

OSCAR

Customer Area and Product Guide



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1. Introduction

Firstly, thank you for becoming a customer of Oscar Research. We have been striving to provide the best service and the highest quality information for over 25 years and we're always grateful to have new members, contributors and subscribers. We also appreciate all thoughts and feedback on how we can further improve our services so don't hesitate to get in touch with any questions or ideas.

As a customer, you will have received a welcome message from your account manager with a username and password to gain access to your customer area. If you have forgotten your password, you can get a reminder via 'forgotten password' link on the customer login page - https://www.oscar-research.co.uk/login?from=/customer/

LOGIN	
Username	
oscillaria	myusername
Password	
	Forgotten your password?
	Login Cancel



Once logged in, you will see a screen like this with active products and services shown with a tick:

CUSTOM	ER AREA:	A CUSTOMER ACCOUNT	Logout
Activ	ve Pro	ducts	
	~	FREE PSN SUPPLIER SUBSCRIPTION Your free supplier subscription is valid until 13 Oct 2028 Please note all aspects on your subscription should be managed via www.publicsector.co.uk - you can be this platform using your Oscar username and password Edit Profile View Tenders Add/manage Events	og-in to
	~	LIVE CONTACT DATABASE SUBSCRIPTIONS Selection tool Make and download selections from your subscriptions. My Database Subscription 1 (Expiry: 13 Sep 2024) Full download https://www.oscar-research.co.uk/api/406e1c79e4c0b54d1f83737769dc0b21 My Database Subscription 2 (Expiry: 13 Sep 2028) Full download https://www.oscar-research.co.uk/api/406e1c79e4c0b54d1f83737769dc0b21 My Database Subscription 2 (Expiry: 13 Sep 2028) Full download https://www.oscar-research.co.uk/api/4023b5eeb446391937088f5ed01b17aca	
	~	BESPOKE DATABASE SUBSCRIPTIONS My Bespoke Database Subscription (Expiry: 13 Sep 2028) Full download https://www.oscar-research.co.uk/ap//g7d41ba98848c3e6/3c9c06a3a922adg	
	0	REPORTS AND BESPOKE FILES Reports None Files None	
•	\checkmark	ELOBBY PLATFORM Set up your eLobby campaigns and embed into your own website.	



2. PSN Supplier Subscription Guide



Since August 2023 all aspects of PSN Supplier Subscriptions should be managed via our new PSN platform - <u>www.publicsector.co.uk</u>

A new guide to the subscription can be seen here - <u>https://www.oscar-research.co.uk/documents/PSNSupplierSubscriptionGuide.pdf</u>



3. Contact Database Subscriptions

There are 4 options for accessing the data you are subscribed to. These are all included with your database subscription without cost and are designed to make it simple and efficient to consume the latest data from our live database. Improving the quality and effectiveness of the data you have available, maximising the value of our research work and helping to ensure data compliance by reflecting permission changes more quickly.

The best method will depend on whether you are maintaining a copy of your selections within your own database, or if you wish to download and use the data 'on demand'. In all instances the data is returned as a CSV file and the standard field list can be seen at - <u>https://www.oscar-research.co.uk/databases/structure</u>



1. Selection Tool - This takes you to the online Oscar selection tool, where you build a set of specific selections across your database subscription by type of organisation, job function and region and then download the live results.

2. Full Download - This returns the latest complete copy of your data in Excel from the live database.



3. Changes Since - Provides all records within your data subscription that have been changed since your last full download. Data is provided in Excel format and the changes are categorised in the last field of the download as being either:

'New' - they didn't exist in the last file 'Changed' - an aspect of the record has changed since the last download or 'Deleted' - the postholder is no longer listed at that organisation.

Please note: If you wish to download changes going back to a date of your choosing, see the section on pages 9 - 12 for using the selection tool and making a 'changes' download.

4. API Delivery

Each contact database subscription is provided with a unique URL (web service endpoint) that contains a specific token (long string of numbers and letters), which when loaded ('called') authorises access to your specific subscription and provides a simple and secure means of receiving the latest data you have under license. Each time the endpoint is called, the latest version of the data is selected from our live database and returned in CSV format.

