



# LaborKey

## Version 4.0

### User Guide

**4.01a**  
**FEB 2007**

Introduction to LaborKey  
Basic LaborKey Features  
Reference Materials

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# Preface

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## Introduction to LaborKey

LaborKey is a membership mobilization management system, especially geared toward political mobilization of union members. This product was designed to be integrated with existing union membership dues management systems. LaborKey can be set up to automatically synchronize with multiple membership databases, providing a union office with an incredible amount of additional information about its members including voter history, district data, and candidate information. Typically, no data entry is required in LaborKey because it automatically recognizes any changes to a member's account data in the dues management system (when a "synchronization" is performed). LaborKey software also provides the user with access to statewide registered voter data beyond the union's membership. LaborKey has numerous data management features including convenient selection profile management, useful contact and analysis reports, barcoded worksheet and integrate walk map reports, email broadcasting, and even an optional fully integrated automatic dialer feature which allows labor organizations to conduct sophisticated dialer projects without having to import and export databases.

## About this Guide

### Document Purpose

This guide describes basic concepts and step-by-step instructions for completing tasks in LaborKey so that users can begin mobilizing union membership.

This guide assumes that LaborKey service has already been activated from the SERVICE PLAN screen (under the CONFIG menu option), and that LaborKey user accounts and user passwords have already been created by your LaborKey administrator. Refer to the ***LaborKey 4.0 Installation Guide*** for instructions to install, activate, and configure LaborKey.

### Document Location

The most current LaborKey User Guide is located online at [www.laborkey.com/support.html](http://www.laborkey.com/support.html).

## Applications Needed

Microsoft® MapPoint® 2006 or later is required to generate barcoded worksheets and walk maps. (LaborKey Corporation is not a reseller of Microsoft MapPoint.)

## Additional Resources

Additional support resources can be found at:

[www.laborkey.com/support.html](http://www.laborkey.com/support.html).

Additional important LaborKey documents:

***LaborKey 4.0 Installation Guide***

***LaborKey 4.0 Synchronization Configuration Guide***

***LaborKey 4.0 Partner Network Guide***

# Logging In & Out

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## Logging In

**Note:** Before Using LaborKey software, LaborKey service must be activated from the SERVICE PLAN screen (under the CONFIG menu option), and LaborKey user accounts and user passwords should be created by your LaborKey administrator. Refer to the *LaborKey 4.0 Installation Guide* for instructions to install, activate, and configure LaborKey.

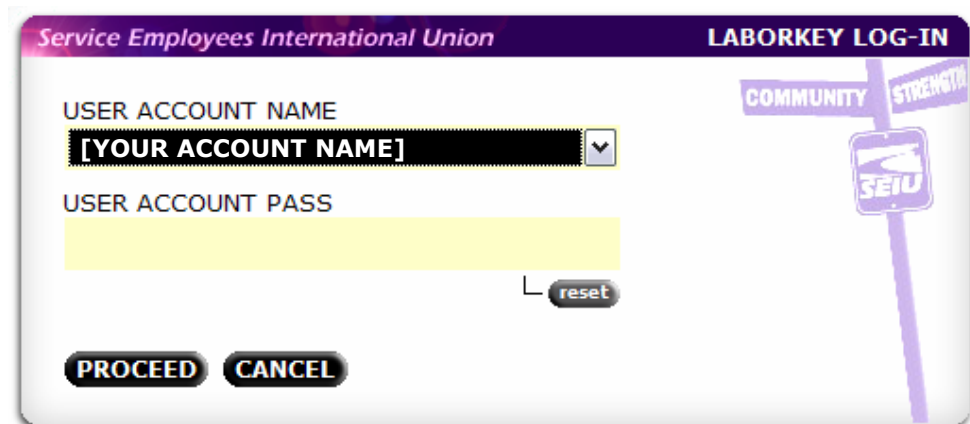
### Step 1

Double-click on the LaborKey icon on your desktop to open LaborKey software.



(LaborKey icon)

The **LABORKEY LOG-IN** screen appears with the last logged user account name displayed. If the appropriate user account is not displayed, you must select the appropriate user account from the dropdown list.

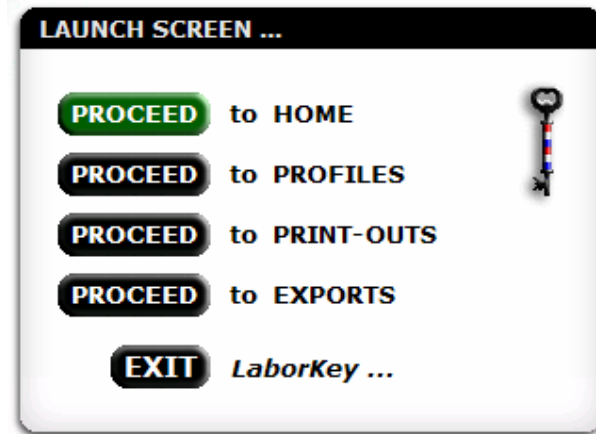


*To change your password, click the **RESET** button. You will be prompted to enter your current password once and a new password twice. If you forgot your password, your LaborKey administrator can help you reset your password.*

**Note:** There are many styles of this screen and several other LaborKey screens, usually associated with particular labor unions.

## Step 2

When your account is selected, enter your password under **USER ACCOUNT PASS**, and then click **PROCEED**. The **LAUNCH SCREEN** displays as illustrated below.



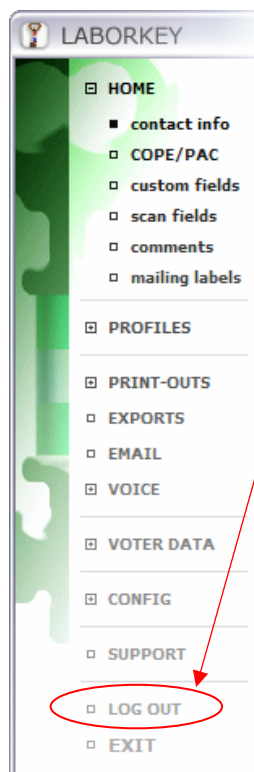
## Step 3

Click **PROCEED** next to the feature you wish to open to begin using LaborKey.



*If you typically begin with the same feature, you can ask your LaborKey administrator to set this feature as your default initial screen, instead of this LAUNCH screen.*

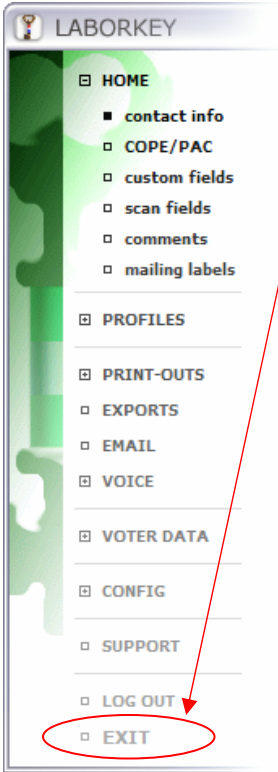
## Logging Out



While in LaborKey software, click on the menu item **LOG OUT** to log out of the software without exiting the software entirely. The **LABORKEY LOG-IN** screen will appear just as when opening the software originally.



# Exiting

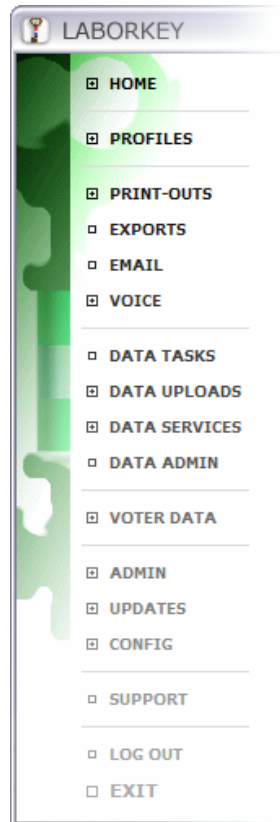


Click on the menu item **EXIT** to exit LaborKey.

# LaborKey Menu

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## Menu Overview



The LaborKey software features are organized according to the LaborKey menu. The menu provides access to all of the features in the software.

The menu items displayed to the left might not match the items displayed in your configuration of LaborKey. The LaborKey menu lists features according to (1) the client's service plan, (2) the labor union or other organization type, (3) the type of office (local, council, or other), (4) custom software features designed for the client, and (5) the user account created by the LaborKey administrator. There is no standard LaborKey menu configuration. The illustration to the left includes the most basic menu options.

The following iconographic symbols are used by the LaborKey menu:

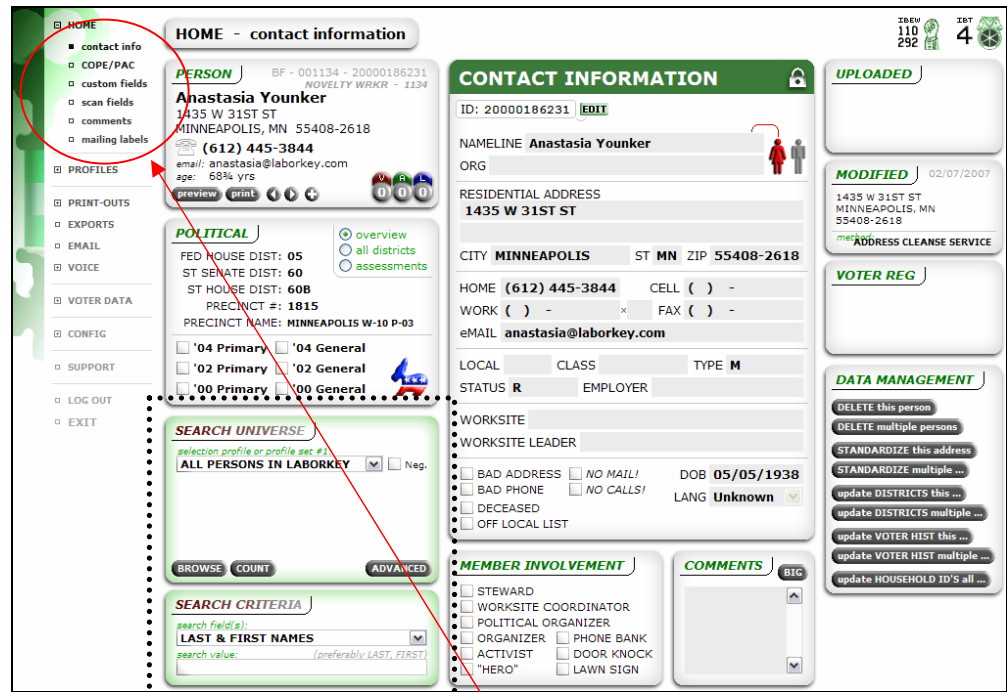
- ▣ **"expandable menu icon"** – click to expand menu item and display submenu items.
- ▣ **"collapsible menu icon"** – click to collapse menu item and hide submenu items.
- **"unselected menu icon"** – click to open feature.
- **"selected menu icon"** – feature is already open.



- **"menu overflow cutoff"** – too many menu items are expanded for all items to be displayed.

# Search & Browse

## HOME Screens

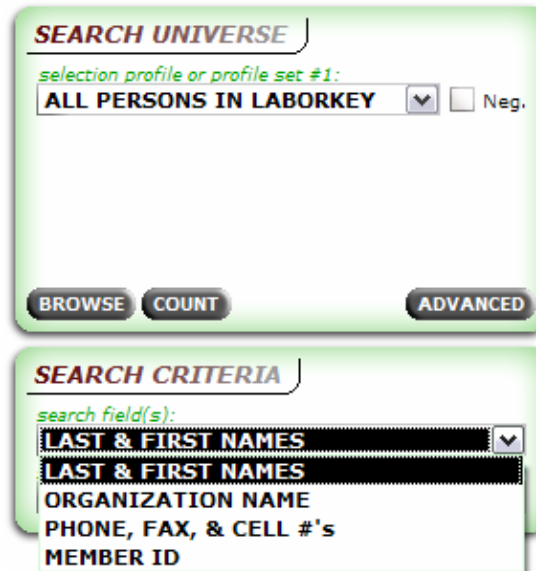


LaborKey includes a number of HOME screens, all of which can be accessed from the HOME submenu which is circled in the illustration above. Different configurations of LaborKey contain different arrangements of HOME screens.

LaborKey can be used to manage an organization's membership database (except for dues management); however, most organizations use other membership management databases, and then install LaborKey and synchronize LaborKey with their membership management databases. As a result, most of the data management features of the HOME screens are typically not used, except for member searching, browsing, and barcoded information scanning. Barcode scanning and other uses of the HOME screens are covered in topical references. This guide only covers member searching and browsing in the HOME screens.

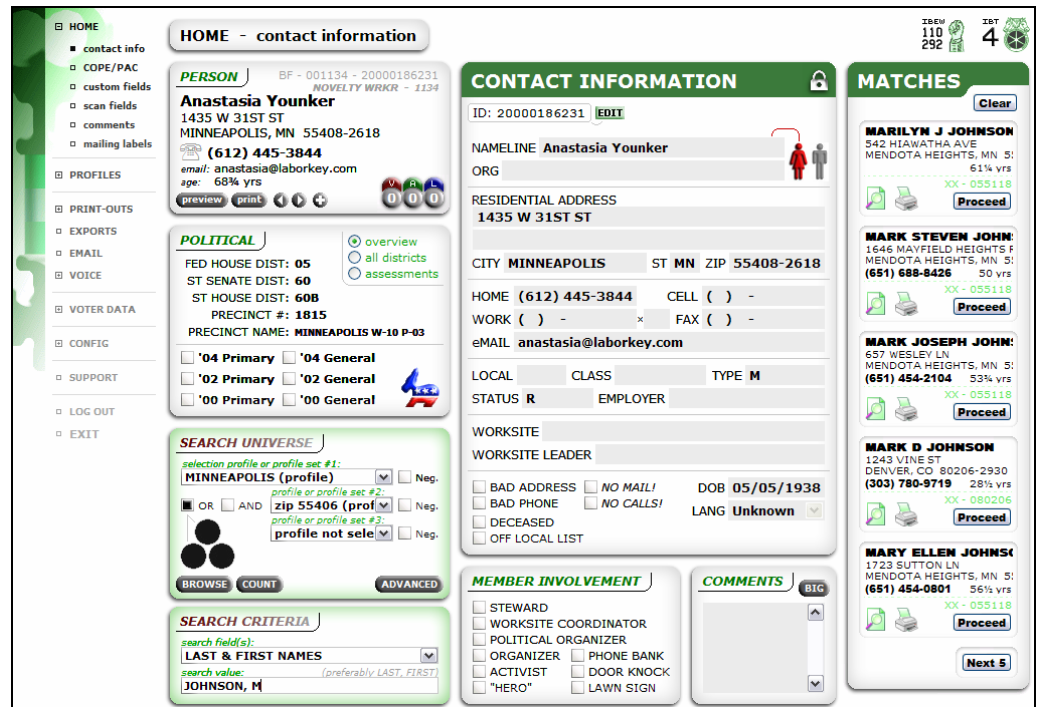
A member search begins in the bottom left search modules of the HOME screens which are contained within the dashed box in the illustration above.

# Search Options



Four search field options can be selected from the **search field(s)** dropdown at the bottom left corner of the HOME screens.

# Search Criteria



After selecting a **search field** option from the dropdown, a search criterion is entered at the bottom left under **search value**. In the illustration above, the search search field option **LAST & FIRST NAMES** is selected, and "JOHNSON, M" is entered as the search criterion.

# Search Results

**MATCHES** Clear

**MARILYN J JOHNSON**  
542 HIAWATHA AVE  
MENDOTA HEIGHTS, MN 5:  
61½ yrs  
XX - 055118  
Proceed

**MARK STEVEN JOHN:**  
1646 MAYFIELD HEIGHTS F  
MENDOTA HEIGHTS, MN 5:  
(651) 688-8426 50 yrs  
XX - 055118  
Proceed

**MARK JOSEPH JOHN:**  
657 WESLEY LN  
MENDOTA HEIGHTS, MN 5:  
(651) 454-2104 53¾ yrs  
XX - 055118  
Proceed

**MARK D JOHNSON**  
1243 VINE ST  
DENVER, CO 80206-2930  
(303) 780-9719 28½ yrs  
XX - 080206  
Proceed

**MARY ELLEN JOHNS**  
1723 SUTTON LN  
MENDOTA HEIGHTS, MN 5:  
(651) 454-0801 56½ yrs  
XX - 055118  
Proceed

Next 5

The right-hand column in the illustration on the prior page is also illustrated to the left. As the search criterion is entered at the bottom left corner of the HOME screen, match results are displayed at the right. If selection profiles are selected under **SEARCH UNIVERSE** in the bottom left corner of the HOME screen, all matches within the SEARCH UNIVERSE are displayed first, followed by all other match results. The profile selections under SEARCH UNIVERSE do not limit the match results.

Profiles and profile sets are defined in a later section of this guide, but basically, profiles and profile sets are stored data selection criteria, not much unlike saved queries in Microsoft Access.

