



PPS Databank Data Entry Policy

5/1/2013

Purpose of this Guide

The purpose of the data standardization guide is to provide the most efficient practices for data entry and management. The guide does not provide instructions on how to use the Databank. Further instructions on how to access and use the Databank may be found by visiting the user's guide section after logging into the Databank or can be found below:

[The Databank Official User's Guide](#)

[The Databank Powermail Guide](#)

[The Databank Meetings and Events Module User Guide](#)

Why Standardize?

If you have ever spent hours trying to look up a name that you know is on your mailing list, you understand the importance of accurate and consistent data entry. By standardizing the way information is entered, you increase the usefulness of your database including:

- More accurate query results
- Better success rates for mailings
- Less guesswork for data entry staff or volunteers

In the sections that follow, you will find the guidelines for standardizing data entry into the Parents for Public Schools Databank.

Main Member Information

You have just returned to the office after a busy day at a committee meeting. Your organization had a table where you collected contact information from attendees who want to be added to your mailing list. You log in to the Databank, and prepare to enter the information for this married couple:

Mary T Carson-Roth and Stuart Roth
123 West Main Street, Apartment Six
St. Paul, Minn. 55101
651-555-1234
maryn@mnroth.com
stuart@mnroth.com

Following are some suggested formats for entering data into the main fields of the Databank. See Appendix A for common abbreviations.

Names (records, members, etc.)

Title

- Use the common abbreviation; capitalize the first letter; end with a period.
- Example: Mrs.

First Name (First) / Middle (MI) / Last Name (Last)

- Use standard capitalization.
- If the record is for a couple, use these fields for the name of the primary person.
- You may use a full middle name, or a middle initial. If using an initial, do not use a period after the middle initial.
- For un-hyphenated last names with two parts, use the “MI” field for the first part of the name.
- For hyphenated last names, put the entire last name in the “Last” field.
- If a middle initial or other information is unknown, leave the field blank.
- Example: Mary / T / Carson-Roth

Title2 / First2 / MI2 / Last2

- This second set is generally used for a spouse. **You will want to create individual records for each partner if you need to track their contact histories, giving records, or activist records separately and they have individual email addresses. Connect the two records using the advanced relationship power tool.** There is a Householding function that will eliminate duplicate mailings to the same address.
- Example: Mr. / Stuart / Roth

Company

Spell out the organization name. Avoid abbreviations. You may wish to have a distinct field (not this one) to indicate a person’s employer if your organization does not have a relationship with that employer.

You can also keep a general record for the organization and leave the name fields blank.

Address line

- Use this field for street addresses or post office box addresses.
- For numbered streets, use the number (e.g., 3rd Ave).
- Avoid abbreviations (e.g., Saint, not St.).
- You can also include the apartment or suite number in this field.
 - Example: 123 W Main St; 800 Washington Ave S Ste 303

Address 2

- Use this field for apartment, suite or floor numbers.
- You can also use this field for building names or “care of” instructions.
 - Example: Apt 6; City Hall; C/O Nancy Goodman

City

- Spell out the city name.
 - Example: Saint Paul

State (St)

- Use standard two-letter abbreviation with no periods.
 - Example: MN

ZIP Code (Zip)

- Use nine-digit code with hyphen when available.
 - Example: 55101-1234
- Country can be left blank unless it is not the United States.

Telephone Numbers

Home Phone / Work Phone / Fax / Mobile

- Use all ten digits.
- If there is an extension, use a consistent format to enter that information. One common way to do this is to use the abbreviation “ext” with no comma. (e.g., 6124552255 ext 3)
- **When doing data entry, there is no need to type in the hyphens; the Databank will automatically add them for you.**
- To utilize the text message feature, **you must** enter the mobile phone number and select the provider from the drop down menu. If a provider needs to be added to the list, contact the National Office.
 - Example: 6515551234

Email

- Use all lower case.
- You can enter more than one email address in this field; separate them with commas. *When there is a record with more than one email address in this field and the individual unsubscribes from electronic communications, the entire record is unsubscribed.*
Example: maryann@mnroth.com,stuart@mnroth.com

Record category

- Choose the record category that’s appropriate for the record that’s being entered.

Best Way to Contact

- Choose the best way to contact the record.

School that Parent is Connected to

- Spell out the entire school name. Avoid abbreviations.

School District

- Spell out the entire school district name. Avoid abbreviations.

Flag 1: Is this Person a member?

- Select “Y” if the person is a member or “N” if not a member.

Join Date

- Enter the date the record joined the chapter. *This field requires manual data entry and*

update.