The structure of the data delivered can be seen here - http://www.oscar-research.co.uk/databases/structure

Users can either use this method of delivery to more easily download their data selections simply by loading the URL in their browser. Or completely automate their data workflow by scripting calls on the web service via their own database systems. These calls can be set at any frequency and rules can be added to control how data is added, changed and deleted. We're happy to discuss these processes with your development team if needed.

There are two options for how you may wish to use the web service to receive your data:

1 - Receiving the latest full set of data within your subscription:

This means you will receive the latest version of all the data contained within your subscription. To do this, simply use the URL given in your customer area against each contact database subscription (as seen in the screenshot above).

It should be noted here that records which have been deleted since your last download will not be present in the feed. Therefore if you are using this resource to maintain a parallel copy in your own system, any records that you hold that are not in the live feed should be treated as a Deletion. Records that have been changed or are new can be identified by two specific fields provided 'Date Changed' 'Date Added'.



2 - Receiving only records that have changed since a certain date:

This option provides a much more efficient means of maintaining a copy of your database selections in your own system.

Once you have taken an initial complete copy of your data, you can then use the following method to just receive records that are new, have been changed in some way or have been deleted since a given date. Or to use a more technical description (nod to the 'devs' out there) using our REST API you can specify a DATE parameter via the HTTP call.

To do this you need to add a date to the endpoint, as follows:

https://www.oscar-research.co.uk/api/youruniquetoken?since=20220101

Breaking this down, you would use the unique URL and add the following to the end:

?since=YYYYMMDD (eg '20220101' as shown above for the 1st of January 2022)

It should be noted (as shown in the database structure page linked to above) this method of delivery provides the following additional fields:

ChangeDate - Date any aspect of the record was changed DeleteDate - Date the record was deleted CreateDate - Date the record was created OrgDelete - Shows a date if the organisation linked to the postholder has been deleted SiteDelete - Shows a date if the site linked to the postholder has also been deleted Change - summary of the type of change since the date specified in the call

We would thoroughly recommend getting your technical team to script the calls and updates to your copies of Oscar data and for the updates to be made either daily or weekly.

Separately, we have a guide for automating the loading and refreshing of Oscar Data within Google Sheets and Excel using the API delivery method. Please see - <u>https://www.oscar-research.co.uk/databases/OscarDatatoSpreadsheets.pdf</u>

We can also provide a range of bespoke formats, feeds and data delivery solutions to suit your individual requirements. Please contact us if you'd like to discuss in more detail.



3.1 Selection Tool Guide

Selection tool	

After clicking on the customer area, you will see the screen below. Choose the subscription you wish to make selections from and click next.

COUNT TOOL		
Subscriptions Organisation types Categories & functions Regions & areas Results	YO	OUR SELECTIONS:
SUBSCRIPTIONS	Next	
You are logged in, and can select a subscription from below.		* Remove Remove all
Oyour Data Selections 2 Choose the subscription you with to build a selection from and click 'Next'		

Now you choose the types of organisation you want within your download. Types of Org are grouped into broader areas of Government. Granular categories can be found and selected upon by clicking on the '+'.

If you want all organisation types, just click on the top option and go straight to next. Otherwise, see below.



COUNT TOOL			
Subscriptions Organisation types Categories &	functions Regions & areas Results	YOUR SELECTIONS:	
SELECT ORGANISATION TYPES		Next Subscription: Your Data Selections 1 Further Education College Higher Education College	-
 All organisation types 	Selects All Org Types		*
Schools	Broad Org Type	Remove Remove a	all
Dentists		Added org type: Higher Education College	
Parish Councils			
NHS			
= Further and Higher Education		Make selections by clicking on the categorie	20
Adult Residential College (ARCA)	Granular Org Type	and they will appear in the 'Your Selections'	rə
Agriculture & Horticulture College		Organisation Types' to cover everything, bro	bad
Arts/Design/Performing Arts College		areas of Government (Such as Further and Higher Education) or click on the + symbols	to
Community College		see a more granular list.	
FE College with HE Courses		NOTE: If you select a broad area of	
Further Education College		selected automatically. Once you've made th	; he
Higher Education College		selection of the org types you want, click Ne	xt
independent College			