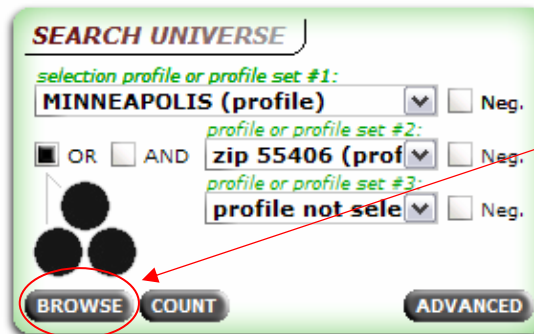
Match results can be accessed by clicking the **PROCEED** button for a matched person. The active HOME screen is refreshed with membership data for the selected matched person. To toggle between matched persons, click the PROCEED buttons for multiple matched persons.

The match results displayed in the right column will not be cleared until the **CLEAR** button is clicked.

**Note:** if there are less than 100,000 persons in the LaborKey database, the match results are displayed as-you-type; otherwise, a **FIND** button is displayed which must be clicked to find and display match results.

## Browse

While the SEARCH feature on the HOME screen is the fastest search method, it only offers the search options "LAST & FIRST NAMES", "ORGANIZATION NAME", "PHONE, FAX, & CELL #'s", and "MEMBER ID". Also, it can only be used for exact matches. The BROWSE feature is much more flexible, because it includes search capability for many LaborKey fields, as well as simple sort and scroll capability for manually browsing through data selections.



The screenshot shows a search interface titled "SEARCH UNIVERSE". It features three search criteria fields, each with a "Neg." checkbox to its right. The first field is labeled "selection profile or profile set #1:" and contains "MINNEAPOLIS (profile)". The second field is labeled "profile or profile set #2:" and contains "zip 55406 (prof)". The third field is labeled "profile or profile set #3:" and contains "profile not sele". Between the first and second fields, there are radio buttons for "OR" (selected) and "AND". At the bottom of the interface, there are three buttons: "BROWSE" (circled in red), "COUNT", and "ADVANCED". A red arrow points from the text on the right to the "BROWSE" button.

Just as with the SEARCH feature, the **BROWSE** feature can be accessed from the bottom left corner of the HOME screens. The BROWSE feature can also be accessed from most screens where PROFILES can be selected.

**Note:** The following section, "PROFILES and PROFILE SETS", describes what PROFILES and PROFILE SETS are, how to create them, and how they can be selected within selection modules such as the module illustrated above. It might be useful to skip back and forth between this section and the following section.

If no PROFILES are selected in the selection module (default), all persons in the LaborKey database will be included; otherwise, only the persons within the selected PROFILES will be included. Click the **BROWSE** button to open the BROWSE screen (illustrated on following page).

BROWSE

IBEW 110 292  
IST 4

**PERSON** BF - 001134 - 20000201275  
NOVELTY WRKR - 1134

**Clayton Sprinkles**  
 10680 HAMPSHIRE AVE S, APT 210  
 MINNEAPOLIS, MN 55438-2640

**(612) 266-2662**  
email: clayton@laborkey.com  
age: 40½ yrs

preview print

**SELECTION "FINE-TUNING"** **2,635**

- EXCLUDE PERSONS FLAGGED "OFF LOCAL LIST"
- EXCLUDE PERSONS FLAGGED DECEASED
- EXCLUDE PERSONS WITH EMPTY & INVALID ADDRESSES
- EXCLUDE PERSONS FLAGGED "NO MAIL"
- EXCLUDE PERSONS WITH EMPTY & INVALID PHONE NUMBERS
- EXCLUDE PERSONS FLAGGED "NO CALLS"
- EXCLUDE PERSONS WITH EMPTY EMAIL ADDRESSES (w/out "@")

**"AD HOC LIST"**

ADD ADDRESS TO "AD HOC LIST"

TAKE ADDRESS OFF "AD HOC LIST"

PREVIEW LABELS PRINT LABELS

PRV. ENVELOPES PRT. ENVELOPES

CLEAR "AD HOC LIST"

RETURN TO PRIOR SCREEN SHOW PRINT-OUT OPTIONS

<input type="checkbox"/>	<u>INT'L ID</u>	<u>ENTITY ID</u>	<u>MEMBER ID</u>	<u>SOURCE TYPE</u>	<u>PERSON TYPE</u>	<u>SSN</u>	<u>ORGANIZATION</u>	<u>NAMELINE</u>	<u>LAST</u>	<u>FIR</u>
<input type="checkbox"/>	BF	001134	20000201001	??	R			Perry Greentree	GREENTREE	PEI
<input type="checkbox"/>	BF	001134	20000201003	??	R			Rochelle Quinton	QUINTON	RO
<input type="checkbox"/>	AB	000588	20000201005	??	R			Theresa Sprinkles	SPRINKLES	THI
<input type="checkbox"/>	XX	000000	20000201023	??	R			Mamie Jackson	JACKSON	MA
<input type="checkbox"/>	EF	000141	20000201095	??	R			Carrol Whipper	WHIPPER	CA
<input type="checkbox"/>	EF	000141	20000201097	??	R			Joni Olson	OLSON	JOI
<input type="checkbox"/>	EF	000141	20000201098	??	R			Jeanine Nantucket	NANTUCKET	JEA
<input type="checkbox"/>	EF	000141	20000201100	??	A			Loren Loopie	LOOPIE	LOI
<input type="checkbox"/>	EF	000141	20000201101	??	A			Kimberly Loopie	LOOPIE	KIM
<input type="checkbox"/>	EF	000141	20000201103	??	A			Charlie Hopper	HOPPER	CH
<input type="checkbox"/>	EF	000141	20000201104	??	A			Ron Nantucket	NANTUCKET	RO
<input type="checkbox"/>	EF	000141	20000201106	??	A			Mae Evermore	EVERMORE	MA
<input type="checkbox"/>	BF	001134	20000201196	??	R			Shawna Mabel	MABEL	SH
<input type="checkbox"/>	BF	001134	20000201203	??	A			Chad Sprinkles	SPRINKLES	CH
<input type="checkbox"/>	BF	001134	20000201204	??	A			Elizabeth Whipper	WHIPPER	ELI
<input type="checkbox"/>	BF	001134	20000201205	??	A			Barbara Dingler	DINGLER	BA
<input type="checkbox"/>	AB	000588	20000201226	??	R			Hope Olson	OLSON	HO
<input checked="" type="checkbox"/>	<u>BF</u>	<u>001134</u>	<u>20000201275</u>	<u>??</u>	<u>A</u>			<u>Clayton Sprinkles</u>	<u>SPRINKLES</u>	<u>CL</u>
<input type="checkbox"/>	BF	001134	20000201276	??	A			Perry Greentree	GREENTREE	PEI
<input type="checkbox"/>	AB	000588	20000202103	??	A			Harold Younker	YOUNKER	HA
<input type="checkbox"/>	AB	000588	20000202104	??	A			Matt Vienna	VIENNA	MA

Navigating through records in the BROWSE screen is rather simple. You can scroll up and down through records (persons) by using the scroll bar at the right side of the grid, and you can scroll left and right through columns (fields) by using the scroll bar at the bottom of the grid. Click once on a record to select and highlight the record, and to display information for the selected person in the "contact card" module displayed at the top left. You can sort the records on a selected field by clicking on the header at the top of the selected field. Clicking once on a field header sorts the records in ascending order. Clicking a second time resorts the records in descending order, and so forth. An underlined field header caption indicates that the records are currently sorted according to that field. Clicking on most field headers will also activate and display a search option for the field. The illustration on the following page shows records sorted on the birthdate field. Notice that the field header BIRTHDATE is underlined, and a **BIRTHDATE** search option is displayed just above the grid.



IBEW 110 292 IST 4

**BROWSE**

**PERSON** EC - 000146 - 20000161889  
SIGNALMEN - 146

**Diane Sprinkles**  
3330 FREMONT AVE N  
MINNEAPOLIS, MN 55412-2405  
(612) 302-5230  
email: diane@laborkey.com  
age: 54½ yrs

preview print

**SELECTION "FINE-TUNING"** **1,936**

- EXCLUDE PERSONS FLAGGED "OFF LOCAL LIST"
- EXCLUDE PERSONS FLAGGED **DECEASED**
- EXCLUDE PERSONS WITH **EMPTY & INVALID ADDRESSES**
- EXCLUDE PERSONS FLAGGED **"NO MAIL"**
- EXCLUDE PERSONS WITH **EMPTY & INVALID PHONE NUMBERS**
- EXCLUDE PERSONS FLAGGED **"NO CALLS"**
- EXCLUDE PERSONS WITH **EMPTY EMAIL ADDRESSES (w/out "@")**

**"AD HOC LIST"**

ADD ADDRESS TO "AD HOC LIST"

TAKE ADDRESS OFF "AD HOC LIST"

PREVIEW LABELS PRINT LABELS

PRV. ENVELOPES PRT. ENVELOPES

CLEAR "AD HOC LIST"

**FIND** BIRTHDATE: // // RETURN TO PRIOR SCREEN SHOW PRINT-OUT OPTIONS

NAMELINE	LAST	FIRST	BIRTHDATE	LANG	eMAIL	HOME #	BAD PHONE	NO CALLS	HOME # (v.r.)
Lola Greentree	GREENTREE	LOLA	11/11/1951		lola@laborkey.com	(612) 655-1655	<input type="checkbox"/>	<input type="checkbox"/>	
Marian Younker	YOUNKER	MARIAN	11/11/1951		marian@laborkey.com	(612) 219-5121	<input type="checkbox"/>	<input type="checkbox"/>	
Noelle Olson	OLSON	NOELLE	12/12/1951		noelle@laborkey.com	(612) 304-5130	<input type="checkbox"/>	<input type="checkbox"/>	
Tessa Utter	UTTER	TESSA	12/15/1951		tessa@laborkey.com	(612) 204-5120	<input type="checkbox"/>	<input type="checkbox"/>	
Wendy Nantucket	NANTUCKET	WENDY	12/16/1951		wendy@laborkey.com	(612) 385-1385	<input type="checkbox"/>	<input type="checkbox"/>	
Jessica Nantucket	NANTUCKET	JESSICA	01/01/1952		jessica@laborkey.com	(612) 447-5244	<input type="checkbox"/>	<input type="checkbox"/>	
Julianna Olson	OLSON	JULIANNA	01/01/1952		julianna@laborkey.com	(612) 300-5230	<input type="checkbox"/>	<input type="checkbox"/>	
Autumn Dingler	DINGLER	AUTUMN	05/05/1952		autumn@laborkey.com	(612) 835-2835	<input type="checkbox"/>	<input type="checkbox"/>	
Betsy Younker	YOUNKER	BETSY	06/06/1952		betsy@laborkey.com	(612) 540-5254	<input type="checkbox"/>	<input type="checkbox"/>	
Elisabeth Jackson	JACKSON	ELISABETH	07/07/1952		elisabeth@laborkey.com	(612) 665-2665	<input type="checkbox"/>	<input type="checkbox"/>	
Diane Sprinkles	SPRINKLES	DIANE	07/07/1952		diane@laborkey.com	(612) 302-5230	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Ellis Sprinkles	SPRINKLES	ELLIS	07/07/1952		ellis@laborkey.com	(612) 223-5222	<input type="checkbox"/>	<input type="checkbox"/>	
Kristen Quinton	QUINTON	KRISTEN	10/10/1952		kristen@laborkey.com	(612) 301-5230	<input type="checkbox"/>	<input type="checkbox"/>	
Katheryn Vienna	VIENNA	KATHERYN	10/10/1952		katheryn@laborkey.com	(612) 502-5250	<input type="checkbox"/>	<input type="checkbox"/>	
Margie Younker	YOUNKER	MARGIE	11/11/1952		margie@laborkey.com	(612) 321-5232	<input type="checkbox"/>	<input type="checkbox"/>	
Miguel Younker	YOUNKER	MIGUEL	11/11/1952		miguel@laborkey.com	(612) 204-5220	<input type="checkbox"/>	<input type="checkbox"/>	
Patty Sprinkles	SPRINKLES	PATTY	12/13/1952		patty@laborkey.com	(612) 379-5237	<input type="checkbox"/>	<input type="checkbox"/>	
Stacie Kipper	KIPPER	STACIE	12/14/1952		stacie@laborkey.com	(612) 342-5234	<input type="checkbox"/>	<input type="checkbox"/>	
Van Jackson	JACKSON	VAN	12/16/1952		van@laborkey.com	(612) 795-2795	<input type="checkbox"/>	<input type="checkbox"/>	
Douglas Greentree	GREENTREE	DOUGLAS	01/01/1953		douglas@laborkey.com	(612) 415-3415	<input type="checkbox"/>	<input type="checkbox"/>	
Angela Quinton	QUINTON	ANGELA	01/01/1953		angela@laborkey.com	(612) 300-5330	<input type="checkbox"/>	<input type="checkbox"/>	

Common "exclusions" are available at the top of the screen in the **SELECTION "FINE-TUNING"** box. Selecting exclusions reduces the data selection, and the total count displayed at the top of the screen is instantly adjusted accordingly. In the illustration above, the total has been reduced from **2,635** as illustrated on the prior page, to **1,936**.

The **"AD HOC LIST"** box at the top right can be used to manually create a list of persons for the purpose of generating mailing labels and/or addressed envelopes. Usually it would be much easier to print mailing labels or envelopes for selected PROFILES in the BASIC REPORTS screen (covered later in section "Print-Outs"). However, a person might require 3 labels for one person, 6 labels for another person, and single labels for a handful of other persons ... for instance. This feature would be ideal for this sort of scenario. Simply select a person in the grid, and then click the button **ADD ADDRESS TO "AD HOC LIST"** to add the person to the list. Clicking three times would add three instances of the person to the list. Click the button **TAKE ADDRESS OFF "AD HOC LIST"** once to remove ALL instances of the selected person. The list is not specific to the displayed selection of data. The BROWSE screen can be closed and then reopened with a different data selection, and then additional persons within the new data selection can be added to the "ADD HOC LIST" as well. The list is not cleared when the software is closed and reopened, and the list is specific to the particular work station on which the list was created. A different list can be created on each station where LaborKey is installed (unless LaborKey is accessed over Citrix).



BROWSE

ID# 110  
292 IST 4

**PERSON** EC - 000146 - 20000161889  
SIGNALMEN - 146

**Diane Sprinkles**  
3330 FREMONT AVE N  
MINNEAPOLIS, MN 55412-2405  
(612) 302-5230  
email: diane@laborkey.com  
age: 54½ yrs

preview print

**SELECTION "FINE-TUNING"** **1,936**

EXCLUDE PERSONS FLAGGED "OFF LOCAL LIST"

EXCLUDE PERSONS FLAGGED **DECEASED**

EXCLUDE PERSONS WITH **EMPTY & INVALID ADDRESSES**

EXCLUDE PERSONS FLAGGED "NO MAIL"

EXCLUDE PERSONS WITH **EMPTY & INVALID PHONE NUMBERS**

EXCLUDE PERSONS FLAGGED "NO CALLS"

EXCLUDE PERSONS WITH **EMPTY EMAIL ADDRESSES** (w/out "@")

**"AD HOC LIST"**

ADD ADDRESS TO "AD HOC LIST"

TAKE ADDRESS OFF "AD HOC LIST"

PREVIEW LABELS PRINT LABELS

PRV. ENVELOPES PRT. ENVELOPES

CLEAR "AD HOC LIST"

**FIND** BIRTHDATE: / / **RETURN TO PRIOR SCREEN**

NAMELINE	LAST	FIRST	BIRTHDATE	LANG	eMAIL	HOME #
Lola Greentree	GREENTREE	LOLA	11/11/1951		lola@laborkey.com	(612) 655-1655
Marian Younker	YOUNKER	MARIAN	11/11/1951		marian@laborkey.com	(612) 219-5121
Noelle Olson	OLSON	NOELLE	12/12/1951		noelle@laborkey.com	(612) 304-5130
Tessa Utter	UTTER	TESSA	12/15/1951		tessa@laborkey.com	(612) 204-5120
Wendy Nantucket	NANTUCKET	WENDY	12/16/1951		wendy@laborkey.com	(612) 385-1385
Jessica Nantucket	NANTUCKET	JESSICA	01/01/1952		jessica@laborkey.com	(612) 447-5244
Julianna Olson	OLSON	JULIANNA	01/01/1952		julianna@laborkey.com	(612) 300-5230
Autumn Dingler	DINGLER	AUTUMN	05/05/1952		autumn@laborkey.com	(612) 835-2835
Betsy Younker	YOUNKER	BETSY	06/06/1952		betsy@laborkey.com	(612) 540-5254
Elisabeth Jackson	JACKSON	ELISABETH	07/07/1952		elisabeth@laborkey.com	(612) 665-2665
Diane Sprinkles	SPRINKLES	DIANE	07/07/1952		diane@laborkey.com	(612) 302-5230
Ellis Sprinkles	SPRINKLES	ELLIS	07/07/1952		ellis@laborkey.com	(612) 223-5222
Kristen Quinton	QUINTON	KRISTEN	10/10/1952		kristen@laborkey.com	(612) 301-5230
Katheryn Vienna	VIENNA	KATHERYN	10/10/1952		katheryn@laborkey.com	(612) 502-5250
Margie Younker	YOUNKER	MARGIE	11/11/1952		margie@laborkey.com	(612) 321-5232
Miguel Younker	YOUNKER	MIGUEL	11/11/1952		miguel@laborkey.com	(612) 204-5220
Patty Sprinkles	SPRINKLES	PATTY	12/13/1952		patty@laborkey.com	(612) 379-5237
Stacie Kipper	KIPPER	STACIE	12/14/1952		stacie@laborkey.com	(612) 342-5234
Van Jackson	JACKSON	VAN	12/16/1952		van@laborkey.com	(612) 795-2795
Douglas Greentree	GREENTREE	DOUGLAS	01/01/1953		douglas@laborkey.com	(612) 415-3415
Angela Quinton	QUINTON	ANGELA	01/01/1953		angela@laborkey.com	(612) 300-5330

**HIDE PRINT-OUT OPTIONS**

→ Avery 5160

PREVIEW PRINT MAIL LABELS  
household results (group persons with same last name & address)

PREVIEW PRINT ENVELOPES  
household results (group persons with same last name & address)

PREVIEW PRINT COMPACT LIST  
excl. member id #'s  
incl. selection detail

PREVIEW PRINT PHONE LIST  
excl. member id #'s  
incl. selection detail  
incl. voter activity

PREVIEW PRINT CONTACT LIST  
excl. member id #'s  
long version  
grouped by employer

PREVIEW PRINT NAME TAGS

Clicking the button **SHOW PRINT-OUT OPTIONS** (see illustration on prior page) reduces the width of the browse grid, and adds a panel on the right side for printing basic reports (see illustration above). These reports are all available from the BASIC REPORTS screen as well; however, the most common reports are included in BROWSE feature as a convenience. The print-out options on this screen print the persons displayed in the grid according to the current displayed field sortation. Clicking the button **HIDE PRINT-OUT OPTIONS** removes the panel on the right side with print-out options and restores the full width of the browse grid.