Membership Expiration Date

- Enter the date the record's membership expires. *This field requires manual data entry and update. When the expiration date passes the "Flag 1: Is this person a member?" field doesn't update automatically.*

Salutation1/Salutation 2

- This field can be used in mail merges to store a nickname or preferred name.
- Use "Salutation 1" for a formal address, "Salutation 2" for an informal address.
- Example: Mary Ann and Stu Roth
Salutation 1: Mr. Stuart Roth and Mrs. Mary Ann Carson-Roth
Salutation 2: Stuart and Mary Ann

Email

- **OK** – Member can be contacted by email.
- **Always OK** – Email bounces will be ignored for this record.
- **Unsubscribed** – Member does not want to be contacted via email, the system will not send to this address.
- **Bad Email** – The specified email address doesn't accept email. The system will not send to this address.

Postal Mail

- **OK** – Member can be contacted via postal mail.
- **Do Not Mail** – Member should not receive information via postal mail. You can exclude from reports and labels.
- **Bad Address** – Mail cannot be delivered to the address currently associated with the member. You can exclude from reports and labels.

Phone

- **OK** – Member can be contacted via phone.
- **Do Not Call** - Member should not receive solicitations via phone.
- **Bad Phone #** - Cannot reach the member using the current phone number for the member

in the Databank.

Maximum Requests/Year

- Select the maximum number of requests to be sent to the member annually.

Do Not Exchange

- This selection is checked if the member does not want his/her record to be shared with other organizations.

Other Information

Relationships (Advanced Relationship Tool)

The advanced relationship tool allows chapters to link member records to one another as well as allow those records to automatically update each other. Because the relationship type and role are shared among all chapters and users in the Databank, when assigning relationships to records, use the predefined relationships. If new relationship types and roles are required to be created, **contact the National Office**. When making your request, indicate the relationship type and the roles affiliated with the relationship type. **Any relationship types and roles added to The Databank not created by the National Office will be deleted. This will result in the entire relationship being deleted from the record.**

FUNDRAISING

Campaigns/Campaign Segments

Campaigns refer to any type of marketing initiative to solicit responses from members or prospective members of the Databank. Campaign segments refer to sub-section of a campaign. Each chapter has an annual campaign and general campaign segment set up based on the chapter's fiscal year to organize financial information for donations, membership dues, fundraisers etc. **Each campaign is required to have at least one campaign segment.**

Each chapter data manager has the ability to create an unlimited number of campaigns and related campaign segments. When creating your campaign code/name always begin with your designated **Chapter Code** to identify your chapter (e.g., HIHON Annual 12-13, OHSTR Annual 13-14). **See Appendix B for list of chapter codes.**

When creating your campaign segment name, keycode, and list abbreviation, data managers are advised to develop a naming convention. If you are unsure of how to create campaigns/segment codes, **contact the National Office and/or The Databank**. Below are the maximum characters for the campaign and campaign segment required fields:

Campaigns

Campaign Name: 25 characters

Campaign No./Code: 20 characters

Description: 100 characters

Segments:

List Abbrev:10 characters

Keycode:8 characters

List Name:100 characters

Subscriptions/Publications

Subscription and publication management allows constituents to decide to which of your chapter's publications they are going to subscribe. At this time, chapter data managers will not have read/write/delete permissions to the subscriptions/publications feature.

Standard drop downs

Within the Databank, there are several drop down menus that are shared among all chapters and users. There are four drop down menus – relationship type, relationship role, meeting type, and meeting activity - where new values **SHOULD NOT** be created by chapter data managers. If there are new values required to be created, **please contact the National Office.**

In the contact history section of a record in the Databank, the “contact by” and “contact type” drop down menus accept new values that must be created/managed by chapter data managers. Since these drop down menus are shared among all chapters and users, precede the “contact by” value with your chapter's code followed by an identifier of choice that represents the individual that contacted the record (e.g., MSJXNBob, OHSTRAnn). Keep in mind that the “contact by” and “contact type” fields have a character limit.

Maximum number of characters for the contact history fields are below:

Contact History

Contact by: 10 characters

Contact type: 20 characters

Note: 255 characters

Meetings module

Within the meetings module, the set up and edit functions are shared by all chapters and users in the Databank. This means that when setting up or editing meeting data, all chapters and users have access to the list of all meetings in the Databank. To avoid confusion and to ensure that the chapter is working with the correct meeting, chapter data managers must ensure that they are setting up or editing only those meetings identified by the meeting type code that has been established for their chapters.

If you would like to use the meetings module feature on your chapter's website, contact the National Office.

