

# OTM Assistant User Guide

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## User Guide

### About OTM Assistant

This is an iOS app that runs on both the iPhone and iPad devices and is available for free on the Apple App Store.

The OTM Assistant app helps a user locate potential speakers of a particular language. It was specifically designed for use in conjunction with the Online Territory Management (OTM) tool.

The premise is that search workers are always looking for new speakers of a language group (“leads”). Known leads are typically managed in a host library (or territory management system such as OTM or ALBA). The OTM Assistant app is an enabler of NEW leads in that they can be found locally through automated searches of publicly available data sites, investigated and only uploaded to the host system once verified. This will keep the host system clean in that false leads will not clutter it up (i.e. empty lots, absentee owners etc.).

This app can also be used by search workers who do not have access to a host system like the OTM. They can thus use this app as a host system on its own – like for example those in unassigned territory. These users can follow the instructions below for Using OTM Assistant, skipping the import from and export to OTM.

The OTM Assistant was designed for use in Chinese language field, but can also be used in other language fields.

It is NOT an app for recording your detailed field experiences with leads. For that type of functionality, you should use an app like MyTime or others that are designed for that purpose.

## Using OTM Assistant

### Use with a Host (OTM)

1. When initially installed, the app comes pre-loaded with “Demo” leads. These are random addresses in south west Florida selected to demonstrate the function of the app to potential users.
2. To get real-life benefit from the app, you will need to get started with a current data file of addresses for NEW leads. This data file can be created by accessing publicly available (free) data sources such as property tax records, white pages etc.
  - You can write your own program to do this or contact the author of this app for a file or more information on how to create one.
  - The program that produces new leads will typically eliminate all empty lots, use an algorithm to determine absentee owners, assign a probability rating (i.e. how likely it is that this is a speaker of the intended language), clean the data of duplicates and standardize address names (St vs Street or street or ST etc.).
  - The file must be a Comma Separated Variable (.csv) file with the column headings as shown in Appendix C.
3. Once you have the data file, Go to the Tools section of the OTM Assistant app and select the button called “Initialize”. Select this button THE FIRST TIME you set up your “live” / non-Demo system. You will be prompted for a file to use. Select the file created in step 2 above.
  - The initialize button wipes out any existing records and adds records from the input file, so it removes the Demo leads (who wants those cluttering up the system!) and sets you up with the NEW records. These new records will appear in RED in the app map browser.
  - If you ever want to go back to using Demo leads, simply go to the Tools tab and select the Demo Data button. Your system will then only contain the Demo leads.
4. At this point in time, you have a fully functional system. You can try it out and see how it works. However, because territories are usually worked every two(?) months, you will most likely want to get the latest information from the OTM (Host). Typically you will only do this when you sign out a territory from OTM. The next few steps explain how to import OTM host data into the OTMA app:
  - To load data from the host system for a specific territory, you need to access the host to get known leads for a territory into a Comma Separated Variable (.csv) file. In OTM you would:

- A. Login to OTM
  - B. Go to Territory Check Out -> Address Search
  - C. Select a Territory number
  - D. Select Search
  - E. Select Export Results – gets saved in your Downloads file.
  - F. Open with a spreadsheet program such as EXCEL (this is best done on a desktop), do a “Replace-All” command to change all commas (“,”) to the four character sequence @&&c
  - G. Save as .csv
  - H. In the Tools section of the OTM Assistant app there is a button called “OTM import”. Selecting this button, the user can import the data that was just created (the .csv file that came from the OTM host system).
    - This will be the authoritative source of information. Thus when importing, the app will use the OTM record if it detects a duplicate from the NEW data. It will not address the issue of duplicate OTM records from the host system. The host OTM addresses will appear in BLUE in the app map browser.
5. At this point you are ready to work your territory with NEW leads added. One nice feature of the app is that you can work your territory directly with the app (doing both OTM and NEW calls in one app), or just use it to investigate the NEW calls.
- Whichever you choose, you should edit information on each call as you go such that when it comes time to export for use back to the host system, you have good, up-to-date data.
6. Using the app:
- The first screen you are presented with is a List which shows you all leads based on filters you set in Filters and Settings. Each List entry is color coded based on current status, and it also shows probability (see Appendix A for details). The List also contains a search function which you can use to search by lead name or address.
  - You can work with leads directly from the List or directly in the Map.
    - Swiping left on a lead in the List provides an Edit and Delete menu, whereas tapping on a lead takes you to the location of that one lead on the map.
    - Each lead on the map is represented by a map marker. See Appendix A for details on map marker and map symbol meanings.
    - Tapping on a map marker, will provide you with more information about the lead, as well providing buttons to Edit or Map driving directions to the location of the lead.
    - To see ALL leads on a map (based on your filters), select the Map button (top right) from the List screen. This enables you to go from lead to lead based on your current location.





