Neighborhood Organizing System (NOS) User Guide

So, you have agreed to become a Neighborhood Coordinator (NC) and have signed up a group of neighbors to be donors. They all have green bags. You have a clipboard with donor's names, addresses, phone numbers and emails. The next collection date is three weeks away.   Now what?

The Food Project has a web-based Neighborhood Organizing System (NOS) tool that allows each NC to easily manage all information for their own donor list. It has a map view function that shows the neighborhood with a green dot at each donor house. You can send out batch emails to your donors for pick up date reminders and other communications. There is a way to plot the route you want to take to pick up bags and to print out a list organized to match your preferred route. It is available 24/7 from any internet browser.

NOS is a powerful database system. At the "Administrator" access level, the full roster of donors for the Clark Neighbors Food Project (CNFP) is available. At the District Coordinator (DC) level, all donors and neighborhoods assigned to that district are available. Donors can be assigned as NC's and new districts and neighborhood groups can be created. Separate Guides describe the additional program functions at those levels.

- **This User Guide is written to describe NOS as it functions for a Neighborhood Coordinator**

Each NC can access NOS using their own email address and password. You will have full control of the database functions for your own neighborhood only.

BEFORE YOU START:

1. This program does NOT currently work well on phones. You will need to use a desktop or laptop computer or a tablet. And an internet connection. You'll be accessing NOS via a web browser.

2.   Happily, a new version of NOS that WILL work on your phone has been developed and is currently in the testing stage. We are looking forward to the release of that program in the near future.

3. You will need to have Adobe Acrobat Reader on your computer to view and print tally sheets.
- It helps if you have the most current version, so if you haven't updated lately, please do so.
- If you don't have this program on your computer, go to www.adobe.com and download it for free. It is a very safe program!

4. The information you enter into the program does not reside on your computer. You will be using an internet connection to access the NOS server. This means that sometimes when you type in something all of the expected changes (like seeing a new green dot show up on your map for a new donor) may not appear immediately. You may need to back out and then REFRESH the program.

5. If you haven't already requested or been assigned a password, or if you forget your password, please send an email to clarkfoodproject@gmail.com and request a specific password. You can change your password yourself once you are using the program.

If you have any questions about how to use this fabulous program, please contact Greg Nelson at clarkfoodproject@gmail.com

NIFTY NOS FEATURES

- Add new donors in your neighborhood
- Update existing donor information
- See a map with your donors designated by "dots" to help you set your route and plan for canvassing
- Change the donor order on your Tally Sheet to match your actual pickup route
- Print out your own Tally Sheet for each collection
- Record the results of a collection to keep track of donor activity
- Mark donors as inactive or archived, removing them from your Tally Sheet and/or Donor list
- Request to re-assign an existing donor when they move to another neighborhood in the CNFP area

SIGNING ONTO THE NOS

1. Open our website clarkfoodproject.org, click on "Coordinators Log In". Sign in with the phrase **NCs are awesome!** On the right side of the NC page, click on **NOS Login**.
2. It will give you a choice of states and cities
   - Click on *Washington/Clark County*
3. Click on **Log In**
4. Enter the email you use for the Food Project and your password
   (You will be provided with an initial password. You can easily change your password later.)

Your smart computer will probably greatly reduce this procedure the next time you log in.

Your personal Profile will appear on the screen. *Scroll down to see the full form and the map at the bottom.* If you'd like to change your initial password, click **Set/Reset Password** at the bottom of the screen.

INITIAL SIGN IN

Along with your Personal Profile, you will have access to four buttons:
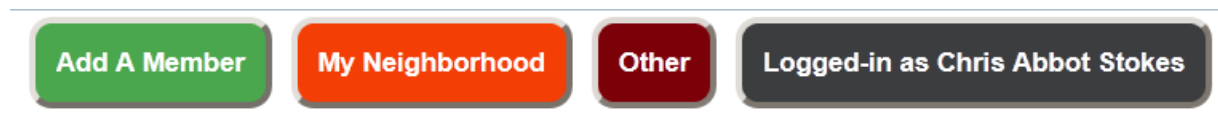
Hover your cursor over "My Neighborhood" to see the drop down menu.

"Big Map" shows the locations of our green bag donors in green and neighborhood coordinators in red. You can expand and move around the map. You should be able to find your own red dot. Use the back arrow to exit.

*Click on your own neighborhood name to open the Home Page.*

Home   **CONFIRM NEW DONORS**

On the left side of the page is "Confirm New Donors". On the right side is the map of your neighborhood.

Occasionally, a donor who lives near you will sign up on the website or at an event. Our Welcome Committee will then use this page to ask if you're willing to take on the new donor.

