If you use this method to upgrade, ODB will leave a file on your desktop called **odbupgrade.exe**. You may **delete** this after the upgrade completes; if you have a slow Internet connection you might want to provide this file (via diskette, USB "pen" drive, or your network) to other users of ODB in your office so they can also upgrade at the same time. Upgrades to 1.0.1 must be done on all your networked computers at once. Other upgrades can be done on one machine as a test, but this is not really necessary. If you have concerns about an upgrade, just check the forums at http://organizersdb.org/users a couple of days after the release of a new version to be sure that other users have not reported any problems.

If you originally installed ODB in a location that is not standard (any other than the default recommended by the installer), you will be prompted when upgrading to make sure you choose the same location when updating, to insure that you upgrade "on top of" this installation.

Uninstalling. Please use the uninstaller only if you plan to cease using ODB on a machine, as one of its features will **delete your entire ODB** program files folder, including extra copies of backup files, custom queries, and possibly customized versions of the zip code file, custom reports, or thank you notes. (In

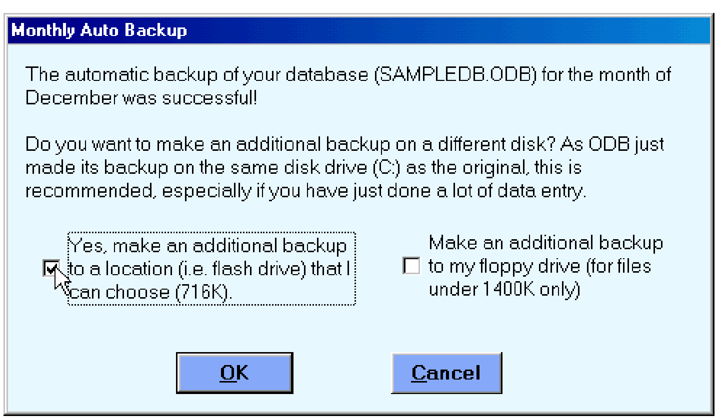
ODB these items can reside outside the program files folder.) Please remember that uninstallation is **unnecessary** and **counterproductive** if all you want to do is upgrade to a new version.

14. Backing up the Database; Reverting to a Backup

Backing Up Your Data. If you clicked "yes" to the additional back-up option during your initial installation, ODB will automatically back up your database to your hard drive at the beginning of each month.

Plus, you may enable additional backup options for your ODB installation that will create an additional backup in the location where your database is installed, on a daily, monthly, or annual basis. If all of the automatic backup options are on, ODB will make a single daily copy of your data, plus another monthly copy, plus weeklyh backups within the week starting the 8th, 15th, and the 22nd of each month.

Plus, ODB by default will give each user an option to also save the database file to an external drive or diskette – a standard diskette holds about 2600 records – or to an external disk such as a USB key, network server, zip drive, or even an iPod! We highly recommend that you alllow ODB to back up your data to an **external location**, not only your hard drive.



You should also back up the database manually, after a period of high data entry. To access the manual backup feature, right-click on the Mass Action button button and choose **Backup Database** from the popup menu.

Reverting to a Back Up. In case you ever need to restore your database from a backup, it may help to get assistance from someone very familiar with computers.

1. Open up the folder named "Backup" within the folder where your current copy of the ODB program was installed. (This is usually the "OC" folder within "Program Files" within the "C:" drive.)

2. In this folder you should see all your monthly auto-backups (named odbdata01, odbdata02, for the January and February backups) as well as any manual backups (named odbdata0205, for a backup made on Feb. 5), or weekly backups.

3. Examine the dates of the files by choosing "Details" in the View menu in Windows to determine which of the backup files is most recent. Copy the most recent backup file to the location where you keep the master copy of your database, and then rename it to what the master copy was named.

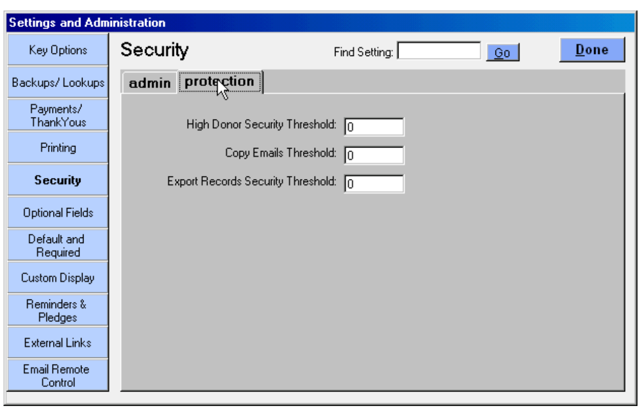
4. Finally (when ODB is not running), change the name of the main database and then rename

the backup copy to match the old name of the main database.

15. Security Features

There are several kinds of security within ODB: protect donor information, restrict database exporting, lock down codes and settings, and protect the copying of email addresses, all using a single password. These features are off by default, but it is possible to turn one or all of them on by going into the **Settings and Administration** area in ODB (wrench icon in upper-right-hand corner) and clicking on Security in the list to the left. See section B for more detail.

Password. There is one password used to secure your database, defined in the setting labeled Administrator Password in the security area. If you change it, we strongly recommend that you save the



new password in a secure location, as we will not be able to retrieve it for you.

Protecting Donor Information. Enter an amount (in dollars) in the "high donor security threshhold" setting. When high donor protection is in use, ODB will ask for a password if you attempt to retrieve the donor payment history or edit the donor information for anyone who gave that dollar amount or greater. But the password will be requested only once. After that, as long as you do not exit ODB, you will have full access to all donor information.

Protecting Exports. You can turn on the "protectexport" setting (as explained above) by entering a number (of records). ODB will ask for a password each time a user attempts to export more records than the limit.

Protecting Copy Emails. You can turn on the "protectcopyemails" feature by setting a number (of email addresses) similar to the Protect Exports feature. ODB will require a password each time a user attempts to copy email addresses of people who have donated more than the limit.

Entering "0" will turn off the "protecthidonors," "protectexport," and "protectcopyemails" settings.

Lock Down Codes. To make sure that a casual user does not change your codes and settings once you have customized them, turn on the setting labeled "Require Password to Change All Settings".

No Spam. When you copy a list of emails, records that have been marked with the "nospam" checkbox are omitted. The exception to this rule is that the last six right-click options in the Copy Emails menu will generate a formatted list with the "nospam" emails "flagged" rather than omitted entirely.

Note: these settings do not completely lock down the information; a casual user can still view, search and edit records. The idea is to have a fairly simple method of restricting the database so that a casual user will not have total access.

If you need a higher level of security, you can use Windows file sharing to restrict access to the database file. Please contact us if you need to do this and you are looking for technical help costs involved.

B. ODB Customization Guide

One of the most powerful features of ODB is the ability to change almost any configuration setting, tracking code, or type code within the software.

There are two types of customizations possible:

1. Changing tracking codes and type classifications to reflect activities, issues, constituencies, volunteer actions, etc. that are relevant to your group.

2. Modifying more than 160 settings and prompts.

Many ODB users decide to sign up for one of our support packages for assistance with performing the customization of their ODB installation. Even if you do sign up for assistance, you should find this section helpful because ODB will allow you to continually make changes, turning on or off features based on your needs and requirements.

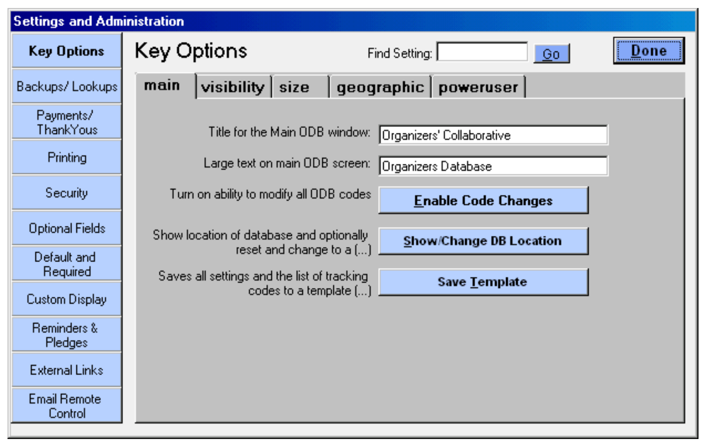
If you are just getting started, we recommend you fill out the Customization Survey (found in the Appendix and at www.organizersdb.org) before making the changes described in this section. The survey helps you begin to think about how to use ODB effectively.

1. Changing the Tracking and Type Codes

Most healthy organizations are dynamic, constantly adapting their programs to serve community and social needs. It makes no sense to use a database program that makes it difficult to remove obsolete information, or requires a costly expert to make simple enhancements. A checkbox showing who attended the charity auction in 1996 might have been important in 1997, but it is not very relevant today? So ODB makes it easy to remove it and add new checkboxes (tracking codes) that you are much more likely to use.

ODB allows you to modify almost all of the codes and value lists used to classify the records and donations in your database. This feature is powerful and easy to use. To turn it on, click the wrench icon in the upper right-hand corner of the main menu.

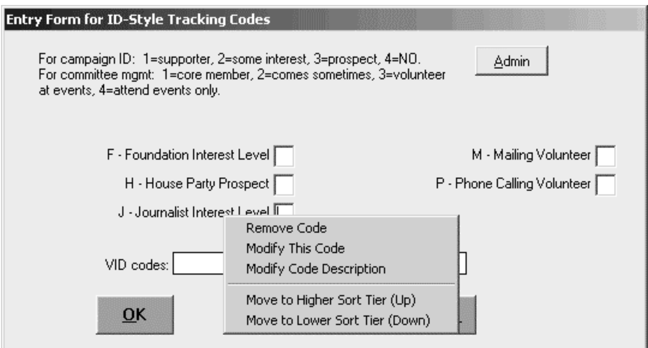
This will open up the **Settings and Administration** screen. From here, click on the button labeled **Enable Code Changes**. ODB will confirm and then return to the main menu.



Once you have done this, this, it is possible to edit the lists of codes or menu options from several places in the ODB program. The details are described in subsquent pages.

Editing a Tracking Code list. To see this feature in action, click any ODB record (or the Select Records button) and then click one of the tracking code buttons (Act, Iss, Cons, or VID).

In the resulting screen full of check boxes, you will now see an **Admin** button in the upper right-hand corner. Clicking on **Admin** will reveal a small menu whose first item lets you add a new code to the list. In addition, the RIGHT mouse button can be used on any existing code to modify or delete it.



You can also modify the order in which the tracking codes are displayed, using the 4th and 5th options in the right-click menu. By default, all codes are assigned to a "sort tier" of 0. If, for instance, you want your to put the three annual dinner-related codes down at the bottom of the list, you can right-click on each of them and move them to a lower "sort tier" (1). If you hold the cursor over the code, the tooltip will display which "sort tier" it falls into. You can also completely reset all sort tiers to 0 by clicking on the **Admin** button, and choosing to reset the sort order.

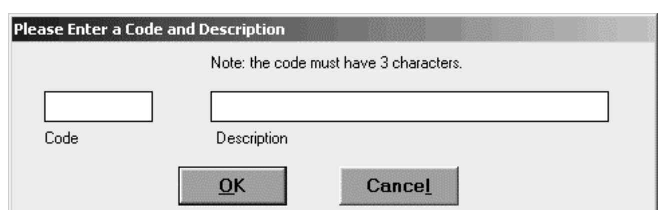
Tracking codes for Issues, Constituencies, and Activities must be one letter followed by one number. VID tracking codes consist of a single letter. The codes are not case sensitive. (Lower-case letters are converted to capital letters.) Be forewarned that this feature is extremely powerful. If you remove a tracking code, ODB will automatically go through your entire database and remove all occurrences of that tracking code.

Type Code and Payment Category Editing. It is also possible to modify the **Type** codes used to classify an individual or an organization. Type codes consist of one capital letter plus a description such as S – Supporter. A separate list of Type codes can be created for People and Groups. Remember that Type codes are NOT overlapping categories. Please note that the type list in the People and Groups Entry windows will not be immediately regenerated; you must quit and restart ODB for this to happen.

Donation Category and **Subcategory** codes have a similar format. You may have up to 32 different codes, and codes can be just a single letter, or a letter followed by a number. Type and Donation Category codes can be modified like any other type of code. However, you must access these windows from the Advanced Search Tool, instead of from a particular record. To modify the Type categories for People, you must be searching for People; to modify the Type categories for Groups, you must be searching for Groups; to modify the type categories for Payments, you must be searching for Payments.

Note Category codes use the same format as Donation Category codes. These categories are available only if you have enabled the "shownotes" setting – described more fully in section D of this manual.

SRC Codes. Creating, modifying, and deleting SRC codes is done in the same manner as for tracking codes. You may create as many as you need; SRC codes are 3 or 4 letters long.