- Using the Filters and Settings functions effectively will improve your efficiency in searching.
  - Check out the OTM Assistant Legend in Appendix A for additional helpful information.
7. If you are working the territory with others who also have the app, you can share your data / results with them using the Tools-Export section of the app, send them the file and have them bring in the data using Tools->Update.
- Just be sure that when you Export, you export only what you want to share. Do this in the Filter section. Export will export whatever is showing in your main List of address. Examples:
    - If you want to share all your data:
      1. In Filters: set all the filters to All.
      2. In Settings: ensure all Filter settings are set to ON.
    - If you want to share the results of only one territory:
      1. In Filters: set the City filter to All, the Filter Type to All, the Territories to the **territory name-number** you want to share and the Zip Code to All.
      2. In Settings: ensure all Filter settings are set to ON.
8. When you have finished working the territory, you need to update the host system (OTM), To do that you would:
- Set your app filters for the territory you just finished:
    - In Filters: set the City filter to All, the Filter Type to All, the Territories to the **territory name-number** you want to share and the Zip Code to All.
    - In Settings: ensure all Filter settings are set to ON.
  - If you don't do the above step you will export whatever your filters are currently set to.
  - Now you can import the file you just created (NameAddressExport.csv) into the host OTM system.
    - At this time, importing to OTM is a manual function (you have to type it in or copy/paste).

## Appendix A: OTM Assistant Legend

### MAP Markers

- BLUE** Markers in BLUE are addresses obtained from OTM database
- RED** Markers in RED are NEW addresses from local searches
- CYAN** Markers in CYAN are addresses tried at least once within the period
- GRAY** Markers in GRAY are addresses that have been completed within the period

### MAP Symbols inside Map Markers

-  Validated contact
-  High Probability contact (Flag: Blue or Red)
-  Low Probability contact (Triangle with Down Arrow)
- X Confirmed NOT a contact
-  Address in gated community

### Address List / Table Legend

- **(OTM)**
  - Record source is the central Online Territory Manager.
- **(NEW)**
  - Record source is local searches.
- **(NH)**
  - Tried at least once within the timeframe specified in Settings as “Months Until Cold Call”, but no one was home.
- **(Gated)**
  - Address is within a gated community.
- **(Completed)**
  - At home OR not a speaker of the target language.
- **Address Text in RED**
  - This address HAS NOT been tried within the timeframe specified in Settings -> “Months Until Cold Call”.
- **Address Text in BLUE**
  - This address HAS been tried at least once within the timeframe specified in Settings -> “Months Until Cold Call”, but no one was home.
- **Address Text in GRAY**

- Someone of the target language was found at this address OR
- No one of the target language lives here (empty lot, other language speaker).
- **Address Text in BROWN**
  - This address exists within a GATED community.

## Appendix B: Testing in Demo Mode

To observe what the app does, the following steps can be followed:

1. The first screen to appear is a list of demo leads (potential language speakers). Selecting a lead (table row) will show the lead's location on a map. Swiping left on a lead (table row) will reveal a Delete and Edit option. To see all leads on a map, select the Map button (top right). To filter out certain leads, select the Filter button (top left).
2. Once in the map, selecting a marker, will reveal additional information about the lead. Selecting the left accessory button, will allow the user to edit the lead information. Selecting the right accessory button will enable the user to get directions to the address of the lead.
3. The Settings tab enables the user to customize their experience, by setting lead language, and what type input sources to view.
4. The Tools tab allows the user to input or export data. As a sample (assuming the user is using Demo data), select Export. User is prompted to save file in a location. User can then select the Initialize Button and specify the file to use (i.e. then one just exported). Alternatively the user could select the Update button and specify a file to use for updating the existing records.

### Technical Notes:

To gain real life benefit, the user will need to import their own data using the file format provided by the Export function in the Tools tab. Members of OTM (Online Territory Management) can also create input using exports from that system, however they should first edit that file with a spreadsheet program to change all commas "," to "@&c".

Any data that is not created by the OTM Assistant or the Online Territory Manager (OTM) must be in Comma Separated Variable (.csv) format and conform to the column headers provided by the Export tool in the Tools section or the OTM export function.

## Appendix C: Column Headings for NEW records

Each value in quotes represents a column heading:

```
"RecordID", "RecordSource", "Name", "HighProbability", "AreaCode", "Phone", "Address", "City", "Zip", "Lat", "Long", "Valid", "Language", "ConfirmedNonSpeaker", "TerritoryID", "TerritoryNameNum", "Comments", "DateAdded", "DateUpdated", "Completed"
```