Having now selected the types of organisation you want, it's time to select the post holder responsibilities for those organisations. A helpful guide to the categories and their responsibilities can be seen at - <u>https://www.oscar-research.co.uk/databases/categorycodes</u>



COUNT TOOL			
Subscriptions Organisation types Categories & functions Regions & areas Results	YOUR SELECTIONS:		
SELECT CATEGORIES & FUNCTIONS	Subscription: Your Data Selections 1 Further Education College Higher Education College Central Financial Services		
	Remove Remove all		
Administration/Planning	Added: Central Financial Services		
Building & Engineering	Overall responsibility for financial services in the organisation		
Communications			
Education			
= Financial	As with the organisation types, you can select all functions via the top option on the list. Or select		
Central Financial Services	broad categories (in this case broad areas of responsibility) or click the '+' symbols to view and		
Central Financial Services - Accounting	select a granular list (as in this example).		
Central Financial Services - Payroll	NOTE: That selections are made on an 'OR' basis - so when you download the data, you will receive		
Central Financial Services - Pensions	post holders covering every functional category selected.		
+ Food	Once happy, click Next		
+ iT/Computing	and nappy on the		

So that's types of organisation and post holder functions selected, now for geographical areas

COUNT TOOL	
Subscriptions Organisation types Categories & functions Regions & areas Results	YOUR SELECTIONS:
SELECT REGIONS AND AREAS	Higher Education College Central Financial Services East Midlands Essex v
Channel islands East Midlands	Remove Remove all
Eastern Bedfordshire Combridgeshire	
Essex	This section allows selection by all UK ('All'), by broad Political Region or by specific County.
Hertfordshire Norfolk	Sample principles as before apply here. Select All, broad or, by clicking on the '+' symbols, granular category, or combine both (as in this
Suffolk	example - East Midlands and Essex from the Eastern Region). Once content, click Next
North East	

Please contact us to discuss any aspect of our services: 0330 128 9892 | hello@oscar-research.co.uk



So, now you have made your selections it's time to run some counts and download the data. If you just want records with a direct email address you can click the 'email only' box, as below.

COUNT TOOL					Clicking the 'email only' box means the counts and downloads will only contain post holders with a direct email address.				
Subscriptions	Organisation types	Categories & function	s Regions	& areas	Results		YOUR SELECTIONS:		
RESULTS:	Run counts on your have the expected your postal, telepho	r selections to check y volumes and to help p one or email activities.	ou blan for			Email only	Higher Education College Central Financial Services East Midlands Essex		ļ.
Field coverage	Organisation types	Categories & functions	Seniority	Region				Remove	Remove all
Organisation t	уре				Contact co	unt			
Further and Hig	her Education	Purther Educati	on College		55				
Further and Hig	her Education	Higher Educatio	on College		1				
De-duplicated to	otal				55				
DOWNLOAD Request full	05: download or changes s	ince dates	(Thanges dow	inicad				
Download y selections i file. Downlo from the live	vour data nto an Excel vads are made e database.	Download ju these data s historical po 'Changes' d with an addi of change.	ust the chan selections ba int. As with ownload, the itional field t	ges made ack to any the main e data cor o show th	nes e type				



4. Bespoke Database Subscriptions

8	BESPOKE DATABASE SUBSCRIPTIONS						
0		My Bespoke Database Subscription	(Expiry: 13 Sep 2028)	Full download			

Customers with subscriptions to either bespoke or organisational database subscriptions can download live copies of their data via the button highlighted above. If activated on your account, there are also unique URL links listed against each subscription that provide access to the latest live version of your data through the Oscar webservice.

In all cases the data provided is in CSV format and the field structure and descriptions for organisational database subscriptions can be seen here. - <u>https://www.oscar-research.co.uk/databases/structure2</u>

5. Reports and Bespoke Files

	\checkmark	REPORTS AND BESPOKE FILES
N N		Reports
		Full Care Homes Report https://www.oscar-research.co.uk/report/43c47bc4083e1fd7cd3630b7fd335c6a
		Files
		None

This section provides a home for any bespoke data files that we may have prepared for you, as well as data driven reports and data visualisations (such as our CAP, Political or other Public Service area reports). These are all accessed via the descriptions and links shown which either provide a file download or take you to a secure page to view your content.



