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

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MAIN MENU NAVIGATION (ALL USERS)

Use this VoteBuilder page to navigate to data gathering, data entry, and other pages. **Your content may vary.**



Administration (left)

-  Committee Membership, Help, Troubleshooting, and Account Management
-  Create reports, activist codes, questions, and scripts

Get Data Out (center)

- **Create a New List** to make a new list of voters
- **Go to My List** to work with, save, or print a list of voters
- **View My Folders** to select saved lists, searches, and turfs

Load Data In (right)


- Use **Grid View** to enter data for many voters at a time
- Use **Neighbor to Neighbor** to identify your relationships to family or friends.

QUICK WALK LIST RECIPE (ALL USERS)

Use this recipe to cook up a quick walk or phone list. This is a very common activity.

1. Open the VoteBuilder web site (www.votebuilder.com) in your web browser.
2. Log in using your **User Name** and **Password**.
3. Click on **Create a New List**. Your choices will determine which people will appear on your list. There are lots of choices and combinations. Examples:
 - **Location**: Choose your county, wait a second for **Precinct** to load, and then choose your precinct.
 - **Voting History**: Choose **Any** from the drop down, and then click on **an election** and select **Voted**.
 - **Likely Party**: Choose both **Unknown** and **No Data** to identify voters.
 - **Early Voting**: Choose to **Exclude** voters who have already voted when creating a list to get out the vote (GOTV).
4. Click on **Search** (near the top of the page on the right hand side). Wait a few moments and your list will come up.
5. Click on **Reports**.
6. Under **Report Format**, choose **WA-DEMS Walking List With No Bar Codes**, or another report format.
7. Under **Script**, choose **WA-DEMS Official Voter ID Script**, or another script. You can leave this blank to get a plain list without a script.
8. Under **Source**, choose **Walking** for walk lists, or **Calling** for phone lists. This sets the **Sort Order**. You may change these if you like.
9. Under **Report Title**, change “**My List**” to something more descriptive so you can identify what this list represents. As a suggestion, add your name, what you chose for voting history and likely party, etc.
10. Skip **Clear Sort Order**, unless you want to change the order.
11. If not needed (necessary when you have multiple volunteers) clear the **Page Breaks** checkboxes to save paper.

12. Click on **Next** to go to the next page.
13. Click on **Finish** and your report will come up. The first page will be an explanation of the canvass (the Legend), and the list will follow.
14. Go to the **Printer** icon or to **File** in your web browser's menu, and click on **Print**.

After you are done canvassing, on the Main Page use **Grid View**  **Grid View** Load a list to edit in Grid View to enter the data you gathered back into VoteBuilder. VoteBuilder remembers for 30 days every list that it prints, by using the list number that prints at the bottom of each page.

CREATE A NEW LIST (ALL USERS)

Use this VoteBuilder page to specify search criteria for selecting groups of voters.

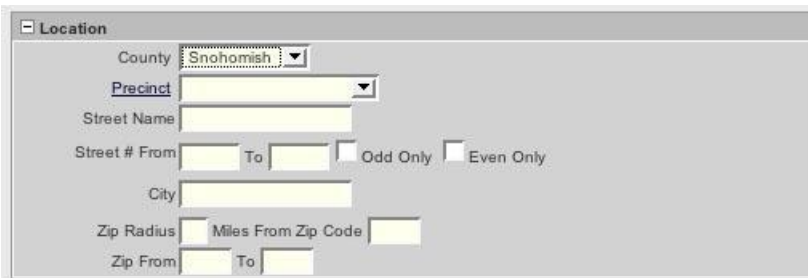
There are lots of ways to select groups of voters. What you search for depends on what you want to do. Click on any Blue Underlined word to make a multiple selection.

To create a list of voters for a precinct, open the **Location** form by clicking on the plus (+) sign next to the word **Location**.



The screenshot shows the 'Location' form with the following fields: County (dropdown menu), Street Name (text input), Street # From (text input), To (text input), Odd Only (checkbox), Even Only (checkbox), City (text input), Zip Radius (text input), Miles From Zip Code (text input), and Zip From (text input) To (text input). The 'County' dropdown menu is highlighted with a blue border.

Next, select the County to populate the list of precincts to choose from and the Precinct drop-down will appear.



