

WASHINGTON STATE DEMOCRATS



USERS MANUAL

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Version.1.001



WASHINGTON STATE DEMOCRATS VOTE-BUILDER MANUAL

by
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Version 1.001

Introduction

Welcome to the Washington State Democratic Party's manual for **Vote Builder**. This voter database is made available through the Democratic National Committee (DNC) and is the first nation-wide effort by the Democratic party to build an integrated file of U.S. voters. The opposition has had this capability since the mid '80's.

The Washington State Democrats have had a variety of previous voter files, beginning with proprietary computers and paper-or-disk exports by the people who eventually evolved into the Olympia-based *Labels and Lists*, through **Prevail** (a commercial CD based program issued to campaigns and Democratic groups throughout the state), to **Trimeros??**, a commercial web-based program, and, finally, several versions of **VMATE**, a web-based program developed in-house that evolved, like *Labels and Lists*, into a commercial effort liaisoned with WSDCC.

There were also a number of stand-alone voter files developed by or for individual Washington campaigns, counties, and Legislative Districts (LDs). These diverse efforts had several common weaknesses--perhaps the worst was that data were not easily passed to other efforts working within the same political areas. As a result data updates by the diverse party and campaign efforts frequently did not keep up with the needs of the campaigns and party, and all too often, data was lost during or between campaign cycles.

Vote Builder provides the tools that can eliminate the deficiencies of the earlier efforts. Perhaps most integral to **Vote Builder's** potential is that, through pre-determined authority, data entry is real-time from the field. Precinct Committee Officers (PCO's), Campaigns, and party units can change voter preference, telephone numbers, addresses, and many other essential data, on the fly, either individually or by bulk data uploads, including from Personal Digital Assistants (PDA's). As such, data provided by all campaigns in a local area, or state-wide, will be readily available for use for national as well as local campaigns. The actual database resides on three computers in New England and is backed up nightly to tapes kept offsite and in fireproof vaults.

Vote Builder does have Campaign Management routines to build your own database for a campaign. It is fairly independent of the voter file, but nevertheless, provides the means for a giant step forward in voter-contact strategy for Washington State Democrats.

Requirements

In order to use the **Vote Builder**, you need a computer with an internet connection (preferably high-speed DSL or Cable). No other software is required. Apple Safari has its problems. With Apple, use Firefox for a browser. Mozilla Firefox is the fastest browser. Internet Explorer works without problems. Report compatibility problems and observations to wes@wa-democrats.org

The only other requirement is that each user must obtain a username and an initial password appropriate to their needs and function in the party.

Username and initial passwords are assigned by Wes Beal and his designates. In general, all Committee Chairs are able to provide access for their PCO's and committee members.

Your username will typically be your first name and last name in lower case with no spaces. Your initial password will be some combination of letters and numbers. You will be required to create your own password at your first login. Make it easy to remember, but complex enough that hackers cannot guess it. Write it down. Note that you will be required to revise your password every thirty days with a previously unused password.

Logging In

In order to access the voter file, either click the following hotlink or type <http://votebuilder.com/login.aspx> in the address bar of your browser. Typing simply "votebuilder.com" into your browser will automatically morph into the complete "votebuilder.com/login.aspx" url.

You will see the following screen:



In order to use this site, you must be registered. Please log in by entering the user name and password you have been provided.

USER NAME

PASSWORD Login

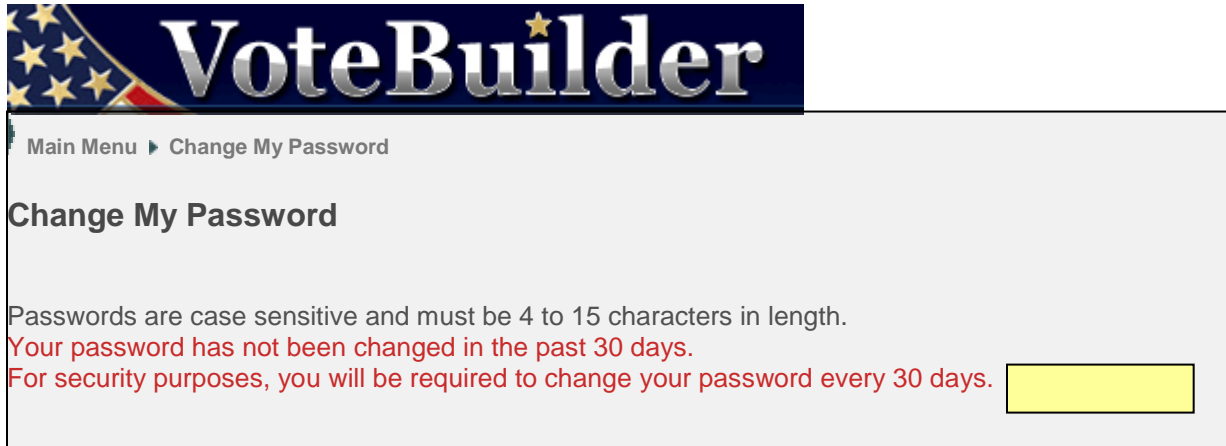
SECURED BY
SBS
Secure Plus
AUTHENTIC

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Enter your USER NAME and PASSWORD.

When you first login you will be asked to change your password to one of your own choosing. Passwords last for one month.

When your password expires, you will be prompted, by the following page, to create and confirm a new password which you previously have never employed.



Main Menu ► Change My Password

Change My Password

Passwords are case sensitive and must be 4 to 15 characters in length.
Your password has not been changed in the past 30 days.
For security purposes, you will be required to change your password every 30 days.