When you find a new donor on the page, check their location. Click on **Show Donor Location on Map.** A pin will appear on the map to show you where they are. This will help you decide whether you want to accept them as a donor*. **Scroll down to see the option buttons at the bottom**.

• If you decide not to accept, click on the **Decline** button. The donor's name will disappear from the page

• If you say yes, click on the **Accept** box. Then after you have contacted the new donor and delivered a bag, click on **Accepted and Has a Bag**. The name will disappear and move directly into your donor list and Tally Sheet. This also informs the Welcome Committee that there is nothing else they need to do with the donor — He/She is all yours.
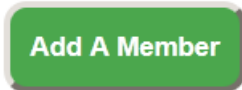
Add A Member

When you solicit new donors in your neighborhood, you can add them here. **This is a two-step process.** (Some of the procedures are also described under the "My Neighborhood" section).

STEP ONE
Click on **Add A Member**
- This takes you to the *Sign Up Form* screen, where you can enter the donor's information
- Check the *Food Donor* box only (do NOT check the Neighborhood Coordinator box)
- Help us keep track of how we add new donors with the *Source* box (NextDoor, Canvass, etc)
- Enter any *Pickup Notes* you may need about this donor (Example, "Snow Bird Dec –April)
- Scroll to bottom of form, if necessary
- Check the box by your name below the "*Skip Welcome Committee*" **(Important!)**
  - This assigns the donor to your neighborhood
- Click **Submit**

A new blank screen appears for the next donor. If you have more donors, continue.

STEP TWO
Use **Back Arrow** at top left of screen to exit the *Sign Up* forms
Hover over **My Neighborhood**
Click on your **Neighborhood Name**
Click on **View Donors**

The donor list should include the new donors that you just added.

Starting with the first new donor, click on the **Edit** button at the left side. The information form for the new donor will appear. Make any corrections or additions you want. Scroll down to the bottom of the form.

The main purpose of Step Two is to locate the new donor on your neighborhood map. When you enter new donors in Step One, the default location on the mapping system is Wizard Island in Crater Lake.

Click the **Re-Geocode** button. Verify that the donor location is now correctly displayed on the map. You can fine tune it by dragging the marker to the correct location (even a specific part of a large building). Remember to "Save Changes". If you want to return it to the original location, click *Re-Geocode* again.

Click **Save Changes** at the bottom of the screen. **(Important!)**

A red banner message will be present at the top of the screen, with the message that the profile page has opened in a separate browser tab. Hover the cursor over the gray tab on the top right of the screen (says "*Neighborhood Food Project*"). An "*x*" will appear at the left side of the tab. Click on this to **Close the Tab**. *(Not the same on your computer? Try the back arrow, or consult the "Help" menu on your computer.)*

The screen will return to the donor list. If there are additional new donors that need to be located on the map, repeat the procedure described above.

Use the **Back Arrow** to return to the home screen. *The new donors will not yet be located on the map.*

Hover over the **My Neighborhood** button, click on your **Neighborhood Name** to refresh your file.
The new donor locations should now be present on the map.
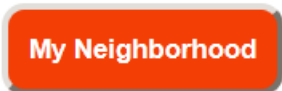
My Neighborhood

Hover your cursor over **My Neighborhood**, and your neighborhood name will appear below. Click on your **Neighborhood Name** to display your neighborhood home page.

You now have access to 8 more buttons!

| Home | View Donors | Email | Tally Sheet | Record Tally | Route Order | Notes | Options |

To return to this screen after using any of the button functions, use the **Back Arrow** or click **"Home".**

Options

We're starting on the far right button, but you'll only have to do this once!
NOS keeps track of your donors on a map, based on the address in the system. This can help you in two ways:
1. Creating your pickup route order
2. See the "holes" in your neighborhood for future canvassing for new donors.
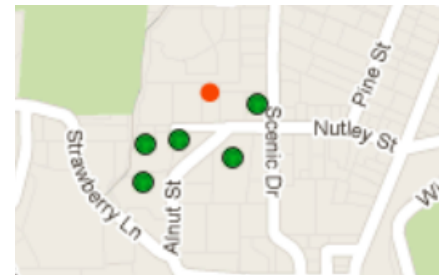
Click on **OPTIONS** to set the map size and center.
- The map will open to the Clark County area, but not specifically to your neighborhood unless it has already been set up by someone. (It's a Google map, so you can use your mouse to move the map around on your screen.) The map may have a number of green dots. These dots represent your donors. There's a red dot, too. It represents you, the NC.
- To make changes to the map, use the cursor to drag your neighborhood area to the center of the map. Use the "+" & "-" buttons to change the scale of the map.   Notice that at some point the scale changes to where you can see individual houses. Use the drag and scaling functions to locate and size the map to best suit the neighborhood area. Determine what location will best work to center the map at the scale that you want to fully show your neighborhood.
- To make your neighborhood the center of the map, click on **Locate Physical Address** and enter your own street address and zip code.   *(Or use another address, or cross street location, if that works better as the map center to show your current and potential donors.)*
- Click on **Show on Map**. Then click on **Save as Map Center**.
- Click on **Zoom**. Play with the Zoom number. When it's the size you like, click on **Save Zoom Level**.