SRC codes are by default assigned a date, today's date. You can use this capability to organize the codes chronologically; right click on a code once you have enabled code changes and you will see a menu option to modify the date associated with the code. This is useful if you remember in March that it would be useful to have a code for "received payment" and you want that code to appear in the list next to other codes for that event, entered a few months back.

Donation Appeal Codes. These codes can be customized in a manner very similar to SRC codes. First you must access the window with the list of appeal codes, which is available in the Advanced Search screen if you search for "Payments" using the pull down menu in the upper left corner of that screen.

Form Letters. If code changes are enabled, it is possible to add a form letter from within the Print window. The last menu option under the form letter radio button should read "Add New…"

Thank You Letters. If code changes are enabled, it is possible to add a form letter from within either the Add Payment or the Thank You Options window. You will see an orange "Admin" button next to the pull down list. More details on this feature are in part 3 of this chapter of the manual.

Reports. Once code changes are enabled, you can extend the list of custom reports in ODB, using an Admin button that appears in the 'Custom Reports' pane of the Print screen. (Note: this button was disabled in prerelease versions of ODB 1.0.1 but if you downloaded after 1/3/07 it will appear.) . See section E for more details.

Reports Categories. Once code changes are enabled, you can extend the list of report categories in ODB, an Admin button will in the window used to edit report definitions. See section E for more details.

Archiving Codes. ODB includes a powerful feature that enables you to move code info from one section to another. By right-clicking on an SRC code when "enable code changes" is turned on, you can "archive" old activity codes into the SRC code table, or you can take an SRC code and copy it back to an Activity, Issue, or Constituency code.

To use the feature, enable code changes in the Settings and Administration screen and bring up any SRC window. Then right-click on the code you want to transfer. This brings up a menu with three new options to copy the SRC code to an activity, constituency, or issue code.

After you move the code you must remove the SRC code manually if you don't want it anymore. Note that at the present time this capability only works with People records; Group records cannot have SRC codes.

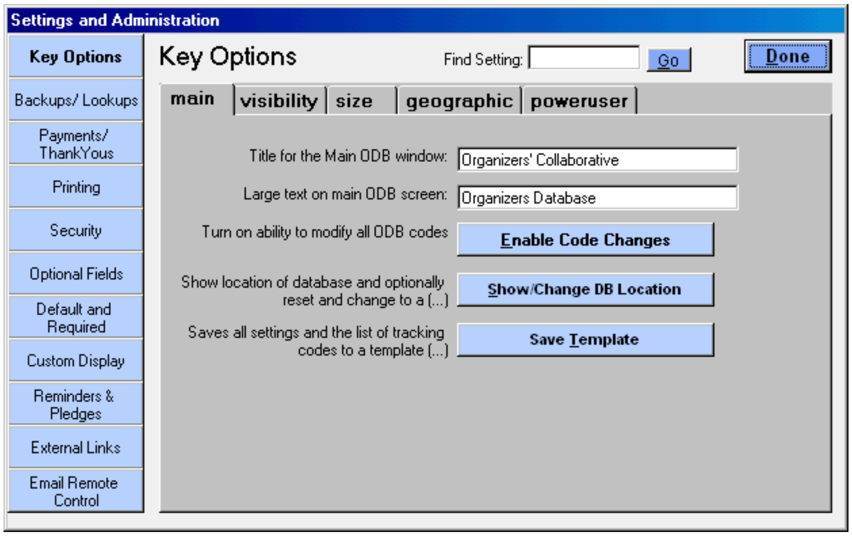
SRC codes can also be 'merged into' an issue, activity, or constituency code. When you try to copy an SRC code to an existing activity code, ODB will no longer force you to choose a new code. If you choose an existing one, you will be presented with the merge option.

SRC codes can also be saved as part of a template for sharing among groups. The SRC code feature will continue to improve; we plan to implement the ability to automatically assign a new SRC code to a record that ODB thinks is a duplicate when you are importing a list.

When finished using 'Code Changes', it is a good idea to disable the feature by quitting and restarting ODB before allowing others using your PC to perform data entry. It is also a good idea to require a password to get into 'Code Changes,' as the next section explains.

It is also possible to archive a code using the "mass update" features described in the previous section of the manual. For example, you can create a new activity code (A9, for example). Then you can select all the people using a SRC code (A999, for example). Finally, click on the Mass Action button and then assign all the chosen records to use the A9 activity code.

2. Customizing Settings and Prompts



ODB also allows you to modify over 160 settings and prompts. After you click the wrench icon in the upper right-hand corner of the ODB main screen, you will see a list of 11 categories that organize 45 different setting screens into tabbed groupings.

The categories are:
Key Options
Backups/Lookups
Payments/Thank Yous
Printing
Security
Optional Fields
Default and Required
Custom Display
Reminders & Pledges
External Links
Email Remote Control

Rather than try to describe all of these settings here, we recommend that you open up your copy of ODB and move the mouse cursor on top of each of these buttons. You will see tooltips that document each settings category. Within each of the eleven main setup screens, there is now text describing the function of a setting as well as longer tooltip text which more fully documents that setting.

If you spend ten minutes browsing through the screens without making changes, you will get a good idea of the flexibility of ODB. If you wish to refer to a setting by its internal "0.9" name, type that name into the "Find Setting" box and click 'GO' and the screen with that setting will quickly appear.

For text and numeric fields it is possible to go back to a value you accidentally erased by right-clicking the text box and then choosing 'undo' from the popup menu.

The new setting are is much better than the 0.9 settings screen about preventing errors. Several of the settings enforce limits on how many characters you can type, or the size of a number that you can enters. This greatly reduces the chance of errors.

Even so, it is a good idea to restrict access to the Settings area in your database to one or two key people; if you go ahead and randomly make changes to it you might run into some problems. To do this, click on Security and then turn on the setting labeled "Require Password to Change All Settings". Then you can set the Administrator Password setting to something that you will not forget.

3. Customizing Thank-you Letters

Quick thank-you letter printing is one of the most popular features of ODB. You can select a list of recent donors, then print letters that automatically merge the donors’ addresses, salutations, last gift amounts, and last gift dates, and other fields too.

ODB 1.0.1 is backward compatible with previous versions, yet it contains a completely revamped interface for printing and modifying thank you notes, plus the ability to generate arbitrary form letters.

Before describing how the feature works, it is important to first understand how form letter printing works, because thank you printing is just a specialized version of form letter printing.

Form Letter Locations. By default, all form letters are stored locally on the computer where you installed ODB. If you have several users of ODB in a network, each user will have his or her own private cache of form letters. You can install ODB multiple times on one computer, and the addlitional installations will all have their own cache of form letters.

Your organization may opt to share form letters and thank you notes among all users on the network. To do this, someone familiar with Windows must copy the folder labeled 'mergetext' from the location where ODB is installed to the location in which your shared ODB database file resides. You can determine the exact location by printing a 'tip sheet' (click on the '?' and choose Print Tip Sheet…).

If you have made a shared copy of the mergetext folder, all users of ODB on your network will see the same list of form letters and thank you notes, and changes made by one user will be visible by all users. The shared 'mergetext' folder will take precedence overlocal copies.

Thank You Letters vs. Form Letters. When you select any group of records in ODB, you can print form letters for them. Thank you letter printing, however, is restricted to people records and more precisely, people who have recorded gifts.

The list of form letters is accessible under the last radio button option in the Print screen. The list of thank you letters is accessible only after you click the OK button in the Print screen, provided you select the form letter choice labeled "<thank you letters>. The thank you letter list also appears in the Add Payment screen.

The actual letters used to print thank you and form letters are interchangeable. By default, when you first install ODB, only the default thank you note 'thankyou.txt' will appear in the thank you letter list. All other letters that reside in the active mergetext folder will appear in the list of form letters.

If you select 5 people in your database, three of whom are donors, and you click Print -> Form Letters, and then you choose one of the form letters from the list and click Print, what will happen? ODB will print 5 letters. However, if you select "<thank you letters>" from the list, then ODB will bring up a popup window offering to print thank you notes for just the 3 people with gifts.

Note that ODB will happily print thank you notes for people who gave a year ago or more; it is up to you to select the appropriate group of recent givers before clicking Print.

Setting up Multiple Thank You Letters. Since 2005, ODB has had the capacity to use multiple thank you letters, and to pick which thank-you to print based on the category of the gift. This means that you can enter 50 gifts, 30 of them contributions to a special building fund and 20 of them membership renewals. ODB has the capability to print out the batch in one operation, automatically selecting the correct letter to go with each gift.

The way you set this up in ODB is as follows:

1) In the Wrench, choose **Payment/Thankyous** -> **Codes** and you will see a box labeled "List of Categories Considered Gifts." This is the setting that in previous ODB versions is called "giftcategories."

2) Put into the box a list of one or two letter codes for the payment categories that require thank yous to be generated. I.e. if you wanted to generate thank yous for the categories B (building fund) and M (membership) you would enter "B M" into this box, without the quotes.

3) Exit out of the wrench area (it will ask you to restart).

4) Go back into the wrench area, and click on "Enable Code Changes"

5) Select any donor in your database, and click the Print button, choose Form Letters, and click Print again to open the thank you letter for the donor.

6) In the "Thank You Printing Options" window there should be an orange admin button. Click it and choose "Add Thank You Note to Defs."

7) This will bring up yet another window, labeled "Create new acknowledgement letter for unassigned gift category". This will screen allows you to assign thank you letters to the categories you created back in step 2.

Once you do this, you will be able to print a batch of thank you notes using the default thank you note category option, which is labeled "<use category default>". This will automatically select the thank you letter based on the gift category of the last gift, for each donor.

Additional Notes: the letters you created in step 7) will appear in the dropdown lists in ODB where you have the opportunity to list letters. Letters that appear in this list will be excluded from the list of form letters.

Also, we should note that you do not have to assign a custom thank you note to all of the gift categories. If you have a gift category without a custom thank you note, then the default thank you note (thankyou.txt) will instead be used.) It is possible to edit the list of thank you notes manually, which can be useful if you want to clear the list entirely, or if you want to modify the category codes but leave the definitions intact.

Finally, if you are using the **giftcategory** setting in ODB, it will **not** let you print thank-you notes for non-**giftcategory** payments. For instance, if you make a ledger category called Fee-For-Service and exclude it from the giftcategory setting (because it is not a donation), you will not be able to print thank-you notes for these payments. If you leave the giftcategory setting blank, ODB will let you print thank-you notes for payments in all categories.

Printing a Batch of Thank You Letters

Normally, when you print thank you letters, you must first choose people who have gifts by going into the Advanced Search window and finding people in the Payments section of Advanced Search. To access this section, use the pull-down menu in the upper left hand corner of the Advanced Search window. Then choose the thank you letters you want to print by entering a range of 'entry dates'; if you are printing a batch of thank yous for today's data entry just enter two slashes (//) in the first box and click Search to find them.

Once you have found the donors you want to thank, click OK and then click **Print**. Since you have selected payments first, the text "Selected data includes people and payments" will appear just underneath the name of the selected printer.

At this point you may print anything for these donors: labels, arbitrary form letters, etc.

If you leave the form letter pulldown menu at its default setting, "<thank you letters>", and click the Print button, a new **Thank You Printing Options** window will pop up showing the names of the letters that will be printed and giving you the ability to omit letters you do not want to print. The window is flexible in that it allows you to let ODB determine the date range for thank you printing based on the date you last printed thank you notes, or you may put in a custom set of dates, or ignore the date range restriction altogether.

The list of thank yous displayed in the **Thank You Printing Options** window consists only of the people who actually have payments. ODB will put a check box next to all of the donors, unless the Giftcategories setting is in use and the donor's recent gift was not in a category that needs to be thanked.

Printing a Batch of Thank You Letters. If you choose to print just a single thank you letter, ODB will bring up the same Thank You Printing Options window, but it look different. In place of a list of thank you notes you will see a full preview of the thank you letter to be generated. You can select a different letter from the pull down list and the preview will update automatically. [Ability to edit the text to be added.]

Thank You Formatting. Thank-you letters will use the title and suffix (if turned on in settings) in the address at the top.

The default salutation is the first name. You may define custom salutations on an individual basis by enabling the **showtitle?** field and choosing a title from the pull-down menu. This will automatically make the salutation field visible with a formal salutation using the title chosen. You may edit the salutation (to a nickname or anything you choose).

Note: If you decide to only use a salutation and wish to exclude the title (which appears on address labels), then you must change the title pull-down back to the <blank> choice. You must then type a custom salutation into the field.

For cases when you wish to formally address doctors, you should either use the title field (Dr.), or the suffix (M.D.) but not both. If you wish your letters to use the suffix in the address, but the title in the salutation, you must enable the salutation field by selecting Dr. from the pull-down title menu, and then disable titles by selecting the <blank> choice.