There is one more report available from this screen. In the upper left corner, in the "contact card" module, click the **preview** and **print** buttons to produce an "INDIVIDUAL PROFILE" report for the selected person. This report provides a simple summary of basic contact, demographic, and political data for an individual.

When finished browsing, select and double-click a record to proceed to the HOME screen and display the selected person, or click the button **RETURN TO PRIOR SCREEN**.

# Profiles & Profile Sets

---

## Profiles Defined

Profiles are saved user-defined criteria used to select specific persons, such as union members, activists and/or voters, etc., from the LaborKey database. The criteria may include locational information, i.e., precinct or municipality, or demographic data, like birth date or language. After you create a profile and assign it a name, you can select it again and again, either by itself, or in combination with other profiles, profile sets, and/or exclusion criteria.

## Profile Sets Defined

Profile sets are groups of profiles and/or other profile sets. You can create profile sets that are narrower or broader in scope depending on your needs. Like profiles, after you create a profile set and assign it a name, you can select it again and again, either by itself, or in combination with profiles, other profile sets, and/or exclusion criteria.

**Note:** Wherever profiles are selected throughout the software, profile sets can also be selected. Profiles are always listed at the top of dropdown lists, and profile sets are always listed at the bottom of the same dropdown lists.

## Managing Profiles

### Building Profiles

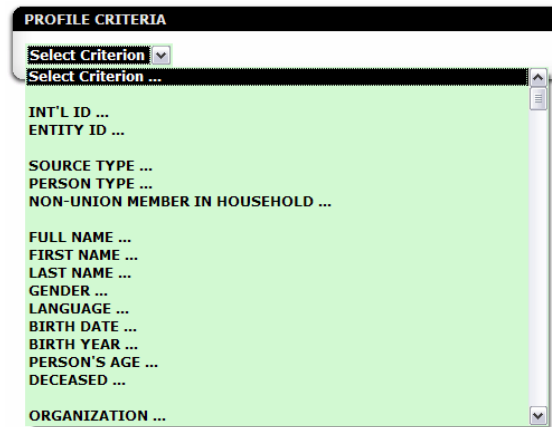
To build a new profile, follow the steps below.

1. Select the **build profiles** option under the **PROFILES** item on the LaborKey menu to open the **PROFILES – build profiles** screen as illustrated below. **“BUILD A NEW PROFILE”** must be selected in the dropdown at the top of the screen.

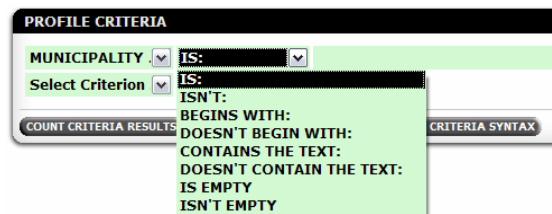
The screenshot displays the 'PROFILES - build profiles' interface. On the left is a sidebar menu with the following items: HOME, PROFILES (expanded), build profiles (selected), join profiles, PRINT-OUTS, EXPORTS, EMAIL, VOICE, DATA TASKS, and DATA UPLOADS. The main content area has a title bar 'PROFILES - build profiles'. Below it is a dropdown menu with 'BUILD A NEW PROFILE' selected. To the right of this dropdown is a text area for 'PROFILE DESCRIPTION / COMMENTS (optional)'. Below the dropdown is a 'PROFILE NAME' input field. At the bottom of the main area is a 'PROFILE CRITERIA' section with a 'Select Criterion' dropdown. A 'SAVE NEW PROFILE' button is located between the 'PROFILE NAME' field and the 'PROFILE CRITERIA' section.

2. Provide a name for the new profile under **PROFILE NAME**. A profile name should be relatively easy to recognize from a dropdown list of profiles.

3. Optionally you can provide comments under **PROFILE DESCRIPTION / COMMENTS** for future reference.



4. Click the **Select Criterion** dropdown to view a list of available criteria for the new profile. The dropdown appears as illustrated to the left. Select a criterion.



5. After you select a criterion, additional options will usually appear for the selected criterion, as appropriate for the criterion selected. Most criteria require an operator such as **IS**, **ISN'T**, **BEGINS WITH**, **DOESN'T BEGIN WITH**, **CONTAINS THE TEXT**, **DOESN'T CONTAIN THE TEXT**, **IS EMPTY**, and **ISN'T EMPTY**. If an

operator is selected which requires additional arguments, such as **BEGINS WITH** or **CONTAINS THE TEXT**, a text entry object will appear to the right of the selected operator. To enter multiple arguments, enter an argument, such as "MINNEAPOLIS", and then click the TAB key on your keyboard. Additional text entry objects will appear as necessary, and if more arguments are needed than what fit on the screen, the screen will automatically paginate and buttons will appear for navigating between pages of profile criteria.

6. Repeat steps 4 and 5 as many times as necessary to add all the necessary criteria to the profile.

7. If you are satisfied with your new profile, click **SAVE NEW PROFILE**.

You are finished creating your new profile. If you do not save the profile, you will need to click **CLEAR NEW PROFILE** to continue.

**Notes:** (1) The same criterion, such as MUNICIPALITY, may be included more than once with different operators and arguments. (2) Any criterion which begins with the text "CUSTOM CRITERIA:" creates custom criteria syntax for the user. Custom criteria options can be used to type or paste complicated criteria syntax.

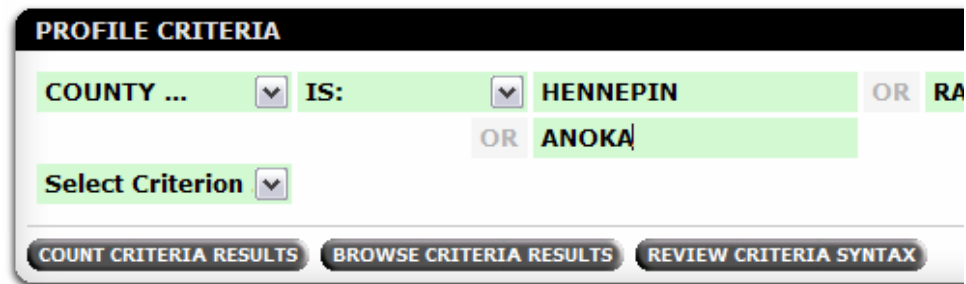
## Evaluating Profiles

Before saving a new profile (between steps **6** and **7** on the prior page), it is often a good idea to evaluate the new profile. The buttons illustrated below are provided for this purpose. (The **REVIEW CRITERIA SYNTAX** button is an advanced option which is not activated for all user accounts.)

Click **COUNT CRITERIA RESULTS** for a simple record count.

Click **BROWSE CRITERIA RESULTS** to call up the BROWSE screen described at length in the prior section "Search & Browse".

Advanced users can click **REVIEW CRITERIA SYNTAX** to review the criteria syntax, or to copy the syntax to be pasted elsewhere.



The screenshot shows a web interface titled "PROFILE CRITERIA". It features a search bar with a dropdown menu for "COUNTY ..." and a text input field containing "HENNEPIN". To the right of the input field is a "RA" label. Below the input field is a "Select Criterion" dropdown menu. At the bottom of the interface are three buttons: "COUNT CRITERIA RESULTS", "BROWSE CRITERIA RESULTS", and "REVIEW CRITERIA SYNTAX".

## Modifying Existing Profiles

Often profile criteria need to be modified as the scope of mobilization projects change.

Instead of selecting "**BUILD A NEW PROFILE**" in the dropdown at the top of the screen, select the saved profile which you need to modify.

The saved criteria are displayed in the bottom portion of the screen. To clear a criterion, select the top option, "**Select Criterion**", in the criterion dropdown (*shortcut: right-click the criterion*).

Any operators or arguments for any of the profile criteria can be changed as needed.

To add new criteria, simply follow the same steps that are required for creating a new profile (steps **4** and **5** on prior page).

When finished and satisfied, click the button **SAVE CHANGES TO PROFILE**, or click **CANCEL CHANGES TO PROFILE** to safely undo any changes that have been made (since criteria or changes were last saved).

# Managing Profile Sets

## Building Profile Sets

To build a new profile set, follow the steps below.

1. Select the **join profiles** option under the **PROFILES** item on the LaborKey menu to open the **PROFILES – join profiles** screen as illustrated below. **“CREATE A NEW PROFILE SET”** must be selected in the dropdown at the top of the screen.

2. Provide a name for the new profile set under **PROFILE SET NAME**. A profile set name should be relatively easy to recognize from a dropdown list of profiles and profile sets.
3. Optionally you can provide comments under **PROFILE SET DESCRIPTION / COMMENTS** for future reference.
4. Select from 2 to 18 profiles and/or profile sets to join. Additional dropdowns will appear as needed. For any profile or profile set where you need to include all persons who do NOT meet the criteria, flag the **Select Opposite** checkbox to the right.

**Note:** There is no limit to how many levels deep profiles and profile sets can be combined/nested within profile sets.

5. At the left, flag either **OR** or **AND** to indicate the type of join.

Selecting **OR** (“union”) includes ALL persons who meet the criteria of ANY of the selected profiles and/or profile sets. If **OR** is selected, a person only has to meet the criteria of one selected profile or profile set to be included. Selecting **OR** increases the number of persons selected.

Selecting **AND** (“intersection”) includes only persons who meet the criteria of each and every selected profile and/or profile set. Selecting **AND** decreases the number of persons selected.

6. If you are satisfied with your new profile set, click **SAVE NEW PROFILE SET**.

You are finished creating your new profile set. If you do not save the profile set, you will need to click **CLEAR NEW PROFILE SET** to continue.

## Evaluating Profile Sets

Before saving a new profile set (between steps **5** and **6** on the prior page), it is often a good idea to evaluate the new profile set. The buttons illustrated below are provided for this purpose. (The **REVIEW CRITERIA SYNTAX** button is an advanced option which is not activated for all user accounts.)

Click **COUNT CRITERIA RESULTS** for a simple record count.

Click **BROWSE CRITERIA RESULTS** to call up the BROWSE screen described at length in the prior section "Search & Browse".

Advanced users can click **REVIEW CRITERIA SYNTAX** to review the criteria syntax, or to copy the syntax to be pasted elsewhere.



## Modifying Existing Profile Sets

To modify a profile set, first select the profile set which you wish to modify from the dropdown at the top of the screen.

Any selections within the profile set can be changed as needed.

When finished and satisfied, click the button **SAVE CHANGES TO PROFILE SET**, or click **CANCEL CHANGES TO PROFILE SET** to safely undo any changes that have been made (since criteria or changes were last saved).

## Selecting Profiles & Profile Sets

A screenshot of a software interface. The top section is titled "SELECTION CRITERIA" and contains a dropdown menu with "ALL PERSONS IN LABORKEY" selected, a "Neg." checkbox, and three buttons: "BROWSE", "COUNT", and "ADVANCED". The bottom section is titled "EXCLUSIONS" and contains a list of checkboxes with labels: "persons flagged 'OFF LOCAL LIST'", "persons flagged DECEASED", "persons w/ empty & invalid addresses", "persons flagged 'NO MAIL'", "persons w/ empty & invalid phone #'s", and "persons flagged 'NO CALLS'".

Profiles and profile sets are central to the use of LaborKey software. Throughout the software, profiles and profile sets are used to select data for browsing member information, printing reports, exporting data files, communicating with members, submitting data to partner organizations, etc. Nearly all features which require the selection of data include member selection and exclusion modules which are similar to the modules illustrated to the left. Understanding how to **create** useful profiles and profile sets, and how to **select** profiles and profile sets is the key to generating valuable reports, exports, communications, etc.

**SELECTION CRITERIA**

selection profile or profile set #1:  
  Neg.

profile or profile set #2:  
  Neg.

**EXCLUSIONS**

persons flagged "OFF LOCAL LIST"  
 persons flagged DECEASED  
 persons w/ empty & invalid addresses  
 persons flagged "NO MAIL"  
 persons w/ empty & invalid phone #'s  
 persons flagged "NO CALLS"  
 persons w/ empty email addresses

**SELECTION CRITERIA**

selection profile or profile set #1:  
  Neg.

OR  AND   Neg.

profile or profile set #2:  
  Neg.

profile or profile set #3:  
  Neg.

**EXCLUSIONS**

persons flagged "OFF LOCAL LIST"  
 persons flagged DECEASED  
 persons w/ empty & invalid addresses  
 persons flagged "NO MAIL"  
 persons w/ empty & invalid phone #'s  
 persons flagged "NO CALLS"  
 persons w/ empty email addresses

**SELECTION CRITERIA**

selection profile or profile set #1:  
  Neg.

OR  AND   Neg.

profile or profile set #2:  
  Neg.

profile or profile set #3:  
  Neg.

**EXCLUSIONS**

persons flagged "OFF LOCAL LIST"  
 persons flagged DECEASED  
 persons w/ empty & invalid addresses  
 persons flagged "NO MAIL"  
 persons w/ empty & invalid phone #'s  
 persons flagged "NO CALLS"  
 persons w/ empty email addresses

You will need to understand how to perform the following four tasks.

## 1 – SELECTION OF PROFILES

If no profiles or profile sets have been selected, the default selection "ALL PERSONS IN LABORKEY" displays in the first selection dropdown (as illustrated on prior page). Selecting a saved profile or profile set causes an additional profile selection dropdown to appear (as illustrated left, top). Selecting a second profile or profile set causes another selection dropdown to appear, as well as the **OR** & **AND** join options (as illustrated left, middle). Up to five profiles and/or profile sets can be selected.



*If more than five profiles and/or profile sets are needed, you can create a profile set and then select the profile set.*

For any profile or profile set where you need to include all persons who do **NOT** meet the criteria, flag the **Neg.** checkbox to the right of the profile or profile set selected (as illustrated left, bottom).

## 2 – SELECTION OF OR & AND

Selecting **OR** ("union") includes ALL persons who meet the criteria of ANY of the selected profiles and/or profile sets. If **OR** is selected, a person only has to meet the criteria of one selected profile or profile set to be included. Selecting **OR** increases the number of persons selected.

Selecting **AND** ("intersection") includes only persons who meet the criteria of each and every selected profile and/or profile set. Selecting **AND** decreases the number of persons selected.





### 3 – SELECTION OF EXCLUSIONS

Exclusion options in the **EXCLUSIONS** module (illustrated to the left) should be selected thoughtfully depending on the task at hand. **“Persons with empty & invalid addresses”** should usually be

excluded from mailing labels, envelopes, and other mail or neighborhood walk communications. **“Persons with empty & invalid phone #'s”** should usually be excluded from phone lists, contact sheets, dialer projects, and other phone communication materials. Email messages cannot be sent to **“persons with empty email addresses”**. **“Persons flagged DECEASED”** and **“persons flagged “OFF LOCAL LIST”** (see note below) should be excluded from nearly all output. Some software features force the user to select required exclusions when certain exclusions are absolutely necessary. For instance, email cannot be sent to persons without email addresses, and so the software forces the user to exclude persons without email addresses from email submissions.

By default, both **“persons flagged “OFF LOCAL LIST”** (see note below) and **“persons flagged DECEASED”** are selected.