- Now move your cursor over any of the dots. When the cursor changes from an open hand to a pointing finger, click on the dot. The donor's name and address will appear in a dialogue box.

- Once the center and scale of the map has been set, you can use the drag and scale functions to temporarily change the map view as needed. For instance, you may expand the map to show actual house locations. The center and scale settings will reset the next time you open the map.

Now let's move to the 2ⁿᵈ button from the left. (We'll come back to the first one in a bit)

This button opens up your donor list. You can do a lot of things here:
- Add/modify information for your donors, such as updating an email address, adding a phone number, and adding pickup notes
- Request that an existing donor be re-assigned when they move to another neighborhood in the CNFP area.
- Update donor history after a pickup

Edit	Pickup History	Row	Last Name	First Name	House	Street Name
	search					

> **IMPORTANT NOTE:**
> You must click the *Save Changes* button before you close the Profile screen to return to your list. There is a *Save Changes* button on the bottom of each Donor Profile*.* You'll need to close this browser window tab and go back to the original browser window tab to continue*.*

ADD/MODIFY INFORMATION and ADD PICKUP NOTES:
- Search: The Search button is located at the top of the donor list, as shown above. To use it to find specific donors from the full roster, type in the first few letters or numbers in the appropriate box, then click *Search*. Matches will appear in a list. To return to Donor List, use the back button.

- You can sort the list by any of the fields by clicking on the blue field name at the top of the list, such as *Last Name.* Or click on *Date Entered* to sort the list from oldest to newest. The system takes a moment to "think about it" – so be patient! The list will reset to default last name sort the next time it is opened.

- Clicking on the *icon* on the far left of each donor opens a new browser tab and brings up that donor's profile information for you to edit. You can change any of the information here.   The red warning banner shown below will appear. Close the tab by hovering over the gray tab at the top right of the screen, click on the *"x"* at the left side of the tab to close. Or use the back arrow to exit.

> ***This **Profile** page has opened in a separate browser tab from the home interface. Save any changes & close this tab.***

- While on the Donor Profile screen, you can enter **Pickup Notes** that will display on the Tally Sheet. Anything entered into **Member Notes** will not display on the Tally Sheet.

- **Status:** Click on the *Up/Down Arrow Symbol* to see "Active," "Inactive," and "Archived." "Inactive" keeps someone on your list, but with a grey background. "Archive" deletes the donor.

- **Refresh!** If you make changes to your donor roster and the changes don't seem to be showing up on the donor list, use the *Back Button* to return to the home screen. Then hover over *My Neighborhood*, click your *Neighborhood Name,* and try *View Donors* again. The changes should now be there.

Pickup History: The Pickup History is a tool for your use, to help you decide the best way to work with donors. You can use this information to contact donors who may not have been donating recently, to inquire about status. This will also make it clear when donors have stopped participating, but haven't informed you.

• Each box represents a completed pickup, with the most recent pickup on the far right. Information will move to the left every time another pickup is added to the list.

- **Key**: A green box means your donor left a bag; a red box means your donor didn't leave a bag; a grey box means they're out of town or on vacation. An empty box means we didn't have the info, or they were just getting started.

REQUEST REASSIGNMENT:

- If one of your donors moves to another neighborhood in the Clark County area, you can initiate a re-assign request:
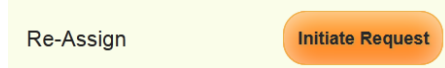
    - When you click on the *Initiate Request* button, it opens the request in the original browser tab. Provide as much information as you have with your request, such as, "Sue is moving to 123 Main St on February 1st and wants to continue to donate. Please reassign."

   - Click on *Send Request*.

UPDATE DONOR HISTORY:

As much as we'd love for everyone to leave their bag on their doorstep on pickup day, it doesn't always happen that way! The Record Tally function only works for recording results for your whole donor list. If you have to modify the record for a single donor, here is how you do that.
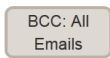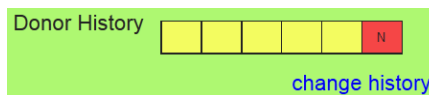

From the Donor Profile, you can click on *Change History*. This opens a dialogue box in your original browser, where you can change the "N" to a "Y", or even a "V" (vacation) if they let you know that they are out of town. Make sure you hit the *Submit* button.

