

NEIGHBORHOOD LEADER PROGRAM

Updating the list of Potential NLs (Revision 3 – August 2015)

Purpose

Everyone that is given a turf to canvass voters for the Neighborhood Leader Program, must be entered into the list of potential NLs in the NLP Services database. We enforce this rule to ensure we assign turfs to the correct person, to ensure we spell the NL's name correctly, and to keep track of assigned turfs. The list we maintain is of prospective NLs. We track everyone who is, was or should be an NL. We track who actually signs up and gets a turf in the NLP Services database.

The list of potential NLs is maintained in MyCampaign. MyCampaign has the advantage of being linked to the VoterFile and keeps address and contact information current. Since MyCampaign does not offer an automated method of coordinating databases, the process of synchronizing MyCampaign with the NLP Services is manual. This document describes how to do this synchronizing process.

Step 1: Adding or Deleting an NL from the list

When adding or deleting a person from the list of potential NLs, you start by finding their record in MyCampaign. You may have to create a new record for a new person. Then verify that the NLP-Prospective Activist Code is set. Either set it or delete it as appropriate.

Lawrence Marvin Skidmore

My Campaign ID
101003522 Go

Addresses

Type	Address	Source	Edited	
Home Address	120 W Hereford St Gladstone, OR 97027-2043	User Added	4/22/11 (A. Gorry)	Get Map Delete

View Address History Add New Address

My Campaign ID

External ID 7088632
My Campaign ID 101003522
VAN ID 243820
My Activist

Name • Salutation

Name Lawrence Marvin Skidmore Suf
Salutation Larry
Envelope Name Larry Skidmore
Save

Activist Codes

Activist Codes	Date	
Party - County: CD5-Delegate5	005	10/24/11 Delete
Party - County: County Exec Comm-Clackamas	005	1/25/12 Delete
Party - County: District Leader40	040	11/30/14 Delete
Party - County: NLP-Prospective		
Party - County: SDC DelegateClackamas	005	6/7/10 Delete
Precinct Program: 2014 Elected PCPClackamas-031	190574	
Precinct Program: NL signupClackamas	005	
Precinct Program: PCP-Elected @Clackamas-031	190574	6/22/14 Delete
Source Tags: 08-Obama		12/19/08 Delete
Source Tags: DPO Web		4/20/08 Delete
Special Activities: Tech Team		4/21/08 Delete
Subscriber: Washington Dems News		5/10/10 Delete

Data originally entered in a different database Save New

Add Multiple Activist Codes

Check for the NLP-Prospective Activist Code

If not present, then use the drop down menu to select the activist code

Districts

State Oregon
County Clackamas
Precinct Skidmore
State Senate 20
State House 40

Also in Household

Actions

Save All
Save Page Layout
Merge Duplicate

Step 2: Create a new list

Create a new list with the state, county and activist code selected. This will produce a list of all the existing potential NLs.

The screenshot shows the 'Create A New Search' interface. It has a left sidebar with 'Location' and 'Activist Codes' sections. The 'Location' section includes dropdowns for State (Oregon), County (Clackamas), and Precinct, along with text fields for Street Name, Street # From, City, Zip Radius, and Zip From. The 'Activist Codes' section includes a dropdown for Activist Code (Party - County: NLP-Prospective (Public)), Input Type, Contact Type, Canvassed By, Entered by, and Canvassed From. On the right, there's a 'Step 1: New Search' panel with a 'Refresh Step' button and a 'Run Search' button. Annotations with blue arrows point to the State and County dropdowns, the Activist Code dropdown, and the Run Search button.

Select the state and the county

Select the Activist Code for NLP-Prospective

Then Run Search

Step 3: Export the list

Select the Export function.

The screenshot shows the 'My List' interface. At the top, it says '223 People', '190 Phones', '190 Doors', and '191 Mailboxes'. Below this is a row of icons for various actions: Print, Letters, Labels, Emails, Calls, Export, MinVAN, Counts, Split, Faxes, and Upload. A blue arrow points to the 'Export' icon. Below the icons is a 'Description' section with fields for Last Name and First Name. At the bottom, there's a table with columns: Name, Address, City, Phone, and Age.

Select Export

Name	Address	City	Phone	Age
Adams, David T	19621 S Hazelhurst Ln	West Linn	(503) 636-7503	62
Ames, William Mark	3500 SE Concord Rd Unit 61	Milwaukie	(760) 660-1490	70
Anderson, Julie K	52501 E Sylvan Dr	Sandy	(503) 622-3411	64
Angier, Naomi K	14425 SE Johnson Rd	Milwaukie	(503) 653-7639	63
Backs, Beverley Kay	13558 SE Aldridge Rd	Happy Valley	(971) 275-3003	54

For the first export, you will have limited options for Export format. Chose the Standard Text and then click the Customize Export. This will permit you to create a new format, save this format with a name, and use it for future exports. For subsequent exports, just select the one you created and named.

Export Wizard

Choose an Export Format

Export Format* **Standard Text** Select Customize Export

One record for every person in your list, including fields that you choose

Based on Export Type: People Use Standard Text Format

Customize Export... Export Now

Now select the list of fields shown below. They can be in any order and there can be more than what is listed. But you do need these as a minimum. Select the Text File Type, click the Save option (this lets you name the export for future use), and give your export a memorable name.