6. E-Lobby Platform



Access is provided here to the eLobby Platform. After clicking on the campaigns link shown above, the initial page (as below) shows a list of the current campaigns that are running in your account.

6.1 - Setting Up/Editing a Campaign and Downloading Campaign Data

Overview/All

ELOBBY CAMPA	IGNS				Back to customer area
Current	New				
Campaign	Start Date	End Date	# submissions	Script Link	Actions
1 Oscar Lobby Test			1 4	<script src="https://www.lobbynetwork.org.uk/1 </script 	^(*) = 2 3
Lobby Test	Mon 16 Nov 20	Thu 31 Dec 20	4	<script src="https://www.lobbynetwork.org.uk/l </script 	(+) =

As above, key elements shown with numbers:

- 1 The Name of the Campaign
- 2 Copy the script link to your clipboard
- 3 Download the submissions made for this Campaign

4 - The script link/plugin that can be added to your own website (for how to add to your webpage, see 7.2 - Adding eLobby Plugin to your Website')



Current and New Campaigns

The following pages are the same for when you are creating a New or editing a Current Campaign, so the same instructions apply to both.

'Details Tab'

ELOBBY CAMPAIGNS	Back to customer area
Current All New	
Campaign Title	
Oscar Lobby Test	
Details Description Recipient letter Thank you letter	
Subtitle	
Oscar Lobby Test Subtitle	
Upload new image	
Choose file No file chosen	
Start Date	
End Date	
Has newsletter	
• Yes O No	
Successful submission redirect URL	
Optional URL for redirect after successful submission	
Privacy Policy URL	
https://www.oscar-research.co.uk	
Delete	Save

Under which you need to add the following:

Campaign Title - the overall name for the campaign - will be shown as bold text over the image you upload

Subtitle - secondary text that will appear over the uploaded image

Upload Image - JPG or GIF format



State/End Date - These are optional, but start and end dates for the campaign can be added. Otherwise the campaign will be available immediately and run until it is manually cancelled.

Has newsletter - this is to allow those submitting letters to their representatives the choice to opt-in to your newsletters

Successful submission redirect URL - (Optional) the webpage address that people can be taken to once submitting a letter (can be a thank you page, your home page, or any other page you feel would be suitable). If no value is entered the user will just remain on the e-Lobby page.

Privacy Policy - This is mandatory - the link should take users to your own Privacy Policy



'Description Tab'

ELOBBY CAMPAIGNS	Back to customer area
Current All New	
Campaign Title	
Oscar Lobby Test	
Details Description Recipient letter Thank you letter	
Description	
B I I _x ;= := ≞ = :≡ ⊕ ⊕ ⊕ Format -	
Lorem IpSum GOIOT SIT amet, ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea cor aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidat cupa qui officia deserunt moliit anim id est laborum. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad u nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit ess nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.	nmodo consequat. Duis at non proident, sunt in minim veniam, quis æ cillum dolore eu fugiat
Delete	Save

Under which you need to add the following:

Description - this is a HTML editable section that allows you to describe the campaign and why people should engage with it. The content will be displayed below the initial image and titles and above the postcode search box.



Recipient Letter Tab



Recipients

The recipients tick boxes are a crucial part of the campaign set up and caution should be used here. Until you are happy that a campaign is ready to go and share with both the public and the elected representatives, please ensure the 'TEST' postholder is ticked. This will prevent any message being submitted to postholders.

Please contact us to discuss any aspect of our services: 0330 128 9892 | hello@oscar-research.co.uk



If you are unsure about which postholder should be in receipt of the campaign letters, please contact your account manager.

The categories for post holders are as follows:

- 1 Member of UK Parliament (MP) (National MP)
- 2 Member of Welsh Government/Senedd Member (SM) (National SM)
- 3 Regional Members of Welsh Government/Senedd Member (SM) (National RSM)
- 4 Member of Scottish Government (MSP) (National MSP)
- 5 Regional Members of Scottish Government (MSP) (National RMSP)
- 6 Members of the Legislative Assembly/NI Government (MLA)
- 7 Council Leader (Local Council Leader)
- 8 County Council Leader (Local County Council Leader)
- 9 District Councillor (Local Ward Councillor)
- 10 County Councillor (Local County Councillor)

Letter to Recipients

This is the letter that will be sent by your supporters/members to the selected postholders. The Name of the Postholder and Sender can be added to the letter via the mail merge fields at the bottom of the page (click on them when your cursor is where you would like the name to be added). As per the terms of usage, please ensure the letters are concise, accurate and respectful.