**Note:** The exclusion option **“persons flagged “OFF LOCAL LIST”** does not appear in the EXCLUSIONS module for all installations of LaborKey. LaborKey includes a special OFF LOCAL LIST field which is only relevant if an organization automatically gathers data from other union locals or “partnering” organizations using LaborKey. If persons which had been submitted from “partnering” organizations before are no longer included in data submissions gathered, those persons are flagged as “OFF LOCAL LIST” in the LaborKey database (and not deleted) so that the receiving organization can review these records before deleting them. This is important, because a person which might have been dropped from the submitting “partner” database may have activism or other important information tracked in the gathering “partner” database.

### 4 – EVALUATION OF SELECTIONS



Click the button **COUNT** for a simple record count of persons matching your selections. Click the button **BROWSE** to open and review your data selection in the BROWSE feature, which is described at length in the prior section “Search & Browse”. If your user account includes advanced profile features, the button **ADVANCED** will display, which provides direct access to the selection criteria in code format.



## **CONCLUDING THOUGHT**

Typically, people who readily understand these tasks have a very positive experience using LaborKey software right out-of-the-box. For other people, LaborKey software requires more practice – more getting used to.

# Print-Outs

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## Introduction

LaborKey offers a variety of print-outs. This section provides an overview of the following LaborKey print-out features:

**BASIC REPORTS** - includes mailing labels, envelopes, phone lists, name tags, and other common reports. These reports are the most basic reports which would be used daily for routine tasks.

**DISTRICT COUNTS** – includes a series of frequency distribution reports which list total numbers of persons residing within districts or other defined areas. These reports are the easiest way to get a quick count of persons per district from the entire membership database or from a specific selection of membership data.

**STAT REPORTS** – includes a series of complex reports providing an incredible amount of statistical detail. These reports were created in response to a number of similar requests for customized reports. There are separate reports for *political activity*, *member involvement*, *COPE/PAC contributions*, *language, race & ethnicity*, and for user-selected custom *scan sheet question sets*.

*(Note: Additional report features can be added in the future if LaborKey is provided with rough drafts.)*

**BARCODED CALL SHEETS (or WORKSITE CONTACT SHEETS)** – generates barcoded call sheets containing up to 24 custom survey questions. This report was designed with worksite contacts in mind, but it can be used for any initiative where simple questions are asked and responses are collected.

**BARCODED WALK SHEETS & INTEGRATED MAPS\*** – generates barcoded walk sheets, corresponding walk maps, and drop-off maps (for dropping off volunteers starting from a “staging area”). The barcoded walk sheets are nearly identical to the barcoded call sheets, containing up to 24 custom survey questions. This feature is the most sophisticated barcoded walk sheet and integrated walk map system available anywhere, and it is included in LaborKey as part of the freeware configuration at no cost.

**BASIC MAPS\*** – generates a simple map starting at a user-specified departure point, and connecting up to 50 selected persons. This mapping feature is useful for house calls.

\* Mapping features require that Microsoft® MapPoint® 2006 or later be installed.

# Basic Reports

The **PRINT-OUTS – basic reports** screen is accessed by selecting the **basic reports** option under the **PRINT-OUTS** item on the LaborKey menu.

These reports are the most basic reports which would be used daily for routine tasks.

### *To generate a report:*

- (1)** specify the appropriate data selection in the selection modules in the upper right (*refer to instructions in section “Profiles & Profile Sets” under the sub-topic “Selecting Profiles & Profile Sets”*),
- (2)** select a preferred print sortation order from the dropdown labeled **SET PRINT ORDER** at the top of the screen,
- (3)** flag the appropriate print preference checkboxes listed under the report of choice, and
- (4)** click the **PREVIEW** or **PRINT** button for the report.

*Some print preferences requiring explanation:*

**“household” results** – selecting this option removes all persons having the same address and last name, except for the first person, and the name line for this person is changed to **[LAST NAME] Household**.

**exclude member id #'s** – selecting this option suppresses all member id #'s so that member id information does not print on the report. In some membership databases, the member id includes or provides access to sensitive or private data.

**include selection criteria detail** – selecting this option causes the selection profile and exclusion information to be summarized at the top of the print-out. This option is very handy if multiple lists are printed, and if it is important to remember the criteria by which each list was selected.

*Special reports requiring explanation:*

**WINDOW ADDRESSES** – this report is a non-standard solution to save time when letters need to be personalized with a standard inside address at the top of the letter, and when each letter must be inserted into an envelope and addressed with a matching member address. One could export a database, carefully design a mail merged letter where the inside address is perfectly positioned for a standard #10 envelope window, or one could skip the mail merge and print the letters leaving a blank space on the letters where the standard inside address would normally be printed. Then one could run the letters through the printer a second time using this LaborKey report option, automatically printing the selected addresses on the letters, perfectly positioned for a standard #10 envelope window.

**COMPACT LIST** – this report is similar to an Excel<sup>®</sup> spreadsheet print-out. However, the fields included in this report are pre-determined. An alternative to this report is to export the same selection to a spreadsheet from the **EXPORT** feature, and to print exactly the fields needed.

**HOUSEHOLD CONTACT SHEET** – this report can be used to target members based on a combination of the voter activity of members and the voter activity of persons living in the same households. For instance, from within your data selection, you can limit the report to members with a poor voter turnout (a low voter score) who live in the same household as at least one person with excellent voter turnout (a high voter score).

# District Counts

The **PRINT-OUTS – district counts** screen is accessed by selecting the **district counts** option under the **PRINT-OUTS** item on the LaborKey menu.

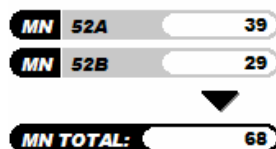
These reports list total numbers of persons residing within districts or other defined areas. These reports are the easiest way to get a quick count of persons per district from the entire membership database or from a specific selection of membership data.

### To generate a report:

- (1) specify the appropriate data selection in the selection modules in the upper right (refer to instructions in section "Profiles & Profile Sets" under the sub-topic "Selecting Profiles & Profile Sets"),
- (2) click the **PREVIEW** or **PRINT** button for the report of choice.

### Sample report 1 – House Districts:

## HOUSE/ASSEMBLY DISTRICT COUNTS




Sample report 2 – School Districts:

# SCHOOL DISTRICT COUNTS

<b>MN</b>	<b>0012</b>	<b>5</b>
<b>MN</b>	<b>0624</b>	<b>2</b>
<b>MN</b>	<b>0831</b>	<b>35</b>
<b>MN</b>	<b>0832</b>	<b>21</b>
<b>MN</b>	<b>0834</b>	<b>4</b>
<b>MN</b>	<b>2144</b>	<b>1</b>
▼		
<b>MN TOTAL:</b>		<b>68</b>

# Stat Reports

IBEW 110 292
IBT 4


**PRINT-OUTS - "stat" reports**


**POLITICAL ACTIVITY STAT REPORT**  
 SELECT PRIMARY GROUPING (each begins a new page): LOCAL (within International) ▾  
 SELECT SECONDARY GROUPING (page line items): SENATE DISTRICT ▾  
 Report Counts  Report Percentages
 PREVIEW PRINT

**MEMBER INVOLVEMENT STAT REPORT**  
 SELECT PRIMARY GROUPING (each begins a new page): LOCAL (within International) ▾  
 SELECT SECONDARY GROUPING (page line items): SENATE DISTRICT ▾  
 Report Counts  Report Percentages
 PREVIEW PRINT

**COPE/PAC CONTRIBUTION STAT REPORT**  
 SELECT PRIMARY GROUPING (each begins a new page): LOCAL (within International) ▾  
 SELECT SECONDARY GROUPING (page line items): SENATE DISTRICT ▾  
 Report Counts  Report Percentages
 PREVIEW PRINT

**LANGUAGE / RACE / ETHNICITY STAT REPORT**  
 SELECT PRIMARY GROUPING (each begins a new page): LOCAL (within International) ▾  
 SELECT SECONDARY GROUPING (page line items): SENATE DISTRICT ▾  
 Report Counts  Report Percentages
 PREVIEW PRINT

**SCAN SHEET QUESTION SET STAT REPORT** SCAN SHEET QUESTION SETS  
 SELECT "SCAN SHEET QUESTION SET": SELECT SCAN SHEET QUESTION SET ▾  
 SELECT PRIMARY GROUPING (each begins a new page): LOCAL (within International) ▾  
 SELECT SECONDARY GROUPING (page line items): SENATE DISTRICT ▾  
 Report Counts  Report Percentages
 PREVIEW PRINT

**SELECTION CRITERIA**  
 selection profile or profile set #1: MN SENATE 52 (profile) ▾  Neg.  
 profile or profile set #2: VOTED 2004 GE ▾  Neg.  
 OR  AND  Neg.  
 profile or profile set #3: profile not sele ▾  Neg.  
  
BROWSE
ADVANCED

**EXCLUSIONS**  
 persons flagged "OFF LOCAL LIST"  
 persons flagged DECEASED  
 persons w/ empty & invalid addresses  
 persons flagged "NO MAIL"  
 persons w/ empty & invalid phone #'s  
 persons flagged "NO CALLS"  
 persons w/ empty email addresses

**RESULTS** 68

The **PRINT-OUTS – "stat" reports** screen is accessed by selecting the **stat reports** option under the **PRINT-OUTS** item on the LaborKey menu.

### The five stat reports:

**POLITICAL ACTIVITY** – summarizes voter participation/turnout, party affiliation, candidate assessments (support/oppose/undecided), and other pertinent field data.

**MEMBER INVOLVEMENT** – summarizes field data which demonstrate member activism or participation within the Union.  
*(This report will be improved greatly with upcoming updates.)*

**COPE/PAC CONTRIBUTIONS** – summarizes contribution data.

**LANGUAGE / RACE / ETHNICITY** – summarizes demographic data such as language, race/ethnicity, gender, and age.

**SCAN SHEET QUESTION SET** – summarizes survey question response data (custom field data) for a user-defined "scan sheet question set" (a group of custom fields designed to be included on a barcoded call sheet or walk sheet). By defining a "scan sheet question set" and selecting that question set for this report, you can actually use this feature to design your own custom field summary reports.

**POLITICAL ACTIVITY STAT REPORT**

SELECT PRIMARY GROUPING (each begins a new page): LOCAL (within International) ▼

SELECT SECONDARY GROUPING (page line items): SENATE DISTRICT ▼

Report Counts  Report Percentages

- INTERNATIONAL
- LOCAL (within International)
- STATE
- CONGRESSIONAL DISTRICT
- SENATE DISTRICT
- HOUSE/ASSEMBLY DISTRICT
- PRECINCT NUMBER
- PRECINCT NAME
- SCHOOL DISTRICT
- COUNTY
- COUNTY COMMISSIONER DISTRICT
- MUNICIPALITY
- CITY
- ZIP (5-DIGIT)
- EMPLOYER
- WORKSITE
- WORKSITE LEADER

These reports are very useful if you need a breakdown of numbers by any of the groupings illustrated in the dropdown to the right. If your selected primary and secondary groupings are different, these reports will provide all the results by the primary grouping, within which the results will be broken down further by the secondary grouping. If the primary and secondary groupings are the same, the report will only summarize the data by the primary grouping. An example of how these groupings might be used would be to print the POLITICAL ACTIVITY stat report by WORKSITE and then by SCHOOL DISTRICT to figure out how many members at the various worksites live in particular school districts, and how politically active they are, with the intent of recruiting members at worksites to show up at a school board vote which would impact a union contract.

Flagging the options **Report Counts** or **Report Percentages** determines if the report will show numbers or percentages. Sometimes it is useful to print a stat report twice – one with each option selected.

The report column headers and the itemized results are displayed in three rows (a matrix) instead of a single row because of limited report space. The itemized results are displayed in cells where the results are broken down further by member (“mbr”), non-member living in household (“house”), and the total of the two.

**Note:** In order for non-members living in household to be included, they must first be automatically uploaded from the voter file using the upload feature **household fill** which can be accessed by selecting the **household fill** option under the **DATA UPLOADS** item on the LaborKey menu.



## Barcoded Call Sheets (or Worksite Contact Sheets)

**PRINT-OUTS - call sheets / "worksite contact sheets"**

110 292 4

**SELECT UP TO 3 "SCAN SHEET QUESTION SETS"**

scan sheet question set #1: "ELECTION SURVEY" NEW "SCAN SHEET QUESTION SETS"

scan sheet question set #2: "VOLUNTEER SURVEY 1"

scan sheet question set #3: "VOLUNTEER SURVEY 2"

**SELECT ADD'L CALL SHEET OPTIONS**

- INCLUDE PHONE DATA
- INCLUDE AGE
- INCLUDE "VOTER SCORE" BOX
- INCLUDE PARTY SELECTIONS
- INCLUDE EMAIL ADDRESS
- INCLUDE LANGUAGE
- INCLUDE ADDITIONAL OPTIONAL LINE ITEMS

CALL SHEET TITLE (shorter is better)  
CALL SHEET

**SELECT GROUPING ...**  
grouped by 5-ZIP, sorted

**SELECTION CRITERIA**

selection profile or profile set #1: zip 55406 (profile) Neg.

profile or profile set #2: profile not selected ... Neg.

**EXCLUSIONS**

- persons flagged "OFF LOCAL LIST"
- persons flagged DECEASED
- persons w/ empty & invalid addresses
- persons flagged "NO MAIL"
- persons w/ empty & invalid phone #'s
- persons flagged "NO CALLS"
- persons w/ empty email addresses

**CALL SHEET** **215**

60 MARIE AVE E, # 256 WEST ST PAUL, MN 55118-5931 651-123-4567

(1) JONATHAN MARKUS DOE 51 3/4 yrs 9

Registered REGVY CORZI VOTE BY MAIL VBM VOTE BY MAIL VPOLL PLACE

YNU SOU SOU YNU YNU YNU YNU

Knock VOL. PhonBank VOL. LawSign VOL. KNOCK PHONE SIGN

deceased bad addr / moved bad phone do not mail do not call

DEM REP IND GRN No Affl

eMAIL: john@acmehosting.com

LANGUAGE: Spanish

[ADDITIONAL OPTIONAL LINE ITEMS INSERTED HERE]

Household Notes:

The **PRINT-OUTS – call sheets** screen is accessed by selecting the **call sheets** option under the **PRINT-OUTS** item on the LaborKey menu.

The CALL SHEET (or WORKSITE CONTACT SHEET) report is a sophisticated phone list, with numerous options to customize the report, a barcode for each person, and up to three rows of up to eight questions each per person (up to 24 survey questions total). With this report you can have volunteers contact members and check off responses to custom questions on the paper report, and collect other member information such as email addresses, address corrections, party affiliations, etc. Back at the office other staff or volunteers can use this report together with barcoded response sheets (see ...) to quickly and accurately scan responses into the LaborKey database. This report is a very simple tool which can help streamline the collection of survey data.

### To generate call sheets follow these steps:

**(1)** Specify the appropriate data selection in the selection modules in the upper right. (Refer to instructions in section "Profiles & Profile Sets" under the sub-topic "Selecting Profiles & Profile Sets".)

(2) Select a preferred print grouping and sortation order from the dropdown labeled **SELECT GROUPING ...** at the top of the screen. For instance, if this report will be used for worksite contacts, select the worksite grouping option.

(3) Select up to three "scan sheet question sets" at the top left. If you need to define new question sets first, click the button labeled **NEW "SCAN SHEET QUESTION SETS"** at the top of the screen. Before defining new question sets, you might need to define new questions (or custom fields) first. Custom fields are defined in the **custom fields** feature under the **ADMIN** item on the LaborKey menu. Question sets are defined in the **SCAN sets** feature under the **ADMIN** item on the LaborKey menu (and this is the feature which the **NEW "SCAN SHEET QUESTION SETS"** button accesses).

(4) Select your preferred **"CALL SHEET OPTIONS"**.

**Note:** The image at the bottom of the screen illustrated on the prior page provides an example of what the report will look like with the current selected options. As options are selected or deselected, the report image changes to reflect the new report design.

(5) Click the **PREVIEW** or **PRINT** button to generate the CALL SHEETS.