Export Wizard

Prospective NLPs

Based on Export Type: People

Fields needed for import the the NLP database

Select these fields for your export

<input type="checkbox"/>	My Campaign ID	<input type="checkbox"/>
<input type="checkbox"/>	Name	<input type="checkbox"/>
<input type="checkbox"/>	Home Phone	<input type="checkbox"/>
<input type="checkbox"/>	Primary Address (My Campaign)	<input type="checkbox"/>
<input type="checkbox"/>	Cell Phone	<input type="checkbox"/>
<input type="checkbox"/>	County	<input type="checkbox"/>
<input type="checkbox"/>	Email	<input type="checkbox"/>
<input type="checkbox"/>	Legislative Districts	<input type="checkbox"/>
<input type="checkbox"/>	Notes (Will include your most recent note)	<input type="checkbox"/>
<input type="checkbox"/>	Party	<input type="checkbox"/>
<input type="checkbox"/>	Precinct	<input type="checkbox"/>
<input type="checkbox"/>	Preferred Phone	<input type="checkbox"/>
<input type="checkbox"/>	Salutation MyCampaign	<input type="checkbox"/>

Use the drop down menu to add fields to the suggested list

Check the save option

Export File Type: ☐ Excel (.xls) ☒ Text (.txt) Select Text as the type

☒ Save as New Export Format

Export Format Name: Prospective NLPs Enter a name you can remember

Description:

Then click Export

Cancel Export

Step 4: Download the exported list

After a bid, your export will be ready. You can find in the main menu link “My Export Files”. Click this and download the list. The download process is browser specific. Chose a friendly browser and stick with it. Save the download file uncompressed in some folder where you can find it easily.

DNC VOTEBUILDER Oregon

My Voters My Campaign

Welcome Steve

- Account Requests 0
- My Export Files 1
- My PDF Files 0
- Counts/Crosstabs Outputs 0
- Follow Up Calls 0
- Process Volunteers 0
- Support Requests 3 New
- Contact the Admin
- NGP VAN Help and Training Guides
- VoteBuilder Documentation Link

Quick Look Up

Quick Look Up

Load Data

- Quick Mark
- Scan Bar Codes
- Script View
- Grid View
- Form View
- Run Bulk Uploads
- MiniVAN

Find your NLP export here

My Export Files

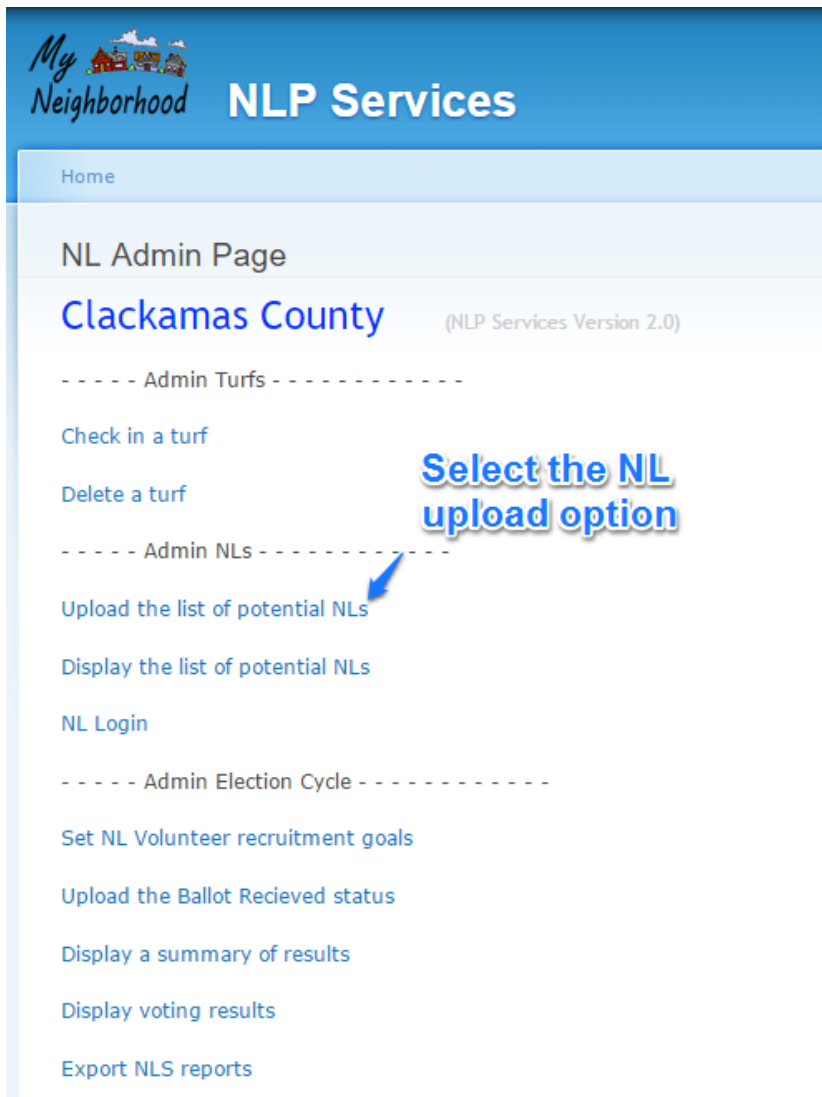
Export File	Exported	List Size	Record Count	Export Description	Download Link
ProspectiveNLs20150205-7351945377.zip	2/5/15 8:44 PM	223	223	ProspectiveNLs20150205	Download File

1 Export File · 1 Page

Click Download File

Step 5: Upload the Prospective NL list

The link the NLP Services Admin Page is county specific. You should already know this link. Choose the “Upload the list..” link.



Then Choose the file to upload and click upload.