The letter will be shown in the results section of the plugin below the name(s) of the postholder(s).



Thank you Letter Tab

ELOBBY CAMPAIGNS	Back to customer area
Current All New	
Ocrar John Test	
Details Description Recipient letter Thank you letter	
Description B I I _x := := E ⊆ Ξ ≡ ∞ ∞ ∞ E ≡ Format -	
Thank you {{SenderName}}	
nostrud exercitation ullamco laboris nisi ut aliquip ex e commodo consequal. Duis aute irure dolor in reprehenderit in voluptate velit e nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.	sse cillum dolore eu fugiat
Mailmerge Sender name	
Delete	Save

Description - this is a HTML editable section that allows you to write a thank you email to your supporter/member that has completed a submission. The email will automatically be sent when the campaign form is submitted.

The Name of the Sender can be added to the letter via the mail merge field at the bottom of the page by clicking on them when your cursor is where you would like the name to be added.



7.2 - Adding eLobby Plugin to your Website

To add the plugin to your website you will need to be able to access/edit the HTML code for the web page where you would like it added.

The plugin can be added wherever you wish within the page, but must be within the <body> tags.

Add the following tag wherever you wish the plugin to display:

<div id="lobby"></div>

And then beneath that add the specific <Script> tab from your campaign overview page (see section 7.1), eg as below:

```
<script
src="https://www.lobbynetwork.org.uk/THISISANEXAMPLE/lobby1.js"></script>
```

So, your code will look something like this:

```
<body>
</div id="lobby"></div>
</script src="https://www.lobbynetwork.org.uk/thisisanexample/lobbyl.js"></script>
```

</body>

It should be noted here that the plugin requires JQUERY to be available. Most sites will already have this available. More information can be found here - <u>https://en.wikipedia.org/wiki/JQuery</u>

If the plugin does not work and/or you know you don't have jQUERY available, then you can add the following script tag to your page. It should be added above the campaign specific script tag.

<script src="<u>https://code.jquery.com/jquery-3.5.1.min.js</u>" integrity="sha256-9/aliU8dGd2tb6OSsuzixeV4y/faTqgFtohetphbbj0=" crossorigin="anonymous"></script>

The plugin has its own styling, but will also inherit styling from the host page in order to give those setting up/running campaigns freedom to change some of the look and feel. You should liaise with your technical team if you are having any issues with styling/CSS.



Once added to the page, the plugin will look something like this:

1 - Initial state with the image, title and subtitle, description and postcode search box:



The letters, recipients and thank you emails are all handled by the system and configured by the client.

Try the postcode search below





2 - Once a postcode has been submitted, the following section will be displayed

YOUR REPRESENTATIVES:		
MP House of Commons		
Councillor Leader of the Council Torbay Council		
Recipient Name Recipient Job Title Recipient Organisation		
YOUR DETAILS:		
Title Form below to be completed by the supporter		
Please Specify V		
First Name*	Last Name*	
Email*	Telephone	
Address Line 1*	Address Line 2	
City / Town*	Postcode*	
	TQ1 1JZ	
YOUR LETTER:		
Dear Letter to postholders is shown here		
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.		
Many thanks		
□ I would like to sign up to the e-newsletter to keep updated on the progress of the campaign		
I have read and accept the privacy policy		
Send Letter Send button completes process and send campaign and thank you letters		



8. More from Oscar

In addition to the services available via the customer area, we also offer bespoke data research, data processing and analysis, reports, visualisations and market research. An overview of these services can be seen here - https://www.oscar-research.co.uk/intelligence.php

For those wishing to digitally promote their organisations and services, please see our media pack for a range of content syndication and advertising options on our PSN Media Pack. Our media pack located on: <u>http://www.publicsector.co.uk</u>

We also have a range of of packages for Public Sector Suppliers based around our Public Sector Network Platform - more information can be found here - <u>https://www.oscar-research.co.uk/psn/</u>



Supplier Packages