Forgotten your password? Trying to enter an invalid password will produce the following screen:



Access Denied

In order to use this site, you must be registered. Please log in by entering the user name and password you have been provided.

Forgot your password? Click [here](#).

USER NAME

PASSWORD

SECURED BY
SBS
Secure Plus
AUTHENTIC

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Select "Forgot your Password?" and have the system e-mail you to create a new password:

Once you are logged in, you will see this page:



If you have access to multiple committees, select the area you wish to access. In either case, hit **[Continue]** to go on to the Main Menu.

MAIN MENU

A successful log-in opens the **Main Menu** screen (See Below). You can Log out at any time by clicking the **[LOGOUT]** button in the upper right corner of the screen. The **Main Menu** is where you choose the actions that you wish to do. You can execute one action, say, find a person with **Quick Look Up**, and return to the **Main Menu** screen by clicking on the words **Main Menu** in the upper left hand corner of the webpage. This menu bar will also show you at all times where you are in **VoteBuilder**.



The left column is **Administrative**.

The center column is **Lookup** of names with selectable constraints

The right column is **Upload Data** functions

ADMINISTRATION OVERVIEW

All users are responsible for keeping their user profile up-to-date. Maintain current data for your address, email, telephone numbers, etc.

Chairs will be responsible for creating new users for their campaign as needed, and creating any new ID questions (survey questions), any new activist codes, or scripts you will need.

LOOKUP OVERVIEW

Quick Lookup - Use to access an individual record to look up information and/or make modifications to an individual record.

Creating New Lists - Use this section to produce a list of individuals who meet some criteria. Use to produce walk and call lists. Lists can be saved for future reference. The system saves your most recently created list for easy access. You can even access your most recent list again if you logout or become disconnected from the system.

UPLOAD OVERVIEW

Loading Data – This is used to upload canvassers' findings to the main database. There are essentially five ways data can be used to update the database.

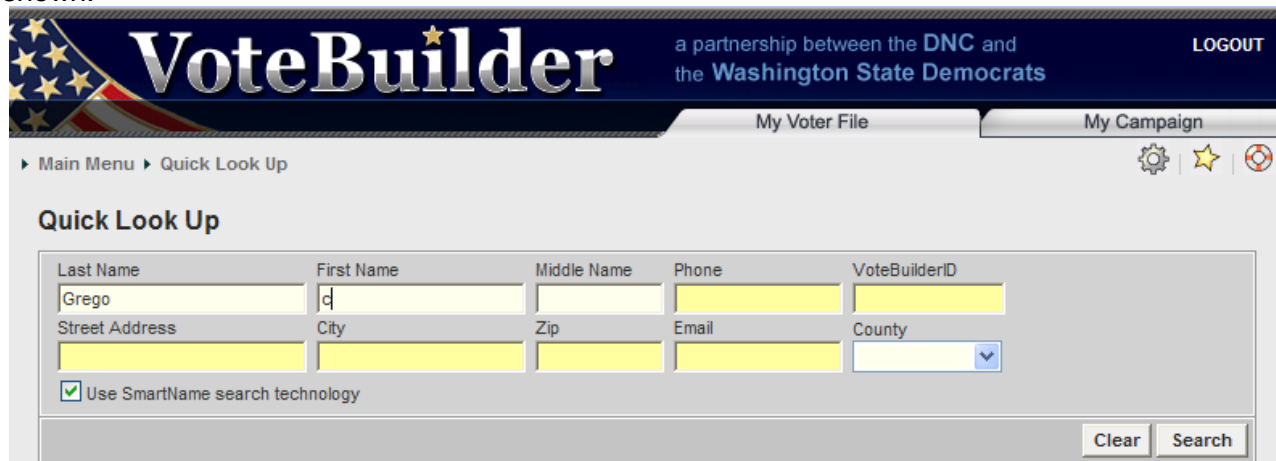
1. A barcode scanner can be used scan the codes on walk/call lists bringing up an individual record and then scanning codes corresponding to what happened when you contacted the voter.
- 2 & 3. Script View and Grid Format use a recreation of your walking list in the exact order you printed it to allow you to manually enter the data either one by one or in a group.
4. One can create a 'Bulk' Excel Spreadsheet in which you type the voter's VANID (system ID number) and responses in separate columns. The computers will then match up the VANID to the appropriate voter and ask you how you want to 'map' each column back to the file.
5. You can go door-to-door using a Palm Pilot (not provided by the Washington Democratic Party) and hot-synch such data back with the server at the end of the day.

LOOKUP DETAILS

QUICK LOOK UP

From the Main Menu, click on the link for **[Quick Look Up]** and look up a record for an individual voter

You do not need to spell the name correctly, though it helps. The system has smart technology and looks for names that sound similar, or in the case of first names, diminutives or more common first names. For example, if you look for Christine Gregoire, Chris Gregoire, or c grego, it will bring up Governor Gregoire's record plus every one else who may match these criteria. A screen example is shown:



The screenshot shows the VoteBuilder web interface. At the top, there is a navigation bar with the VoteBuilder logo, a tagline "a partnership between the DNC and the Washington State Democrats", and a LOGOUT link. Below the navigation bar are tabs for "My Voter File" and "My Campaign". The main content area is titled "Quick Look Up" and contains a search form with the following fields:

Last Name	First Name	Middle Name	Phone	VoteBuilderID
Grego	d			

Below the first row are fields for Street Address, City, Zip, Email, and County. A checkbox labeled "Use SmartName search technology" is checked. At the bottom right of the form are "Clear" and "Search" buttons.