Meeting Type

Separate online calendars have been created for each chapter by using the "meeting type" field. This field is pre-populated and new values **SHOULD NOT** be added by chapter data managers. Each chapter's "meeting type" is identified by the state followed by the chapter's name (e.g., California: San Francisco, New York: Syracuse). **See Appendix B for list of chapter codes.**

Meeting Activity

The "meeting activity" represents the category of events that your chapter will host. This field is prepopulated and new values **SHOULD NOT** be added by chapter data managers. If you require a new "meeting activity" value, **contact the National Office.**

Saved search lists

The Search menu provides sophisticated yet easy-to-use options for locating member records. Most functionality in the Databank relies on having a search in place.

All users can see saved searches where the "allow other users to replay this search" box is checked. If this option is not selected, search results will only return members who belong to the chapter's data set.

Powermail

Powermail is the Databank's powerful, yet easy-to-use tool for communication with members of your database through email. With Powermail, you can develop online relationships with your existing supporters and engage new supporters. You can use PowerMail to:

- Send electronic newsletters to update interested recipients on what's happening with your organization
- Distribute fundraising email appeals allowing members and supporters to contribute online with a few simple clicks (this requires set up of an integrated secure donation page)
- Send donation thank-you email receipts with personalized donation information
- Link people to current issues or activities by sending timely action appeals
- Promote events and activities
- Easily communicate with volunteers, board members, or any other identified segment of your database

Within the Powermail tool there are certain areas that are shared among all chapters and users in the Databank. When using Powermail to create/manage your chapter's electronic communications, keep in mind the following:

- Powermail issues are organized by folders. By default, a folder has been created for each chapter and it can only be seen by the chapter's data manager and the PPS Databank administrator. It is at the chapter data manager's discretion to determine the most efficient strategy for organizing Powermail issues.
- Within the "powermail properties" window, you can select your chapter's publication listed in the "publication" field. If you decide to use this option, select ONLY your chapter's publication. When you assign a PowerMail to a publication, on the publish page you can send it to all the members who are subscribed to that publication without doing a search. **This is optional.**
- Within the "Powermail properties" window, you can select your chapter's campaign. If you decide to use this option, select ONLY your chapter's campaign. At the present time, the Databank has not completely developed this feature. **PPS recommends to not use this feature at this moment.**
- In the WYSIWYG (What You See Is What You Get) html editor, you have the option to edit content, add images, etc. When adding an image to your Powermail issue, upload the image to your chapter's image folder that has been created. The chapter data manager can create subfolders under your chapter's main image folder. **Do not modify the title of the chapter's main folder. See Appendix B for list of chapter codes.**
- Always create a text version of your Powermail publication because some email programs have been set to show all email as Text Only.

Appendix A. Abbreviations

The US Postal Service publishes a set of standard abbreviations. Below are some of the most common ones. A complete list can be found on their web site at <http://www.usps.com/ncsc.lookups/abbrev.html>.

Ave	Avenue
Bldv	Boulevard
Cir	Circle
Ct	Court
Dr	Drive
Expy	Expressway
Hwy	Highway
Jct	Junction
Ln	Lane
Pkwy	Parkway
Pl	Place
Plz	Plaza
Rd	Road
Sq	Square
Apt	Apartment
Rm	Room
Ste	Suite
N	North
E	East
S	South
W	West
Apt	Apartment
Rm	Room
Ste	Suite

Appendix B. Chapter Table

Chapter Name	Chapter Code	Meeting Type
PPS of San Francisco	CASFO	California: San Francisco
PPS of Truckee – North Tahoe	CATNT	California: Truckee - Tahoe
PPS of Hawai'i	HIHON	Hawai'i: Honolulu
Springfield PPS	ILSPI	Illionois: Springfield
PPS of Greater Kalamazoo	MIGKM	Michigan: Greater Kalamazoo
Columbia PPS	MOCOL	Missouri: Columbus
PPS of Greenwood & Leflore County	MSGLC	Mississippi: Greenwood-Leflore County
PPS of Jackson	MSJXN	Mississippi: Jackson
PPS of Meridian & Lauderdale County	MSMEI	Mississippi: Meridian
PPS of Starkville	MSSTK	Mississippi: Starkville
PPS of Syrcause	NYSYR	New York: Syracuse
PPS of Greater Cincinnati	OHCVG	Ohio: Greater Cincinnati
PPS of Streetsboro	OHSTR	Ohio: Streetsboro
CPPS of Portland	ORPDX	Oregon: Portland
PPS of Houston	TXHOU	Texas: Houston
PPS of Waco	TXWAC	Texas: Waco
CPPS of Seattle	WASEA	Washington: Seattle
PPS of Milwaukee	WIMKE	Wisconsin: Milwaukee
National Office	XXNAT	National

Sources

Thanks to the following for supplying background information and sample data entry guides which were used in developing this tip sheet.

Action 4 Kids
Action4Kids Style Guide (2003)

Metro GIS
Guidelines and Issues for working with Address Data (1997)

United States Postal Service
Domestic Mail Manual (2004)