If you want to completely suppress the title from all labels in a particular mailing, you must turn off **showtitle?** in settings while you print labels. The titles for each record will not be deleted, only suppressed.

The lastgift and lastgiftdt merge fields used in the thank-you letter will automatically default to the most recent gift for each donor. If someone has given more than once in the time period for which you are generating than yous, you must generate a thank you note right after you enter each gift, from the Add Payment screen. If you have already entered the gifts, you just need to double-click the gift entry in the payment history screen, check **the Print Thank You** box (if you have enabled the **thankyoucheckbox?** in Modify Settings), and click **Save**. The letter will print immediately.

Please also note that ODB has three settings, **leftmarginpoints, topmarginpoints, and rightmarginpoints**, which define the margins to use on your letterhead when printing thank-you notes. If you use 72 (points) as your margin, this is equivalent to one inch.

4. Customizing ODB for Membership Management

ODB's powerful membership management functions are designed to help you build and maintain a strong membership program. (For organizations that do not need these features, or have legal reasons they cannot use them, the features can be hidden.)

While ODB is set up for membership management by default, it is also possible to exclude most of your donation categories from membership management using the **membercategories** setting. It is also possible to hide some of the buttons related to payments or donations, using hidepeoplecontrols, hidemaincontrols, and hidegroupcontrols settings.

If you are interested in using ODB as a donor database but not in assigning membership expiration dates, examine the template: "standard – not a membership organization" to see what settings are needed in order to achieve this.

1) For initial donations, ODB automatically sets up someone's **joined** and **expiration** dates. As we stated earlier, ODB assumes you are operating on an "annual giving" model where members are expected to give every twelve months. However, this twelve-month period may be customized: you can set it to six months, or 24 months, for example, by entering the number of months in **RenewFrequency**.

2) For subsequent donations, a box labeled "Renew based on <current expiration date>" will be visible in the Add Payment screen. The box may or may not be checked. By default, ODB operates with a 45-day "renewal window". This means that the "renew" box will be checked if a donation is entered within 45 days (before or after) the date a person is supposed to renew their membership. Reset the **RenewWindow** feature by entering the number of days of your window (which will be the same for before and after).

   Example: John Jones pays $25 to join your organization on January 1, 2002. You receive the check on January 4 and enter it into the computer on January 10. John's membership expiration date would then be marked as January 1, 2003. The year goes by, and then you receive another check from John on December 2, 2002. You find John in the database and click **New Payment**. Since John's gift was within the expected renewal window, the box "Renew to 1/1/03" will appear and will be checked. This means that even though the check from John was received on 12/2/02, John's expiration date will be advanced to 1/1/04.

   Example 2: John Jones pays $25 on January 1, 2002 and you enter it as described above. Then you receive another donation of $25 from John on November 1, 2002. This time, when you click New Payment, the "Renew to 1/1/03" box will not be checked since this may be an "additional" gift. If you proceed and confirm the donation, ODB will give you an option of leaving the expiration date alone (assuming this is an additional gift) or change the expiration date to November 1, 2003 (assuming this is a renewal). Or you can decide to back out and check the "Renew to 1/1/04" box, which would advance the expiration date a full year (assuming this is a renewal, but you don't want to take advantage of your member donating early to push up her/his expiration date). The idea is that when you have the check or donation slip in hand, you can best determine how to treat this gift.

   Example 3: John Jones pays $25 on January 1 and you enter it as described above. Then you receive another donation of $25 from John on July 15. This time, when you add a gift for John, the "Leave Expiration Date Alone" box will be checked. This donation came so soon that John probably intended it to be an additional gift. If you uncheck the box, ODB will ask you how you want to advance the renewal date (based on the check date or the expiration date) before proceeding.

3) If someone enters a donation of less than one-half of the renewal amount at a time when they are supposed to renew, ODB will by default give that person a six-month membership (if you enable the **usehalfmemberships?** setting). Thus, if your organization has dues of $30, and someone gives $15, ODB will treat this by default as a full renewal donation. But if someone gives $14 or $10, ODB will by default add on only six months, or half the renewal period, to her/his membership.

4) If someone enters a donation of $250 or more, ODB will offer to print out a **tax receipt**. The tax receipt printout has been improved based on feedback from ODB users. You may change the threshold for printing a receipt by changing the dollar amount in the "TaxReceiptAmt" setting. Changing it to 0 disables the feature.

5) **Customizing Donation Slips**. ODB will generate two different donation slips depending on whether the slip is for current up-to-date members or new prospects and members who have lapsed for a long time. You can modify the tagline text for the slips in the settings named **DonationSlipText** and **RenewSlipText**.

   A person's donation options will be based on the **AskAmount** field in the **People Entry** screen, which will automatically increase to the person's largest gift. You may also manually adjust the AskAmount so that people with an ability to make a major gift will receive slips that start off at $50 or $100 per year instead of the **DefaultDues** amount (which is $25 in the standard ODB template but can be modified). Or if a lapsed donor is low-income, you can reduce the AskAmount to a level in their giving range. **MinimumDues** is the lowest amount you would accept for a donation to be considered membership dues.

   You can also write up to three customized **checkoff** lines on the slips such as: please send me your newsletter, add me to your email list, send me more information, or I've included the names of friends on the back of the slip.

5. Using and Saving Templates

Templates in ODB are only used when you are initially creating your ODB database file. After that they are of little use to you, however they might be of use to others.

A tempate is basically a file that records all of your customizations to ODB that can be shared with other people who are creating their own ODB databases.

Templates may be chosen during setup using the Wizard, if you choose the option to "Create a new database file." It is not necessary to choose a template; if you just accept the default selection of "standard", ODB will populate your codes and setting with values that can easily be deleted and replaced with your own.

If you have already gone through the setup wizard once and you want to start over using a new template, it is easy. Just click the Show/Change DB Locatoin button on the first page of the **Settings and Administration** screen. You must enter a password to complete this action. The password defaults to "admin". If you upgraded from ODB 0.9, the password is whatever it was in 0.9, which by default is "Administrator" (it is case sensitive). Once you enter the password, ODB will restart and bring you back to the place where you can choose creating a new database.

The template selection menu will appear in step 4 of the wizard if you elect to "create a new database".

At this screen, click the help button for information on accessing additional templates that have been shared by ODB users.

Templates are very small text files, located in a templates directory in the folder where ODB resides (c:\program files\oc\templates on most machines). You can save your template to a different folder, but in order to use it to create a new database, that template must be present in the Templates folder.

Once you have chosen a template that matches your group best, you can still customize it to be even more specific to your activities. Or you can choose a very standard template and make all the modifications to the template from scratch.

You can then permanently save your setup by clicking the **Save Template** button, under the **Settings and Administration** screen. An organization with chapters, with help from OC, can create an installer for ODB that includes this template as one of the options or as the only option. This allows all the chapters to create similar, compatible databases.

Please submit your templates in the ODB user forus (http://organizersdb.org/users)! We may include them (after removing your organization's contact information) in future installations of ODB, under a generic name, so that other organizations with similar needs may find them.

6. Creating a Custom Icon for Your Main Menu Page

One of the most common ODB customizations involves changing the title of the ODB main window and the large title text that appears just above the main control buttons. The Access database fields are Wintitle and progText respectively, and both are located in the Settings area as described in the previous section.

The default value for WinTitle is "Organizers' Collaborative" and the default value for ProgText is

"My Database." You can change **progtext** to the name of a web-compatible image file; usually this will be an image whose extension ends with either .gif or .jpg. The image must be located in the folder where your ODB database is located, or in the folder where you installed ODB. ODB will look first in the folder where the database is located. To create an appropriate image for your logo, use any graphics-editing program like Photoshop, Fireworks, or Windows Paint. If your image will not use the full 132 x 99 size, it's a good idea to fill the extra pixels with the color value that matches the "sidebarcolor" setting in ODB. The default sidebarcolor value is D8D8D8 hexadecimal, or 216-blue, 216-green, 216-red for graphics programs that use decimal numbers.

C. Getting the Most Out of ODB

1. Using ODB for Fundraising

When communities come together to formulate and achieve common goals, often they have to spend money. That means, of course, that someone has to raise the money to spend.

Community organizers often see themselves as "people people" who care about the well-being of their neighbors. Sometimes they are "issues people" who work tirelessly to bring about a change in policy or social structure. Not many see themselves as "money people." No one goes into community organizing for the money! Yet many promising grassroots campaigns wither and die because no one worked on raising the funds – at least not with the energy and creativity they put into their organizing efforts.

Fortunately, getting people to give time and energy to a cause, and getting them to give money, are similar processes. Both involve:

- Identifying people with shared interests
- Collecting information about those people
- Building relationships
- Sharing information
- Recognizing opportunities to act in a way that will promote shared goals
- Asking people to help
- Achieving and celebrating victories
- Being accountable to supporters

If you can organize people, you can organize money! And just as a database is not essential for organizing people but makes the task a lot simpler, so too, using ODB can help a grassroots organization raise the money it needs to keep itself alive and flourishing.

How can you make ODB work for your fundraising efforts? ODB is a relational database, and how you use it depends on where you are in the cycle of a relationship with a donor.

- You start a relationship with donors by *identifying* them as prospects. Members and supporters, their friends and relatives, people who sign your petitions or visit your web site: all have a reason to be interested in your success. All are potential donors.

- Your next step is *acquiring* donors, which is the technical term for "getting them to give." The basic techniques for grassroots fundraising are beautifully explained in Kim Klein's **Fundraising for Social Change** (http://grassrootsfundraising.org). Any way you raise money, from passing the hat or selling t-shirts to soliciting through direct mail or in person, counts as acquiring donors – as long as you get their names and contact information!

- You go on by *cultivating* your donors. Over time, you want them to know more about your organization, care more about it, and feel more closely connected to it. Your newsletter is a simple, low-level way to cultivate your donors. At a higher level, you might invite them to your group's public events – or schedule events specifically for them.

- The point of cultivating is *renewing* your donors. That means getting them to give a second time. The first time might have been an impulse gift; you want donating to your cause to become a habit.

- You eventually move toward *upgrading* your donors. As their knowledge of the organization, participation and trust in it, and commitment to it all grow, so should their gifts. Many people of limited means give substantial sums to groups they believe are doing essential work. Don't sell them – or your organization – short. Honor their dedication by asking for an amount that makes sense to them.

As you build relationships with your donors, ODB can be useful at each step of the way.

Identifying prospects: As soon as you become aware of a person's interest in your work, create a record for him or her in ODB. As you interact more often with prospects, keep adding what you learn about them to their records.

EXAMPLE: Someone who's been on the mailing list for your candidate awhile, volunteers to hold a sign at a "stand-out." While chatting with her, you find out she and her female life partner are both nurses involved in church and union activities. You upgrade her Volunteer ID from 4 to 3, check the boxes to note that she's interested in GLBT and labor issues and connected with a religious constituency – and clone her record to put her partner's name in the database. The next time you ask her to hold a sign **or give money**, you will know a lot more about what matters to her.

Many of your donors will be people involved in your organizing campaign. By the time they give money, you may already have entered a lot of information about them into ODB.

Acquiring donors: Even if a person makes a donation, you only "acquire" her/him as a donor if you know when and how much s/he gave, and how to get in touch with her/him when you want to ask her/him again.

When you create a record for each donor and add each gift to their record as it comes in, ODB will enable you to print a thank-you letter and receipt and send them out right away. Your chances of getting another donation will increase dramatically when your donors feel their gifts are noted and appreciated. ODB also allows you to check when a donor last gave, and how much, and review their entire payment history with just one click.

ODB can also help you with the activities that bring in donations from people who aren't directly involved in your campaign. Inviting people to fundraising events or house parties is easier with ODB. So is sending a direct mail or e-mail appeal to people who you think might support your cause. If you have a web site, absolutely collect e-mail addresses from people who visit there, especially if they give online. Make it easy for them to give you their addresses. ODB will make it easy for you to record and use those addresses from then on.

Cultivating Donors: Use ODB to send the right message to the people who want to hear it most.

EXAMPLES: Find all your donors who are interested in one issue and send them a mailing about your work on that issue. Invite all the people who live in a certain neighborhood to hear a speaker or attend an event. Reach out to all the people who identify with a particular ethnic community. Poll your most committed members on the strategic direction your organization should take next.

Using the VID codes, you can assign donors a level of commitment. You can track all the events a donor or member has attended with Activity and SRC codes, not just how much she or he has given. This will help you determine how much they know about your organization and if they may give more.

For donors who have a lower level of commitment, being able to invite them to learn more about your organization or campaign can be an important step to making their donations habitual and upgrading them.

ODB can help you easily select all the most informed and committed members from your list. You may invite them to events, send them a specific appeal, or make a round of phone calls. They may even be a base to find new board members.