You can simplify your search by limiting the search to a particular zip code, city, county, even phone number or ID number.

You cannot add a new voter to the system. Those data are entered 3-4 times a year by the system administrator from the State's official voter files.

Click **[Search]** and receive a list matching your search criteria. Pick out the correct person from the search list and click on their underlined name. The data reported shows you what is known about any individual voter and allows you to make some modifications.

Addresses: You can not put in a new address for a voter if the address on the file is wrong. This is to maintain standardization of addresses and street names. In fact, a misplaced period in the street number field could cause the entire system to crash as it did in Missouri in 2004. You can mark an address as bad **[Mark Addr Bad]**

You can also bring up a map of where this individual lives **[Get Map]**.

Any time you mark an address as bad on the file, it is marked bad for every single user. If you make a mistake, it is correctable by you within 24 hours. If that time is exceeded, contact Wes Beal (Wes Beal [wesleyb@mindbuzz.net]) or let your WSDCC Regional Expert know about the problem so that it can be corrected.

Salutation: These are the names that appear on mailings to the voter. Included are the first name and the last or mail name. Suppose Christine was an M.D., we could update the record to say Dr. Christine Gregoire. *Changes to this field are private.* That means that any changes you make are only shared with the campaign, club, or central committee whose account you are accessing at the time. This allows your campaign to personalize how you contact people by calling people by the names they commonly call themselves, and hopefully will get people more receptive to reading your mail. The default is merely the first name and the full legal last name for both salutations.

Email: You may enter email addresses into the system. Currently, changes to this field are in the public domain. That is, all users will see the new email addresses or changes you make.

Activist Codes: This is where you can add voters to specific lists such as Volunteers, Donor prospects, High School Classmates. In addition, you can create additional private activist codes that are accessible to your campaign only. The state party will provide you with certain lists we've either purchased or accumulated. These lists will be public. That means all committees will see the list and any changes you or any other user makes will be made available to all users. Such lists include previous donors to Republican and Democratic campaigns (Republican Donor, Democratic Donor), lists of Democratic activists, in some counties lists of 2002 and 2004 volunteers, etc. We are looking at ways to also get lists of certain licensed professionals (especially useful for fundraising and volunteers). Other codes are already available to you and will be private: volunteers, poll workers, drivers, etc. You can mark someone as a volunteer for a particular day and job.

Survey Questions: Survey Questions are like Activist Codes in that we are trying to get information about a voter, but in this case a voter has the choice of more than one answer to the question asked of them in your survey. Typically, survey questions are Issue or Candidate IDs. For example, "Do you consider yourself a Republican, a Democrat, an Independent, or what?" You will have an opportunity to see some of those ID questions and ask them yourselves. Any changes to these common ID questions are public and available to all users.

Other survey questions are private. Questions that you create yourself will not be shared with other users. Your IDs for your campaign are never shared without your permission. Even if you are running on a slate, you must give explicit written permission to share IDs with slate members.

You can select a survey question from this menu and directly input the response if you choose. If you err, you have 24 hours in which you can manually delete the response. After that get in touch with a Regional Expert or Wes Beal.

Contact History: Every time you contact, or attempt to contact, a voter can be recorded.

Voting History: From the Board of Elections, voter participation is known and recorded. The system displays the voting history from 2000 to the present. This record may be incomplete if the voter moved from another state to Washington.

We use this data at an aggregate level to search for pockets of persuadable voters, voters who need to be GOTV'd (Get Out The Vote), or areas that are more or less likely to vote for us.

Notes: You can put in additional information about a voter. This is private. Only your campaign can see these notes.

Vital Stats: This includes party leaning, gender, date of birth, date of registration, and race. As we develop a modern voter file for all 50 states at the Democratic National Committee, we'll be able to know when you first registered to vote anywhere in America. Right now, that date may be off if you moved into Washington from another state or if the county where you first registered did not keep or send such records to your new county.

You can mark if a voter has passed away. Do not obsess with doing that though. We match our entire file against the Social Security Master Death Index (a government list of all people who have died and final Social Security benefits have been paid) four times a year.

Likely Party – This shows accumulated points based on weighted input from voting, surveys, doorbelling

Districting Information – This is Inferred from where you live. **County/Precinct:** This information comes from the county’s voter file and can not be modified by the user. This information is downloaded approximately four times a year, or sooner if your county changes precinct lines.

Also in Household – This includes the names of any additional voters in the same home or apartment who are registered to vote.

CREATE A LIST

Probably 90% of what you will be using this file for is to create lists of people to contact at the door, on the phones, or via the mail.

From the Main Menu, click on **[Create a New List]** to activate the following page on which you will see a whole host of different attributes you can include when you produce a list of voters

Create A New List

You currently have 18 voters in your list.
Running this search will clear your current list and start a new one.

Location

Age · Registration Date

Party Points

Survey Questions

Activist Codes

My Saved Lists

Notes

Ethnicity

Early Voting

Voting History

Canvass Status

Precinct-Level NCEC Data

Neighbor to Neighbor

InfoUSA

Districts

Congressional

LD

Likely Party

Sex

Ethnicity

Phones · Emails

Name

Suppressions

Actions

[Save Page Layout](#)

You do not need to select any or all of these fields in order to produce a list. Leaving everything blank and hitting **[Search]** produces up all the voters in a selected area. The criteria are there if you wish to zero in on a select group of voters.