*Sample CALL SHEET report:*

**CALL SHEET**

**MN ZIP 55406**

---

2718 E 24TH ST

MINNEAPOLIS, MN 55406-1320

612-447-5244

---

**JESSICA NANTUCKET** 55 yrs

Registered REGVT YNU	Vote for CORZI SOU	Vote for SAMMY SOU	Vote by Mail VBM YNU	Vote at Poll VPOLL YNU	Where Poll Pl. PLACE YNU
----------------------------	--------------------------	--------------------------	----------------------------	------------------------------	--------------------------------

DoorKnock VOL  
KNOCK   
  PriorBnk VOL  
PHONE   
  LinnSign VOL  
SIGN

Volunt BD51  
VOL51   
  Volunt BD52  
VOL52

deceased   
  bad addr / moved   
  bad phone  
 do not mail    do not call

DEM   
  REP   
  IND   
  GRN   
  No Affil

eMAIL: jessica@laborkey.com  
 LANGUAGE: \_\_\_\_\_  
 COPE/PAC SCHEDULED: NO  
 SENATE DIST: 62

---

Household Notes:

---

3108 E 24TH ST

MINNEAPOLIS, MN 55406-1404

612-487-0487

---

**PATTY YOUNKER** 37 yrs

Registered REGVT YNU	Vote for CORZI SOU	Vote for SAMMY SOU	Vote by Mail VBM YNU	Vote at Poll VPOLL YNU	Where Poll Pl. PLACE YNU
----------------------------	--------------------------	--------------------------	----------------------------	------------------------------	--------------------------------

DoorKnock VOL  
KNOCK   
  PriorBnk VOL  
PHONE   
  LinnSign VOL  
SIGN

Volunt BD51  
VOL51   
  Volunt BD52  
VOL52

deceased   
  bad addr / moved   
  bad phone  
 do not mail    do not call

DEM   
  REP   
  IND   
  GRN   
  No Affil

eMAIL: patty@laborkey.com  
 LANGUAGE: \_\_\_\_\_  
 COPE/PAC SCHEDULED: NO  
 SENATE DIST: 62

---

Household Notes:

This document is geared toward typical users, and it does not cover advanced topics in depth. It does not cover the creation of custom fields & scan sheet question sets (*in the **custom fields** and **SCAN sets** features under the **ADMIN** item on the menu*), the printing of response scan sheets (*from the **SCAN sets** feature*), the scanning of scan sheet responses into LaborKey software (*in the **scan fields** feature under the **HOME** item on the menu*), and the selection and preparation of handheld barcode scanners (*WASP WCS 3900/3905 series recommended and a programming cheat sheet for LaborKey available*).

# Barcoded Walk Sheets & Integrated Maps

The **PRINT-OUTS – walk sheets & maps** screen is accessed by selecting the **walk sheets** option under the **PRINT-OUTS** item on the LaborKey menu.

Like the CALL SHEET, the WALK SHEET is a sophisticated report with numerous customizable options, a barcode for each person, and up to three rows of up to eight questions each per person (up to 24 survey questions total). The CALL SHEET and WALK SHEET reports are very similar. However, this feature also generates WALK MAPS to accompany the WALK SHEETS, and DROP-OFF MAPS to drop volunteers off at the initial stops of each of the WALK MAPS. The WALK SHEETS and WALK MAPS are printed with an identical sequence, optimized for door knocking. With these reports you can have volunteers contact members door-to-door and check off responses to custom questions on the paper report, and collect other member information such as email addresses, address corrections, party affiliations, etc. Back at the office other staff or volunteers can use these reports together with barcoded response sheets (see ...) to quickly and accurately scan responses into the LaborKey database.

**To generate the walk sheets & maps follow these steps:**

**(1)** Specify the appropriate data selection in the selection modules in the upper right. (*Refer to instructions in section "Profiles & Profile Sets" under the sub-topic "Selecting Profiles & Profile Sets".*)

**(2)** Select up to three "scan sheet question sets" at the top left. If you need to define new question sets first, click the button labeled **NEW SCAN SHEET QUESTION SETS** at the top of the screen. Before defining new question sets, you might need to define new questions (or custom fields) first. Custom fields are defined in the **custom fields** feature under the **ADMIN** item on the LaborKey menu. Question sets are defined in the **SCAN sets** feature under the **ADMIN** item on the LaborKey menu (and this is the feature which the **NEW SCAN SHEET QUESTION SETS** button accesses).

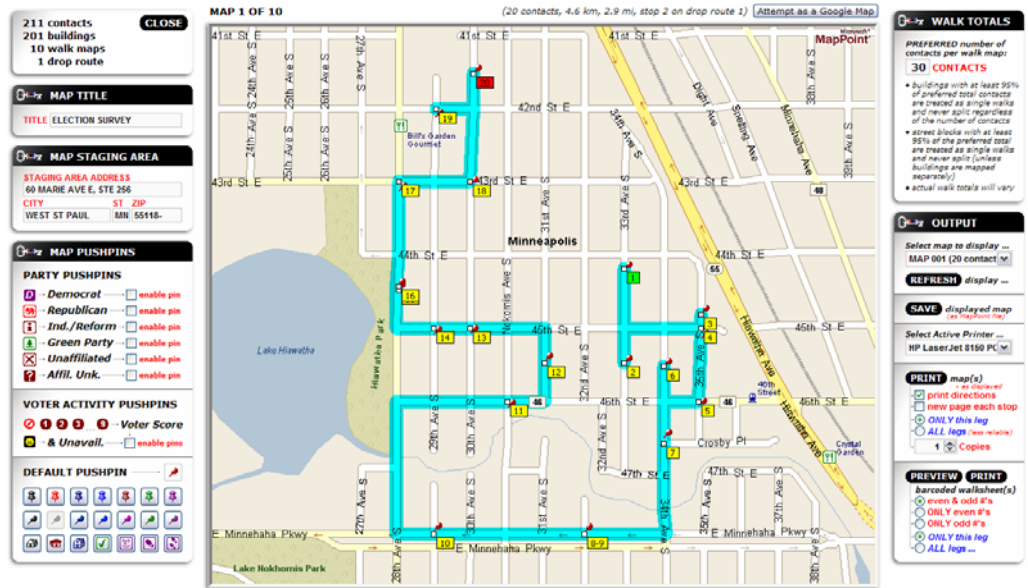
**(3)** Enter or verify the map project staging area address at the top of screen. This address is the address from which volunteers would be deployed (for instance, by van). This address will also be the starting point on volunteer DROP-OFF MAPS, which map the initial stops of each of the WALK MAPS.

**(4)** Select your preferred **"WALK SHEET & MAP LAYOUT OPTIONS"**.

The **"PREFERRED TOTAL CONTACTS PER MAP"** is a preference, not a definite cutoff. Single multi-unit dwellings are not split up into multiple maps even if they contain more than the preferred total contacts per map. Any multi-unit dwellings with at least 95% of the preferred total are automatically mapped as single maps. Any street blocks with at least 95% of the preferred total (less the large multi-unit dwellings) are also mapped as single maps. All remaining contacts are mapped using the preferred total contacts per map as a target. The software automatically calculates and factors the saturation of the contact selection, the average proximity of nearest next addresses, reasonable overall walk distances based on both the preferred total contacts and the average proximity, etc. Sometimes the maps will exceed the preferred total contacts, and more often, the maps will include less contacts than the preferred total. (*Note: Short maps can be given to willing volunteers who are walking other routes nearby.*)

**(5)** Click the **PREVIEW & PRINT** button to calculate and prepare map sequences, and to open the LaborKey MAPS screen from which WALK SHEETS, WALK MAPS, and DROP-OFF MAPS can be previewed and printed.

The LaborKey MAPS screen is illustrated on the following page.



The LaborKey MAPS screen provides access to all of the WALK SHEETS, WALK MAPS, and DROP-OFF MAPS prepared.

In the top left corner of the illustrated MAPS screen above is a summary of the total contacts which were successfully mapped, the total buildings, the total WALK MAPS, and the total drop routes or DROP-OFF MAPS.

Below this summary is a module labeled "MAP TITLE" where the title printed on the various reports can be changed.

Below this is a module labeled "MAP STAGING AREA" where the staging area address can be changed, which alters the DROP-OFF MAPS.

Below this is a module labeled "MAP PUSHpins" where the pushpin icons on the maps can be changed. The "PARTY PUSHpins" change the pushpins so that the party affiliations of the contacts are represented by the pushpins for the contacts. The "VOTER ACTIVITY PUSHpins" change the pushpins so that the voter scores of the contacts are represented by the pushpins for the contacts. Otherwise, the "DEFAULT PUSHpin" resets the pushpin to a single preferred pushpin.

In the upper right corner is a module labeled "WALK TOTALS" where the preferred number of contacts per walk map can be modified, in which case a button labeled "UPDATE MAPS" will appear to recalculate and prepare new map sequences.

In the bottom right is the most important module labeled "OUTPUT" where WALK MAPS and DROP-OFF MAPS can be selected from the dropdown, individual WALK MAPS can be saved or printed, and where WALK SHEETS can be previewed or printed.

# Basic Maps

**PRINT-OUTS - basic maps**

**MAP TITLE**  
TITLE 55406 HOUSE CALLS

**MAP QUALITY**  
 GOOD  BETTER  BEST

**DEPARTURE POINT**  
ADDRESS 60 MARIE AVE E, STE 256  
CITY WEST SAINT PAUL ST ZIP MN 55118-

**MAP EXECUTION ...**  
ONLY UP TO 50 PERSONS CAN BE MAPPED WITH THIS FEATURE! **GENERATE MAP**

**PUSHPIN OPTIONS**

**PARTY PUSHPINS**

- Democrat  enable pin
- Republican  enable pin
- Ind./Reform  enable pin
- Green Party  enable pin
- Unaffiliated  enable pin
- Affil. Unk.  enable pin

**VOTER ACTIVITY PUSHPINS**

- Voter Score
- & Unavail.  enable pins

**"DEFAULT" PUSHPIN**

**SELECTION CRITERIA**

selection profile or profile set #1: zip 55406 (profile)  Neg.

profile or profile set #2: VOTED 2004 GE  Neg.

profile or profile set #3: profile not sele  Neg.

OR  AND

**EXCLUSIONS**

- persons flagged "OFF LOCAL LIST"
- persons flagged DECEASED
- persons w/ empty & invalid addresses
- persons flagged "NO MAIL"
- persons w/ empty & invalid phone #'s
- persons flagged "NO CALLS"
- persons w/ empty email addresses

**8**

The **PRINT-OUTS – basic maps** screen is accessed by selecting the **basic maps** option under the **PRINT-OUTS** item on the LaborKey menu.

The **basic maps** feature simply generates a map starting at a “departure point” (see **DEPARTURE POINT** module above), and connecting up to 50 persons with addresses. If more than 50 persons are selected in the selection modules at the top right, this mapping feature finds the 50 addresses from a data selection which result in the shortest overall map distance. The map title is modified in the **MAP TITLE** module. The quality of map (a shorter map is a better map) can be slightly improved by selecting the BETTER or BEST options in the **MAP QUALITY** module; however, the improvement is not very significant, and the processing speed may be impacted adversely. The **PUSHPIN OPTIONS** module provides the same pushpin options available in the WALK SHEETS & INTEGRATE MAPS feature. Pushpins can represent the party affiliations of persons mapped, the voter scores of persons mapped, or the pushpin can simply be specified using the DEFAULT PUSHPIN option.

After selecting all options as described above, click the **GENERATE MAP** button.

The map generated using the options illustrated above is illustrated on the following page.







# Exports

The **EXPORTS** screen is accessed by selecting the **EXPORTS** item on the LaborKey menu.

In this screen you **(1)** select your data selection in the select modules at the top right (*refer to instructions in section "Profiles & Profile Sets" under the sub-topic "Selecting Profiles & Profile Sets"*), **(2)** select the data fields to include at the left and bottom right, and at the very bottom you **(3)** select a file format to export and **(4)** click the **EXPORT SELECTION AS** button to export the file. These are the basic steps. Certain options need further clarification.

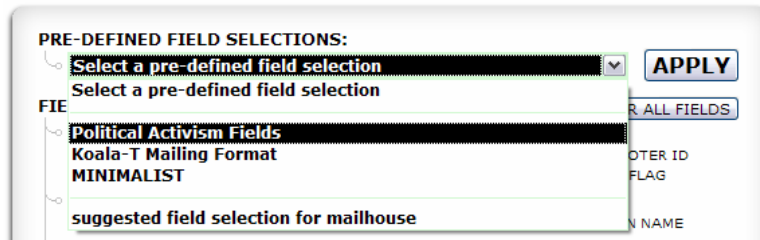
The dropdown at the bottom right with the caption **ADD'L** and the default value "**select additional fields ...**" allows you to select and add additional fields beyond the core fields displayed on the left side of the screen. This list will grow with time.

Below this feature is a **HOUSEHOLDING** option, where you can choose to "Household" your exported selection. Doing so would remove 2<sup>nd</sup>, 3<sup>rd</sup>, ... persons having the same last name and address, removing non-members in member households first.

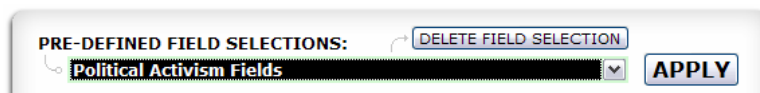
Below this feature is a button labeled **SAVE FIELD SELECTION FOR FUTURE USE**, which, when clicked, saves the currently selected fields on the screen (including the "ADD'L" fields selected at the bottom right) to a **PRE-DEFINED FIELD SELECTION** which can be selected and applied at any time from the dropdown at the top left. To save the pre-defined field selection, you must specify a name in the dialog which appears as illustrated below.



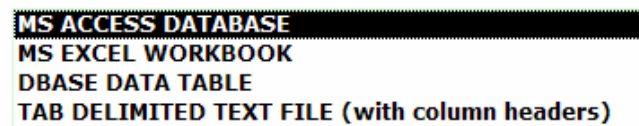
This saved field selection would instantly be available from the field selection dropdown, and it would appear as illustrated below.



After selecting the saved field selection, you can simply click the **APPLY** button to apply the selected field selection. Also, selecting the saved field selection causes the **DELETE FIELD SELECTION** button to display (illustrated below), which allows for easy removal of the saved field selection.



The export formats are available from the dropdown at the bottom right corner of the **EXPORTS** screen, and the dropdown options are illustrated below.



# Email Blast

**EMAIL BLAST**

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**SUBJECT LINE:**  
L\_ [ ] **SEND** @

**BODY (greeting & message):**  
L\_ Hello [FIRST NAME], (plus 2 line returns) [v]  
[ ]

**SEND A COPY TO SELF\*** (including documentation of results)

**ATTACHMENTS:**  
L\_ [ ] **ADD** **REMOVE** **CLEAR ALL**

**\*SENDER'S LOCAL EMAIL ADDRESS:** L\_ [ ] **SENDER'S SMTP MAIL SERVER NAME:** L\_ [ ]  
 **SMTP MAIL SERVER REQUIRES AUTHENTICATION**

**SELECTION CRITERIA**  
selection profile or profile set #1: **MN SENATE 52 (profile)** [v]  Neg.  
profile or profile set #2: **VOTED 2004 GE** [v]  Neg.  
profile or profile set #3: **profile not sele** [v]  Neg.  
**BROWSE** **ADVANCED**

**EXCLUSIONS**  
 persons flagged "OFF LOCAL LIST"  
 persons flagged **DECEASED**  
 persons w/ empty & invalid addresses  
 persons flagged "NO MAIL"  
 persons w/ empty & invalid phone #'s  
 persons flagged "NO CALLS"  
 persons w/ empty email addresses

**RESULTS** **51**

The **EMAIL BLAST** screen is accessed by selecting the **EMAIL** item on the LaborKey menu. This feature submits an individual email to each recipient one-by-one to avoid spamming. This feature is ideal for simple member notifications, while a messaging service such as Capwiz would be ideal for persuasive messaging.

*To send an email message to members follow these steps:*

- (1)** Specify the appropriate data selection in the selection modules in the upper right. (Refer to instructions in section "Profiles & Profile Sets" under the sub-topic "Selecting Profiles & Profile Sets".)
- (2)** Enter a **SUBJECT LINE** at the top.
- (3)** Select a **greeting** from the dropdown under **BODY**, or select the first option provided – "skip standard greeting / type greeting below in message". If you select to skip the standard greeting, you can type your own greeting at the beginning of the message in the next step. With standard greetings, [FIRST NAME] indicates that LaborKey will automatically insert recipient first names, [FULL NAME] indicates that recipient full names will be inserted, and the text Brother(/Sister) indicates that either "Brother" or "Sister" will be included in the greeting depending on the gender of the recipient.

**(4)** Enter a **message** in the text entry box under **BODY**. If you selected to skip the standard greeting in the prior step, you should include a greeting at the beginning of the message. The message does not support text merging (mail merging).

**(5)** Flag the **SEND A COPY TO SELF** option if you would like a copy of the message and documentation of emails submitted to be forwarded to the email address below under **SENDER'S LOCAL EMAIL ADDRESS** (covered below in step 7).

**(6)** Under **ATTACHMENTS** select the documents or files you would like to include in your email by using the **ADD**, **REMOVE** and **CLEAR ALL** buttons.