The screenshot shows the 'Location' form with the following fields: County (dropdown menu), Precinct (dropdown menu), Street Name (text input), Street # From (text input), To (text input), Odd Only (checkbox), Even Only (checkbox), City (text input), Zip Radius (text input), Miles From Zip Code (text input), and Zip From (text input) To (text input). The 'Precinct' dropdown menu is highlighted with a blue border.

Choose a specific Precinct to search for using the drop-down list. To select multiple precincts at once, click on the blue underlined **Precinct** word instead of the drop-down.

The screenshot shows a 'Location' search form with the following fields and options:

- County: Snohomish (dropdown)
- Precinct: Mill Creek 02 (dropdown)
- Street Name: (text input)
- Street # From: (text input) To: (text input) Odd Only: Even Only:
- City: (text input)
- Zip Radius: (text input) Miles From Zip Code: (text input)
- Zip From: (text input) To: (text input)

Finally, click on the **Search** button (top of the page) to create the list of voters.

MY LIST (ALL USERS)

Use this VoteBuilder page to work with the current list of voters.

Using your current list of voters, you can print **Reports** (such as walk or phone lists), print form **Letters** or address **Labels**, **Export** data to Excel or to Palm devices, produce statistical **Counts** or random **Samples** of voters, use **Cut Turf** to subdivide the list geographically, and **More**.

Now that you have a list of voters, you can **Add** more voters to the list, **Remove** voters from the list, or **Narrow** the current list of voters, using search criteria just like you used when you created a new list.

For example, you might choose to Narrow your current list to include only those voters with a Likely Party of **“Unknown** or **“No Data”**, so that you can work to identify their likely party.

To **Get Out The Vote** during election season, you might choose to **Narrow** your current list to include only those voters with a **Likely Party** of Strong Democrat, Democrat, or Independent-Democrat. *Remember to Exclude Anyone Who Has Early Voted during elections.*

When you get a list you like, be sure to **Save** the list or the **Search Criteria** to return to it later. **Lists** are groups of voters that do not change over time. **Searches** are groups of voters that can change based on new information. For example, if someone new moves into your precinct, they will not show up on a previous list, but they would show up in a search.

After you have saved your list, you may want to cut it into Turfs before you print walking lists

PRINT REPORT (ALL USERS)

Use this VoteBuilder page to print walk lists or calling lists.

The **Report Format** controls how the report will be formatted on the paper. If you want a custom report format, click **Report Formats** from VoteBuilder’s main menu page. You can also share these custom reports with others in your committees.

You may choose a **Script** for volunteers to follow as they doorbell or call. If you want a custom script, click **Codes Questions Scripts** from VoteBuilder’s main menu page. You can also share these custom codes, questions, and scripts with others in your committees.

Selecting **Source** loads a default sort order optimized for either calling or walking. Usually this is good enough, but some people like to uncheck the “Page Break” boxes to save paper. List numbers are printed on the bottom of each page to make data entry easier later. Click **Next** when you are ready to print the list.

The next page tells you how to set the print settings in your web browser to make the list print properly. Use your web browser to print the report.

Usually the report gives you some room to write response notes as you are canvassing.

GRID VIEW (ALL USERS, ESPECIALLY DATA ENTRY VOLUNTEERS)

Use this VoteBuilder page to enter data efficiently using a keyboard and mouse.

Grid View lets you fill in canvassing answers for many voters at once.

If you are entering a data from a printed walking or calling list, enter the **List Number** here so that VoteBuilder can recall the list you used. You can find the **List Number** printed at the bottom of each report page.

On the next page, enter the name of the **Script** and **Canvasser**, the **Date Canvassed**, and whether the **Source** is from walking or calling.

Click **Next** to see the **Grid View**.

Important: be sure to click **Save** when you are done filling in the responses. VoteBuilder

DATA ENTRY METHODS (ALL USERS)

Use this page to decide what method VoteBuilder data entry works best for you.

Script View *(beginner)*

Script View lets you fill in canvassing answers for one voter at a time, within the context of a script. Good for training on a new script, but Grid View is more efficient.

Grid View *(all users, data entry volunteers)*

Grid View is an easy and efficient way to enter script responses for many voters at once. No special skills or equipment is needed.