Note: Any term that is underlined is one on which you can directly click to choose multiple answers (to pick 2 or more cities/counties, etc). Expand each one to understand its content and usefulness.

Location and Districts - You can select voters based on county and precinct. Typically, PCO access is limited to an individual's particular precinct, but Chairs have access to the area they chair.

In order to select a precinct, you must first select the **[County]** and let the screen refresh. You can also click on the underlined word **[Precinct]** to select multiple precincts. If you select one precinct only, you can then select (if you desire) the streets you want. Click on **[Street Name]**.

The counts you see are for the total number of registered voters on the street.

Age-Registration Date - You can choose voters based on their age or date of registration.

Survey Questions, Activist Codes: You can choose voters who have responded a particular way to one or more ID questions. Click on **[Survey Question]**. Select the voters that represent the point of view you are seeking. The same principle works for Activist Code lists.

My Saved Lists - Any list you produce you can save and come back to later or use as a filter from which to narrow down a search.

Notes - Select voters based on specific notes entered by you or others.

Ethnicity - Select voters of a particular race or country for specific candidates or issues.

Voting History - Often you will single out voters who are either very active, or especially inactive, for campaign issues or GOTV activity.

Canvass Status - You can eliminate, or limit to, people you have previously canvassed, people who weren't home, or whom you canvassed during a certain time period. This can be helpful so you can exclude people from call lists you've already talked to, or print a list of those people who weren't home when you went door to door so you can call them or write them a post card.

Precinct –Level NCEC Data - You can search for voters who live in precincts which are more or less persuadable, or Democratic, or include more or less 'lazy' voters who could benefit from an intensive GOTV program.

Neighbor - You may want to see if someone has referenced a friendly neighbor.

InfoUSA - Here you can select from a broad range of interesting categories including marriage, motorcycles, pets, age, religion, etc.

Likely Party - Select here for people to persuade to vote, or to skip because they are sure to vote opposite your desires.

Sex - Sometimes you want to find the women in a certain age bracket that might think alike about an issue, for example.

Ethnicity - Issues can often be decided along racial lines. Jewish is included here.

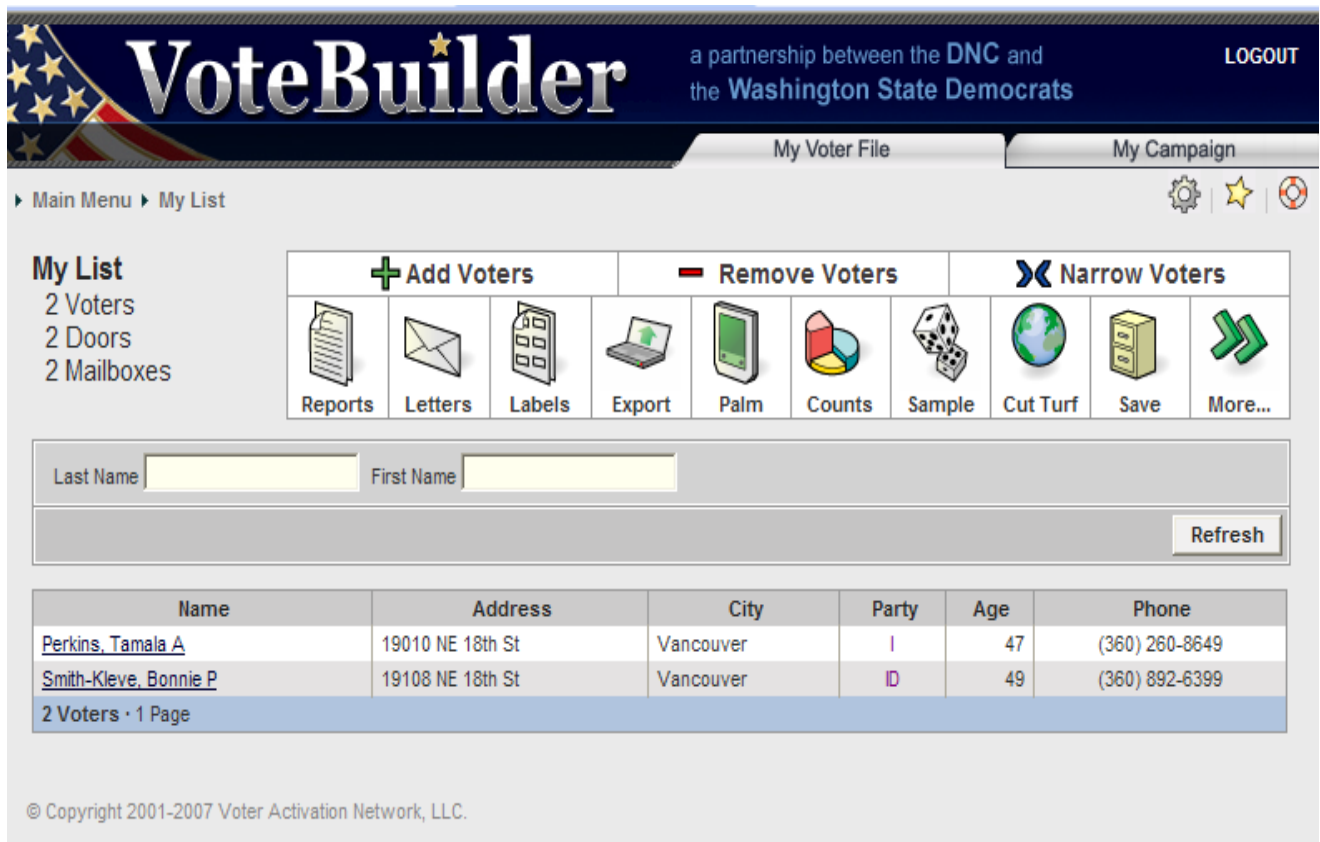
Phone or Email - Find people with or without this availability.