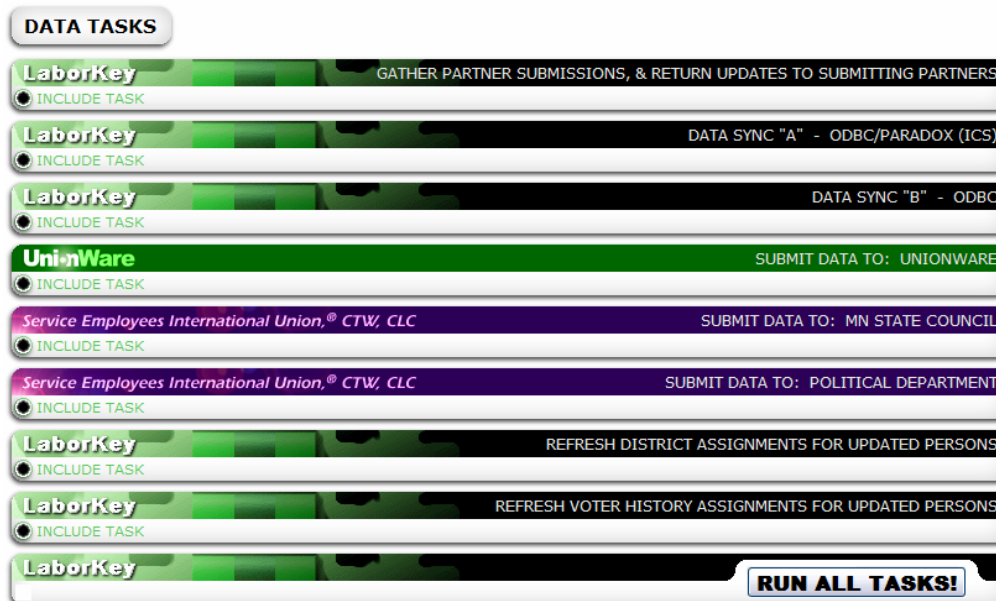
**(7)** The **SENDER'S LOCAL EMAIL ADDRESS** and the **SENDER'S SMTP MAIL SERVER NAME** must be provided only once on each computer station. LaborKey software remembers the last entries on each station. These two pieces of information are also needed when configuring an email account in Outlook or any other email software, and you can open the email account settings in Outlook or any other email software to find this information. Ask your network administrator for assistance if you need help.

**(8)** If your email account requires a user name and password, flag the option **SMTP MAIL SERVER REQUIRES AUTHENTICATION**, and provide the appropriate user name and password in the text boxes which appear.

**(9)** Click the **SEND** button to submit your email message to the selected recipients.

Repeat steps **(1)** through **(6)** to send additional email messages.

# Data Tasks



The **DATA TASKS** screen is accessed by selecting the **DATA TASKS** item on the LaborKey menu. This feature is one of the most important new features added to the LaborKey software in version 4.0. Different configurations of LaborKey software include different special data management tasks which must be performed by the users. Instead of performing the various tasks separately from different screens throughout LaborKey, the user can now perform critical tasks all at once by clicking only one button on one screen – **RUN ALL TASKS!**. Individual tasks can be deactivated or turned off by deselecting the **INCLUDE TASK** options on the left.

For councils who gather data submissions from affiliated locals, the option **GATHER PARTNER SUBMISSIONS ...** is listed as the first task.

For locals whose LaborKey software is configured to be automatically updated off the local membership management database(s), one or more **DATA SYNC ...** options are usually listed at the top. (*Note: LaborKey can be configured to be automatically updated by synchronizing with up to five ODBC-compliant data systems. Nearly all membership and organizing management software programs are ODBC-compliant. Refer to the document **LaborKey 4.0 Synchronization Configuration Guide** for instructions.*)

Some locals who automatically update their LaborKey database by synchronizing with their local membership management database(s) have an option to automatically post enhanced data back up to the source membership database(s). The illustration above includes an option to **SUBMIT DATA TO: UNIONWARE**.

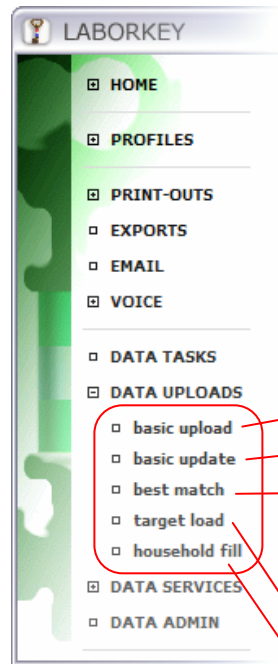
For locals or councils who submit data up to higher councils or their national or international office, one or more **SUBMIT DATA TO: ...** options are included.

When information is updated in the LaborKey database, it is important to update district assignments and voter history assignments in the database. The last two listed tasks on this screen, **REFRESH DISTRICT ASSIGNMENTS ...** and **REFRESH VOTER HISTORY ASSIGNMENTS ...**, are included for this purpose.

Up to twelve tasks can be included on this screen, but most often there are only three or four tasks listed.

# Data Uploads

## Introduction



There are five upload features in LaborKey software. These upload features can be accessed by expanding the **DATA UPLOADS** item on the LaborKey menu, as illustrated to the left.

The first three upload features are used to upload data from selected data files (*dBase data tables, Excel spreadsheets, and delimited text files*):

- **basic upload,**
- **basic update &**
- **best possible match.**

The remaining two upload features are used to upload registered voter data from statewide voter registration data files:

- **organizing target load &**
- **household fill.**

These five upload features are each used for particular purposes, and they can be used in combination to accomplish much more complicated tasks, as is described at the very end of this section. The following simplified descriptions cover the most basic application of these features:

**Basic Upload** – uploads new membership data files, preferably having unique member id fields, although a unique member id can be assigned during upload. This feature updates existing records having matching member id values, and it adds members having id values not already listed in the LaborKey database. This would be the feature used (1) to upload a new membership data file, or (2) to upload a newer copy of a membership data file having matching member id values and potentially new members.

**Basic Update** – updates only selected fields (potentially all fields), by matching uploaded records having a unique id with records in the LaborKey database having the same unique id values. Specific fields in the uploaded file are selected by the user to be applied to matching member records in LaborKey. This would be the feature used to match and apply a file having the original LaborKey unique id field and particular enhanced fields such as a phone number field or an email field provided by a data service.

**Best Possible Match** – updates only selected fields (potentially all fields), by matching uploaded records with records in LaborKey by comparing available data fields. The uploaded data file must have adequate field data available to achieve a reliable high probability match. Specific fields in the uploaded file are selected by the user to be applied to matching member records in LaborKey. This feature should NOT be used to match a data file which has the original LaborKey unique id field, because the **Basic Update** feature would match the file perfectly on the unique id field, and it would execute much faster. This upload feature matches data very accurately, but it is not perfect, and it can take a very long time to run. This would be the feature used to match and apply a file NOT having the original LaborKey unique id field, but including persons which match or likely match with persons in LaborKey, and which includes field data which would enhance existing LaborKey records. For instance, a data file provided by a phone company would not have the original LaborKey unique id field, but it would include current phone numbers which would improve the LaborKey database. This feature could be used to upload the phone company data file, matching persons as accurately as possible, and updating the phone field in LaborKey.

**Organizing Target Load** – loads new persons from a statewide voter registration data file into LaborKey where names and other available data from a selected target data file match with registered voters. The user must specify a list of up to 60 zip codes in order by distance from an organizing target location, such as a Walmart store. Only close matches within the specified zip code list will be loaded into LaborKey. This feature was designed specifically for organizing targets where staff would otherwise look up names one-by-one in a phone book from a sketchy employee list provided by an employee of a targeted employer. This feature loads a sketchy list, and it finds reasonably close matches from within the loaded voter file, and these matches are loaded into the LaborKey database. The matches are not always very reliable. The loaded matches can be verified using other communication tools, and false matches can then be deleted from the list.

**Household Fill** – quickly adds registered voters to the LaborKey database where the voters live in the same households as specified selections of members. This feature does not load registered voters where the voters match with persons already listed in the LaborKey database. It can be very useful to add non-Union persons living in the same households as Union members before an election campaign, and then to delete all such persons without any tracked data after elections are over.

Detailed instructions for each of these five upload features continue on the following pages of this section.



# Basic Upload

**DATA UPLOADS - basic upload**

IBEW 110 292 IBT 4

**"BASIC UPLOAD" - defined ...**

- refreshes and adds complete records in the LaborKey database from a selected member data file
- refreshes matching persons already in the LaborKey database when the same member id (or ssn) already exists in LaborKey
- adds new persons to the LaborKey database for each member having a member id (or ssn) not found in the LaborKey database
- the selected data file should ideally have MEMBER ID (or SSN), NAME, ADDRESS, CITY, & ZIP fields (PHONE & BIRTHDATE recommended)
- the user may choose to delete non-matching existing LaborKey records within a data selection

**STEP 1 • SELECT THE DATA FILE TO UPLOAD**

**STEP 2 • SELECT CRITERIA FOR REPLACING EXISTING DATA IN LABORKEY**

selection profile or profile set #1:

Neg.

- OPTION #1** delete all selected LaborKey data immediately preceding successful upload of new data (e.g. entirely replace a subset of data)
- OPTION #2** delete only persons in LaborKey within data selection which do not have member ids which match with new data (typically the best option)
- OPTION #3** delete nothing

**STEP 3 • DECIDE IF TO AUTOMATICALLY GENERATE A UNIQUE MEMBER ID FIELD**

- DONT generate a unique member id field. The selected data file already has a unique member id field.
- YES, GENERATE a unique member id field (named \_MBR\_ID).

The **DATA UPLOADS – basic upload** screen is accessed by selecting the **basic upload** option under the **DATA UPLOADS** item on the LaborKey menu.

The top module on this screen highlights key points about this upload feature.

All following modules are arranged as upload steps.

## STEP 1 • SELECT THE DATA FILE TO UPLOAD

In STEP 1, select a data file – a **dBase** (.dbf) file, **Excel** (.xls) spreadsheet, or a **tab or comma delimited** (.txt, .tab, .csv) file.

## STEP 2 • SELECT CRITERIA FOR REPLACING EXISTING DATA



In STEP 2, select **OPTION #1** to delete a selection of data (selected in the left portion of the module) if the file being uploaded should completely replace a selection of data already in the LaborKey database. Select **OPTION #2** if the file being uploaded is an update for data already in LaborKey. Select **OPTION #3** if the file being uploaded is a new data file which is not related to any selection of data in LaborKey.

### STEP 3 • DECIDE IF TO AUTOMATICALLY GENERATE A UNIQUE ID

In STEP 3, decide if to automatically generate a unique id. If you do not consistently use the original member id's from the original membership data sources when reloading member files, LaborKey will upload member records as duplicates. LaborKey can only update existing persons in the LaborKey database if the member id values in the original member id fields match to the member id values in the LaborKey database. This option is not very important if data files are only uploaded once, or if **OPTION #1** is selected in STEP 2 above to delete the existing selected members in LaborKey, to be completely replaced by the uploaded data file.

### STEP 4 • SPECIFY / MAP THE INT'L UNION ID & LOCAL NUMBER

STEP 4 appears after selecting a data file in STEP 1 as illustrated below, but only for configurations of LaborKey where data files are expected to be uploaded from multiple locals or other sources. *(Note: If STEP 4 does not appear in your configuration of LaborKey, and if you wish to activate this configuration option, contact LaborKey. This option is free.)* In the LaborKey database, member id's only need to be unique within a specified Int'l ID field value and Local number (or "entity id" value), assuming this configuration option has been activated. The values assigned to, or the uploaded fields mapped to these two field options in STEP 4 can be used to conveniently identify and profile the uploaded data once it has been uploaded.

**DATA UPLOADS - basic upload**

**"BASIC UPLOAD" - defined ...**

- refreshes and adds complete records in the LaborKey database from a selected member data file
- refreshes matching persons already in the LaborKey database when the same member id (or ssn) already exists in LaborKey
- adds new persons to the LaborKey database for each member having a member id (or ssn) not found in the LaborKey database
- the selected data file should ideally have MEMBER ID (or SSN), NAME, ADDRESS, CITY, & ZIP fields (PHONE & BIRTHDATE recommended)
- the user may choose to delete non-matching existing LaborKey records within a data selection

**STEP 1 • SELECT THE DATA FILE TO UPLOAD**

**C:\DOCUMENTS AND SETTINGS\OWNER\MY DOCUMENTS\COTEST.DBF**

**STEP 2 • SELECT CRITERIA FOR REPLACING EXISTING DATA IN LABORKEY**

selection profile or profile set #1:

Neg.

- OPTION #1** delete all selected LaborKey data immediately preceding successful upload of new data (e.g. entirely replace a subset of data)
- OPTION #2** delete only persons in LaborKey within data selection which do not have member ids which match with new data (typically the best option)
- OPTION #3** delete nothing

**STEP 3 • DECIDE IF TO AUTOMATICALLY GENERATE A UNIQUE MEMBER ID FIELD**

- DONT generate a unique member id field. The selected data file already has a unique member id field.
- YES, GENERATE a unique member id field (named \_MBR\_ID).

**STEP 4 • SPECIFY / MAP THE INT'L UNION ID & LOCAL NUMBER (or other entity identifier)**

INT'L ID  LOCAL # (6 char.)



A LaborKey field dropdown appears as illustrated on the bottom of the prior page. Select the appropriate field in LaborKey to which each uploaded field should be mapped.

The **ADD FIELD TO SELECTED DATA FILE** option at the bottom of the screen provides a quick and easy way to append a field populated with a specific value. This option can be used to map a consistent value to a user-defined custom field or any standard field in the LaborKey database for the records to be uploaded. For instance, if the file selected to be uploaded would contain only precinct caucus attendees, then it could be useful to add a LOGICAL field with the value TRUE to be mapped to a custom field named "PREC CAUC ATTENDEE". Clicking the **ADD NEW FIELD** button appends the new field to the bottom of the field grid in the middle of the screen. Many new fields can be added.

After all the appropriate uploaded file fields are mapped to LaborKey fields in the grid, the **APPLY** checkbox for each mapped uploaded field should be flagged appropriately. Deselecting the **APPLY** checkbox for a mapped field causes the field to be disregarded; otherwise, the mapped fields are uploaded and applied.

Before uploading the file, you can click the **SAVE A COPY AS** button at the bottom of the screen to save a copy of the selected data file to a file format selected from the file format dropdown. If fields have been added with the **ADD FIELD ...** option, these fields will be included in the saved file copy. While not intended, this feature can be used simply to convert file formats, and then aborted before uploading the file.

To upload the data file, click the **UPLOAD** button. File upload progress is displayed both by a thermometer bar at the top of the screen, and with detailed results at the bottom of the screen, both of which are illustrated below. When the upload is complete, simply navigate to another feature of choice using the LaborKey menu at the left.

UPLOADING SELECTED DATA FILE - 7.10%



**BASIC UPLOAD PROGRESS ...**

PERSONS ADDED: 423	MATCHED PERSONS UPDATED: 0	DUPE IDS SKIPPED: 0	7%
	MATCHED PERSONS NO UPDATE: 0	BLANK IDS SKIPPED: 0	

# Basic Update

**DATA UPLOADS - basic update**

IBEW 110 292 IBT 4

**"BASIC UPDATE" - defined ...**

- updates user-selected fields for existing persons in the LaborKey database from a selected data file containing matching unique id's, ssn's, or state voter id's (for states where available)
- refreshes only fields specified in the uploaded data file when the same unique id (or ssn or state voter id) already exists in LaborKey
- doesn't add new persons to the LaborKey database; records having ids which don't match to ids in the LaborKey database are skipped
- the selected data file must have a UNIQUE ID, SSN, or STATE VOTER ID field, and fields with data to be applied

**STEP 1 • SELECT THE DATA FILE TO UPLOAD**

SELECT dBASE (.dbf) FILE    SELECT EXCEL (.xls) SPREADSHEET    SELECT TAB or COMMA DELIMITED (.txt, .tab, .csv) FILE

C:\DOCUMENTS AND SETTINGS\OWNER\MY DOCUMENTS\COTEST.DBF

**PROCEED**

The **DATA UPLOADS – basic update** screen is accessed by selecting the **basic update** option under the **DATA UPLOADS** item on the LaborKey menu.

The top module on this screen highlights key points about this upload feature.

The following modules are arranged as upload steps.

## **STEP 1 • SELECT THE DATA FILE TO UPLOAD**

In STEP 1, select a data file – a **dBase** (.dbf) file, **Excel** (.xls) spreadsheet, or a **tab or comma delimited** (.txt, .tab, .csv) file.

Click the **PROCEED** button to proceed to the second step on the next screen.

**STEP 2 • MAP THE FIELDS IN YOUR SELECTED DATA FILE**

SELECTED DATA FILE:  
COTEST.DBF  
RECORD COUNT: 5,930

MAP FIELDS IN THIS COLUMN  
field: UNIQUE\_ID  
 LaborKey unique id  
 social security number  
 state voter id

SELECT A MATCH ID FIELD →

#	FIELD NAME	TYPE	LENGTH	>> SELECT FIELD MAPPING <<	APPLY DATA
001	UNIQUE_ID	C	019	(no field mapping selected)	<input type="checkbox"/> APPLY
002	UNIQ_ICODE	C	014	(no field mapping selected)	<input type="checkbox"/> APPLY
003	UNIQ_LOCAL	C	016	(no field mapping selected)	<input type="checkbox"/> APPLY
004	MEMBER_ID	C	017	(no field mapping selected)	<input type="checkbox"/> APPLY
005	NAMELINE	C	035	NAMELINE	<input checked="" type="checkbox"/> APPLY
006	FIRST	C	017	FIRST NAME	<input checked="" type="checkbox"/> APPLY
007	LAST	C	023	LAST NAME	<input checked="" type="checkbox"/> APPLY
008	BIRTHDATE	D	008	BIRTHDATE	<input checked="" type="checkbox"/> APPLY
009	ADDRESS_1	C	043	PRIMARY ADDRESS (123 Main Stre	<input checked="" type="checkbox"/> APPLY
010	ADDRESS_2	C	029	SECONDARY ADDRESS (Apt...	<input checked="" type="checkbox"/> APPLY

ADD FIELD TO SELECTED DATA FILE:

POPULATE NEW FIELD WITH VALUE: character value "1"

"UNIQUE\_ID" SAMPLE DATA ...  
 XX00000000006559  
 XXCTWACT00000752558  
 XXCTWACT00000754292  
 XXCTWACT00000764532  
 XXCTWACT00000764842  
 XXCTWACT00000764984  
 XXCTWACT00000767148  
 XXCTWACT00000769009  
 XXCTWACT00000769187  
 XXCTWACT00000770195  
 XXCTWACT00000770463  
 XXCTWACT00000770464  
 XXACTADD00015875818  
 XXCTWACT00043547151  
 XXCTWACT00078132899  
 XXCTWACT00106892697  
 XXCTWACT00106892919  
 XXACTADD00208121309  
 XXNONMBR100037  
 XXNONMBR100115  
 XXNONMBR100177  
 XXNONMBR100178  
 XXNONMBR100206  
 BH00006810028  
 XXNONMBR100341  
 XXNONMBR100342  
 XXNONMBR100388  
 XXNONMBR100483  
 XXNONMBR100485  
 AV000105100494  
 AV000105100563

MS ACCESS DATABASE

**STEP 2 • MAP THE FIELDS IN YOUR SELECTED DATA FILE**

In STEP 2, first select the **MATCH ID FIELD** from the field dropdown at the very top. This upload feature requires that the selected data file contain either the **LaborKey unique id** field (not the memberdate id field), the **social security number** field, or the **state voter id** field. Make sure the appropriate checkbox is flagged under the selected match id field.