When you ask them for money again, the more your donors feel involved in your work, the more likely they will be to give. Cultivating donors through two-way communication strengthens your group politically and builds its capacity to raise funds.

Renewing Donors: This is where your community organizer skills (like finding out people's interests, sharing information, and building relationships) turn into money for your group.

Do you publish a newsletter on paper and send it through the U.S. mail to keep in touch with your supporters? ODB makes that process easier, from sorting addresses to printing labels, to marking old or bad addresses as expired. But why not also keep in touch with your members and supporters by e-mail? As Michael Gilbert of the Gilbert Center (www.gilbert.org) says, "Email brings down the cost of keeping stakeholders informed." Some people will always prefer paper, but for those who don't, it may be worth your while to get their permission to e-mail them their newsletters, using ODB.

Do you canvass door-to-door or hold meetings to find out their needs and interests? Why not also survey them online? Using web forms (such as www.surveymonkey.com) you can ask them basic questions like "Which of these community issues do you care about the most?" or "What community organizations do you belong to, and how involved are you in each?" With answers to these questions recorded in ODB, you'll know who to call about that rent control issue you're working on – or who can help you get invited to speak at the church breakfast or on the community cable news.

Do you ask your members for money at events? Why not ask online? We're not talking about simply accepting donations on a web site. To quote Michael Gilbert again, "The ability to take credit cards online is like having a checking account. It's essential. But it's not fundraising. Just ask yourself this question: When was the last time you opened a bank account for a nonprofit and had a thousand people line up to make deposits?" (See http://news.gilbert.org/features/featureReader$4637.)

You have to ask, and e-mail is a great way to get people to give.

> EXAMPLE: Organizers' Collaborative conducted a personalized, targeted end-of-2002 e-mail appeal to 3,500 addresses and raised over $2,500 in less than two weeks – at very little cost. With ODB, you can do the same.

Upgrading Donors: Many people dread asking for the big bucks. If getting that first donation makes me nervous, they think, how can I possibly ask someone who's already given money (and maybe time and effort) to give more? But experienced fundraisers say that there comes a time in the relationship when the donor is getting more and more involved and is, in a sense, waiting to be asked. Most people don't ask their loved one to marry them before they're pretty sure they'll hear a "Yes." Asking for a major donation is asking for a different kind of commitment, but when it's the right time to commit, it's easy.

ODB cannot do the asking for you, but with it, you can keep track of where you are in the relationship. At the simplest level, you can use it to check the donor's history of giving. You can personalize the reply slip you send them in the mail to begin with $100 and go up, instead of $25, for instance. You can also search your whole database for people who have given a certain amount recently and invite them to a special event, or make appointments to see them in person.

ODB lets you store and share what everyone in your organization has ever learned about a donor. That's a handy tool when you're figuring out who cares about your organization and why – which you must do if you are going to ask them to give.

2. Using ODB for Organizing

A basic definition of organizing is helping people who have shared interests come together to formulate and achieve common goals. After you have customized ODB, it should be very easy to keep track of the interests and commitment level of thousands of people or groups who may get involved with your organization. Having this information at your disposal provides you with a powerful tool for communicating with committed individuals, identifying candidates for greater involvement, and engaging various people with similar interests.

A database is not essential for organizing, of course. For centuries, political organizers have compiled information on the people and groups they work with by making detailed handwritten notes. An index card file often served as the central repository storing the giving history of a group's donor base, for example. More recently, many organizations have stored their information using a spreadsheet or word-processing program.

However, there are many advantages of using a database program for this task. Handwritten records are difficult to search, expensive to back up and maintain, and impossible to be used simultaneously by two or more organizers. Spreadsheets and word processing software can be used to compile this information, but after you have more than 100 records they become tedious to work with. A database program addresses these shortcomings, and even provides the capability for many people to access the information simultaneously. It can provide a central place for staff to share the most important information on every individual or organization with which your group works.

Since a database will most likely serve the overlapping needs of several staff people and volunteers, it is very important to spend some time planning how you might use it. For an ODB database, this entails defining how your group needs to track the involvement, interests, and affiliations of the people and groups who are in your database.

In ODB, this process is accomplished by defining four independent sets of tracking codes that your organization is likely to use. The initial codes can be determined by asking your group three questions:

1) What are some of communities in which your contacts are most involved (e.g. Korean, Veterans, Church/Synagogue, Parents, etc.)
2) What are some of the issues that have a high level of interest among your contacts and affiliated groups?
3) What are some of the activities in which people associated with your group can participate? And for each of these activities, is it something that has one level of involvement or multiple levels?

The information under category 1) should be represented by "constituency codes." The information under category 2) should be represented using the "issue codes." Finally, the information under category 3) should be represented by the "activity code" feature (for activities that have only one level of involvement), or by the "VID code" feature (for activities that have multiple levels of involvement). Initially, you may want to have just a few (3-5) of each kind of code.

You may prefer to use the **Customization Survey**, available at http://www.organizersdb.org/docs and the Appendices of this manual, instead. The survey is designed to help you think about the different types of tracking codes available, and how you might define them.

The four buttons used to assign tracking codes appear on the People and Group Entry screens. You can add, modify, or remove codes at any time.

There is one other important code labeled **SRC** (to distinguish it from the phrase "source code", which refers to application development). The SRC code can be used to track the source of the contact in your database – or the way you first interacted with a person. For instance, if someone signed up for an event, registered on your web site, or responded to a survey, you may want to keep that information. If you convert an old database to ODB, or if an allied organization shares a contact list with you, you can use the SRC code to track that too.

But the SRC code is flexible, and can be used for many purposes. You can organize events using this code (tracking lists of speakers, people registered, people who have paid, volunteers, etc.) or use it for extra activities that you may want to track. You can even archive old, unused Activity codes by transferring them into the SRC feature.

Note: the SRC codes are stored in a separate data table from the other codes. This means that they are searched differently, and are not exactly like Activity codes.

3. Sorting a Bulk Mail List for the Post Office

Bulk mail preparation is a skill that is useful for any grassroots organization that needs to do large mailings to inform the community or attract new membership. The cost of a bulk mailing can range from 13 to 16 cents per letter, as opposed to the 37 or 55 cents normally charged by the post office.

The tips here assume that you are using ODB with Postage $aver software, an inexpensive shareware program that is used by many nonprofit organizations. A trial version can be downloaded for free at http://savepostage.com.

The basic procedure for generating a bulk mailing is as follows:

1) Select the records of the individuals to whom you want to send a mailing.

2) Export the records to a text file.

3) Run the Postage Saver Software and choose Sort Wizard from the Sort menu.

4) Choose the kind of mailing you are going to do. This is usually "Nonautomation Standard", "Nonprofit", "Letter", "3.3 or less", "mm". Then click "Next" and enter the postal office from where you are sending your mailing.

5) Finally, choose the text file created in step 2 when you are asked to choose a list to sort.

6) Postage $aver will order the list for you.

7) Now you are ready to print the labels. Instead of printing them from ODB, it is best at this time to use a standard word processor. If you want to do this, please contact us to obtain a "label template" that can be used to generate a mail merge. We will let you know at that time whether we have a label template that supports your word processor, or whether you will have to create one on your own.

Eventually ODB may incorporate a feature that will, in one step, import and print a Postage-Saver generated file, including extra spacer labels that provide information on where to stop grouping pieces together, and where to start with a new bundle.

If your organization does a lot of bulk mail and you would be interested in working with Organizers' Collaborative to further develop and perfect this feature, please contact us via email at odb2006 <at> oc-tech.org.

4. Cleaning Your List Before a Mailing

It is extremely useful to use some of the list-cleaning features of ODB periodically, to get your mailing list in shape for sending out mail. This is extremely important for low-income organizations in urban areas, where people tend to move around a lot. If you do a grassroots fundraising mailing each year that raises $2000 but 10% of your addresses are bad, you might be able to increase the amount you raise by $200 just by spending a few hours correcting your list.

Below are examples of some steps that you can perform from the **Select Records** screen. ODB also comes with several built-in queries that address simple, but important, list-maintenance functions (available by clicking **View Custom Query** and then **Load Query**).

1) Find all records that have a street address but have no ZIP code. (Enter two single quotes in the ZIP-code box and check the "No Address" box and click **Search** and **OK**.) Then choose "Lookup ZIP Code" from the right-click menu to connect to the Internet and find the appropriate nine-digit ZIP code for each record.

2) Find all records that are marked as "Address Incomplete". (Select the "Add SQL to broaden your search" box, type: mailcode='ai' and click **Search** and **OK**.) Research the records to complete the addresses. There are several web sites, like http://people.yahoo.com and http://anywho.com, that allow you to look up as many addresses as you want for free!

3) Find all records that are marked as "Address Expired". (Select the "Add SQL to broaden your search" box, type: mailcode='ae' and click **Search** and **OK**.) See if you can determine to where these people have moved. If you have previously performed this step, qualify your search by looking only for records that have been modified recently.

   Note: printing "return service requested" on envelopes for any bulk mailings will prompt the post office to return any mail for which it has a forwarding address, with that information, instead of forwarding it directly to the addressee. Once you have updated your database, resend your letter.

   For a price the USPS can also automatically forward the mail piece and send you the correction.

4) Periodically find all the records that were incompletely entered in the last few weeks (perhaps because, as an organizer, you were too busy at the time). Type: > 6/1/04 (or any date) in the **Updated** field. Also select the **Bad Address** box, then click **Search** and **OK**. That way, while it is fresh in your memory, you can add additional information to change these bad addresses into good ones.

5) Your donors and key activists are committed to your organization already. It's a good idea to maintain your group's connection with these committed individuals: prioritize the correction of expired addresses of people who have recently (in the past 2 years) donated or attended an event.

6) Email can be used to ask members for address updates. Select everyone whose address is suspect, click **OK**, and then click the **Copy Emails** button. Then send out a mass email - paste the list into the "bcc:" line of your email software - letting people know that you are about to send out invitations, etc. and that you need an updated address for them.

7) As part of your regular database maintenance routine, you may want to update or collect the email addresses of your contacts. To find records missing an email address, check the "No Email" box and click **Search**. You can request them in your regular mailings and on reply

forms. You can also try searching for your contacts at http://www.google.com to see if their email address is available on the web. But of course you should manually add people to email lists only if they have consented to receive this kind of email from you in the past.

8) There are services that will help you clean your mailing list such as http://www.ListCleanUp.com

D. Notes, Pledges, and Reminders

(DRM = 'Donor Relationship Management') Organizers' Database 1.0 now provides you with tools to more easily manage the relationship with your donors and members, through the use of dated notes, reminders, and multiple-gift pledges. These additions to 1.0 represent major improvements in ODB's capabilities. Until the end of 2005, the documention for these features will still be under development, so initially we expect most users of them to be early adopters, or direct clients of Organizers' Collaborative or other ODB consultants.

An Overview of Changes in Version 1.0

ODB 1.0 Introduction

Version 1.0 of ODB contains three major new features which transform the program into a much more powerful piece of software. These features are:

- the ability to record notes linked to a contact
- the ability to generate a reminder associated with a contact
- the ability to record a pledge by a donor to give money

These features are disabled by default in the initial release of version 1.0. This has the advantage of making the basic features of ODB much easier to user. So we generally recommend that organizations starting to use ODB leave these new features turned off initially. Then, after a few days, or weeks, when your staff is comfortable with all of ODB's basic functionality, you can introduce a second learning curve by turning these features on.

To turn on the advanced features, click on the wrench, and then click on the second tab. Turn the checkbox labeled "Enable Pledges, Notes, and Reminders" (at the bottom of the tab) on. Click on "Done" ODB will ask you if you would like to restart the software. Click "yes", and then in a few seconds, ODB will open itself back up. Now you will be able to experience the full power of ODB.

The "Notes" feature.

First of all, 1.0 incorporates the ability to record notes about your daily conversations with donors, clients, or constituents. This is done through a "Dated note" capability: you can click on Add Note and then enter the type of note (this can be customized), a title (optional), and your note. ODB provides check boxes that enable you to generate followup reminders to your note. For instance, you might want to send an email tomorrow and then followup by phone in one week.

You might also want all of your reminders to automatically appear in an external calendar as well (ical), such as an Outlook calendar. [to be implemented in 1.1]

Notes are usually added from three different places. When you are in the main menu, clicking **Add Note** will add a note associated with the selected person. When you are editing a people record, you can click on **Save, Add Note** to jump immediately to the screen to add a note for this person. Finally, when you are viewing the existing list of Notes for a person, you can click on the Add New button to add an additional note to the list.

The "Reminders" feature

The Reminders feature provides you with a "to-do" list of tasks to be completed, relating to communication with your contacts and constituents. This is a useful tool in fundraising: you could make a note to send a letter to Ms. Thompson in early February to ask her for another gift. Or you could contact your printer to get a price quote on a job, and record the date on which you agreed you would submit the original artwork.