Use this feature to easily send out group email reminders and information to your donors. The email addresses will automatically populate the Bcc window, so they won't be readable by other donors.
Be sure to read the instructions – there are two options to accommodate different browsers. Some require that the addresses be separated by a comma. Others require a semi colon.
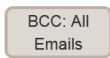
Click and it will put the email addresses into a new email for you. If you wish to delete any of the addresses (like, your own), just delete them from the Bcc list in the email. Put your own address in the "To" line of the email. Fill in the Subject line and the Message and send.

Tallysheet

A Tally Sheet is the list of donors, their addresses, phone #s, email addresses and pickup notes to take with you when you do your pickup.   The list will be organized to match the collection route that you have designated (see Route Order).

The Food Project keeps all of this information confidential and does not share it with anyone outside of the Food Project. It is used for organizing neighborhoods, reminding donors about pickups, telling them about our successes and needs. Knowing who has become inactive prompts the Neighborhood Coordinator to check in with those donors to see if they would like to continue donating, or not.

- Click on the *Tally Sheet* button**.**

- Once you see your tally sheet, click on the *icon* in the upper left of the screen**.** This brings up screen that asks whether you want to *Open* the file or *Save the PDF* file. If you *Open*, you'll be able to print directly. If you *Save* the file, you'll need to open the file from wherever you saved it.
- Print a fresh tally sheet before each pick up and use it to check off who has donated and who has not
    - Y = Yes.   N = No   V = Vacation

- Once you have printed the sheet, return to the Tally Sheet display. (You may have to close the print page, then click on your browser button). Press the back button to return to your neighborhood.

Record Tally

After your collection is complete, use the information from your Tally Sheet to record the results.
WARNING: When you enter the data and press Send, it looks like the data disappears. The list has reset to its original "Everybody Yes" default status. But if you back out and Refresh, the changes are there.
- Click *Record Tally*. A list of your donors arranged by your route order will appear.
- At the top of the form, indicate the month and year of the collection.
- Options for each donor are **Yes, No, Vacation, & Not Applicable. All will be in the 'Yes' default mode.**
- Enter the results for your entire list. You can also add notes. Click the *Send Data* button.
- A long message with a "**Click OK to Continue***"* will appear. The message basically says that you have to submit your whole list at the same time. If you want, you can change the whole list later, just not one entry at a time. There IS a way to change individual records, but not here. (See "Update Donor History").
- Click *OK*. The screen will now return to the default condition with all donors listed as Yes.
- Click the *Back Arrow* to get out of the screen. A message may appear asking if you want to send a form again. Click *Yes*. If you are stuck, use the green buttons at the top of the screen to get **Home**.
- *Refresh!* If you go directly to your Donor List, the changes that you just made will probably not appear. From **Home**, hover over *My Neighborhood,* click your *Neighborhood Name*, and try *View Donors* again. The collection record changes should now be there.

Once you figure out your pickup route, you'll want your tally sheet to list donors in the order in which you actually pick up their bags. The Route Order button allows you to do that.

Just number the donors in the order you want them to appear. Put the numbers, starting with 1, in the boxes in the column labeled "Route Order" (The boxes will have zeroes to start with.) When you are done numbering the donors, click on **Save Route Order**. it will automatically re-order the names on this list and the Tally Sheet.

Your Tally Sheet will display and print in this order.

House	Street	Apt	First Name	Last Name	Phone & Emails	Pickup History	Pickup	PU Notes
215	Nutley St	-	Chris	Abbot Stokes	941-3329 quadrant1@jeffnet.org	Y	Y N V	-
151	Alnut St	-	Alina	VanBeek	858-212-9139 alinavanbeek@gmail.com	Y	Y N V	-
196	Nutley St	-	Rod & Lynde	Farmers	-	Y	Y N V	Need email address

Nifty, eh?

OK, say you already have 30 donors on your list and you get a new green bagger (Freddie Meyer). How do you add him to your route order? One way is to look on your map and figure out which existing donor should be picked up right after Freddie's. If it's Mike Albertson, existing #21, then make Freddie #21 also and click the "save route order". You'll now have (2) #21's on your list. Re-assign the numbers following Freddie.

Another trick: Say you have 40 donors and are splitting the collection with a partner. Number the first half from 1 to 20 and the second from 31 to 50. This makes it easy to split a tally sheet and add new donors.

LOGOUT
Be sure to click the **Log Out** button every time you have finished using the Neighborhood Organization System. This keeps the information secure.

- Hover your mouse over **Logged in as (***Your Name***)** and click on **Log Out.**

A NOTE ABOUT SECURITY
It is very important that we all take extra care to protect the information our donors have trusted us with.
This applies to all uses of the information, including, for example, always using the Bcc feature when sending out group emails, so people's emails aren't exposed.