Map the fields (rows) from the selected data file by clicking on the value in the **>> SELECT FIELD MAPPING <<** column. Select the appropriate field in LaborKey from the field dropdown which appears (as illustrated below).

#	FIELD NAME	TYPE	LENGTH	>> SELECT FIELD MAPPING <<	APPLY DATA
001	UNIQUE_ID	C	019	(no field mapping selected)	<input type="checkbox"/> APPLY
002	UNIQ_ICODE	C	014	(no field mapping selected)	<input type="checkbox"/> APPLY
003	UNIQ_LOCAL	C	016	(no field mapping selected)	<input type="checkbox"/> APPLY
004	MEMBER_ID	C	017	(no field mapping selected)	<input type="checkbox"/> APPLY
005	NAMELINE	C	035	NAMELINE	<input checked="" type="checkbox"/> APPLY
006	FIRST	C	017	NAMELINE	<input type="checkbox"/> APPLY
007	LAST	C	023	PREFIX	<input type="checkbox"/> APPLY
008	BIRTHDATE	D	008	FIRST NAME	<input type="checkbox"/> APPLY
009	ADDRESS_1	C	043	MIDDLE NAME OR INITIAL	<input type="checkbox"/> APPLY
010	ADDRESS_2	C	029	LAST NAME	<input type="checkbox"/> APPLY

ADD FIELD TO SELECTED DATA FILE:

POPULATE NEW FIELD WITH VALUE:

ANA L NAKANO  
 DWAYNE A ADI  
 RICHARD O SW  
 ROBERT C CREF  
 DENNIS J MCP  
 JANINE L MCP  
 PHILLIP DALBY  
 JOHN HOLZWA  
 LORETTA CRAW  
 DOUGLAS L MII

PRIMARY ADDRESS (123 Main Street NE)  
 SECONDARY ADDRESS (Apt...)  
 HOUSE NUMBER (e.g. 423 or 423 1/2)  
 HOUSE FRACTION (e.g. 1/2 or 1/2)  
 PRE-DIRECTIONAL (e.g. N, S, E, W, NE, NW, SE, SW)  
 STREET NAME (e.g. Hennepin, Hennepin Ave, or Hennepin Ave NE)  
 STREET TYPE (e.g. Avenue or Ave)  
 POST-DIRECTIONAL (e.g. N, S, E, W, NE, NW, SE, SW)

The **ADD FIELD TO SELECTED DATA FILE** option at the bottom of the screen provides a quick and easy way to append a field populated with a specific value. This option can be used to map a value to a user-defined custom field or any standard field in the LaborKey database for the records to be uploaded.

After all the appropriate uploaded file fields are mapped to LaborKey fields in the grid, the **APPLY** checkbox should be flagged for each mapped uploaded field (row) which should be loaded and applied to the LaborKey database. Deselecting the **APPLY** checkbox for a mapped field causes the field to be disregarded.

For more advanced users, there is a hidden feature which provides better control over how field data are actually applied. On the bottom of the field mapping grid is a scroll bar. If you scroll to the right, the field mapping grid is expanded, and the scroll bar disappears. An additional column with the option **APPLY ONLY WHEN NOT EMPTY** is displayed at the right, as illustrated below. By default this option is flagged in every row where the **APPLY** checkbox is flagged, because this is usually the most appropriate option. If an uploaded field is empty for a person, and if the matching person already listed in the LaborKey database already has a value assigned for this field, it is usually not a good idea to replace the existing value with an "empty value". Select the **APPLY ONLY WHEN NOT EMPTY** option for each field where you only wish to apply the uploaded field values which are not empty, to avoid blanking out useful data in the LaborKey database.

#	FIELD NAME	TYPE	LENGTH	>> SELECT FIELD MAPPING <<	APPLY DATA	APPLY ONLY WHEN FIELD NOT EMPTY
001	UNIQUE_ID	C	019	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
002	UNIQ_ICODE	C	014	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
003	UNIQ_LOCAL	C	016	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
004	MEMBER_ID	C	017	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
005	NAMELINE	C	035	NAMELINE	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
006	FIRST	C	017	FIRST NAME	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
007	LAST	C	023	LAST NAME	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
008	BIRTHDATE	D	008	BIRTHDATE	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
009	ADDRESS_1	C	043	PRIMARY ADDRESS (123 Main Stre	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
010	ADDRESS_2	C	029	SECONDARY ADDRESS (Apt...	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
011	CITY	C	022	CITY	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY

Before uploading the file, you can click the **SAVE A COPY AS** button at the bottom of the screen to save a copy of the selected data file to a file format selected from the file format dropdown. If fields have been added with the **ADD FIELD ...** option, these fields will be included in the saved file copy.

To upload the data file, click the **UPLOAD** button. File upload progress is displayed both by a thermometer bar at the top of the screen, and with detailed results at the bottom of the screen. When the upload is complete, simply navigate to another feature of choice using the LaborKey menu at the left.



# Best Possible Match

**DATA UPLOADS - best possible match**

**"BEST POSSIBLE MATCH" - defined ...**

- updates user-selected fields for existing persons in the LaborKey database from a selected data file containing matching persons when a reasonably high probability match is achieved; the selected data file must have adequate field data to achieve a reliable match
- doesn't add new persons to the LaborKey database; records which do not match with persons in the LaborKey database are skipped
- LaborKey automatically performs a preliminary match evaluation and prompts the user to decide whether to accept final match results or to cancel the update

**STEP 1 • SELECT THE DATA FILE TO UPLOAD**

SELECT dBASE (.dbf) FILE    SELECT EXCEL (.xls) SPREADSHEET    SELECT TAB or COMMA DELIMITED (.txt, .tab, .csv) FILE

C:\DOCUMENTS AND SETTINGS\OWNER\MY DOCUMENTS\COTEST.DBF

**STEP 2 • DECIDE IF TO LIMIT MATCHES TO SPECIFIED INT'L UNION ID & LOCAL NUMBER**

FIND "BEST POSSIBLE MATCHES" WITHOUT REGARD FOR INT'L UNION ID & LOCAL NUMBER

FIND "BEST POSSIBLE MATCHES" WITHIN SPECIFIED INT'L UNION ID & LOCAL NUMBER

INT'L ID AV - SERVICE EM    LOCAL # (6 char.) specify LOCAL # to the right ->    000123

**PROCEED**

The **DATA UPLOADS – best possible match** screen is accessed by selecting the **best match** option under the **DATA UPLOADS** item on the LaborKey menu.

The top module on this screen highlights key points about this upload feature.

The following modules are arranged as upload steps.

## **STEP 1 • SELECT THE DATA FILE TO UPLOAD**

In STEP 1, select a data file – a **dBase** (.dbf) file, **Excel** (.xls) spreadsheet, or a **tab or comma delimited** (.txt, .tab, .csv) file.

## **STEP 2 • DECIDE IF TO LIMIT MATCHES TO SPECIFIED INT'L UNION ID & LOCAL NUMBER**

STEP 2 appears after selecting a data file in STEP 1, but only for certain configurations of LaborKey. (*Note: If STEP 2 does not appear in your configuration of LaborKey, and if you wish to activate this configuration option, contact LaborKey. This option is free.*) If this configuration option has been activated, you can choose if you wish to match the selected data file to the entire LaborKey database, or only within a specific Int'l ID and Local number (or "entity"). If the selected data file to upload is from a specific Local Union, it would usually be best to only match the data within the Int'l ID and Local number representing this Union Local.

Click the **PROCEED** button to proceed to the final step on the next screen.



**STEP 3 • MAP THE FIELDS IN YOUR SELECTED DATA FILE**

SELECTED DATA FILE:  
COTEST.DBF  
RECORD COUNT: 5,930

MAP FIELDS IN THIS COLUMN

"UNIQUE\_ID" SAMPLE DATA ...

#	FIELD NAME	TYPE	LENGTH	>> SELECT FIELD MAPPING <<	APPLY DATA
001	UNIQUE_ID	C	019	(no field mapping selected)	<input type="checkbox"/> APPLY
002	UNIQ_ICODE	C	014	(no field mapping selected)	<input type="checkbox"/> APPLY
003	UNIQ_LOCAL	C	016	(no field mapping selected)	<input type="checkbox"/> APPLY
004	MEMBER_ID	C	017	(no field mapping selected)	<input type="checkbox"/> APPLY
005	NAMELINE	C	035	NAMELINE	<input checked="" type="checkbox"/> APPLY
006	FIRST	C	017	FIRST NAME	<input checked="" type="checkbox"/> APPLY
007	LAST	C	023	LAST NAME	<input checked="" type="checkbox"/> APPLY
008	BIRTHDATE	D	008	BIRTHDATE	<input checked="" type="checkbox"/> APPLY
009	ADDRESS_1	C	043	PRIMARY ADDRESS (123 Main Stre	<input checked="" type="checkbox"/> APPLY
010	ADDRESS_2	C	029	SECONDARY ADDRESS (Apt...)	<input checked="" type="checkbox"/> APPLY
011	CITY	C	022	CITY	<input checked="" type="checkbox"/> APPLY
012	STATE	C	009	STATE (any format incl. FIPS)	<input checked="" type="checkbox"/> APPLY
013	ZIP	C	016	ZIP (min. 5 digits)	<input checked="" type="checkbox"/> APPLY
014	PHONE_HOME	C	015	HOME PHONE	<input checked="" type="checkbox"/> APPLY

ADD FIELD TO SELECTED DATA FILE:

POPULATE NEW FIELD WITH VALUE: character value "1"

XX00000000006559  
XXCTWACT00000752558  
XXCTWACT00000754292  
XXCTWACT00000764532  
XXCTWACT00000764842  
XXCTWACT00000764984  
XXCTWACT00000767148  
XXCTWACT00000769009  
XXCTWACT00000769187  
XXCTWACT00000770195  
XXCTWACT00000770463  
XXCTWACT00000770464  
XXACTADD00015875818  
XXCTWACT00043547151  
XXCTWACT0007R132899  
XXCTWACT00106892697  
XXCTWACT00106892919  
XXACTADD00208121309  
XXNONMBR100037  
XXNONMBR100115  
XXNONMBR100177  
XXNONMBR100178  
XXNONMBR100206  
BH00006810028  
XXNONMBR100341  
XXNONMBR100342  
XXNONMBR100388  
XXNONMBR100483  
XXNONMBR100485  
AV000105100494  
AV000105100563

MS ACCESS DATABASE

**STEP 3 (or 2) • MAP THE FIELDS IN YOUR SELECTED DATA FILE**

In this final step, map the fields (rows) from the selected data file by clicking on the value in the >> **SELECT FIELD MAPPING** << column. Select the appropriate field in LaborKey from the field dropdown which appears.

The **ADD FIELD TO SELECTED DATA FILE** option at the bottom of the screen provides a quick and easy way to append a field populated with a specific value. This option can be used to map a value to a user-defined custom field or any standard field in the LaborKey database for the records to be uploaded.

After all the appropriate uploaded file fields are mapped to LaborKey fields in the grid, the **APPLY** checkbox should be flagged for each mapped uploaded field (row) which should be loaded and applied to the LaborKey database. Deselecting the **APPLY** checkbox for a mapped field prevents the mapped field from being applied to the LaborKey database, but it does not prevent the field from contributing to a successful person match.

**Important!** In this upload feature, it is very important to map **ALL** upload data file fields which might help contribute to a match with a person in the LaborKey database, even if the fields should not be actually loaded and applied in the LaborKey database. Simply deselect the **APPLY** option for any field which is mapped, but which should NOT be applied in the LaborKey database.



For more advanced users, there is a hidden feature which provides better control over how field data are actually applied. On the bottom of the field mapping grid is a scroll bar. If you scroll to the right, the field mapping grid is expanded, and the scroll bar disappears. An additional column with the option **APPLY ONLY WHEN NOT EMPTY** is displayed at the right, as illustrated below. By default this option is flagged in every row where the **APPLY** checkbox is flagged, because this is usually the most appropriate option. If an uploaded field is empty for a person, and if the matching person already listed in the LaborKey database already has a value assigned for this field, it is usually not a good idea to replace the existing value with an "empty value". Select the **APPLY ONLY WHEN NOT EMPTY** option for each field where you only wish to apply the uploaded field values which are not empty, to avoid blanking out useful data in the LaborKey database.

#	FIELD NAME	TYPE	LENGTH	>> SELECT FIELD MAPPING <<	APPLY DATA	APPLY ONLY WHEN FIELD NOT EMPTY
001	UNIQUE_ID	C	019	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
002	UNIQ_ICODE	C	014	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
003	UNIQ_LOCAL	C	016	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
004	MEMBER_ID	C	017	(no field mapping selected)	<input type="checkbox"/> APPLY	<input type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
005	NAMELINE	C	035	NAMELINE	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
006	FIRST	C	017	FIRST NAME	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
007	LAST	C	023	LAST NAME	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
008	BIRTHDATE	D	008	BIRTHDATE	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
009	ADDRESS_1	C	043	PRIMARY ADDRESS (123 Main Stre	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
010	ADDRESS_2	C	029	SECONDARY ADDRESS (Apt...)	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY
011	CITY	C	022	CITY	<input checked="" type="checkbox"/> APPLY	<input checked="" type="checkbox"/> APPLY ONLY WHEN NOT EMPTY

Before uploading the file, you can click the **SAVE A COPY AS** button at the bottom of the screen to save a copy of the selected data file to a file format selected from the file format dropdown. If fields have been added with the **ADD FIELD ...** option, these fields will be included in the saved file copy.

To upload the data file, click the **UPLOAD** button. File upload progress is displayed both by a thermometer bar at the top of the screen, and with detailed results at the bottom of the screen. When the upload is complete, simply navigate to another feature of choice using the LaborKey menu at the left.

# Organizing Target Load

**DATA UPLOADS - organizing target load**

**"ORGANIZING TARGET LOAD" - defined ...**

- loads new persons into LaborKey where names and other available data from a selected target data file match with registered voters
- the user must specify a list of postal zip codes (min. 1, max. 60) in order by distance from an organizing target location (such as a WalMart)
- this feature accepts possible matches even when the matches are not very reliable (taking the first match found within the zip code list)
- the selected target data file must have at least a partial name; the reliability of resultant matches depends on the amount of data available
- each new person added to the LaborKey database is automatically assigned a unique member id

**STEP 1 • SELECT THE DATA FILE TO UPLOAD**

SELECT dBASE (.dbf) FILE
SELECT EXCEL (.xls) SPREADSHEET
SELECT TAB or COMMA DELIMITED (.txt, .tab, .csv) FILE

... \COTEST2.DBF

**STEP 2 • SPECIFY A LIST OF ZIP CODES IN ORDER BY DISTANCE FROM TARGET (E.G. WALMART)**

ZIP 01	80227	ZIP 10		ZIP 19		ZIP 28		ZIP 37		ZIP 46		ZIP 55	
ZIP 02	80228	ZIP 11		ZIP 20		ZIP 29		ZIP 38		ZIP 47		ZIP 56	
ZIP 03	80229	ZIP 12		ZIP 21		ZIP 30		ZIP 39		ZIP 48		ZIP 57	
ZIP 04		ZIP 13		ZIP 22		ZIP 31		ZIP 40		ZIP 49		ZIP 58	
ZIP 05		ZIP 14		ZIP 23		ZIP 32		ZIP 41		ZIP 50		ZIP 59	
ZIP 06		ZIP 15		ZIP 24		ZIP 33		ZIP 42		ZIP 51		ZIP 60	
ZIP 07		ZIP 16		ZIP 25		ZIP 34		ZIP 43		ZIP 52			
ZIP 08		ZIP 17		ZIP 26		ZIP 35		ZIP 44		ZIP 53			
ZIP 09		ZIP 18		ZIP 27		ZIP 36		ZIP 45		ZIP 54			

**STEP 3 • SPECIFY THE INT'L UNION ID & LOCAL NUMBER**

INT'L ID **XX - EXTRANEIOUS**
LOCAL # (6 char.) **WALMRT**
**PROCEED**

The **DATA UPLOADS – organizing target load** screen is accessed by selecting the **target load** option under the **DATA UPLOADS** item on the LaborKey menu.