Scan Bar Codes *(data entry volunteers)*

Bar Code scanning is the most commonly used and accurate way to enter data into VoteBuilder. Some volunteers actually tend to enjoy this task. To set up a central office, use Scan Bar Codes to print a Bar Code Report, and keep them in a notebook.

To enter data, first scan the bar code on the walking list that identifies the voter, and then scan bar codes from the response page to identify their response.

Virtual Phone Banking *(home volunteers; phone and internet required)*

Click on a telephone to participate in a Virtual Phone Bank from your own home. This is VoteBuilder's easiest feature to use! Call the person, read the script, enter their responses, done. Multiple users can use the same Virtual Phone Bank at the same time without duplicating effort. Virtual Phone Banking is great for GOTV efforts.

Neighbor to Neighbor (*all users*)

Use the **Neighbor to Neighbor** function to identify your relationships to family and friends. Studies consistently show that the most persuasive factor for voters is a trusted opinion. This is a new feature with great potential.

Palms (*advanced*)

VoteBuilder supports palm devices that run the Palm OS and have at least 8 Megabytes of memory. If you already have a suitable Palm device, go ahead and try it. Contact your administrator if you are planning to buy a new Palm device to use with VoteBuilder.

Run Bulk Uploads (*experts*)



Bulk Uploads are the import companion to the **Export** feature. Bulk uploads can be used to upload large amounts of data, such as rosters. All bulk uploads require either the **VoteBuilderID** or the **State Voter ID** in Column A of your spreadsheet.

HOW TO ASK FOR HELP (ALL USERS)


Use this VoteBuilder page to ask your administrator for help or to report problems.

The Yellow Star

When you see the Yellow Star in the upper right corner of a VoteBuilder page, you can click on it to see **What's New** on this page.

Wiki () or **Life Preserver** ()

When you see **Wiki** or the **Life Preserver** in the upper right corner of the VoteBuilder page, you can click on it to see a Wiki for Votebuilder. A Wiki is similar to an encyclopedia or Help File.

The Gear ()

When you see the **Gear** in the upper right corner of the VoteBuilder page, you can click on it to **customize** the page that you are on.

Contact the Admin

This sends a message to your VoteBuilder administrator.

Contact the Admin...

- If you need some help that you can't resolve yourself.

- ☑If you want the admin to enable a VoteBuilder feature for you.
- ☑If you spot a bug or problem in VoteBuilder.

The Administrator's responses will be posted on the Main Menu.

Getting Help with Printing Reports

If your reports won't print correctly, check that **all** of the printer settings in your web browser are set according to the Print Report page. Remember that page (the one titled Important) that you ignored when you printed your report? Read that.

After all this, some web browsers still might not work correctly. You might have to play around with the browser's print settings to get it to work, or possibly use a different web browser. When you find something that works, keep it!

CUT TURF (INTERMEDIATE USERS AND TEAMS)

Use this VoteBuilder page to subdivide your list along geographic boundaries.

Turf cutting is useful if you want to deploy a doorbelling team to different areas at the same time, or to cover large areas over several days.

Repeat the following steps to cut a list of voters into turfs:

- 1) **Draw** a closed polygon (three or more sides) around some unassigned voters,
- 2) Select a **turf name**, Turf 1, Turf 2, etc.
- 3) Click **Save**.

When you are done, click **Finish**.

Repeat the following steps to print a separate report for each Turf.

- 1) Use the **View My Folders** page to load the Turf.
- 2) Use the **Print Reports** page to print it.

VIEW MY FOLDERS (FOR TEAMS)

Use this VoteBuilder page to retrieve previously saved lists, searches, and turfs, and to share searches, lists, and turfs with others.

You can **Add** a New Folder, or **Select** an existing folder from the list of folders.

Folders can hold Searches, Lists, and Map Turfs, and can be shared. **Select a list to use**.

Searches, Lists, and Turfs can be in more than one folder. *Click **Load List** to use it*

USERS, COMMITTEES, SHARING, AND SECURITY (FOR TEAMS)

Use this page to understand how VoteBuilder organizes and secures user accounts.

VoteBuilder user accounts are organized into committees. Committees organize how information is shared between users.

Any user account can belong to several committees. Committees can hold many user accounts.