Name - Find people with a particular name; relatives perhaps.

Exclusions - Exclude moved or deceased people from you list.

Save Page Layout – This feature lets you have the criteria page come up the same way each time, if you repeatedly use a similar combination of factors

After you have made your selections. Click **[Search]**. Your list will look something like that below:



VoteBuilder a partnership between the DNC and the Washington State Democrats LOGOUT

My Voter File My Campaign

▸ Main Menu ▸ My List

My List
2 Voters
2 Doors
2 Mailboxes

+ Add Voters **- Remove Voters** **<> Narrow Voters**

Reports Letters Labels Export Palm Counts Sample Cut Turf Save More...

Last Name First Name

Refresh

Name	Address	City	Party	Age	Phone
Perkins, Tamala A	19010 NE 18th St	Vancouver	I	47	(360) 260-8649
Smith-Kleve, Bonnie P	19108 NE 18th St	Vancouver	ID	49	(360) 892-6399

2 Voters • 1 Page

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Now you can select what you wish to do with the list. For example, create a walking list, create a calling list, create a mailing list, or export to your computer or palm PDA.

The most common use is to create Walking Lists –

WALK/CALL SHEETS

When you've decide this is indeed the list you want to contact, you will need to turn your selections into a workable report (call list, walk list, literature drop list, etc.). So click on **[Reports]**.

The next screen lets you decide what type of report you want; Walking List or Calling List. You can give your report a title.

Now assign a **Script** to the list. A script is just the questions we are asking at the door. We likely will want to record some Activist Codes, like whether they want a yard sign.

The script and activist code selections are very important because when we select them it puts a set of codes next to each voter for us to mark his/her response and, for data entry, all possible answers to a script are translated into barcode for instant data entry. In other words, the inclusion of a script or an activist code in the list provides recording and subsequent data entry locations when canvassing and uploading.

You will have the ability to create a new script on your own. If you own, or have access to, a bar code scanner, be sure to leave the bar codes in the printout.

At "Source", click on **[Walking]**. This puts the list in an order for walking; County, Precinct, Street Name, Odd/Even, and Street Number.

Alternatively, you can select the order you want the list to print. The screen will resemble:

Main Menu > My List > Print Report

Print Report

Report Format	WA-DEMS Walking List With Bar Codes	*
Script	WA DEM Official Voter ID Script	
Source	Walking	*
Report Title	Pete's Short List	
	Clear Sort Order	
Sort Order 1	County	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending <input checked="" type="checkbox"/> Page Breaks
Sort Order 2	Precinct	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending <input checked="" type="checkbox"/> Page Breaks
Sort Order 3	Street Name	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending <input checked="" type="checkbox"/> Page Breaks
Sort Order 4	Odd/Even	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending <input checked="" type="checkbox"/> Page Breaks
Sort Order 5	Street Number	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending <input type="checkbox"/> Page Breaks
Sort Order 6	Apartment	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending <input type="checkbox"/> Page Breaks
Sort Order 7		<input type="radio"/> Ascending <input type="radio"/> Descending <input type="checkbox"/> Page Breaks
	<input checked="" type="radio"/> Print Map with Voters <input type="radio"/> Print Map without Voters	
	<input checked="" type="checkbox"/> Print List Number and Page Numbers	
	<input type="checkbox"/> Print Two Copies of Cover Sheet	
Split Report		

Next

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Click on **[Next]**. You will see the printer setup screen. Follow these instructions for proper printing. Make the adjustments by picking the down-arrow adjacent to the printer icon on your browser toolbar

1. Go to File | Page Set Up menu.
2. Make sure all values are set as shown below:

The screenshot shows the 'Page Setup' dialog box with the following settings:

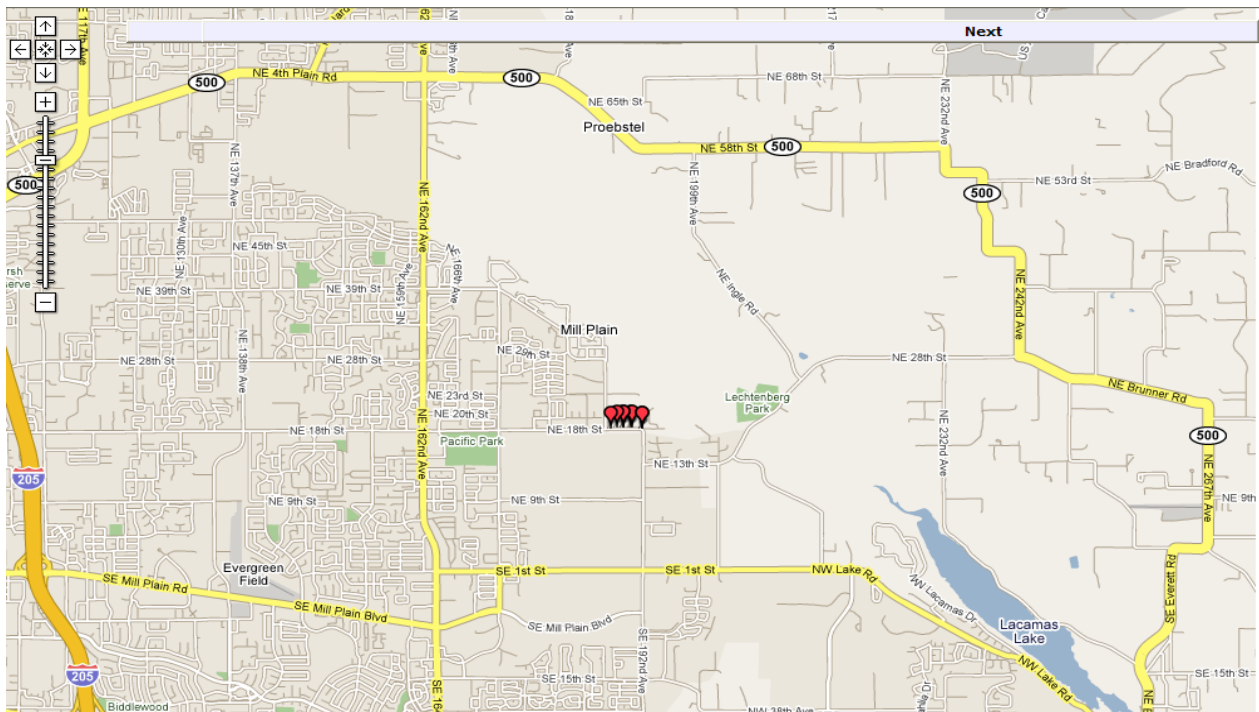
- Paper:** Size: Letter, Source: Automatically Select
- Headers and Footers:** Header: (empty), Footer: (empty)
- Orientation:** Landscape (selected)
- Margins (inches):** Left: 0.25, Right: 0.25, Top: 0.25, Bottom: 0.25

PLEASE NOTE:

Your printer may not accept values as low as .25" and may replace your selection with another value. This value is your printer's minimum acceptable margin and may still work as long as it is not much more than .25". It is possible that you may not be able to print labels using your current printer.

Finish

Click **[FINISH]** and your list will appear; the Map first if selected. Hit the print icon on the browser. Print the map now or lose it. Then hit **[NEXT]** on the map and the Printer Setup page will appear again. Hit **[FINISH]** again and the Walking List preceded by the Script will appear. Hit the Browser print icon again to print the list.



The first page printed will be the script and it will instruct you as to how to code responses at the door (see below). Print at least one copy for everyone canvassing or phoning.

Pete's Short List

Script: **WA DEM Official Voter ID Script**

Voters: **8**

Canvass Results Key		
DC = Deceased	NC = Non-Citizen	SP = Spanish
IN = Inaccessible	NH = Not Home	
MV = Moved	LG = Other Language	

Party: Generally speaking, do you think of yourself as a Democrat, Republican, an Independent, or what?

- D = Democrat
- R = Republican
- I = Independent/Other
- K = Don't Know/Refused

Party: Q2 [Only ask If Q1 answer was IND/Other/Don't Know or Refused] Do you think of yourself as closer to the DEMOCRATIC PARTY or REPUBLICAN PARTY?

- d = Democratic Party
- r = Republican Party
- i = Neither/Independent
- k = Don't Know/Refused

Party: Q3. [Ask only If answer to Q1 was Democrat/Republican] Would you call yourself a STRONG [DEMOCRAT/REPUBLICAN] or NOT A VERY STRONG [DEMOCRAT/REPUBLICAN]?









- D = Strong Democrat
- e = Not Very Strong Dem
- R = Strong Republican
- g = Not Very Strong GOP
- K = Don't Know/Refused

INSTRUCTIONS TO CANVASSER:

IF Q3 RESPONSE WAS "DON'T KNOW/REFUSED" ENTER "NOT VERY STRONG [DEMOCRAT or REPUBLICAN]."

Thank you for your time, and have a nice day!

Clark · 698 · NE 18th St · Even

1852767 	Lepper, Linda F 18716 NE 18th St Vancouver, WA 98684	(360) 256-1353 Sex: F Age: 59 U	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K
1922610 	Hanfileti, Elizabeth A 18810 NE 18th St Vancouver, WA 98684	(360) 449-4500 Sex: F Age: 44 LD	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K
1858858 	Schober, Elizabeth S 18902 NE 18th St Vancouver, WA 98684	(360) 449-4500 Sex: F Age: 45 ND	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K
1858859 	Graville, Lori K 18902 NE 18th St Vancouver, WA 98684	(360) 449-4500 Sex: F Age: 28 ND	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K
1863656 	Perkins, Tamala A 19010 NE 18th St Vancouver, WA 98684	(360) 260-8649 Sex: F Age: 47 I	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K
1871439 	Drake, Donna 19018 NE 18th St Vancouver, WA 98684	(360) 885-2290 Sex: F Age: 71 SD	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K
1917805 	Smith, Bonnie N 19108 NE 18th St Vancouver, WA 98684	(360) 892-5116 Sex: F Age: 76 LD	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K
1920748 	Smith-Kleve, Bonnie P 19108 NE 18th St Vancouver, WA 98684	(360) 892-6399 Sex: F Age: 49 ID	<input type="checkbox"/> DC <input type="checkbox"/> NC <input type="checkbox"/> SP <input type="checkbox"/> IN <input type="checkbox"/> NH <input type="checkbox"/> MV <input type="checkbox"/> LG	Q1 PID Q2 PID Q3 PID	D R I K d r i k D e R g K

Pete's Short List · List 422096-51010 · Page 1

Each voter has his/her VANID number and a barcode on the right. Plus we have the name of the voter, the address, a phone number (so you can call those you didn't see at the door), some codes you can mark if you could not talk to them, and why; the questions you are asking and numbers to correspond to answers they can give, and, if selected, some activist codes.