The top module on this screen highlights key points about this upload feature.

All following modules are arranged as upload steps.

## STEP 1 • SELECT THE DATA FILE TO UPLOAD

In STEP 1, select a data file – a **dBase** (.dbf) file, **Excel** (.xls) spreadsheet, or a **tab or comma delimited** (.txt, .tab, .csv) file. If all you have is a handwritten list of names and potentially other useful information, simply type the information in an Excel spreadsheet, using columns for data types and rows for persons, and then save and close the spreadsheet. Select this spreadsheet in STEP 1. The selected data file is not the primary data file which will be applied to the LaborKey database. The available information in this data file will be matched against more complete voter registration records, and the first matching voter record for each person will be uploaded into the LaborKey database. Any data fields included in the selected data file which are not available in the statewide registered voter file will be applied along with the uploaded voter record.

## **STEP 2 • SPECIFY A LIST OF ZIP CODES IN ORDER BY DISTANCE FROM THE ORGANIZING TARGET (e.g. A WALMART STORE)**

In STEP 2, specify a list of zip codes beginning with the zip code closest to the organizing target, and ending with the zip code furthest from the target. The idea is to select zip codes where employees of a targeted employer would likely or potentially live, assuming that at least a good number of employees would choose a place of work within a reasonable distance from their place of residence. (This feature would not be useful when targeting airline pilots.) If this feature would be used to find matching persons from an entire statewide voter file, the results would be incredibly unreliable, because person names can be very common, and sketchy lists of employees for a target tend to include very little information which can be used for matching, and the information available is often unreliable itself. This feature will search the voter file zip code by zip code, and it will always take the first OK match found in the zip code listed nearest the beginning of the zip code list. The longer the zip code list, the less reliable the results will be. Therefore, it is important to strike a balance, capturing enough zip codes to build an adequate list, but avoiding zip codes further from the target where employees would be less likely to live.



***Tip:** If you would like to enter a series of zip codes in numeric order, type the lowest zip code number first, and then right-click on each subsequent zip code position, and zip codes will appear in sequence. Normally, you would not want to do this, because it is best to enter zip codes in order by distance from the organizing target. This trick is useful when you are short for time.*

## **STEP 3 • SPECIFY THE INT'L UNION ID & LOCAL NUMBER**

STEP 3 appears only for certain configurations of LaborKey. (*Note: If STEP 3 does not appear in your configuration of LaborKey, and if you wish to activate this configuration option, contact LaborKey. This option is free.*) If this configuration option has been activated, you should specify an Int'l ID and Local number (or "entity"). The Int'l ID "**XX**" for **extraneous** is included as an option for all non-Union data uploads. In the illustration above, the values "**XX**" and "**WALMRT**" have been entered in STEP 3. By specifying a unique combination of values in this step, the persons uploaded will be very easy to identify with a profile for easy data management. In this way, these uploaded targets will not become lost within the LaborKey membership database.

Click the **PROCEED** button to proceed to the final step on the next screen.

**STEP 4 • MAP THE FIELDS IN YOUR SELECTED DATA FILE**

SELECTED DATA FILE:  
COTEST2.DBF  
RECORD COUNT: 1,408

MAP FIELDS IN THIS COLUMN

#	FIELD NAME	TYPE	LENGTH	>> SELECT FIELD MAPPING <<	APPLY DATA
001	UNIQUE_ID	C	019	(no field mapping selected)	APPLY
002	UNIQ_ICODE	C	014	(no field mapping selected)	APPLY
003	UNIQ_LOCAL	C	016	(no field mapping selected)	APPLY
004	MEMBER_ID	C	017	(no field mapping selected)	APPLY
005	NAMELINE	C	035	NAMELINE	APPLY
006	FIRST	C	017	FIRST NAME	APPLY
007	LAST	C	023	LAST NAME	APPLY
008	BIRTHDATE	D	008	BIRTHDATE	APPLY
009	ADDRESS_1	C	043	PRIMARY ADDRESS (123 Main Stre	APPLY
010	ADDRESS_2	C	029	SECONDARY ADDRESS (Apt...	APPLY
011	CITY	C	022	CITY	APPLY
012	STATE	C	009	STATE (any format incl. FIPS)	APPLY
013	ZIP	C	016	ZIP (min. 5 digits)	APPLY
014	PHONE_HOME	C	015	HOME PHONE	APPLY

"NAMELINE" SAMPLE DATA ...

JASON L BREHM  
DANIEL J CRANE  
CONSTANT BROWN  
DWAYNE A ADKINS  
ROBERT C CREPEAU  
DENNIS J MCPEEK  
JANINE L MCPEEK  
LORETTA CRAWFORD  
ELTON T STROUD  
JUDITH K CORNISH  
MICHELLE FOUST  
JOSEPH H KRANTZ  
DANIEL JEFFERY  
KATHERINE M JONES  
SYLVIA I KLINE  
TONY R MARTINEZ  
KIMBER L MCARTHUR  
NEIL E MILLS  
MARIAN LOEFFLER  
RONALD K MCDONNELL  
STEPHEN K MCDONNELL  
WALLACE E FARIS  
EVERETT W CARLSON  
HARRY A KUBACKI  
STEFAN PACHER  
MANUEL TRUJILLO  
NIKOLAY ZENIUK  
YEON O YOO  
VICTOR A NEIBERGER  
BILLY G WHEELER  
GERARD C DAUBERMAN

ADD FIELD TO SELECTED DATA FILE:

POPULATE NEW FIELD WITH VALUE: character value "1"

MS ACCESS DATABASE

**STEP 4 (or 3) • MAP THE FIELDS IN YOUR SELECTED DATA FILE**

This final step is very similar to the final step of the **Best Possible Match** upload feature, except that in the Best Possible Match feature, records are matched against the LaborKey database, and in this feature, records are matched against an entire statewide registered voter file.

In the illustration above, you can see that many fields can be included in the selected data file, even though this feature was designed with simple sketchy employee lists in mind. The more person identifiers available in the selected data file, the more reliable the final match results will be.

In this final step, map the fields (rows) from the selected data file by clicking on the value in the **>> SELECT FIELD MAPPING <<** column. Select the appropriate field type from the field type dropdown which appears.

The **ADD FIELD TO SELECTED DATA FILE** option at the bottom of the screen provides a quick and easy way to append a field populated with a specific value. This option can be used to map a value to a user-defined custom field or any standard field in the LaborKey database for the records to be uploaded.

After all the appropriate uploaded file fields are mapped to field types in the grid, the **APPLY** checkbox should be flagged for each mapped uploaded field (row) which should be loaded and applied to the LaborKey database. Deselecting the **APPLY** checkbox for a mapped field prevents the mapped field from being applied to the LaborKey database, but it does not prevent the field from contributing to a successful registered voter match.



***Important!** In this upload feature, it is very important to map **ALL** upload data file fields which might help contribute to a match with a registered voter in the statewide registration voter file, even if the fields should not be actually loaded and applied in the LaborKey database. Simply deselect the **APPLY** option for any field which is mapped, but which should **NOT** be applied in the LaborKey database.*

Before uploading the file, you can click the **SAVE A COPY AS** button at the bottom of the screen to save a copy of the selected data file to a file format selected from the file format dropdown. If fields have been added with the **ADD FIELD ...** option, these fields will be included in the saved file copy.

To upload the data file, click the **UPLOAD** button. File upload progress is displayed both by a thermometer bar at the top of the screen, and with detailed results at the bottom of the screen. When the upload is complete, simply navigate to another feature of choice using the LaborKey menu at the left.

# Household Fill

DATA UPLOADS - household fill

**"HOUSEHOLD FILL" - defined ...**

- adds registered voters to the LaborKey database where the voters live in the same households as specified selections of members
- this feature does not load registered voters where the voters match with persons already listed in the LaborKey database
- this feature assigns a new unique member id to each voter added, assigns the value "NM" (Non-Member) to the [SOURCECODE] field, assigns the value "H" to the [PERSONTYPE] field, assigns the value "HOUSE" to the [TYPE] field, and assigns the Int'l Union ID and Local # to the [LOCAL] field when such data is available for at least one Union member listed in LaborKey database in the same household

**STEP 1 - SELECT PERSONS IN LABORKEY DATABASE TO WHICH VOTERS IN THE SAME HOUSEHOLD SHOULD BE ADDED**

selection profile or profile set #1:

MN SENATE 52 (profile)  Neg.


OR  AND  OR

profile or profile set #2:

ANOKA COUNTY  Neg.

profile or profile set #3:

profile not sele  Neg.



1,512 PERSONS (NOT "NON-MEMBERS IN HOUSEHOLD") ARE SELECTED ...

The **DATA UPLOADS – household fill** screen is accessed by selecting the **household fill** option under the **DATA UPLOADS** item on the LaborKey menu.

The top module on this screen highlights key points about this upload feature.

There is only one step to upload registered voters to the LaborKey database where the voters live in the same households as specified selections of members. Under **STEP 1 – SELECT PERSONS ...**, select persons in the LaborKey database for which you would like to upload all registered voters who live in the same households, but who do not match with persons already listed in the LaborKey database. Click the **UPLOAD** button to upload these non-Union persons living in Union households.

Upload progress is displayed at the top and bottom of the screen, as is illustrated below.

DATA UPLOADS - household fill

HOUSEHOLD FILL IN PROGRESS - 57.80% (remain: 51 seconds)

**"HOUSEHOLD FILL" - defined ...**

- adds registered voters to the LaborKey database where the voters live in the same households as specified selections of members
- this feature does not load registered voters where the voters match with persons already listed in the LaborKey database
- this feature assigns a new unique member id to each voter added, assigns the value "NM" (Non-Member) to the [SOURCECODE] field, assigns the value "H" to the [PERSONTYPE] field, assigns the value "HOUSE" to the [TYPE] field, and assigns the Int'l Union ID and Local # to the [LOCAL] field when such data is available for at least one Union member listed in LaborKey database in the same household

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profile or profile set #2:


ANOKA COUNTY  Neg.

profile or profile set #3:

profile not sele  Neg.



1,512 PERSONS (NOT "NON-MEMBERS IN HOUSEHOLD") ARE SELECTED ...



**"HOUSEHOLD FILL" PROGRESS ...**

PERSONS IN LABORKEY COMPARED:	874	57%
"NON-MEMBERS IN HOUSEHOLD" ADDED:	1,487	



## Using Upload Features in Combination

This subtopic only applies to more advanced users.

The upload features described in this section can be used together in combination to accomplish sophisticated data management tasks. The scenarios are endless.

The best way to become comfortable handling more complicated upload problems is to use the individual upload features a number of times to gain familiarity with the capabilities of these features, and to request assistance with complex tasks as they arise.

The following typical scenario is a good example of how these features can be used together.

### **EXAMPLE** – *loading a precinct caucus attendee list*

Let's assume that you have a data file with all the attendees at a precinct caucus. You need to accomplish two tasks. First, you would like to flag your members who have attended. Second, you would like to upload all remaining precinct caucus attendees into your LaborKey database.

**Step 1 – flagging Union members who have attended:** Using the **Best Possible Match** feature, you would select the data file, map the data fields, add a field with the value TRUE (*at the bottom of the second upload screen*), map the new field to a custom field indicating "precinct caucus attendee", and click UPLOAD to begin the upload. The software would tell you how many persons match and how many don't before actually beginning the upload. Before uploading the data, you would be asked if you would like to save the non-matching persons to a data file. You would do so, and you would save these non-matching persons to a data file with a file name that you remember. Then you would allow the upload to complete.

**Step 2 – uploading precinct caucus attendees who did not match Union members:** Using the **Basic Upload** feature, you would select the file you saved in Step 1 containing non-matching persons. You would map the fields. Again, you would add a field with the value TRUE (*at the bottom of the second upload screen*) and map this field to a custom field indicating "precinct caucus attendee". Finally, you would click the UPLOAD button to begin the last upload.

This example may seem confusing, but after using these upload features for awhile, this sort of task can become routine.



# Data Admin

The screenshot displays the 'DATA ADMIN' interface. At the top right, there are logos for IBEW 110 292 and IBT 4. The interface is divided into three main sections:

- GATHER & APPLY PARTNER UPDATES:** This section contains a 'GATHER ALL PARTNER UPDATES' button. Below it are three dropdown menus: 'SELECT TYPE OF UPDATE' (set to 'ADDRESS & PHONE updates'), 'SELECT SOURCE OF UPDATE' (set to 'ALL update sources'), and 'ONLY INCLUDE UPDATES DATED AFTER' (set to '12/01/2006'). There are buttons for 'PREVIEW SELECTED UPDATES', 'PRINT SELECTED UPDATES', and 'APPLY SELECTED UPDATES'.
- LABORKEY DATA MAINTENANCE/REPAIR:** This section contains a 'REINDEX PRIMARY LABORKEY TABLES' button.
- LABORKEY DATA CLEAN-UP:** This section contains a dropdown menu for 'OBsolete DATA TO DELETE' (set to '[ALL PERSONS IN LABORKEY]') and a 'NEW CRITERIA' button. Below it is a 'DELETED SELECTED OBSOLETE DATA' button.

The bottom section, **UPDATE ADDRESSES, VOTER HISTORY, & DISTRICT ASSIGNMENTS**, includes several checkboxes for 'UPDATE ADDRESSES\* (standardization)', 'UPDATE VOTER HISTORY ASSIGNMENTS', and 'UPDATE DISTRICT ASSIGNMENTS', each with a 'SKIP RECORDS ALREADY ATTEMPTED' option. A note states: '\*Services which include CASS certified address cleansing might provide more thorough results than this update feature.' There is a 'DATA SELECTION TO BE UPDATED' dropdown (set to '[ALL PERSONS IN LABORKEY]') and a 'SELECT NEW CRITERIA' button. A final button reads 'UPDATE VOTER HISTORY AND/OR DISTRICT ASSIGNMENTS'.

The **DATA ADMIN** screen is accessed by selecting the **DATA ADMIN** item on the LaborKey menu.

This screen is similar to the **DATA TASKS** screen. On the **DATA TASKS** screen, routine tasks are performed which facilitate the flow of data (1) between membership databases and the LaborKey database and (2) between configured LaborKey “partners”. The **DATA ADMIN** screen is used to perform additional data management tasks which might not be so routine, but which are equally important. These tasks are organized within modules on the screen, and these modules are described below.

## **GATHER & APPLY PARTNER UPDATES:**

This module is often overlooked by locals and state councils. Any local or council which is configured to submit data up to labor councils or their international office can also automatically gather updates back into the local LaborKey database. These updates are never automatically applied by LaborKey. Clicking the button **GATHER ALL PARTNER UPDATES** does not apply any data – it merely logs the available updates locally so that LaborKey can produce reports listing the gathered updates, and so that the user can apply selected updates by clicking the button **APPLY SELECTED UPDATES** illustrated above.

Updates can be reported and applied by **TYPE OF UPDATE**, **SOURCE OF UPDATE**, and updates can be limited to only those updates made after a certain date.

### **UPDATE ADDRESSES, VOTER HISTORY, & DISTRICT ASSIGNMENTS:**

This is a convenient feature where all three tasks can be performed at the same time.

***Important!** Typically you should NOT run the **UPDATE ADDRESSES** option, because it runs very slow. This option standardizes addresses, and even assigns zip+4 where missing, but it is not a critical task, and running it once every few months is more than adequate.*

Under **UPDATE VOTER HISTORY ASSIGNMENTS** and **UPDATE DISTRICT ASSIGNMENTS** you should generally leave the **SKIP RECORDS ALREADY ATTEMPTED** option checked. LaborKey version 4.0 tracks if voter history assignments and district assignments have already been attempted with the current personal contact and demographic data listed for each person, and with the current loaded voter and district file data. This is a huge time saver. The software quickly skips by all records where the information has not changed, making assignments go much faster. However, if you ever feel that the software is skipping through too quickly, and if you would like to force the software to reattempt matches for the entire file, simply deselect the **SKIP RECORDS ...** options, and the software will reattempt voter history and district assignments for the selected membership data.

### **LABORKEY DATA MAINTENANCE / REPAIR:**

The **REINDEX PRIMARY LABORKEY TABLES** button should be clicked to reindex the LaborKey tables if the software ever appears to function incorrectly. On occasion a computer system might shut down improperly while necessary "index tags" are being written by the system. This causes a data file's index file to become corrupt. All the user needs to know is that this feature can repair the data files when they become damaged.

### **LABORKEY DATA CLEAN-UP:**

In this module you can select and delete obsolete data which should be removed. Click the **NEW CRITERIA** button to access a data selection screen where you can select the appropriate records to remove. Click the **DELETE SELECTED OBSOLETE DATA** button to permanently delete the obsolete data.