When you create a new Report Format, Activist Code, Survey Question, Script, List, Search, Turf, or Folder, you can choose to share your creation with everyone else on your committee, but nobody outside your committees can access them.

All user accounts have passwords. All VoteBuilder passwords are required to be changed every 30 days to maintain security.

VoteBuilder administrators can control each user's access to individual features. If there is some feature that you want to have enabled, ask your Administrator (contact your Legislative District Chair).

CUSTOMIZED CODES, QUESTIONS, AND SCRIPTS (FOR CHAIRS, ONLY)

Use these VoteBuilder pages to create Activist Codes and Survey Questions.

Activist codes express binary values such as yes/no, true/false. Survey questions have multiple-choice responses. Scripts consist of a sequence of Activist Codes and Survey Questions glued together with a little bit of extra text.

It is best to create all the Activist Codes and Survey Questions your script will need before you write a Script. Use existing codes, questions, and scripts whenever possible. Keep your scripts as general as possible so they stay useful when shared.

To create a new **Activist Code**, **Survey Question**, or **Script**, click on **Codes Questions Scripts** on the left side of the **Main Menu**.

New Activist Codes

If you see a code that will work, use it. Otherwise, click **Add New Activist Code**.

Fill in the **Activist Code Type**, **Long Name**, **Medium Name**, **Short Name**, **Description**, and **Script Question**. If you want to share this Activist Code with others on your committee, select **Public**. If this activist code generally implies that this person is politically active for the Democrats, click **Is Also Activist**. Activist codes start out as **Active**, but eventually become **Archived** or **Inactive**.

The **Script Question** will show up in all Scripts using this Activist Code.

New Survey Questions

If you see a question that will work, use it. Otherwise, click **Add New Survey Question**.

Fill in the election **Cycle** year, the question **Type**, the **Long Name**, **Medium Name**, **Short Name**, and **Question**. Survey questions start out as **Active**, but eventually become **Archived** or **Inactive**. Survey questions are **Viewable By** your committees by default, but may become widely shared if they are well written.

The **Question** will show up in all Scripts using this Survey Question.

New Scripts

If you see a script that will work, use it. Otherwise, click **Add New Script**.

Fill in the new script's **Name** and **Description**.

Click **Next** to edit the script.

EDIT SCRIPT (FOR CHAIRS ONLY)

Use this VoteBuilder page to write a calling or walking script.

Use the **Add Script Element** pane to type the new **Text**, or select an existing **Survey Question** or **Activist Code**. Click **Add** to append the element to the script.

Use the **Preview** pane to **Edit**, **Delete** or rearrange script elements.

Use the **Committee Access** pane to indicate what committees can see the Script.

Use the **Walk Results** and **Call Results** panes to indicate which canvass results to track.

Use the **Actions** pane to **Save** the script when you are done.

APPENDIX A

Does Votebuilder require Firefox?

Votebuilder does not require a particular browser.

That said, Votebuilder does depend heavily on JavaScript, and hence on having a recent browser with a decent JavaScript implementation (and if you're trying to cut turf without this, it is not going to work no matter what, since Google maps exercises the JavaScript implementation far more than Votebuilder does). IE 6 or 7 or Firefox 2 (or 3, now that it's out) should all be just fine.

IE7 may have issues if you have the security settings set to "High".

Having Tools->Internet Options->Security -> Internet Zone being set to "High" security rather than "Medium High" security will hurt you because the former turns off JavaScript.

If you absolutely depend on having "High" be the default level so that you do not have JavaScript on at all to protect you from any weird sites you visit, then you'll need to put Votebuilder under "Trusted Sites".

The following method is best for entering a Trusted Site works (for Internet Explorer 6 or 7):

Select the Tools icon or on the menu select Tools->Internet Options->Security

- Click on "Trusted Sites", then
- Click on the "Sites" button; this lets you edit the list of sites that you trust, then
- Uncheck the box labeled "Require server verification (https:) for all sites in this zone", then
- Add two entries to the list:
<https://secure.securevan.com>
<http://www.votebuilder.com>

Entering ...[securevan.com](https://secure.securevan.com) matters because that's where your passwords go to be verified and unchecking the box matters, because having the box checked requires all sites to be https (which you need for good security because with "http:" you don't necessarily know who you're visiting, leaving the door is open for phishing and man-in-the-middle sorts of attacks.