The same principles apply to Call Lists. Call sheets have less information.

Mailing Labels

You can produce mailing labels directly from the system. The computer produces a document that will print directly to 3 different types of mailing label formats. Alternatively, you can export the file and mail merge to labels using Microsoft Word. You must make sure to change the page setup so the labels print properly.

When the labels are loaded up, just fill your printer with the labels, hit print and you are done.

Export the File

We do not encourage you to export our file to Excel and make all modifications offline. But, there will come times when you need to export all or part of the file. For example, your mail vendor may need a list or you may need to send phone numbers to a paid phone bank.

There are three choices when exporting a file. –

Standard Text File – This can be used for any export. If the number of records to be exported exceeds 64,000, you must export it as text and not Excel. You can select to export any publicly available field in the voter file plus anyone's answer to your survey questions and activist codes.

Household Mailing List - Use for any mailings you do.

Household Phone List - For phone banks only when you are conveying a message but are not interested in any possible answer or whether or not the person has moved, died, or is unavailable. Because this list just takes the first name associated with the phone list, you do not want to use this option if you care as to whom you reach. It is best used for Robo-calls (computer generated calls).

For any list you export, you must go pick up the file created and download it to your computer.

Go back to the Main Menu by clicking on **[Main Menu]**. Large lists will take time to download so be Patient.. You can only export one list at a time. Click **[Download Exported File]** and save to your computer. It will be a compressed (.zip) file to save space. Every computer made in the last 2-3 years will automatically be able to open such a file. If your computer is older than that, you may need to install WinZip.exe which is available at www.winzip.com. The trial version will work and does not expire.

Save the List

In the future, you may want to reproduce this list for another purpose. Certainly, you will want this exact list if you are doing Script Entry upload. It is recommended that you Save your lists.

Click on **[Save My List]**.

Give the list a name. It is helpful if you give a short description of how the list was generated or who is on the list. You can create separate folders for things like walk lists, call lists, volunteer lists, etc. and then hit save.

To get to an old list, go back to the Main Menu and select **[View My Saved Lists]**. You can view, edit, or delete a saved list from this menu.

Your saved lists are not shared even within the same committee. Depending on your level of access, you may be able to create a saved list and assign it to other users in your campaign.

UPLOAD DETAILS

LOAD DATA

The rightmost column on the Main Menu has selections to upload data to the database. At the Main Menu, in the right hand column, you will see up to 5 upload options: Scan Bar Codes, Script View, Grid View, Run Bulk Upload, and Palm. Palm Pilot data entry is complicated and rarely used, so let's take that up on a case by case basis. PCO's are restricted to 3 options, Script View, Grid View and Palms

Bar code entry is the simplest and fastest. For this you would need to purchase a bar code reader for about \$100-150. A bar code reader simply scans certain images and translates that into text and numbers. The pen version is cheaper and easy to use after a few practice swipes, but has a shorter life. The gun version works well but requires the user to make sure they are 'shooting' the right person's ID barcode. Older barcode readers work but are not recommended. Modern ones plug into a USB port and need no software.

To begin the process, go to the Main Menu and click on **[Scan Bar Codes]**. Choose the script that was used on the call/walk sheets. Choose the date you spoke to the voters. If it was over a series of dates, choose the latest date that list was 'in the field' or being used. Choose who canvassed them (candidate, volunteer, etc.). Or just choose volunteer. Choose Walk the list, or Call it? Click **[Next]**. Now what appears will be a list of bar codes that represent the answers to the Questions and Codes and look something like below:

Bar Code Report Finish

Party: Q1 - Partisan ID

Generally speaking, do you think of yourself as a Democrat, Republican, an Independent, or what?



Democrat (D) [SQ10621-46670]



Republican (R) [SQ10621-46671]



Independent/Other (I) [SQ10621-46672]



Don't Know/Refused (K) [SQ10621-46673]

Party: Q2 - Partisan ID

Q2 [Only ask if Q1 answer was IND/Other/Don't Know or Refused] Do you think of yourself as closer to the DEMOCRATIC PARTY or REPUBLICAN PARTY?



Democratic Party (d) [SQ10622-46689]



Republican Party (r) [SQ10622-46690]



Neither/Independent (I) [SQ10622-46678]



Don't Know/Refused (k) [SQ10622-46691]

Party: Q3 - Partisan ID

Q3. [Ask only if answer to Q1 was Democrat/Republican] Would you call yourself a STRONG [DEMOCRAT/REPUBLICAN] or NOT A VERY STRONG [DEMOCRAT/REPUBLICAN]?



Strong Democrat (D) [SQ10623-46682]



Not Very Strong Dem (e) [SQ10623-46683]



Strong Republican (R) [SQ10623-46684]



Not Very Strong GOP (g) [SQ10623-46685]



Don't Know/Refused (K) [SQ10623-46686]

Print this out.
Click **[Next]**.

Find your walk/call lists with data to be put on the file, and their printed bar codes.
Plug your barcode scanner into the USB port

Scan over the barcode corresponding to the first person you contacted, even if they weren't home.

Scan over the barcodes for what ever happened on the phone or at the door. That's the data you marked on the call/walk sheet. Repeat for each voter.