The reminder feature will be invisible until you have added a note that contains a followup action. Say it was Monday that you included a followup action to "send an email" to Sara in 3 days, as well as a note with a followup action to phone Jay in a week. The reminders for these actions would begin to appear when you opened ODB on Thursday morning (or they would appear about around 12:01am if you for some reason were up late on Wednesday night).

ODB indicates that reminders are pending by displaying an icon with a small hand right next to the search button on the ODB main menu screen. If you click on this icon, the "Reminders" window will open up:

[screenshot]

Here are some things to notice about this window:

- Each reminder action is separate, but some of the reminder actions might be generated on the same day, as followups to the same note
- The screen allows you to check off reminders as a group that you wish to modify.
- If you select just one reminder, ODB will let you perform all actions to it; however, if multiple reminders are selected (i.e. pertaining to conversations with different people), some of the actions will be grayed out. For example, if you select two reminders which come from the same parent note, the button to go to the parent note will be enabled. If you select two different reminders, to phone two different people, the box showing the phone number of the person to call will NOT appear.

Finally, when you are viewing a reminder, you can add an additional note at the same time as you mark that an action is completed.

By default, all the reminders that any ODB user has entered will show up. If you click the XXX checkbox [to be implemented in 1.1], the list of reminders will be filtered to show only the tasks that you generated.

The "Pledges" feature

In raising money from larger donors, it is very often desirable to secure a commitment from the donor to pledge funds, and to then remind the donor close to the pledge dates to follow through on the pledge. This process is of course more time consuming to manage than a standard once-a-year renewal method, but it has substantial rewards in terms of your ability to raise funds. Furthermore, some organizations catering to lower-income folks also like to use a pledge system, so that the monthly amounts requested are affordable to folks living on fixed incomes.

The pledge entry and management features of ODB are designed to make these situations manageable for a small nonprofit. Without much effort, you should be able to devise a system to segment your list of donors and prospects into those who make regular, fixed contributions (i.e. $35 a year), and those who like to make more frequent, or more substantial payments. Adopting a pledge system also enables you to separate out the social aspects of fundraising – the brief meetings over coffee, or over a beer, or over lunch, or at the intermission during a conference – with the business aspects: writing a check or making an online payment.

Finally, a pledge system integrated with the Internet enables some things that could not be done traditionally by fundraising systems: You can set up ODB to generate the basic text of reminder emails to your donors, and those emails can even contain an identifying link to the donation page of your web site; thus some of the repetitive tasks of check processing and data entry can be minimized.

The functions for entering pledges can be accessed just like the functions for adding Notes. From the main menu, click **Add Pledge** to add a pledge associated with the selected person. When you are editing a people record, you can click on **Save, Add Pledge** to jump immediately to the screen to add a pledge for this person. Finally, when you are viewing the existing list of Pledges for a person, you can click on the Add New button to add an additional pledge to the list.

The similarity to Notes ends there.

The Add Pledge screen is completely focused on the critical information used by ODB to make calculations about amounts, dates, and installments. Normally you just enter the amount of the pledge, the date of the first payment, and the date the pledge was made (if not today). Then you would enter the categories that should be used by ODB when payments on the pledge are recorded. ODB will automatically calculate the installment amounts on the pledge and determine the expected end date.

Once your pledge is recorded, you can view it within the "View History" window. And then when you click on the "New Payment" button, an additional button will appear in the Add Payment window, labelled "Fulfills Pledge." Just click on that button and the default installment amount and category for your pledge will be automatically entered into this screen. If the donor happens to have more than one outstanding pledge, clicking the button will bring up a small menu that allows you to select the pledge to which the payment applies.

You are not locked in by this system; if a donor chooses to pay $30 toward an annual pledge of $10 a month, then ODB will record that $30 of the $120 has been paid off. So someone might commit to paying $120, but actually send in four checks of $30. The pledge will remain active within ODB until the $120 is paid up, or until you go into the pledge entry window and mark the pledge as inactive [already in the database schema, to be implemented in 1.1]

E. 1.0 Custom Reports

This section provides the details on seting up customized ODB reports.

1. The Basics of Reporting in ODB

(please refer to new section by Steve Wishengrad)

2. Using the Access Report Engine

(please refer to new section by Steve Wishengrad)

3. Using the Crystal Reports Engine

4. Integrating with Open Office or other applications

ODB Custom Reports

Purpose

In version 1.0 ODB introduced Custom Reports to provide users with the ability to run unlimited external reports from within the ODB program. An advanced user or consultant can develop these reports using third-party reporting tools such as Crystal Reports, MS Access, Open Office, etc. and make them available to users. The developers did not want to limit users to a specific reporting approach so they implemented an open system that allows anyone to add their own reports using whatever tool they choose as long as the tool can be launched from the command line and read certain command line parameters.

- What is a report
- Why would you want to use a report

OC will develop and ship reports designed to run with Crystal Reports Version X and Microsoft Access. OC will continue to develop more reports and will post them to our website. We encourage ODB users to develop their own reports and share them with other ODB users. If you have developed a report that you think others may benefit from, please set it to OC for possible inclusion with the next release.

Writing a Custom Report

There are several steps required to write a Custom Report.

1. First you must decide what information you want to display in the report. Will you be displaying basic people information or will you include donor information. This is the Output definition step. If you are working with a consultant or advanced user it is often useful to produce a sample or what you want the report to look like. For example, if you are creating a donor information report find several donors in your database and using a word processor enter the information from these donor records in a document so that the document looks the way you would like the output of the report to look. Here's an example:

Irma Donor	Joined: 1/1/2000
100 Main St.	Last Gift: $100
Boston, MA 02134	Last Gift Date: 11/1/2005
Bob Bigbucks	Joined: 2/12/2002
53 Elm Rd.	Last Gift: $50
Cambridge, MA 02138	Last Gift Date: 2/5/2005

Now the consultant can take your report output and determine where the information is stored in your database. They'll look in the People table for all of this information.

2. Next you must decide whom you want to include in your report. There is a difference between what information you display in the output of the report and which records you decide to include in the report. The above output could be run for everyone in the database, all donors who have given this year or everyone in who lives in Massachusetts. You don't need to decide this when you design the report but you will need to decide whether the report will use the ODB's currently selected records or manage the record selection itself. If the report uses the currently selected records, the user of the report would select records using one of ODB's search tools such as the Advanced Search screen. Then they would go to the Print screen and select the report that they want to run. The report would only include information about the selected people, for example those people who live in Massachusetts. If the report does not use the currently selected records, the user can go directly to the report without selecting any people and the report will be responsible for deciding which records to include either by prompting the user or based on the predefined filtering needs of the report. The report might be hard coded to only include people in Massachusetts who have given this year, for example. If that is the case then whenever you run the report you will get the people who match that criteria, regardless of whether you have select anyone using ODB's search tools.

3. Next you must write the report itself. If you are using MS Access for your Custom Report engine, you can use the ODBRPT.mdb report engine that OC has developed. Details about how to use ODBRPT.mdb to write a report can be found in the appendix. Once the report is created it should be placed in a folder that all users will be able to access.

4. Finally, the new custom report must be added to the Custom Reports menu in ODB so that all of the ODB users in your organization can easily run the report. Each custom report engine has a slightly different set of information that must be filled in on the Report Definition screen. The information varies based on the capabilities of the different report engines. ODB supports the following engines:

Default (RptView.exe). This engine displays reports written using Crystal Reports Version X.

MSAccess. This engine displays reports written using MS Access. You may use the ODBRpt.mdb as a basis for your MS Access reports. See the section "Setting up an MS Access for Custom Report" for information on how to add an MSAccess custom report into ODB.

OpenOffice Writer. This engine displays reports written using Open Office.

Custom. This engine allows you to implement your own reporting engine using whatever application you choose.

Using MS Access for Custom Reporting

OC has developed a reporting engine to facilitate using MS Access to write custom reports for ODB. The engine is called ODBRPT.mdb. This engine is actually an MS Access application that knows how to receive certain information from ODB and display reports. The application contains a framework for developing new reports and should someone familiar with MS Access to write their own reports that will work with ODB.

You are not required to use ODBRPT.mdb to write your own reports using MS Access. You may build your MS Access reports using any technique that you want. It is simply an application that understands the parameters that ODB sends on the command line and contains functions that allow implementation of additional reports. For most users it is the best approach.

When you start to create your own reports using ODBRPT.mdb we suggest that you make a copy of the version that ships with ODB and rename it. The name that you choose should describe the type of report that you will put inside the access database (MDB). For example, if you plan to write several reports for processing pledge renewals you might copy and rename ODBRPT.mdb to a new file called RenewRPT.mdb. When you write several reports for donor giving analysis you might call the new file DonorRPT.mdb and so on.

Scenario

This section will demonstrate how a typical organization might use the ODBRPT.mdb engine for custom report generation.

After careful analysis we have decided that our organization, Parents for Better Schools, needs the following types of reports:

- Donor information reports

- Pledge Renewal Reports
- New Member Reports
- Donor Mail merge Reports

To implement these reports we will make four copies of the ODBRPT.mdb and name them: DonorInfoRPT.mdb, PledgeRenewRPT.mdb, NewMemberRPT.mdb, and DonorMergeRPT.mdb to match the four types we defined above. Each report that we write will be put in the Access database whose name matches the types described above. That way we can keep similar types of reports together. Of course you can choose to put all of the reports in a single Access database or each report in a separate database, it is completely up to you. We recommend keeping similar types of reports together for better organization and possible re-use of reporting functionality.

After Parents for Better Schools decided how to segment their reports they developed 5 donor reports, 3 pledge renewal reports, 4 new member reports, and 2 donor mail merge reports. They put each of these reports in the renamed copies of ODBRPT.mdb described above. For more information on creating the actual reports, see the section titled “Creating an MS Access Report Using ODBRPT.mdb”.

One of the reports that Parents for Better Schools created was a giving summary report that tracked how well their fundraising efforts had performed on a state by state basis each year. They named the report “Giving By State” and added it to the custom report menu using the steps described in the section titled “Setting up an MS Access Custom Report”.

Once the report was added to the menu all that was needed for a staff member to do to run the report was start up ODB, click the Print button, select Custom Reports, select Donor information reports from the Custom Report category drop down list, find the “Giving By State” report in the list and then click the Print button.

Clicking the Print button launched the staff member’s copy of MS Access that was previously installed on their desktop computer and displayed the results of the report. Because the “Giving By State” report was not defined as an “Use ODB LastQuery” report they didn’t need to select any records before running the report. The report itself decided which records to include. Here’s a sample of what the report output looks like:

<Screen shot goes here>

It is that simple. Once the report has been written and set up when the user selects the report from the menu and clicks Print it generates the output for the report.

It is important to note that using the MS Access based reporting engine requires that a copy of MS Access is installed on the users machine. We think it is possible to generate a run-time version of an MS Access application and distribute that to your users without requiring them to have a license for MS Access, but we’re looking for someone to help with testing and documenting the steps. The ODBRPT.mdb file is the application that would be turned into a run-time containing the reports that you develop for your organization.

Setting up an MS Access Custom Report

Once you have written your MS Access based custom report you need to add it to the Custom Report Menu in ODB so that other users can use the report. Follow these steps to Add a report definition:

1. Select “Enable Code Changes” on the Settings and Administration screen (accessed by pressing the wrench in the upper right corner of the ODB main screen. After enabling code changes and close the Settings dialog.
2. Click on the Print button on the ODB Main Menu.
3. Select the Custom Reports radio button to display the Custom Reports list.
4. Click the Admin button in the lower right corner of the form and select “Add a Report Definition” from the menu. This loads the “Report Definition” dialog.
5. Enter a value in the “Report Name” field, for example: “Donor Summary”. This name will be displayed in the Custom Reports list.
6. Choose a “Report Category” from the drop down list. The category helps you segment the reports on your list. Create additional categories using the Admin button located next to the drop down. Use categories to define different types of reports such as Donor Information, Pledge Renewals, Event Tracking, etc.; or reports for different users; or reports for different departments.
7. Select the MSAccess engine from the “Report Engine Used” drop down list. This will change the fields that are available so that you can define an MS Access based report.
8. Access Report File. Use the ellipses button to the right of this field to browse for the Access database (.mdb) file that contains the report that you want to add. If you are using the ODBRPT.mdb report engine provided by OC or a renamed

copy of that engine, select that file. The ODBRPT.mdb report engine can be found in the Reports folder located under the OC folder where the application is installed, however in a network or shared machine installation you may want to move the report file to a folder located under your ODB database folder.

