

New Union Work Systems

Organizer's Toolbox v.7.1 Overview

Organizer's Toolbox version 7.1 introduces several important changes that will greatly enhance your ability to manage organizing details with the introduction of **Project Roles**. This document is meant to give a brief overview of these changes so that OT Administrators, Campaign Leads, and Campaign Directors can begin thinking about how to make the best use of **Project Roles** to enhance their campaigns. In the coming weeks we will release detailed support documentation to enable users to get up to speed quickly, and as always we will continue to provide personal phone support upon request.

What's Changed?

New components of the Toolbox:

1. Project Roles
2. Staff Module
3. Project Roles Tab (in the Person Module)

The following modifications have been made that you should pay special attention:

1. Organize Tab has been eliminated
2. Project Edit
3. Reports - Grouping & Sorting: Organizer sorting option
4. Turf Manager - Has been replaced with Project Roles
5. Organizer Module - Replaced with Staff Module

Project Roles

Project Roles is a customizable component that will allow users with appropriate permissions to assign Turf on the basis of a person's "role" or job description in the context of a campaign or Project. Project Roles works similarly to the Turf Manager in that you can:

- * Establish turfing rules for each project or campaign
- * Cut turf based on virtually any data including worksite, geographic and political data
- * Manage both Staff Turf and Member or Activist turf
- * Assign staff and key activists to targeted people using easy-to-assign rules



New Union Work Systems

How is this different from OT 7.0? In Ot 7.0 only two distinctions were made in the Turf Manager, Organizer or Organizing Committee. While this set-up works effectively in the context of a new organizing campaign, some users found it too limiting in the context of Contract Campaigns, Political Organizing, Internal or Membership Organizing (i.e., Member Representation), or COPE Drives. Consequently many people relied on Lists to identify the different Organizing Staff and worker activist distinctions. While this strategy works quite well for many people, it does not allow the use of one of the most powerful & useful features of the Toolbox, managing turf on the basis of defined rules and then generating lists and reports on the basis of these rules. Project Roles will allow you to take managing your campaigns to a new level of sophistication.

Staff Module

The Staff Module replaces the Organizer Module and greatly enhances the level of

The screenshot shows the 'Staff' module interface. On the left, there is a 'Filter' section with a 'Name' search box and a 'Show Inactive' checkbox. Below this is a table listing staff members:

Name	Has Role
Costello, Elvis	Yes
Lapazo, Juan	Yes
Love, Courtney	Yes
Newton, Way...	Yes
Turner, Tina	Yes

The main area displays the details for 'Costello, Elvis'. It includes fields for Name (Last: Costello, First: Elvis, Middle: , Nickname:), Contact Info (Work Phone: 555-123-4567, Home Phone: 555-963-9874, Work Cell: 555-569-7896, Home Cell: 555-123-4569, Work Email: Ecostello@riseup.net, Home Email:), and two tables for roles.

In-Project Roles			Out-of-Project Roles	
Project Role	People	Team	Project / Role	Team / Pe...
<input type="checkbox"/> Contract Action ...			City of EO	Team 1
<input checked="" type="checkbox"/> Organizer	33 Pe...	Team 1	Organizer	14 People
<input type="checkbox"/> Organizing Com...			Mercy Hospital Tech	Team 1
<input type="checkbox"/> Steward			Organizer	36 People

At the bottom left, there are buttons for '+', a trash icon, and 'Deactivate'.

detail available in one convenient location. With the Staff Module you can now see in one place a summary of Staff assignments, the different Roles they have within the Project as well as in other Projects, the Organizing Team(s) they belong to, as well as contact information.

New Union Work Systems

Project Edit - now allows Project Editors to add new Roles to a Project
Please note that both “Add Role to Project” and “Remove from Project” can also be

The screenshot shows a software interface with two main sections: "Project Roles" and "Project Users".

Project Roles

Role	Turf Last Generated
Organizer	1 hour, 16 minutes ago
Organizing Committee	Manual Selections Only

Buttons: Add Role to Project... Remove from Project

Project Users

User	Project Access
clientadmintesting	Project User
mozart	Project User

Buttons: Add... Edit... Remove

Done

done through the Project Roles manager with the Project

New Union Work Systems

The final important component that has changed in Ot 7.1 is the **Grouping & Sorting** portion of the **Reports & Extracts Module**. The Organizer sorting option has been removed and replaced with “Turf.” To sort by Organizer you will now need to select “Turf: Assigned To”. There are also two other options, “Turf: Team Leader,” and “Turf: Team Name.”

The screenshot shows a software interface titled "Details" with three tabs: "1. Which People?", "2. Output", and "3. Layout & Grouping". Below the tabs is a section titled "Customize the layout of your report." containing a "Report Title" text box. The "Group and Sort" section is expanded, showing a "Field" dropdown menu with the value "tur" selected. A list of options is displayed below the dropdown, including "District Legislature", "Jobs: Works 6-Saturday", "Turf: Organizer - Assigned To" (highlighted), "Turf: Organizer - Team Leader", and "Turf: Organizer - Team Name". Below the dropdown is a "Default Sort" dropdown menu with the value "lname (Last, First)". The "Options" section contains three checkboxes: "Hide Detail", "Hide Report Header", and "Include Report Header". At the bottom, there is an "Option" section with a checked checkbox for "Show Group Headers In Reverse Type".