This updates the file instantaneously. Data entry is not subject to mistake other than human error (Say you hear Kerry, but mark them as a Bush supporter or if you see Kerry but scan Bush.).

The rule is--**BE CAREFUL WHEN ENTERING ANY DATA BACK INTO THE DATABASE.**

Script View for Data Entry

One way to do data entry and arguably the most tedious is to go back to the Main Menu and select Current List and select Script View.

This will individually bring up each person on your list and the same questions and codes on your list, and allow you to enter each response. NEXT will advance to the next voter

If you are entering data from call/walk lists you have used in the past. You will want to either create the list over or select the list from your saved lists. You will need the sheets to be the same selection and in the exact walk or call order that you see them your screens.

Grid View

First reproduce your list of data. Either bring it back up from saved lists and select "My List", or enter the number of the list. The system saves a discrete number for each list you create. The number is at the bottom of each page and is a number like 332590-19857. The numbers are only stored for 30 days, then deleted.

With your list reproduced on the screen, enter the results of each Question and Code adjacent to the name of the voter. Hit **[Save]** when finished.

Bulk Uploading

When using this method it is easy to make an error. People are discouraged from using this technique unless they have training or experience in uploading data using Excel .

First, create a Spreadsheet. using Microsoft Excel on your computer The first column is for the VANID, the second column for Canvass Results, Add a column for every survey question or activist code you used.

The last column must be fully populated, that is there is some piece of data associated with every row. Now save it as TEXT (.CSV or .txt)

Go to **[Main Menu]**

Click on **[Run Bulk Uploads]**.

Click on Upload A New File. Browse to insert the exact location and name of the file. Follow instructions as to how to format file needed.

Click on **[Next]**.

The computer will match your file to the Voter File. Remember the first column **MUST** be either the PPID

(from the county voter list) or the VANID (from our voter file).

Select what you want to update first. We may select Add A Survey Response. Click **[Next]**.
Select the appropriate survey question.

Select how they were contacted and when.
Select **[Select the Records]**

When you are done mapping the possible responses for one column to the appropriate question and answers hit **[Next]**. The data will automatically upload to our file when there is some free time on the server. Larger lists may take a few minutes to as long as an hour to appear (very large lists; say over 100,000).

Repeat the process until all relevant data has been uploaded.

This may be a little complicated at first. Feel free to email or call if you need help.

This is how your data from phone banks will be uploaded to the file and why every export you make will always include VANID numbers.

If needed, on a case by case basis, the state party can facilitate and help upload huge lists to the Voter File directly.

ADMINISTRATION DETAILS

ADMINISTERING YOUR ACCOUNT

At the Main Menu, Review the selections in the left-hand column. You will basically be doing four things with your administrative section:

- Editing your profile
- Creating new users
- Creating new survey questions
- Creating new scripts, and,
- Creating new activist codes.

Everything you do here is private to your committee. Other campaigns will not have access to these codes, scripts, or questions or the data generated by them. Everyone can edit their own profile. Only Chairs can create New Users, Questions, and Codes.

Profile - Click on profile and see your basic data. Update your address, email, and phone numbers so others can effectively contact you.

Users - To create a new user, click on **[Users]**. A list of users in your committee will appear. It may be necessary to enter the committee on this page to isolate the desired committee.

See if you have already created such an account, if not click on **[Add User]**. Fill out the appropriate fields and click **{Next}**.

General security privileges will be automatically assigned. Give the user access to all the voters he needs. For example, it may be best to give a Precinct Committee Officer just the names of the people in her/his precinct.

If the box is white, he/she can not do that function or assign it to others. If the box is green with a white border, s/he cannot assign the function but can use it. If the box is entirely green, s/he can do both.

Normally, do not set an expiration date. The assumption is that the person will continue in their job, so there will be no need to re-enter them. If they do decline, then they can be deleted. For volunteers, you may want to set an expiration date.. You can always take that expiration off at a later date or extend it.

Administer Activist Codes

Go back to the administrative menu. Click on Administer Activist Codes. Click on **[New Activist Code]**.

While you can not inadvertently assign your codes to other committees, it always helps to label the code as private. Also, click the boxes for can be searched by and can be assigned/removed

Creating Survey Questions and Scripts

Creating Survey Questions and Scripts is relatively easy as well. If you have questions, feel free to call.

NOTE: Once you create and use a survey question, under NO CIRCUMSTANCES should you change the order of the questions or what number corresponds to what response. If you need to switch the order of the responses or if you need to modify a question (let's say one of your primary opponents drops out), create a new question. Otherwise, your data becomes 'junk' and effort must be expended to figure out which Question 1 Response 2 voters back Bush and which back McCain for example.

Other Information

The purpose of this manual is to serve as a reference for you to manage your duties as PCO, Party Chair, or in the upcoming campaign. We are always here to answer questions. During work hours (M-F 9-6 and longer as we get closer to the election), feel free to call or email the Tech Group's Wes Beal at the State Party HQ, 260-583-0664 , or email; Wes Beal at [wes@wa-democrats.org] If you have a particularly tricky question, email first. He can work on the answer or forward it on to VoteBuilder's designers in Massachusetts.

We strongly encourage one or more people from your campaign to receive live, in-person training.

Also the Washing State Democrats Technology Group is training a number of Regional Experts to provide assistance and support through your local party chairs.

A list of those individuals and their contact information follows: - [LIST NEEDED]

[Additional Sections are needed for:

Virtual Phone Bank

Turf Cutter

Tie-in between Activist Codes and Survey Questions fro selection on Reports.]