9. Description. The description field gives you 150 characters to describe information about the report. The description will appear as a tool tip for the selected report in the Custom Reports list.
10. Include a Date Range? This field and the related “Default to:” and “From” and “to” dates are not currently supported.
11. Use ODB LastQuery? This check box indicates whether the currently selected people in the ODB Main menu area should be used as the filter for who should be included in the report. Checking this box tells the report engine to look for the LastQuery.txt file and use the query contained in that file to select the same group of people that were shown in the ODB Main menu area before the Print button was clicked. The ODBRPT.mdb report engine knows how to read the LastQuery.txt file for this purpose. If you are using another report engine this field may not apply. In addition, if this box is checked the report definition will only be displayed in the Custom Report list if there were selected records in the ODB Main menu area when the Print button was clicked.
12. Extra Args:. This field provides a way to have additional arguments added to the end of the command line. The ODBRPT.mdb report engine does not support this field.
13. Access Action Steps. The items in this drop down list determine which code value (the first to characters of the entry in the list) will be sent to the MSAccess report engine. The ODBRPT.mdb report engine understands how to process each of the items in the list as follows:
    a. R1 – Report Only. This is the default option. It tells the engine to run an MS Access report.
    b. R2 – PreProcess then Report. This option tells the engine to run a PreProcess before running the report. The PreProcess is identified by the value in the “PreProcess Code” textbox that appears below the drop down when this option is selected. A report developer can use this option to run procedural code in advance of running the report. The procedural code might fill data into a temporary table before running the report, for example.
    c. Q1 – Query Only. This option tells the engine that the requested output is a MS Access Query rather than a report. Creating displaying MS Access queries as the output can be useful when a formatted report is not necessary or when the results of the query will be exported to another program such as MS Excel or MS Word for further processing.
    d. Q2 – PreProcess then Query. This option tells the engine to run a PreProcess before running the report. See the explanation of a PreProcess in the description of R2 above.
    e. W1 – Word Mailmerge. This option tells the engine that the requested output is a MS Word Mail merge document. This will use the records selected in ODB as the dataset for a mail merge document. Typically the “Use ODB LastQuery” box will be checked when this item is selected.
    f. W2 – Preprocess then WordMerge. This option tells the engine to run a PreProcess before launching the MS Word Mail merge document. See the explanation of a PreProcess in the description of R2 above.
14. Report/Query/MailMerge: This field’s label changes based on the item selected for the “Access Action Steps” drop down. The field is used to identify the report or query stored in the MS Access database that is associated with this report definition. In other words, the report/query that will be run when the user selects this report definition. The value in this field should be identical to the name of the report or query stored in the MS Access database. In the case of the MailMerge option the value identifies the name (and location???) of the merge document.

Here are the values for the Report Definition for the Basic Record report that ships with ODBRPT.mdb:

Field Label in ODB	Sample Value	Column name in ReportDefs table.
Report Name:	Basic Record Report	ReportName
Report Category:	B1 – Basic Reports	ReportType
Report Engine Used:	MSAccess	ReportEngine
Access Report file:	C:\Program Files\OC\Reports\ODBRpt.mdb	ReportFile
Description:	Lists most basic information about people in the database.	ReportDesc
Use ODB LastQuery	Checked	NeedLastQuery
Access Action Steps:	R1 – Report Only	AccessAction
Report	BasicRecord	ODBrptAction

Creating an MS Access Report Using ODBRPT.mdb

In order to create an MS Access report using ODBRPT.mdb you must have a copy of MS Access installed on your workstation. ODBRPT.mdb was written using MS Access 97 because the ODB database was implemented with that version as well. It may be possible to upgrade the ODBRPT.mdb to a later version of MS Access (if you test this and it works, please let us know). This tutorial assumes that you are comfortable with creating reports using the MS Access reporting tool, comfortable with SQL and creating MS Access queries and understand Visual Basic programming if you want to use a pre-process.

ODBRPT.mdb is a reporting engine. ODB launches the MS Access database and Visual Basic code takes control. The code uses the information passed on the command line to connect to the ODB database by linking the tables. The engine can launch an Access report, a Word mail merge or an Access Query def (which can easily be exported to Excel).

Before a report runs the engine call look at the lastquery.txt file that ODB writes. It contains the last Search query that was run in ODB (either from the Select records dialog or the Search text box). If specified in the report definition the lastquery.txt will be used to write a list of IDs to a table and then the report joins to that table. This allows you to specify whom you want to include in your report based on your ODB selection.

In addition to the query logic you can optionally run an access routine that you've preprogrammed for a particular report. This allows you to do whatever you want to do as far as preprocessing the data.

The first step in creating a report is deciding what information you want to present in the report. Let the ultimate user of the report help you with this process. They should present you with a sample output containing actual data from your database. This will give you an idea of what information they are looking for and how they would like it formatted. Your task then involves finding where the information is stored in ODB and modifying their report design to match the capabilities of the MS Access reporting tool.

Before you implement the report, you must decide whether the report will be an MS Access Report or whether an MS Access Query will be adequate. In addition you should determine whether the data that the report requires could be easily produced with an MS Access Query or whether a pre-process will be necessary to retrieve the data.

For example, it is possible using SQL to generate just about any query that you might want, but sometimes it is easier to use a work table to store intermediate results from several queries so that the final query is a simple SELECT. If this is the case with your data requirements than you should consider using a pre-process. To use the ODBRPT.mdb pre-process feature, add a Case to the PreSubReport function that is located in the QuerySupport module. We recommend forcing the case value to upper case. When the report is installed the “PreProcess Code” field should be filled with a token that will match the Case that you add to the PreSubReport function. For example, if your pre-process is for a donor report you could name the token “DonorReport” and add it to the case statement. The actions that you perform inside that Case statement are up to you, the only requirement is that the bRetVal variable is set to True or False to indicate the success of the pre-process and whether the report should continue. A value of false will stop the report and a value of true will continue it. ODBRPT.mdb has a sample function called FunctionNameGoesHere() that shows how you could use a work table in a pre-process.

If you decide to support the ODB LastQuery, the ODBID table is the key. ODBRPT.mdb inserts one row in this table for every ID in the People table that matches the ODB LastQuery. When ODBRPT.mdb is launched it reads the LastQuery.txt file, parses and executes the query as an INSERT statement that adds the PeopleID to the ODBID table. When you create a Query and like the People table to the ODBID table you effectively include the same group of people that were filtered in ODB before the report was run.

The query that you create should at least have the following join:

```
FROM (People INNER JOIN ODBID ON People.ID = ODBID.ID)
```

This join will provide the support for the LastQuery as described above. Anything else that you add to the query is up to you. Save the query with a descriptive name. The query called “PeopleQuery” contained in ODBRPT.mdb is an example of a query that supports the LastQuery functionality.

After creating the Query for your report, create the MS Access report as you would normally create an MS Access report and use the Query as the Record Source for the report. Save the report with a descriptive name. This name will be used to identify which report to run from within ODB. Put the name of the report in the “Report” field under the “Access Action Steps”.

F. Special ODB Features

This section provides the details on several powerful ODB features. Some of the features, like sharing your database locally, are fundamental to ODB and are used in most office installations of the software. Others, like sharing your database remotely, require significant computer experience to set up. We often work with individual nonprofits that need to add a feature to ODB; some of the new features added as a result of this consulting work will make it to this section.

1. Sharing an ODB Database Over a Local Network

For groups that do political organizing, such as campaigns for political office, it is extremely useful to be able to share a database among two, three, or more users. That way, one or two people can attack a backlog of data entry while your organizers are able to use the database for their political and professional work.

If your office already has an office network, setting up ODB to allow this is quite easy, so we will tackle that situation first.

(Note: the following instructions assume that the folder where the ODB database resides must be assigned a "drive letter" in order for you to access it. We have discovered, recently, that this is not the case; it is possible to set up ODB on the second and third computer in your network to refer to the network path explicitly, e.g. \\shared\odbfolder\odbdata.odb.)

First of all, you need to identify the "shared drive" where you want the master database for your organization to reside. This drive will usually have a letter that is fairly far into the alphabet, like "F:", "K:", or "M:". Then you should identify a folder on that drive in which your network administrator would want you to store your database. You can tell your network administrator that you probably don't need too much space — an ODB database with 5,000 records is smaller than a single "MP3" music file.

Let's say the administrator recommends you put the database in a folder called "F:\documents". You should confirm with him or her that you have "write access" to this location from each computer and that all the computers in your office are set up to access "F:\" when they are turned on. To set up ODB, do this:

a) Download the latest ODB installer file on one computer. When prompted for a location to save the installer, specify "F:\documents".

b) On just one computer — it doesn't matter which one — run the installer (odbsetup.exe). To get to it you may need to look in the F:\documents folder. Or you can open it just after the download completes. After you exit from the "Clickteam" screen you will get to the ODB Setup Wizard where you are asked if you want to create a new database. Confirm that you want to do this and click "Next."

c) Wizard step 2 will ask you to specify the location where you want the database created. Following our example, choose "F:" from the "Drive" menu toward the right-hand side of the screen. Then double-click the "Documents" folder and click "Next." If you do this properly, the next screen will say that the database will be created in the folder "F:\documents\organizers collaborative". (You can go back and change this if needed.) Keep pressing 'Next' to finish the installation.

d) Repeat step b for the other computers that are going to use ODB, except that when you are asked if you want to create a new database, select "Use Existing Database." Then in Wizard step 3, click the "Click Here to Select a Database" button, and choose "F:" from the menu at top (usually labeled "Look In") and open the database file created in step 3: "F:\documents\organizers collaborative\odbdata.odb".

That's all it takes to set up ODB on your network. Of course, if you don't have an administrator to help you, additional steps may be required to get this working. Without going into all the details here, here are a few hints:

a) If you don't have any network cabling connecting your computers, you will need to invest some money to connect them. Connecting two computers can cost as little as $8 for a "crossover cable" if the computers already have network cards installed. If you see an opening on the back of each PC that is similar to a phone/modem jack but wider, you may have PCs that are ready for networking.

b) To connect three or more computers together, you will probably need to invest $30-$60 on a "network hub" in addition to the cost of network cards and wiring. You will also need to enlist a friend who is knowledgeable about computer networking to help you set up the networking software built into Windows. This process usually involves setting up the computer that will be your "server" with the IP address 192.168.0.1 and the other computers with IP addresses in the range 192.168.0.2 to 192.168.0.255. This process is *extremely* complicated, so be sure to get some help. This last part of the process involves turning "file sharing" on, on just one computer. (Right-click on Network Neighborhood, choose Properties, click on File and Print Sharing, click on "I Want to be able to give others access to my files", etc.)

c) Once your network is functioning and you have "file sharing" enabled on one PC, create a shared folder where you will store files such as your ODB database. To do this, right-click on the folder you want and choose "Sharing". Then click the "Shared As" button and enter a name such as "ODB Database". (Case does not matter.) Finally, change the Access Type to "Full." Then click the OK button. If this procedure works, the folder will be redrawn with a hand underneath indicating that this folder is shared on your local network.

d) Now you will need to go to all the other computers that are going to use the ODB database. On each one, double-click on Network Neighborhood on the desktop. Then double-click on the computer that is acting as the server. You should see the shared folder called "ODB Database."

e) Right-click on "ODB Database" and choose "Map Network Drive...". Choose any letter for your network drive; "K:" or "H:" or "F:" are fine, if they are not in use. Check the "Reconnect at login" box and click OK. Do this on all the other computers that will use ODB and choose the same drive letter.

f) Follow the steps outlined on the previous page, using the location you chose in step e instead of the "F:\documents" folder.

I think I have a network; how can I tell?

If you think you already have a network but no one in your office is sure, try this: Go to the computers that you think are set up for file sharing, click the Start button, choose Run…, type "netwatch" at the prompt, and press the **enter** key. If a computer is using file sharing, you will see a user-friendly display of users connected to your computer. Choose "By Shared Folders" from the View menu, in order to scout out a good location to install the ODB database file. To see the whole name, just put the mouse on the column header, right between "Shared Folder" and "Shared As", and drag it until you can see the whole name. When done, close Net Watcher.

2. Getting Back to the Setup Wizard; Starting from Scratch

Most organizations that use ODB set up icons on the desktop to launch the software, and users never have to bother with memorizing the location of the database file in order to use it. ODB was designed this way to prevent users from easily making simultaneous modifications to multiple copies of the same data. Still, it is often useful to "reset" ODB so that it does not point at a database, and then reconnect it to a different database. You can do this using the **Show/Change DB Location** button, which is accessible by clicking on the Wrench.

When you click that button, ODB will ask you for a password to get out of the ODB database. The default password is "admin" (for databases originating in 0.9 it is "Administrator") it is a good idea to change this before other people are entrusted to enter data into your database. Then, the next time you run ODB, you will be sent to the Setup Wizard where you will be able to create or open an existing ODB database.

3. Running Two Different ODB Databases on the Same PC

If two organizations share the same office, or an individual works with more than one group, it is possible to run multiple independent copies of ODB on one computer. To do this, install ODB in a location **other** than the default location (c:\program files\oc). If you have already installed ODB in this location, you may rename this folder to something else, like "ODB2" provided ODB is not running. Then duplicate this folder or use the installer to create another ODB folder. Make sure that you do not install it in the default location (c:\program files\oc).

After doing this, you can create a shortcut to odb.exe in each directory, and put the shortcut in a convenient place like the desktop of your Windows PC. To create a shortcut, right-click the mouse on the odb.exe icon and then choose "Create Shortcut" from the popup menu. Then drag this shortcut to the desired location. It is then possible to run the setup wizard - you may need to click on **Show/Change DB Location** in the Settings and Administration menu - from either copy of ODB, and create or connect to two different ODB databases.

4. Using the "Matching Feature" of ODB (Region Codes)

ODB includes a matching feature that works in conjunction with the ZIP code file that we provide to ODB users. If you want to use these features, be sure to first click the 'wrench' icon and then click Download ZIP Code File… to make sure you have the new, more compact version of this file. The new ZIP code file has some additional database tables for the use of an ODB "power user." Right now these tables can be filled with information that define U.S. Congressional Districts or your own custom-defined "regions" based on a ZIP code. By using this feature, you can easily segment the area you are organizing into sub-areas, and then assign responsibility to your field organizing staff to handle these sections of the territory you are trying to cover.

The matching feature will automatically fill in district or region information, provided you turn on those settings ("useregion" and "dolookups" in Modify Settings). Eventually this feature will be improved so that you could program it to look up ward and precinct information based on addresses within your town! The ZIP code file that ships with ODB contains ten preprogrammed congressional district regions for Massachusetts. (These are convoluted, "gerrymandered" slices of the state.) It also contains eight custom regions defining different areas of the state (e.g. South Shore, Cape Cod, Metro Boston, etc.). Please contact us if you wish to replace the Massachusetts data with other data.

Once you have the regions or CD areas set up to your liking it is then easy to pull up people within a specific region or congressional district. However, keep in mind that this feature is only as powerful as the data on which it depends. We are assuming that most people will program it to do a good job in the areas their organization or campaign covers; we are not planning to organize the collection of data defining all the precincts and wards in each state. Of course, there is nothing preventing you from doing that. But be advised that such a project would be a large undertaking, involving the collection or purchase of a large amount of data which would need to be updated every year or two based on ZIP code changes and redistricting by state legislatures!

Note: this is an area of ODB that depends on an ability to modify the ZIP code tables, which are stored in MS-Access format. You can look at the sample provided (for Massachusetts) as an example. Each region is defined in a table called Region that provides the name of the region and the type of district it represents. The ZIP code ranges that comprise a region are defined in a table called RegionDefinition. So if your region consists of the ZIP codes 02100-02199 plus the ZIP codes 02400-02499, you would need to place one entry in the Region table plus two entries in the RegionDefinition table to set up the region. Then go into ODB and turn the "UseRegion?" setting on.

5. Downloading Data From a Web Form

ODB has a new feature, to allow the software to be connected with external download scripts. It may be configured by going to the External Links screen in the settings area and tabbing over to the Peoplefetch or Payfetch tab. The idea is that you may install two scripts, one for downloading people data and the other for downloading payment data. Once configured, you may access the feature by right-clicking on the Mass Action button and then clicking on “Get External Data.”

This is a brand new feature in ODB and requires that you supply a third-party Windows program that will retrieve the data from an external or online source and save it locally where it can be accessed by ODB. If you have questions, email us at support <at> organizersdb.org. There may be a small fee for assisting you with configuring this feature.

6. Translating Screen Prompts

ODB has a feature that allows you to load a translated version of the interface (buttons, tooltips, menus, and labels) in Spanish. Go into **Settings and Administration** and then click **Save/Load Language File**. The language file, standard.txt, will load into ODB instantly. When you exit ODB, the language file will return to the default in English.

Spanish and Portuguese translation files are both available now. If you rename any language file “standard.txt” it will load when you click the **Load Language File** button. This way you can load the Portuguese instead of Spanish. If you rename it “localize.txt” it will always load automatically when ODB runs. The language file is located where ODB resides (c:\program files\oc\languages on most machines).

It is possible for us to create custom installations of ODB for your organization that will automatically load in your preferred language (provided a translation file for that language is available).

Version 1.0 will include the ability to translate the entire user interface (including dynamically-generated text).

Feel free to translate the text file into any other Roman language and send it to us. We will then incorporate your translation into a future version of ODB. Please note that your text strings should be delimited by double quotes ("); within the quotes, you may use single quotes only (').

7. Sharing an ODB Database Over the Internet

Although ODB is not currently a web based application, there are several products and services which allow you to configure ODB for remote access.

One option for doing this is to use Windows 2000 terminal server, which is a built into Windows 2000 server professional. If you configure this application your ODB installation will allow access from two remote users simultaneously and the users will be able to access the data using Windows, Gnu/Linux, or MacOS. This option should offer excellent speed in accessing your data. A second, option, requiring a monthly fee, is to use services available from Logmein.com or PcAnywhere.com.

A third option is to use open source VNC software. VNC offers similar functionality to PcAnywhere but it is more difficult to configure. One of our interns created instructions which are available here:

http://organizersdb.org/0.9/odbremote.pdf

We are also interested in working on a remote solution that does not require a dedicated PC, and which can be shared by many people at the same time. This step will require modifications to the ODB source code. Some of the steps involved are:

1) The ODB database must be converted from Access to a format recommended for shared Internet access. The conversion utility for the free MySQL product at http://www.cynergi.net/exportsql works well - and Microsoft provides an upsizing utility to move data to Microsoft SQL Server. The resulting database must be installed on a computer that is permanently connected to the Internet with a fast (low-latency, 128K or greater) connection. Symmetric DSL is preferable to Asymmetric DSL, for instance. An ISP-hosted solution may cost $100/month or more, because few ISPs allow "inbound database connections."

2) Each Client PC must be set up using the built-in Microsoft ODBC interface (for SQL Server) or using the MyODBC interface (for MySQL-hosted databases). The former comes with Windows and the latter is at: http://www.mysql.com/downloads.

3) Each Client PC must have a specially configured version of ODB that has the capability to access a data file over the Internet. In this new version, the file name in the odbsetup.dat file must be replaced with a DSN (data source name) that begins with the characters "ODBC;".

There are a few technical challenges in moving ODB to a shared access model; to do it without a huge tradeoff in speed will require a lot of work on the code. So we are collecting the names of organizations interested in this feature and we may initiate a development project whose costs are shared by many groups.

Appendices

1. Major changes from 0.9.7 to 1.0.1

Updates to Existing Features

1. Payment amounts can be in dollars and cents
2. Completely revamped settings area
3. Full support for salutations'
4. Ability to customize labels for Iss, Cons, Act buttons
5. SRC code max length extended from 4 to 8
6. Additional options for automatic backup
7. Additional options for importing and exporting
8. Faster USPS zip code lookup
9. Better organization of fields using tabbed interface
10. Full support for 3 levels of payment categories plus gift comments, check number
11. Addition of right-click tabs on buttons they apply to
12. Ability to search for zip codes and dates in a range, without advanced query

Completely New Features

1. New, advanced data entry
2. Ability to create sample database upon startup
3. Ability to create notes and reminders
4. Ability to track pledges
5. Ability to create cutom reports
6. Ability to define subqueries
7. Built-in Presents for common queries
8. Ability to create merged form letters from within ODB
9. New 'Mass Update' screen
10. Addition of maintenance functions to screen for duplicates
11. Addition of second email address
12. Export to Vcard
13. Ability to customize the first line of your mailing label

2. Comparison with Other Database Software

In choosing a database application, you might have requirements that rule out ODB in favor of other software; conversely you might find that ODB is the only application that will meet your needs. We decided to prepare some comparison charts in March of 2006; you can view all of them on the ODB web site by going to:

http://organizersdb.org/dcompare
http://organizersdb.org/dcompare2
http://organizersdb.org/files/provocative%20comparison.pdf

How is ODB different from the other applications out there? The short answer is that ODB excels in ease of use so that the people using the database in your office do not have to be techies at all. ODB also has a fairly complete set of the features that membership organizations need -- including very basic reporting and generation of donor lists. And ODB also excels in assigning non-financial attributes to your constituents, so that you can tag people according to their issue interests, their constituencies, their activities, and their level of interest.

ODB also excels for organizations that have access to Windows computers but have no funds to spare, since the entry barrier is so low.

If you require a program that will keep two addresses for each person, ODB may not be the best program for you. If you require a web-based program, be advised that ODB keeps all the data locally. If you want staff to use it over the web you will have to invest a few hundred dollars in software like Logmein.com or even better, Windows Terminal server. If you do this than you will be able to access the ODB data remotely. However if you want to give your donors the ability to maintain some of their information, and if you want tight integration with an online donation system, a web-based application may be a better choice -- provided you feel you can be on top of any possible security issues.

We also recommend that you visit the following links that have additional information:
http://grassrootsfundraising.org/howto/software_chart.pdf
http://northstardb.com

2. A Few Key Features of ODB

- ODB provides the ability to enter most of the address as a single field, yet ODB processes the data into separate fields (street number, street name, apt) and has a special algorithm to sort addresses correctly.
- ODB keeps the software program separate from the data file, which makes it easier to back up your database or upgrade to a newer version. This makes a version of ODB using SQL Server or MySQL possible.
- ODB's installation can easily be download in order to preform an upgrade in just a few seconds. Upgrades to not affect your access to the data.
- ODB is so easy to use that everyone in your office – even interns and volunteers – can start using it immediately. Training is recommended if you are going to make use of ODB's more advanced features.
- ODB is implemented in VB5 on top of the Microsoft Access (Jet 3.5 or Jet 4.0) database engine. The data file created by ODB is based on the MS Access format, which means that it is possible to create add-ons and reports using Access97, Access2000, or Open Office.
- ODB includes key filtering and data validation to speed data entry and minimize the chance of errors.
- ODB has shortcuts to allow you to easily create lists of email addresses on the fly.
- ODB has built in integration with search and directory web sites.
- ODB will look up city and state if you type a zip code, and ODB provides the ability to look up 9-digit zip codes directly from the US Postal Service.
- ODB is open source so you are not dependent on a proprietary software company.
- ODB includes pledge tracking and a 'notes' feature.
- ODB's local area networking features are quite powerful and ODB is the only application that allows you to create, without any extra cost, a local network of computers that can all quickly search the same database.
- ODB allows you to access the ODB data tables from third-party applications, and even use software like Access or Open Office to generate your ODB reports.

3. ODB Customization Survey

This survey is designed to be filled out *before* you customize ODB and enter lots of data. It can help you think about how you want to categorize the contacts in your database. Once you have completed the Customization Survey, you have a starting place to modify ODB for your purposes. Section B of the User Manual provides all the information you need to change settings and codes to reflect the customized categories you defined. You may choose to do this yourself, or as we recommend, have someone with ODB experience help you do this.

Once you customize ODB, you can save your settings as a "template" for backup and to share among other organizations with needs similar to yours. Your efforts can help others avoid "reinventing the wheel."

Please keep in mind that codes and categories in ODB can be modified at any time, so you don't have to figure everything out today. The idea is to set up ODB with the codes you are definitely going to use. You can add new codes later (without a consultant). Plus, you can lock down your categories so that a casual user of the system will not be able to change them!

If you realize that you will need a substantial number of custom-designed reports, extra user-defined fields, advanced householding capabilities, advanced voter list management, tracking of outgoing grants, human services client management, etc. then ODB may not be the ideal database solution for you. Please see our Truth In Advertising statement for more information about the capabilities and limitations of ODB.

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1. **Contact Information:** Name, address and email of your organization that people would use to send back contributions.

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You may want to come back to this question after you complete step #3.

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2. **Individual Type Codes**: What are some key categories you use to classify people in your organization?

Examples: For a nonprofit group, typical categories are donor or prospect, press, organizational contact, vendor, foundation contact. Typical codes for a union are union member, nonunion supporter, press, retired member, organizational contact, vendor. For a local electoral campaign, typical categories might be prospective voter, prospective donor, prospective media, and prospective endorsement.

Keep in mind that these categories should not be overlapping. This means that a person coded as one "type" does not also fall under another type code.

Bad Example: overlapping categories like donor, volunteer, board member, prospect.

In the case above, a volunteer might also be a donor. Or a board member is also probably a donor.

3. **Activity Codes**. What are the main roles that people are assigned to, elected to, in your organization? This code can also be used to identify people who are involved in some kind of activity with your group.

Examples: board member, staff, intern, former staff, former officer, town contact, campus contact, shop steward, committee member, or coalition member. If you are organizing a campaign, "Work Election Day" or "Signholding" might also be activity codes.

Note that this code can be overlapping. Here, campaign volunteers can also be former staff or a coalition member. Folks can be assigned to multiple committees or activities. You can create up to 32 activity codes.

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4. **SRC or Event Codes**. What is the first interaction you had with a particular person? What is the source of her/his contact information? Did s/he come to an event, respond to a fundraising appeal letter, come from a list supplied by another organization?
The SRC code is designed to allow you to track a slightly different kind of "activity" than in step 3 – the "source" or first contact made with an individual, as well as ongoing interactions with them. For this reason, it is also useful for organizing events.

Example: If you run a campaign that assembles lists from 25 different environmental organizations, you can use the SRC code to track the original list each name came from. Or if you hold 20 CPR trainings a year, you can sign up who has registered and who has paid.

If you have an old database that you are going to import into ODB, perhaps the first SRC code assigned to all those old contacts could be "Old DB contacts".

You can create unlimited SRC codes.

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5. **Issue Codes**. What issues are your members, donors, or constituents most concerned with? The purpose of these categories is to enable you to mark the key people, or "possible activists," within your organization on issues of most concern to you.

ODB starts you out with some very general categories, but organizations usually remove almost all of them so that they can create issue categories much more specific to the needs of their organization.

Examples: An environmental group might track issues like Toxic Waste, Dirty Power Plants, or Global Warming. Community or labor organizers might track interest in particular campaigns like the Stop Wal-mart Campaign or the Living Wage Campaign.

You can create up to 32 issue codes.

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6. **Constituency Codes**. What are the main kinds of constituencies represented within your membership or the community you serve (if those are the contacts you are maintaining in your database)? The purpose is to identify the active members in specific communities that your organization can target for support.

Examples: A health advocacy organization may want to track different kinds of physicians, nurses, and hospital technicians. A domestic violence group might want to code individuals in the legal, medical, and mental health communities, as well as those who work with survivors or batterers. A community organization may want to track ethnicity, nationality, or religion of members.

You can create up to 32 constituency codes.

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7. **VID or Rate Codes: Volunteer Involvement or Voter Identification**. What are some activities in which people have different levels of involvement or competence?

Example: An events committee might have "core members" who come to practically all the meetings, backup members who come less often, or when needed, and "day of event" people who show up to help with a major event or performance. These people can be classified by level of involvement, from 1 (high involvement) to 3 (low involvement) or 4 (former involvement).

A community literacy program may track the reading level of its constituents, or the level of supportiveness of various journalists who cover education issues.

Alternatively, an election campaign would want to track the level of support of potential voters and a union affiliation drive would also rate supporters. You can create up to 24 VID codes.

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8. **Donation Codes**. When someone gives money to your group, what are the main types of donations and how are the funds are collected?

Examples: dues by mail, 1-on-1 meetings, weekly collections, foundation grant, event, prospect mailing, tuition payment, renewal mailing, web donation, etc.

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9. **Dues**. If you collect annual membership payments directly from your members, what is the standard membership rate, what is the term of membership (often one year), and are contributions to your group tax-deductible? Do you wish to be able to enter $0 donations (in-kind gifts)?

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10. **Fax, Apartment Number, Country, Title, Suffix, Gender, DOB Fields**. Would you like to have any of these fields made visible?

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11. **Large Lookup List**. If you are segmenting your list into a handful of categories, the Type feature listed above works well. But what if you have 1000 categories (like the names of universities people are from)? If you have a really long choice list, you can turn on the Biglist feature of ODB. Then you will need to enter the long list of choices for this pull-down menu. Do you need this?

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12. **Hiding/Renaming Fields**. Do you want to hide some of the fields or make subtle changes to the labels of the buttons?

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13. **Regions**. If you want to divide your organizing territory into sections and delegate responsibility to "captains" who are responsible for one or two regions, you can use the built-in Region code feature of ODB. If you use the region feature without ZIP code lookup turned on, you can, for instance, divide your database into the neighborhood people live in (which are generally smaller than one five-digit ZIP code).

If you turn on the region ZIP code lookup feature, you can have regions in your state or in the entire U.S. (or Mexico or Canada actually) that are determined by the ZIP code. So you could divide the U.S. into West, Midwest, Northeast, South and ODB would automatically fill in a region code like WES, MDW, NEA, SOU when you enter a ZIP code.

Do you need to use the "regions" feature?

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14. **Mandatory Entry**. Several of the fields can be set to require that something be entered into them. You can require a comment to be entered for each person or that a type code or SRC code be assigned to each record you import.

We strongly recommend that you turn on the "require Type" feature. Type codes will then be given to everyone you enter, so you can efficiently segment your entire mailing list. You will be able to distinguish people who should get all your mailings from those who only get a newsletter or those who should not get any mailings at all (e.g. the local office superstore). Will you require certain data to be entered?

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15. **User-defined Field**. ODB currently allows you to add one text field of up to 60 characters and give it a name. If you want to provide a social security number, child's name, year of graduation, etc. you can use this feature. You can set up the field to a fixed number of characters if you want, e.g. 9 for the social security number.

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16. **Backups**. Does your system administrator back up your server automatically or does staff perform this task? If you do this yourself, how frequently would you like to back up your data - daily, weekly, monthly?

4. Detailed Installation Information for Consultants

Installation Components and Philosophy

ODB's basic installation program is a 3.2 MB download that is intended to be usable by novices. Once you have downloaded the installation program, all you need to do is click **Next** twice, then on **Yes**, and you will be running ODB. The process can be accomplished in less than five seconds, and a reboot is not required. When you first run ODB, you will automatically be put into the Setup Wizard which creates a new ODB database.

The new installer was built with the open source Nullsoft Installation System, created by the makers of the popular WinAmp media player.

The basic installation program (**odbinstall-1.0.exe**) does not include a ZIP code database. (This was done because some people might want to have a custom zip code file, or a zip code file for another country, like Mexico.) ODB has a built-in capability (using a single button) to download and install a self-expanding EXE file from the Organizers' Collaborative web site containing the ZIP code database – all without the need to exit ODB. The download is under 1 MB – and the resulting database file (**ZIPcodes.mdb**) weighs in at 3.5 MB. The ZIP code file is based on free public data, and we will update it when we are able to find a free source for the data. The current version includes 42,000 ZIP codes (accurate as of December 1999) and also tables that allow ODB to recognize the location of an area code, last updated in the summer of 2001. It also includes sample GIS source code (as an Access module) for finding ZIP codes within a geographic radius that a user specifies.

The basic installation program also does not include the necessary Jet database drivers. ODB has used Jst 3.5 drivers, which allow the program to read data in the Access97 format. ODB will be updating to the Jet 4.0 (Windows 2000) drivers in 2007; for a while we will offer the software in both formats. At the beginning of the setup wizard, ODB will detect if the Jet drivers are not present, and offer to download a second installation program. The second installer (**odbsupp.exe**) is only 1.3 MB in size.

People have asked whether installation of Jet 3.5 interferes with software based on Access2000. As far as we know, our installation program avoids this conflict. The issue will be moot as soon as the Access 2000 version of ODB is released.

There have been some occasions where people have found that their databases were not opening on a machine where Access 2003 was installed. However it appears that these problems were related to file corruption and not the presence of a newer version of Access.

Administrative privileges are not needed for the basic ODB installation program. However, these privileges are needed for the ODB database support program, as it must make changes to the Windows registry to function properly.

Installation Details

If they don't already exist in your system, the ODB installer will copy three library files (msvbvm50.dll, vb5db.dll, and mscomctl.ocx) into the installation folder. The ODB executable, **odb.exe,** is also copied into this folder. In addition, the installer will create six subfolders: **converters**, **queries**, **mergetext, languages**, and **templates**. Note that you can install ODB anywhere on your hard drive, except the root directory. This means that if you are on a "locked down" system giving a demonstration, you can even install ODB in **My Documents** or in the temp folder for the currently logged in user – provided of course that the database support files mentioned above are already present on the system. For this situation, a build of ODB for Access 2000 might work better because the Jet 4.0 drivers are already installed on most WinXP machines.

When you upgrade ODB as part of the automatic update, items are saved into these subfolders (replacing prior versions that have the same names). The system files are not included in the updater. If you ever need to go back to a prior version, you can reinstall using an earlier full setup program.

The ODB database file SHOULD NOT reside in the program files folder. That is because this folder is usually not backed up. At some institutions, all documents are saved on a network server, and no backups are performed on client PCs. We recommend that you set up the ODB database file to reside in a place where backups are made. When you use ODB you have full control over where your data will reside, and you may change the file name to whatever you would like (as long as it ends with .odb or .mdb). Please note that by default, custom queries, templates, and import specifications are saved in the program files folder. You may create subfolders with the same names within the folder where your database is located, and ODB will use these instead.)

Creation of a new ODB database

The ODB setup wizard prompts the user with a very small number of questions the first time that ODB is run. After these questions are answered, ODB will save setup information to the user's hard drive, so that ODB can find the location of the database file, determine whether the PC should automatically back up the database, etc. The setup information is stored in a file called **odbsetup.dat**, in the folder where you initially installed ODB. The file contains the following:

First line: the location of the ODB templates folder.
Second line: location of the database file (full URI Path is recommended).
Third line: Local or Network, depending on whether the database resides locally.
Fourth line: "Backup On" or "Backup Off"; this enables a "monthly backup" feature.
Fifth line: usually blank; can be used to provide a password to the MS-Access database, if it's protected.

If you initially installed ODB in the default location (c:\program files\oc), and you want to add a second ODB installation to your computer, it is helpful to move the old installation to a location other than c:\program files\oc. This is because ODB is hardwired to look inside c:\program files\oc the first time you run it, in order to read the information from the file odbsetup.dat. This information includes the location of your ODB database. The reason for this behavior is to enable novice users to see their data even if they upgrade, but by mistake specify an install location that is different from the first one.

Summary of default file locations

Database File: User may select!
Program File: "c:\program files\oc\odb.exe"
ZIP code database: "c:\program files\oc\ZIPcodes.mdb" or the folder where the database file is located.
Initialization File: "c:\program files\oc\ocsetup.dat"

Database Size and Memory Requirements

ODB can run on any old computer that is able to run Windows, even Windows 95. A Pentium-333 or K6-300 is recommended for databases of over 5000 records, and a 1 Ghz processor is recommended if you are using 15K records or more. ODB has a low memory footprint (~15Mb, which is less than Word 97). The engine behind MS-Access should work on databases of 75,000 to 120,000 records on a modern PC with 512 MB or 1 GB of RAM. The chief limitation is really that the user interface has not been designed with databases that large in mind. With a 100K-record database, you will find frequent "false positives" in the duplicate checking feature, and you will find that some operations, like importing data, may run slowly. For organizations with a large number of records, we recommend that you look up records by record ID as described in the manual, for donation entry for instance.

5. Data Conversion Details for Consultants

The process of moving data into ODB can be quite easy if you are starting with just a few basic lists stored in a program such as Excel, Outlook, or Access. We recommend you examine the materials on the ODB web site describing the import process, at:

http://organizersdb.org/importhelp

If you are familiar with Access or Open Office, you will be happy to know that these programs can open the ODB data file. It is even possible to load data in to ODB in this manner. However, the ODB data file structure is fixed; you cannot change the structure or field definitions or ODB is unlikely to work. ODB can usually accommodate any organization that is storing basic information on constituents. You can even set up lots of check off boxes for languages spoken (using constituency codes); the process for converting your old data to this format is described on the ODB import help page.

There is no standard provision in ODB to set up households; this keeps the complexity of the software to a level that most nonprofit staff can handle, and actually makes the import issues a bit easier. Organizations that wish to enforce a 1-mailing-per-household rule can do a workarounds using the "VID" code that enables them to do this using ODB. Just create a VID code called "Mail Priority" and assign a value of "2" or "3" to people who should not be receiving a mailing. Then you can use the "extrafirstline" feature to add the text "To the family of:" to the first line of each mailing label.

6. Customizing the Interface

ODB allows you to change many of the default names for buttons, menus, and labels in the program, through the Settings (Wrench) area. You can also make changes by creating a custom template, but in reality 99.5% of the changes you can make are far easier to do from within the program. The purpose of the template system is not to create your new customization; the purpose is to save a customization you have developed through the program. One thing you can customize through the template system is the default list of Mailcodes. However, you do this at your own peril because

ODB depends on the existence of several standard mail codes, such as "AI", "AE", and "AD" which are used to mark addresses as incomplete or expired.

7. Future Plans

Organizers’ Collaborative has set up a developer section on the ODB website that provide information on future ODB plans and allows you to get involved.

Please see http://organizersdb.org/dev for this information.